

Beyond COVID

Thriving in the Pervasive Work-from-Home Environment

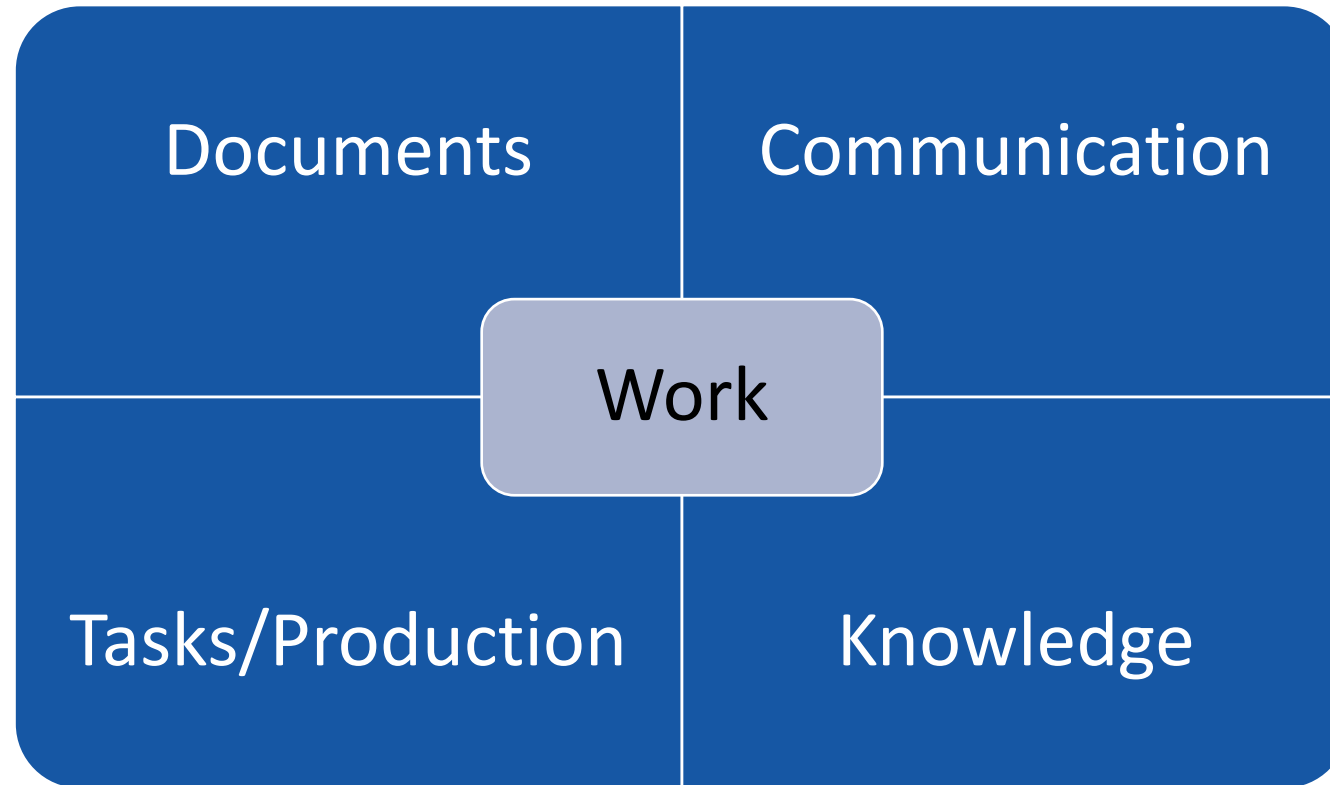


Topics Addressed by this Event

1. Woodard's perfected process for maintaining alignment in virtual teams and maximizing productions around projects and tasks – including projects as extensive as our annual Scaling New Heights® conference.
2. Technologies used at Woodard we use to collaborate, conduct meetings, and democratize information.
3. Woodard's virtual workplace culture that inspires team members to generate powerful outcomes while enjoying flexible office hours, navigating innumerable distractions from family and friends, and receiving unlimited PTO.



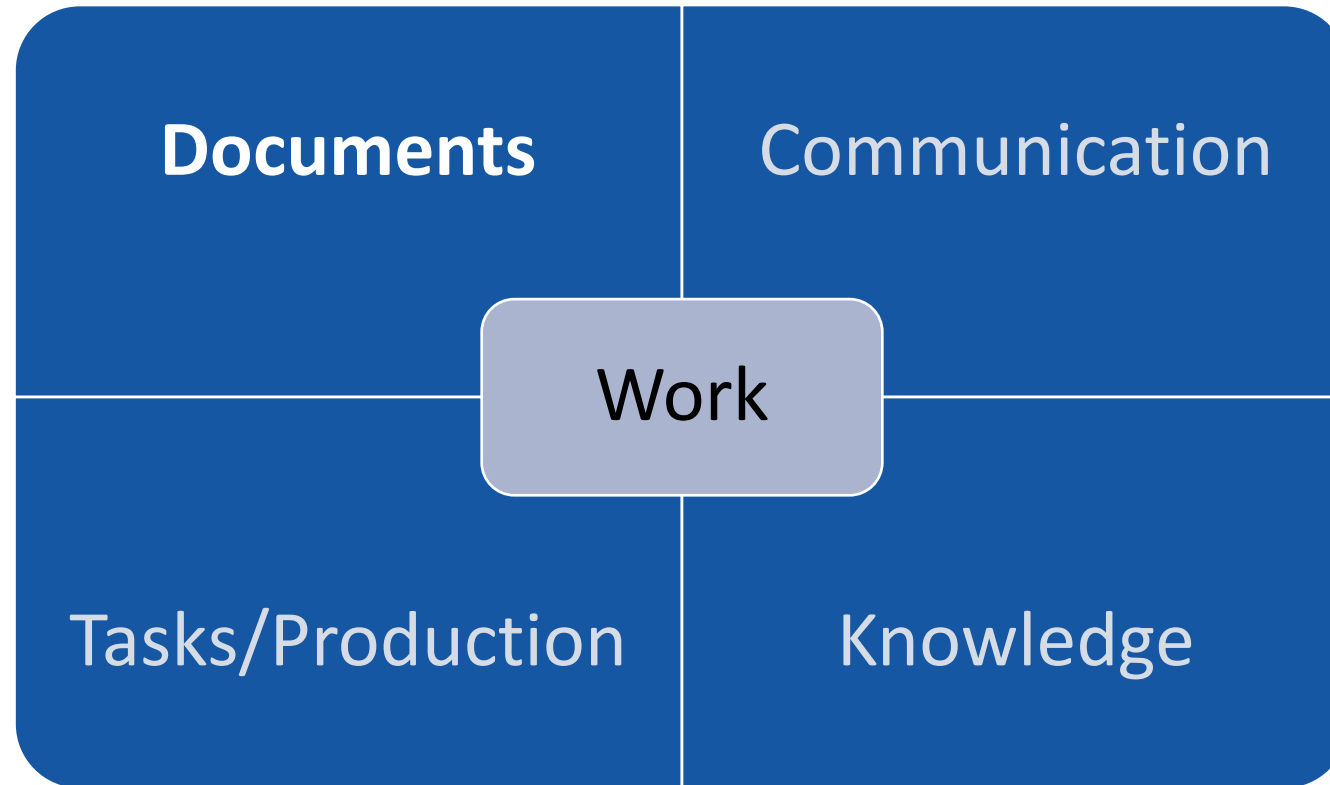
Quadrants of Organizational Level Work



Source: Work quadrants as taught by Rob Smith of Point7Seconds



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Managing Documents in a WFH Environment

Document Centralization and Democratization

- Documents in paper form are available only to those physically with the piece of paper
- Documents in local drives are available only to those physically in front of the hardware
- Documents in cloud silos are available only to those with knowledge and access to the silo



Paper



Local Drives



Cloud Silos



Managing Documents in a WFH Environment

Document Centralization and Democratization

- Scan all paper documents that are relevant to the company's current operations
- Transfer into and store documents within a single, company-managed:
 - Optical Character Recognition
 - Indexing



Managing Documents in a WFH Environment

Document Centralization and Democratization

Demonstration

Find Fishbowl Inventory's Sponsorship
Order Form from Scaling New Heights 2020



Managing Documents in a WFH Environment

Best Practices

- Use company-managed cloud backup with utilities installed on each local workstation...and check regularly!
- Sync the PC's Desktop, Documents and Downloads folders to Cloud Storage Systems
- Use folder mapping for OneDrive or other non-collaborative folders
- Use MS Teams for document collaboration or integrate cloud storage with Slack



BACKBLAZE



Managing Documents in a WFH Environment

Production Documents

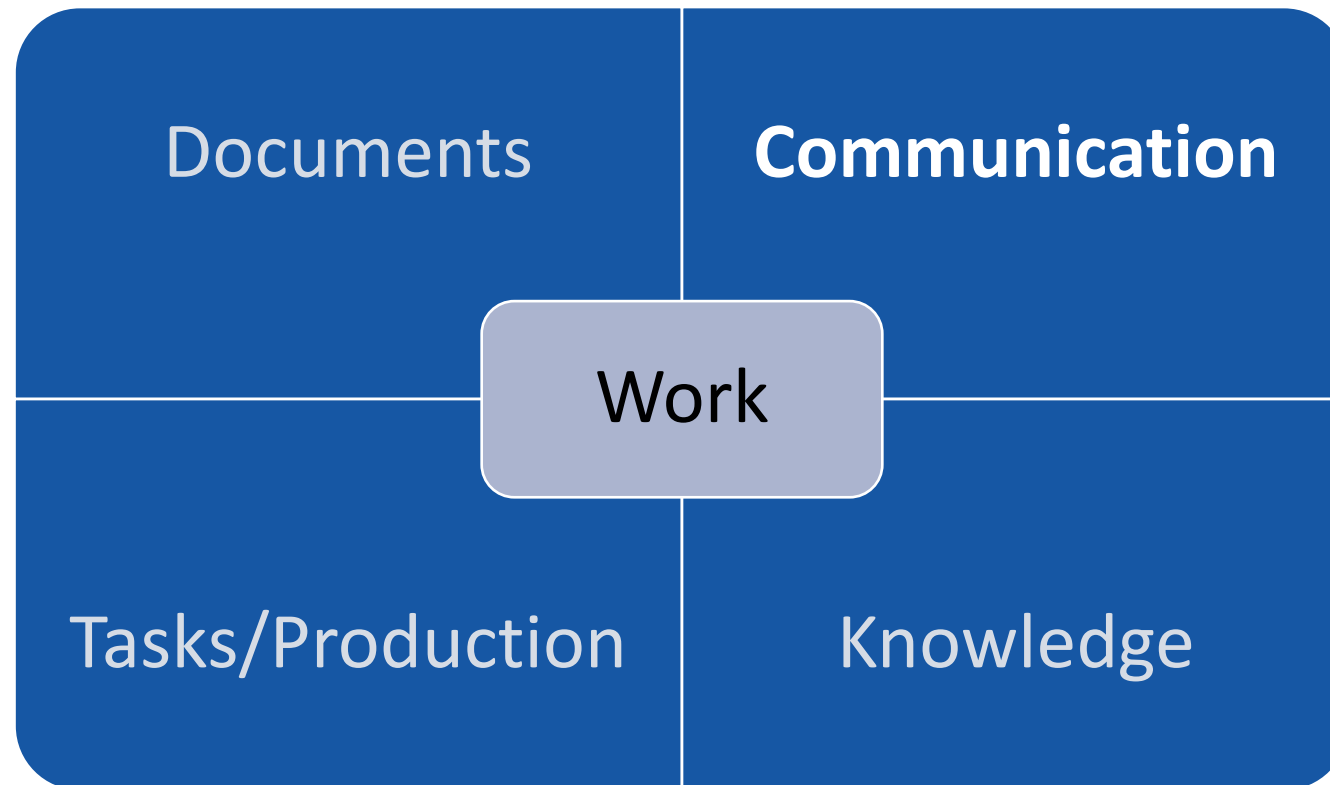
- Retention policies
- Edit tracking
- Check in/out
- Notes
- Association with Engagements/Workflows
- Client Accessibility (e.g., Portals)

Tip: Sync, when possible, with your company-wide cloud document management systems (e.g., SharePoint or Google Drive)

Woodard recommends:



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Managing Communications in a WFH Environment

- Do Not Use Email for Internal Communications
- Deploy a communications/collaboration solution like Microsoft Teams or Slack
- Use Multiple Channels to categorize conversations
- Sample Channels/Teams Include
 - All Company
 - Sales and Marketing
 - Back Office
 - Customer Support (For Collaboration...not Tickets)
 - A Team for Each Functional Area of the Company (e.g., Bookkeeping, Tax, Audit, Consulting, etc.)



Managing Communications in a WFH Environment

Demonstration

Woodard's Teams...and a Look Inside
our "All Company" Team



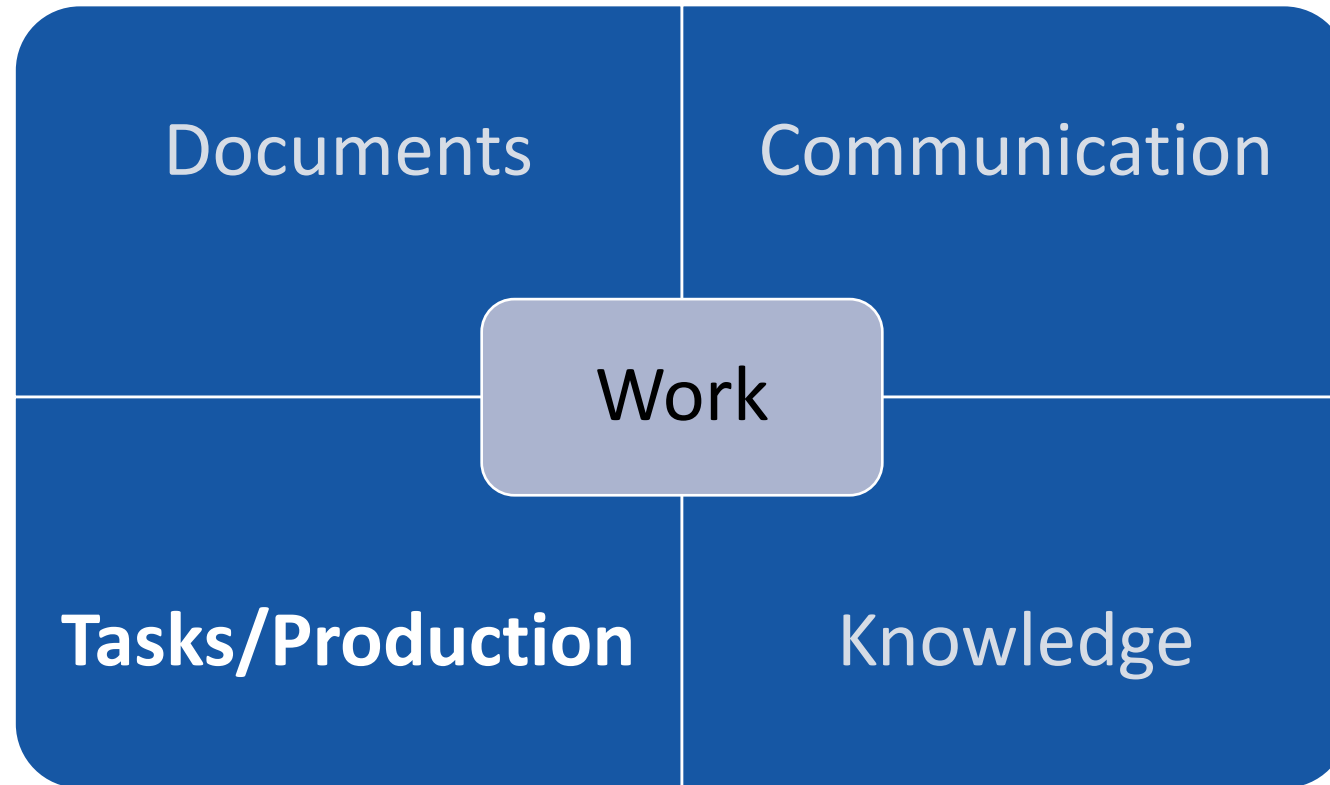
Managing Communications in a WFH Environment

Best Practices

- Tag people to call attention to essential posts or requested information/responses
- Create company policies around the use of important and urgent tags
- Read through *all* posts for *all* channels/teams in which you are invited *every day*. This is your company's "newspaper."
- Have fun. Use GIFs, use a Water Cooler Conversations channel, tell jokes, etc.



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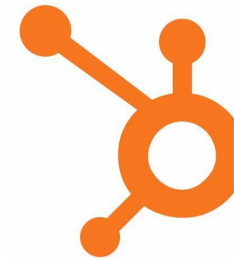


Managing Tasks in a WFH Environment

- Use a Collaborative Solution
- Keep it Simple at First (e.g., Excel Sheets in SharePoint or Google Sheets)
- Evolve into a Task/Ticket Management Solution (Examples to the Right)
- Avoid the temptation to over-purchase (e.g., complex project management solutions)
- Use a solution with repeating/cyclical tasks for client productions



Microsoft Planner



HubSpot



Asana

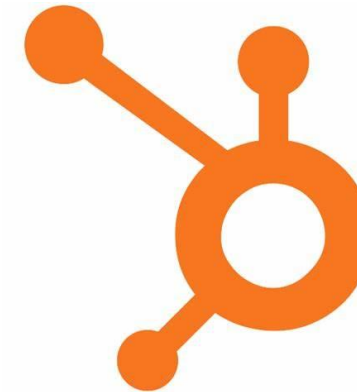


Managing Tasks in a WFH Environment

Demonstration

How Woodard is Collaboratively
Managing this Webinar

[Webinar in HubSpot](#)



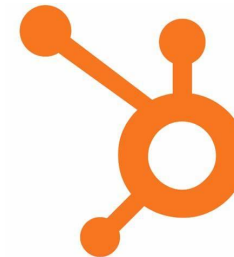
Managing Tasks in a WFH Environment

Best Practices

- Use initials when assigning tasks to others within the company
- Don't miss a deadline for a task that has been internally assigned to you without notifying the other party
- Give people as much lead time as possible when assigning them tasks.
- Have a specific policy/guideline for task statuses and priority settings
- Use a different task management system for collaborative vs. individual tasks.



Microsoft Planner



HubSpot



Asana



Managing Tasks in a WFH Environment

Collaborative vs. Individual Tasks

Collaborative



Microsoft Planner

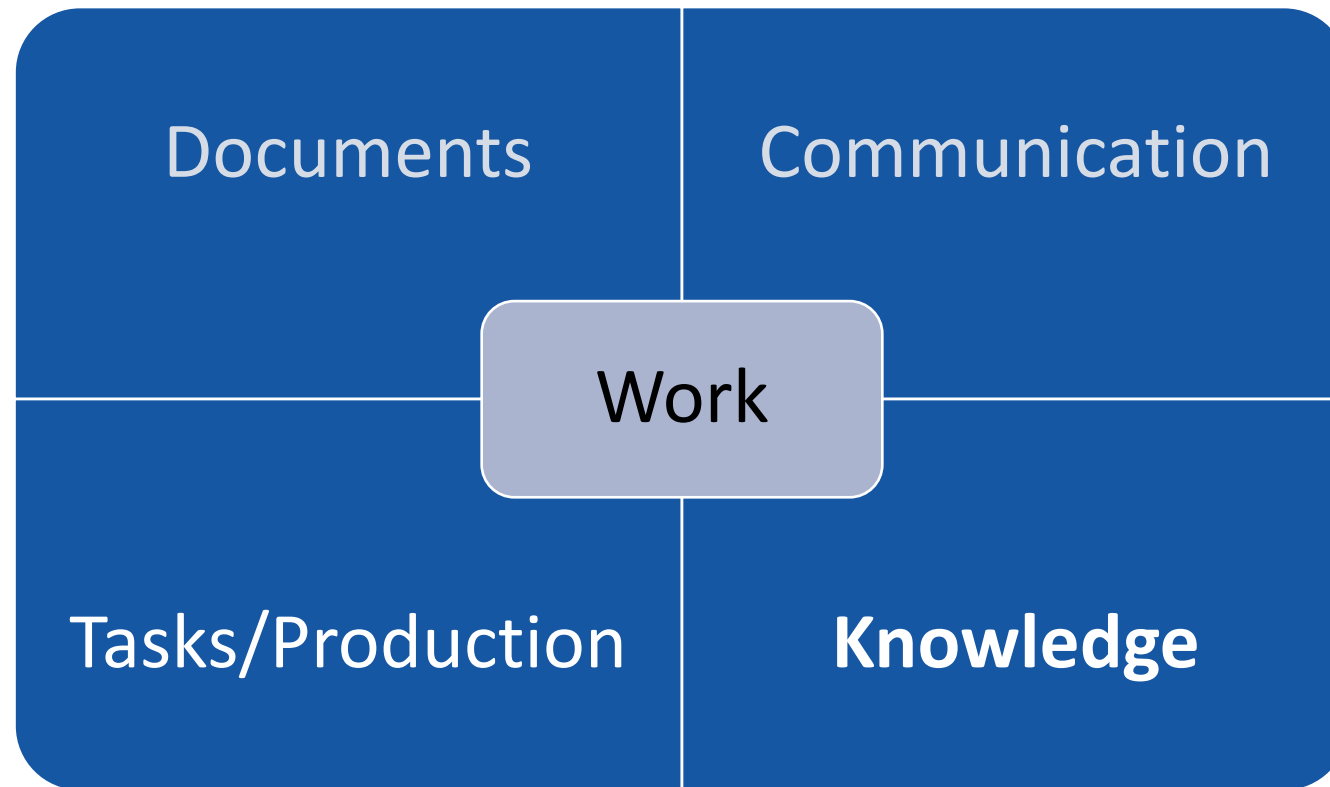
Individual



Microsoft To Do



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Managing Knowledge in a WFH Environment

Information Centralization and Democratization

- Store company information and knowledge in a centralized, accessible space (e.g., OneNote or Evernote)
- Integrate the knowledge container(s) with as many systems as possible.
- Consider deploying a CRM Solution



Paper



Local Drives



Email Exchanges



Voiced
Information/Exchanges



People (i.e. Brains)



Managing Knowledge in a WFH Environment

Information Centralization and Democratization



Maintaining Daily Alignment

- Daily Standing Meeting
- State the Daily Tasks the Person will Accomplish
- Align around the Tasks
- Post the Task Statuses and Accomplishments in Team/Slack
- Conduct an in-depth team wide meeting weekly to align on major projects!



Beyond COVID

Thriving in the Pervasive Work-from-Home Environment

