

Technology Tools for Remote Workers

Staying connected and competitive in a remote environment depends heavily on having the right technology in place. These chapters explore how to leverage office technology effectively and walk you through a practical framework for choosing the digital tools that fit your workflow. Whether you're evaluating communication platforms, project software, or productivity apps, you'll come away with a clearer sense of what to look for—and what to avoid—when building your remote tech stack.

CREDIT HOURS 2 | FIELD OF STUDY BUSINESS | EXAM QUESTIONS 10

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LEARNING ASSIGNMENTS AND OBJECTIVES

Assignment

- Study the full course materials included here.
- Complete the review questions after each chapter.
- Answer 10 final exam questions.
- Final exam is scored immediately, 70% or better passes.
- Certificate of completion is available in your account.
- Failed exams can be retaken free of charge.

Course Objectives

- Identify various tools used to stay connected and competitive remotely.
- Recall the potential causes of unplanned system downtime.

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Chapter 1: OFFICE TECHNOLOGY: STAY CONNECTED AND COMPETITIVE

Chapter Objective

After completing this chapter, you should be able to:

- Identify various tools used to stay connected and competitive remotely.

Transitioning the entire team from the office to remote work from home can be relatively painless if you have the right tools readily available. As previously discussed, with continuity planning, you should ideally have a plan in place prior to your crisis. It's a preventative strategy to allow you to recover quickly with fewer interruptions to your business during a disaster.

It is best to migrate your current operations now to using the methods and technologies discussed in this chapter so that recovery from your crisis point will be a quick one. If you prep your day-to-day work operations for remote transitions now, you could stay up and running and switch the team to full remote work the very same day a crisis occurs. If done in this manner, clients may not even become aware of the transition.

VoIP: FROM DESKTOP TO SOFT PHONES AND FEATURES

Back in 2004, I co-founded a B2B company that provided business communications services including broadband and Voice over Internet Protocol (VoIP; sometimes called *IP telephony*). VoIP allows users to make and receive phone calls over broadband instead of using plain old telephone service (POTS), in other words, traditional telephone lines.

The business class landline services from the big telecom companies have come a long way in recent years and offer great features for small businesses, many of which can now be managed from a centralized online call management portal. If your office becomes unusable, you could use the online portal to forward those incoming calls to another phone number. If your company does not receive a large number of calls each day, this could work as a good solution for your day-to-day business needs and emergency remote work needs. However, if the business uses the phones quite a bit as an external communication tool for sales and customer support, then it's probably best to look to a VoIP system.

There are very few disadvantages to using a VoIP system for your business. The only major one would be that that you need a reliable broadband connection with good upload and download speeds. Your office should already be equipped with a sufficient broadband package from your local

cable provider or the local telecom. So let's take a moment to look at the residential speeds required for remote workers to use VoIP at their homes.

It is recommended that you have at least a 3Mbps connection both for upload and download for a stable quality of service. You can get away with less to make calls; however, you need to take into consideration other services that may be using the same Internet connection. If you are trying to make a VoIP call at home and someone else is streaming a movie while someone else is playing a video game online, you may drop packets. When that happens, your voice may get choppy to the person on the other end of the call, and you may miss some of the conversation while experiencing packet loss.

A few years ago, this may have been more of a concern. However, broadband speeds for residential service have sped up considerably and continue to increase. With this in mind, there is virtually no reason to not make VoIP a part of your remote work crisis prevention plans. It is a feature-rich service that will help make your transition simple and fast.

Best Practices

Switching to a feature-rich VoIP service for your work operations will ensure that you will not lose any calls in the event of a crisis.

Cloud Management

VoIP systems are hosted and managed by the provider and use a software as a service (SaaS) business model. One great advantage to SaaS is that the phone service will work anywhere as long as you have a stable Internet connection available for your calls. Even if the Internet connection at the office is offline, many of the features of your VoIP phone system will remain active and clients may not realize that you are out of the office. Plus, you won't lose any calls if disaster strikes.

You will have a dashboard that can be accessed by administrators from any Internet connection. This is perfect for scenarios such as those we discussed in Chapter 1 of course 82351B, "You Can't Go to the Office: Where Do You Go from Here?," in which an office may become inaccessible. It will be a useful tool for both the beginning and end of your company crisis. You can login to the dashboard, make the switches needed that best suit your remote work migration and then switch them back once everyone is back in the office. It will be a seamless and stress-free way to keep the phones ringing to support sales and clients.

Automated Attendant

The automated attendant will be the first interaction with your company when a call comes in. This is the outgoing message that a person hears when they call your number. A prerecorded message greets the caller and gives them the options to dial extensions for individuals or departments. This

feature is hosted in the cloud, so it is not dependent on the physical accessibility of your place of work.

This automated attendant will also add to the seamlessness of sales prospects and clients reaching your distributed workforce. In fact, paired with the other VoIP features, there would be little need to change the outgoing message to let anyone even be aware that your team is now working remotely.

Forwarding and Follow Me

Cloud management over individual extensions will help keep the flow of business steady. Forwarding is fairly simple to explain. If a client were to try to contact you via phone at your extension, you can simply forward that call to ring your mobile phone instead of your desk phone. Again, this is a seamless transition due to the cloud-based dashboard.

The dashboard is set up to send incoming calls for your extension based on device. Typically, the device would be the phone at your desk, but you can set it up to ring at another desk phone should you want a co-worker to answer your line. Or it can be set to ring to another phone altogether. It is a device-based feature rather than a location-based feature. The dashboard essentially points the call at the device that you prefer to ring when a call comes through for you.

Forwarding also allows you to manage voicemails. Normally when you have an unchecked voicemail, your office phone will flash to alert you to check your messages. However, you can forward the individual extension to email the voicemail instead. This allows the recipient to listen to their voicemails as an audio file attached to an email without ever having to be in physical contact with their desk phone.

Follow Me is slightly different. Let's say that you are expecting a highly urgent call and want to be absolutely sure that you pick up the phone when it comes in, regardless of where you may be at the time. You can program the dashboard with a series of phone numbers where you may be, and the call will be pointed to find you at any of these phones.

For example, the first phone to ring may be your desk phone. If you do not pick up, the system will then send the call to your mobile phone. If you still do not pick up, then the call would go to your home line. The system will try to reach you at each phone number that you have programmed, in the order you designate. Or, it can be set to ring all these different phones simultaneously. The call will thus follow you, allowing you to stay connected to your clients regardless of where you may be.

Soft Phones and Mobile Phones

Should your team not be able to take their VoIP desk phone with them to work remotely from home, you have other options to keep them in contact. You may already be familiar with a soft phone. A soft phone is software that sits on your computer or tablet. You will see a virtual number pad that allows you to punch in the outgoing telephone number; then, you can use a headset or the speakers and microphone on the computer or tablet for the call.

The interface is designed specifically to be highly intuitive and resembles the typical office phone handset. It is complete with a number pad, a call screen to show caller ID, a hold button, a transfer button, and more. The soft phone is also an economical way of getting started with a new VoIP system since you would not incur any equipment costs for physical desk phones.

You may already be familiar with soft phones due to the fact that Google offered a now defunct soft phone service with Google Talk. Skype also has a popular service for consumers to allow people to make local and international calls over a computer or tablet. Skype also provides a business version of its soft phone service. This business-class service is called Skype Connect, and it can integrate with a company's existing VoIP system.

Many VoIP service providers also offer a mobile phone app in their arsenal of business call solutions. Once installed, this would allow team members to make and receive calls from their own mobile device as if they were using their desk phones. The app would give the added benefit of allowing the team members to retain the privacy of their personal mobile phone numbers while conducting business for their company.

Due to these features, a VoIP phone system is a more robust option over POTS lines for a small business when it comes to the ease of remote working. It empowers your team to keep working and brings a sense of normalcy to your crisis. One thing that you do not want to worry about is being able to answer the phone when it rings. Being able to reliably answer sales and support calls will help keep operations seem like business as usual as far as clients are concerned.

EMAIL, CHAT, AND CHANNELS

There is a good deal of discussion about the customer experience and the brand experience. These are examples of how consumers interact with a company. Marketing professionals take their work regarding the brand experience seriously, and with good reason. Creating positive feelings or even emotional connections to a brand will help build faithful and sometimes lifelong customers. Because of this, the ways companies communicate externally to their customers are well measured and given a great deal of thought in order to maintain a great, consistent brand experience.

How a company communicates internally has a big impact on the employee experience. That is something that should be taken as seriously as the customer experience. Savvy businesses leaders know the importance of how a company communicates with staff, especially when it comes to attracting and retaining talented employees. A company that overshares information in a deluge of redundant communications can get a reputation for stifling creativity and productivity with needless amounts of communication.

When everyone suddenly begins to work remotely, there will be some communication adjustments due to the simple fact that you can't just walk over to a person and have a face-to-face conversation.

Using the right technology for sharing various types of information will help keep the workflow at a good pace and maintain a positive employee experience.

Best Practices

Create a company communication policy. It should cover how you communicate internally and externally. Be sure to review what medium is appropriate for each type of communication and collaboration.

Email

For most companies, the biggest use of emails is for external communications. Email is a great tool for marketing campaigns as well as detailed communications with clients and vendors. However, for internal communications, email is far from the best way to convey quick bits of information. In fact, many large companies discourage the use of internal emails. The main reason is that excessive emails kill productivity.

In the modern workplace, people receive so many emails that not all of them are even opened, much less read. Most people have hundreds of unopened emails in their in-box. Because of this digital deluge, the attention span for reading emails has been drastically shortened, much to the chagrin of many email marketers.

For internal use, emails are still appropriate for company memos, policy changes, or announcements. For quick conversations, though, it's best to use chats.

Chats

Have you ever been in on an email chain that seemed to never end because people kept adding in small bits of input? These email threads can cause a great deal of frustration. They are confusing and they make it difficult to get good information in a timely manner. Plus, they can kill enthusiasm for a project. Chats help prevent such issues.

Google has had Google Hangouts as part of its Gmail suite of business services since 2013. It was a part of Google's messaging service and offered video chat as well. In October 2020, the tech giant introduced Google Workspace, a centralized suite of applications for conducting business communications. This includes Google Chat, which takes the place of the familiar Google Hangouts chat.

Since my companies have used the Google suite of services for years, I am very familiar with the chat service. It's an ideal way for me to have a quick conversation with one person to get and give info for a project or client. It's simple to send a link or an image on the platform and is similar to using text messages on my phone. Just as with text messaging, I can have group chats with multiple

people in real time. This is a great solution for my teams because we already use corporate Gmail services, but there are many other chat services available to non-Gmail users.

One of the most widely used chat platforms is Slack. In fact, many of the business leaders interviewed for this course use Slack for their companies, even if other collaboration tools that they use have a similar messaging feature. But even this great communication app can be abused and misused.

Remember the never-ending email thread? Imagine being in an ongoing group chat where everyone chimes in randomly throughout the day. The conversation can devolve quickly and become more of an ongoing ramble. Worse yet, when it gets misused in this way, it can make people less responsive.

If someone was in a meeting or away from their keyboard for a bit, they can quickly find themselves awash in a sea of chat messages discussing a variety of topics. They try jumping in, but they have no context and no idea of the direction the discussion is going. This kind of misuse can lead to a productivity nightmare. Use of channels can be a preventative measure to keeping discussions on track and uncluttered.

Channels

Channels is a feature available on Slack as well as on other collaboration tools that feature chat apps, such as Microsoft Teams. In short, they are a way to keep the conversation organized by topic or project. Even a specific channel can have multiple side channels for different subtopics or areas of work. This keeps information organized and stops overlapping discussions.

Best Practices

Leverage channels to keep conversations organized and productive.

For example, let's say you have a channel dedicated to a specific new client. That channel is where the whole team gets together to discuss the project, but the folks in marketing can have another channel just for them to discuss their tasks dedicated to the new client. At the same time, the team from product development can have their own channel for that client and sales and distribution can have their own channel to discuss their roles and action plan. This allows each team to coordinate within their own field of responsibilities as well as with the entire group. It keeps the conversations cohesive and timely.

Channels can also be dedicated to socialize with each other, share good news about the company or individuals, or just have fun. Remember that during your crisis, there will be loads of stress and feelings of isolation. The teams will need a way to stay in touch and share things with each other that are not entirely work related. They would do that if they were in contact with each other in the office, so it should be encouraged during your crisis as well. It's part of a healthy employee

experience, just as it is for them to sit and talk together at the office. There is a way for them to get close to doing that from home as well.

Voice Chat

Discord is a service that has primarily been used by gamers. It allows people to create a private server, similar to a channel, and chat in real time using VoIP, text, and video technologies. It is great for people who want to team up and play an online game together and speak live in real time as they play. It's also a nice tool for developers who may be working on a project together and want to work live. It's even useful for a group that just wants to sit down and shoot the breeze.

One of the great features of Discord is that its channels can have up to 250,000 members and support 25,000 simultaneous online members. The applications for Discord on a business use level still have not been tapped, but for social discussions, it is already a heavy hitter. For virtual face-to-face connections, the video meeting apps are your best bet.

VIDEOCONFERENCING

Due to the inability to meet in person during the COVID pandemic, the popularity of video calls and videoconferencing exploded. One of the most popular platforms for video meetings is Zoom. It is a great example of the proliferation of video for business. In December 2019, Zoom reported 10 million daily meeting participants using its service. In April 2020, it reported 300 million daily meeting participants on its platform.

Zoom is one of the biggest players in the industry, but there are many different videoconferencing options available. Choosing the best one for your company will depend on your specific needs, the size of your company, and any integrations with third-party apps that you may want to use.

During the pandemic, many businesses began using video in ways in which they probably had not previously used it and would not have used it if they were still able to meet in person with clients and other people on their own team. That led to a great deal of innovation in how to use the technologies to conduct business, manage teams, socialize, and maintain revenue streams. How you will use it is entirely up to you, but you will probably find more ways to use video during your crisis event.

I interviewed Leslie Murphy, president and CEO of Raybourn Group International, and discussed how working remotely affected company processes. She told me how video meetings unexpectedly changed how her company will conduct internal meetings in the future. Here is what Leslie had to say:

Videoconferencing has changed how we do things. A couple of our people were already remote. They weren't ever going to be here in this office. Sometimes if we had a team meeting, people would meet in the conference room and then would audio in the person who was remote. We're not going to do