



Operating Your Brokerage Remotely

Tips and Tricks

Managing Remotely

- Connectivity Tools
- Communications: Tools and Planning
- Your Website – Powerful Communication Capabilities
- Self-Serve Tips and Tricks
- Things To Consider: Operational Best Practices

Connectivity Tools

GOAL: To recreate their work environment at home

- Cloud Based BMS' are a huge help, but don't solve the whole problem
- Most brokers have many of their files stored locally on their PC's such as applications, preauthorization forms, underwriter guidelines, etc.
- Few brokerages have cloud based file solutions for shared documents such as OneDrive, Google Drive, Dropbox, etc.
- Consider little things like saved passwords on their local browsers

SOLUTION: Connect to your PC Remotely

Connectivity Tools



CITRIX®

LogMeIn®
Be Limitless.



GoToMyPC

VNC connect



Microsoft Remote Desktop





Benefits and Costs

- Easy and Quick to Setup – Most don't need any special IT resources or anything
- Quick to Sign Up and Start Using
- Allows users to log into their desktop and operate as if they're at the office – even support multiple screens
- Cost Effective – Average cost of **\$50/user/month**. The more users the less expensive.

Communication and Tools

GOAL: To Effectively Communicate Internally and Externally

- Various tools available for each type of communication
- Having a well thought out plan and considering ALL your stakeholders is key!
- Proper use of these tools becomes more important without face to face interaction
- Be Proactive – Not Reactive. Have a Plan!

SOLUTION: Have the Right Plan and Tools

Internal Communication Tools





Benefits and Costs

- Easy and Quick to Setup – Most don't need any special IT resources or anything
- Quick to Sign Up and Start Using – Not a lot of training needed.
- Almost all are mobile friendly – there is an app for them to take with you on the go
- Cost Effective – Cost ranges from **Freemium to \$25/user per month/user**. Depends on the features you want





Benefits and Costs

- Easy and Quick to Setup – Most don't need any special IT resources or anything.
- Need to pull client list once and then regular updating required. This is the most challenging part.
- Easy to setup templates. The more data you can get, the more you can customize your email
- Cost – Depends on usage. Typically a fee for 'x' number of emails monthly.

Crisis Communications Management




Things To Consider: Operational Best Practices

- Staff and Team Members – Clear Communications is KEY! Set expectations and give clear directions.

Adobe Reader Touch


Adobe Reader Touch



How to install Citrix on your home PC

On the home PC, install the latest Citrix Workspace App:

1. Uninstall any old Citrix Receivers/Citrix Workspace and/or Online Plugins
2. Download and install the latest version of the Citrix Workspace App from www.Citrix.com
3. **DO NOT** put a check mark in the "Enable Single Sign-On check box. Just click Install



4. Once installed, **do not Add an Account**
5. Restart the PC even if not prompted to
6. One logged back in, wait for the message to Add an Account to display, then click on "Do not ask again" and close the window
7. In IE or Chrome, browse to <https://citrix.rogersinsurance.ca/>
8. You will be redirected to Microsoft, where you will be asked to authenticate using your **full email address and your Windows computer password**



CUSTOMER EXPERIENCE TEAM

Work-From-Home Metrics and Performance Expectations

In order to ensure we are able to operate fully as a remote, work-from-home call centre during these unprecedented and challenging times, we have put together a performance expectations chart. It is important that we all remember why we're here, and that is for our customers who need us more than ever.

- 1) **Log in** to phones, email, messenger, etc. at the time your shift starts
- 2) Maintain a **minimum standard of 19 calls per day**
- 3) Maintain a **minimum of 40 client file touches per day**
- 4) Achieve **14 sales per month**: 9 must be for combined home/auto, remarkets/rewrites
- 5) Quality **score of 85% or higher**
- 6) **Daily check-ins** with the leadership team

Things To Consider: Operational Best Practices

- Regular communications to your insurer partners is important
- Control your receivables. This can cause great pain if not managed properly.
- Look at all your expenses. Cut out any unnecessary costs.
- Its time to cut paper out of the equation! There needs to be a focus on digital.
- Digital Payments are going to be super important – Look at options out there (ie. ClearPay for payments to carriers) so you don't need to cut cheque.
- **Marketing and Sales are not unnecessary costs!**
- Commercial Lines will likely get hit first. Personal Lines will follow quickly after.
- Auto losses will likely drop considerably, but property claims will increase with all the stay and work at homes.
- Be Proactive – Not Reactive. Make sure everyone has the right coverage. Pivot and find opportunities.

Questions and Chat

If you have a question or comment please type the word **Question or Comment** in the chat feature below (you don't need to type your whole question or comment)

I'll call on you one by one in order received and you can unmute and share with the group.