truffa Technology

* 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









LogMetin GoTo VyPC

VNC CONNECT







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.



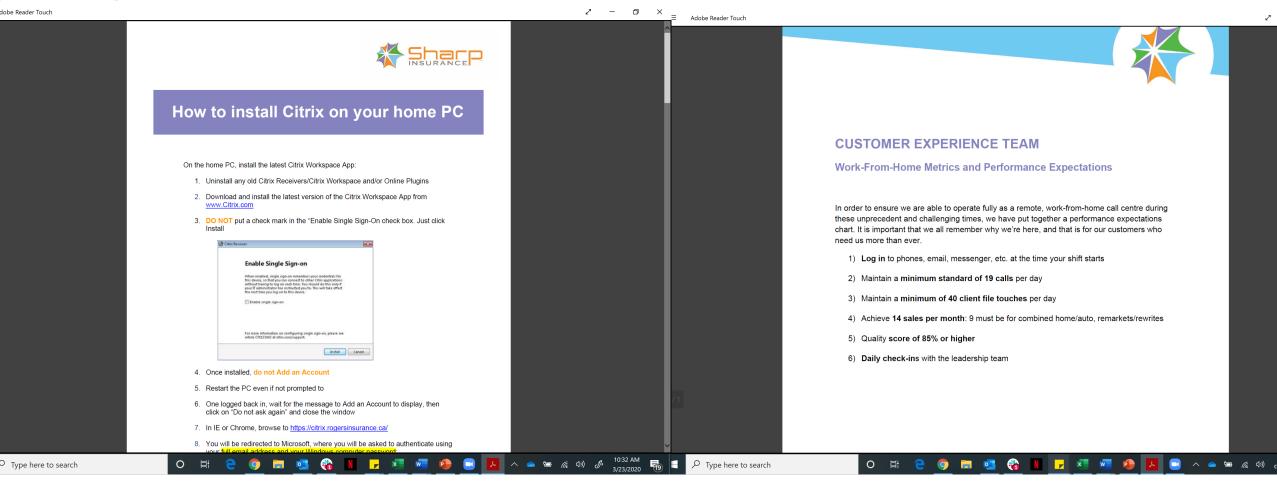
Crisis Communications Management





Things To Consider: Operational Best Practices

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





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.