



Guide To Implementing A Hybrid Way Of Thinking

**The Top 5 Critical Considerations To Keep Your Staff
Engaged When Working From Home**



Top 5 Considerations To Keep Your Staff Engaged & Efficient When Working From Home





Who has access to your company data?

Whether you own a business, are an individual or are part of a Government sector, chances are you have faced the common challenge of when, where and by whom your data has been accessed. Despite the fact that we live in a time in which information has never been easier to access and collaboration online has never been easier to organise and manage, we still need to remain proactive and vigilant when it comes to how we enable our employees to access company data.

So, how do I achieve peace of mind you might be asking? The answer begins with something called **access control**. Simply put, access control is a process of confirming that users are who they say they are and that as a result, they are granted access to only the absolute necessary data they require to carry out the key responsibilities of their role.





Access control comprises two primary components, being authentication and authorisation. Now, you may be thinking that these two components are much the same, however, this is a common misconception made by many. **Authorisation** is a technique used when carrying out verification methods to confirm the user's identity. Examples include multi factor authentication in which users are required to provide two or more verification factors to gain access (i.e. randomly generated short codes across two devices) or an increasingly popular method, being facial recognition of the user.

Authorisation is much more straightforward and is more an internal process in which once users have passed the **authentication** step, the documentation and data access is confirmed in the organisation's back end and the employee is granted permission to view and edit only what is necessary. For example, if your marketing team wishes to access company data, then most likely you will want to give them access to marketing materials, branding guidelines, marketing budget planning templates and collaboration documents between teams relating to campaign strategy and execution. It would be no use giving them access to the company's financial or operational documents as not only is it irrelevant to the job functionality, but it would pose an increased threat of a malicious attack the larger the number of employees who have access to sensitive documentation.



However you and your organisation choose to implement access control is up to you, however, regardless of the initiative, you need to constantly monitor how it is being delivered both in relation to your company security policy as well as operationally, in order to discover and be proactive in discovering any security holes.

As we continue to shift into a World without borders and traditional in office correspondence and face to face contact, your network's access must remain dynamic and fluid through supporting user identity and various application based use cases.



Knowing how to set up your Cloud services properly & keeping it secure

As organisations move applications, documentation and data into the cloud, managers and business owners alike always have the same question lingering on their minds “how can we balance the benefits of productivity gains while ensuring my concerns about compliance and security are taken care of?”

It is a fair point, as the thought of shifting all valuable pieces of information and data that your company owns from on premise to the Cloud is enough cause for inertia and stress, however, this is only the case if best practices for securing your cloud service is not followed.

Below is a list of a few ways you can gain peace of mind and begin to understand how you can make the switch with minimal confusion and headaches as well as alleviate any risk of a data security breach;

Ensure all data is encrypted with SSL

Simply put, SSL stands for Secure Sockets Layer and is the standard technology that organisations all around the World use to keep their internet connection secure and safeguard sensitive data that is shared and sent between two parties. This is achieved through using encryption algorithms to scramble data in transit, giving you data security while in transit.





Optimising your internal collaboration tools

Throughout the past year, the emergence of online collaboration tools such as Slack, Microsoft Teams and Zoom have exponentially become more popular. While the main use cases of the tools themselves may be quick to learn, like anything, in order to gain a competitive advantage, considered strategies must be well thought out and implemented correctly in order to gain the most out of these technologies.

Regardless of your industry and company mission statement however, the sole question which should drive any online collaboration initiative should be “how can I use this platform to better engage my team?” This might sound relatively straightforward, however, many companies try to skip straight to “how can this tool increase revenue for the company and become a way for me to keep tabs on my employees?”

This is especially dangerous as not only does it turn the attention and focus onto a “me” approach towards the business owner or manager to help them perform their role better, but more importantly, it fails to address the opportunity to build trust between employees and management as well as assist them in becoming more efficient and productive collaborative and individual workers.

Below are a few best practice initiatives which when implemented, will help increase productivity, improve collaboration output between team members and encourage day to day communication between employees whether it be work related or general camaraderie in the form of typical discussions had in the kitchen, lunchroom or between desks within the workplace.

Identify and focus on business objectives

When your team is unable to be face to face together, a change in perspective needs to occur in order to determine what success looks like. Whether it is a shift in exact KPIs or deliverables, remaining productive when working remotely requires a set of clearly defined expectations that your team can work towards.





Prioritise communication when working on projects

When working remotely, gone is the ease of simply walking over to a colleague and asking them to clarify something or get their help on an issue. Due to decreased visibility over everyone's day to day tasks, setting up meeting times and communication channels to discuss a specific document or project is paramount to ensuring no important information is missed and day to day communication remains as seamless as possible.

Make room for socialising

One of the benefits of being in the office with your fellow co workers is the sense of feeling connected, included and building personal relationships. These positive feelings can be quickly and easily lost if everyone is working remotely. Take some time to leave room for socialising before or after scheduled meetings, setting up channels and chats to just catch up and having regular team building days. The more connected and close the team feels, the greater the level of trust and output.



Avoid multiple projects at once when remote working, where possible

Keeping track of everything we are working on and what we need to do for who is tricky at the best of times, trying to manage all of this remotely can prove to be a large headache. If you have to have multiple team members across different projects, ensure that set collaboration and meeting hours are organised to talk about each project, with ample time inbetween project catch ups to allow team members to tend to their priorities and other tasks at hand.



Vulnerability testing must be constant and detailed

The Cloud service provider should provide vulnerability and incident response tools to you, which allow you to regularly run security scans that test for any weaknesses within the system and vulnerable areas susceptible to malware attacks.

Have a defined and up to date data deletion/retention policy

Once data is no longer required, whether it be company IP, your client's or a customer's, ensure that a process has been set up to have it deleted and wiped off of your system. Any historical data or entry points that need not remain on the Cloud, are irrelevant and can only cause problems in the future if they are neglected.



Do your due diligence in regards to researching vendors

This is not technology specific per say, however, it is arguably the most important component of migrating to the cloud. You simply cannot underestimate the amount of time and research required to ensure you select an IT vendor that understands the scope of work, your industry's compliance requirements, your company's operations and has had experience in similar previous migrations. Not all vendors are created equal and if you rush into this decision, your migration and security of data is already at risk even before the project has started.





Optimising your workflow systems and practice management software including your CRM

When it comes to the core systems your business uses, it is imperative that you give your team and organisation the best opportunity to succeed from the outset, through centralising these systems and hosting them in the Cloud.

A good example of a core business system which we have come across on multiple occasions, that can be centralised quite easily and has a significant impact on the output of an organisation, is your CRM.

You might feel like you have all your customers packed neatly in one location, however, is your CRM truly a centralised customer database which provides a single view of each of your customers, including behaviours across digital channels, demographic and personal information and all interactions made between business and customer?

When data from customer service, marketing and CRM software is each in it's own silo, no one in your business will be able to get an accurate view of who the customers are, and as a result, might miss out on vital information that can lead to developing a meaningful relationship or sale. The only way to ensure no opportunity is missed, is to create a centralised database through utilising strong architecture allowing data to be pulled from multiple sources into the one.

Below are three key considerations to understand before you embark on transforming your CRM into your dedicated, all in one customer hub:

What is your strategy and WHY, for having a CRM?

You need to have a strategy or a WHY for using a CRM as a centralised hub. Is it to mainly provide great customer experience through customer service initiatives, assist your sales team or level up your marketing efforts through a broader and deeper data collection? It could be all three, however, before you do anything else, you need to know how to measure success.





How can your CRM cater for your customer's journey?

The concept of “customer journey” is not foreign to any business or industry, which in its essence, is the process of plotting out common key milestones and events that take place throughout a rough time frame that lead to the purchase of a company's product or service. Your CRM needs to be structured using the journey and sales cycle as a framework when creating data fields, developing pipelines and automating progress through the pipelines based on a set of defined actions.

How will you ensure you get buy-in from your staff who will use the CRM correctly?

Processes need to be put in place to ensure your team carries out tasks correctly when using the CRM. It is the most practical and hands on component when planning to centralise. Whether it is through formal documentation, regular meetings or external training, this is where you can educate your team on how and why data is collected as well as what their role is in keeping it clean and updated.





Setting up your voice system in the Cloud

Regardless of email and instant messaging chat applications becoming increasingly popular among businesses, the phone system is still the cornerstone of any organisation's operations. When you really think about it, it truly is easier to have a quick chat with someone than wait around with uncertainty over whether or not they have seen or will reply to your email.

On a typical day, you might pick up the phone to talk to a client, a partner, a customer or a colleague, with each conversation potentially discussing some important operational matters! Despite business owners knowing this information however, often little is done to audit and improve the efficiency of such a vital tool for your business and many organisations are still relying on old analogue systems.

Now we know what you might be thinking, don't change what's not broken right? Well, in this case, we would have to say wrong, especially when change, although sometimes scary, can lead to an exponential improvement in dramatically improving the overall customer experience and reducing cost.

We are of course talking about setting up your voice system in the Cloud. In a nutshell, by adopting a cloud based phone system, you are using the internet to send and receive phone calls rather than relying on legacy systems.

Having seen such a shift in how businesses operate in the past 12 months, it's essential that all core business operations are redesigned to ensure productivity and efficiency.

The biggest benefits of this you ask? We thought you might ask, which is why we put together a list of our top three below:



Higher level of availability and mobility

Whether you want to make a work call from your mobile, desktop computer or a laptop at home, you will be able to access and call from the same number. No more having to be reliant and stuck to your office chair to make a call!

Subscription based costing which means it's cheaper for you to run

Having your voice system in the cloud results in a cheaper cost per call compared to standard phone systems. Depending on your provider as well, you will only have to pay extra for the exact features you use, which means no unnecessary spending and only using what you need. Another added bonus is that the initial setup cost for hardware is significantly cheaper than standard phone systems.



Reliability is no longer an issue

Imagine if a bad storm hit or your phone company had system wide issues? How long would your phones be down and what would that mean for your business? When your voice system is in the Cloud, your business will be provided with the tools and support to mitigate any internet based risks or issues to make sure you don't have any downtime.



Questions to ask your IT Partner





1 What is the availability of my systems and is the availability guaranteed?

This question gets the IT personnel's mind out of IT and forces them to think about you and your business. It also puts their money where their mouth is, so to speak – so, potentially, expect some fumbling or resistance. Do not let the response be limited to one system, you want to know about all your systems.

A good response would be where the percentage of availability per month is easily rolled off their tongue, together with the cloud Partners guarantee. Anything less is a queue to dig a little deeper.

2 How do I remove any dependency from my office for my business to continue operating?

In today's climate, you do not want to be at the mercy of your office for your business to continue operating. You want your business to continue operating despite what lock-down restrictions or working conditions are forced upon you and your team. It is imperative that your business is either independent of the office and its technology, or there is a rapid plan to get you there.

The benefit here is that when conditions turn back to normal, you and your team can continue to work from wherever you allow – its not just flexibility for now, but for the future too.

NOTE: This does not need to be an overly expensive exercise.

3 Does my business' cyber security solution follow the 'Essential Eight'?

We are extraordinarily lucky here in Australia. In addition to having such a beautiful country, we are lucky enough that our government regulates and provides guidelines for many facets of business – this includes Cyber Security. They have literally saved many of us from having to go through the pain of security breaches to learn or having to invent our own solutions. They have given us the answers – enough, if followed, to keep us safe from most security threats.

The Australian Department of Defence released the 'Essential Eight' as a robust cyber security guideline that outlines the essential security provisions to protect you from most threats. See <https://www.cyber.gov.au/acsc/view-all-content/publications/essential-eight-explained> for more information.

Every IT Partner should know these. Educate yourself on these 8 essentials and determine if you are protected.

4 Where is my business' data stored, including backups?

Many businesses require a license to operate, and even if a license for a particular line of business is not required, if you are simply collecting some personal information, you're bound by the Australian Data Sovereignty Laws. This means that any data on Australian Citizens, or any data as regulated by a license to operate, must remain on Australian Shores. This includes data-at-rest (backups).

Ensure you have your data's location in writing, and preferably with a reputable cloud or data storage Partner.



5 How can I reduce or eliminate my server upgrade costs?

This question is most appropriate for those that are still operating off an on-premises or a dedicated server in a data centre. If migrating to Cloud is not the first option that is offered, then you need to at least suggest migrating to the cloud as something they can consider and investigate on your behalf.

The cost of migrating to the cloud is a fraction of the cost of upgrading your server. And while your operational expenses may generally go up (because you are shifting to a subscription-based model), research has shown that over a 5-year period, your business will still spend less on technology, your business will be able to leverage more and better technology, productivity increases due to the availability of technology and businesses have an overall competitive advantage due to staff engagement, agility and better ways of doing business.

6 How can technology provide my business a competitive advantage?

This question is great for everyone – again, it is one of those questions that shifts the IT personnel’s mind out of IT and forces them to think about you and your business. This is where true partnership comes to life, and its exciting.

This question is suitable for any technology solution you have in place. If you are already in the Cloud, then there will be many opportunities to help you stand out from your competition – its just going to take the time for your IT partner to understand your business and what technology can be used to compliment.

And sure, your IT partner may not be able to answer the question immediately, but it is a queue to go away, research and come back to you with a proposition.





7 What is the adoption or change management process?

Many businesses require a license to operate, and even if a license for a particular line of business is not required, if you are simply collecting some personal information, you're bound by the Australian Data Sovereignty Laws. This means that any data on Australian Citizens, or any data as regulated by a license to operate, must remain on Australian Shores. This includes data-at-rest (backups).

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Again, there may not yet be a process that they have considered, but this question will get them thinking.

8 How are you incentivised?

Let's not tap dance around this topic. We are specifically talking about benefits, commissions, and money. You have the right to know. Financial Planners and other industries are asked this question all the time, why not IT? You want to make sure that the advice and technology you are getting is unbiased and the best fit for your business, not someone else's holiday budget.

These questions have been written with the best of intent to improve the working relationship between you and your IT Partner. While we love the opportunity to work with more customers, we believe most IT Partners are doing their best in supporting their customer's needs, although some do it better than others.

Partnership is about guiding each other to a collective success. If you feel like you're doing all the guiding, let it be known and consider your options.

At Excite IT, our mission is to simplify the IT services industry in Australia and to create environments where people and organisations with the right attitude are setup to succeed.

We achieve this through helping businesses align their strategies and objectives by providing the following services:

- **Managed Services** From IT operations to Cloud management, we will do the work behind the scenes to make sure your day to day business operations run smoothly.
- **Information & Cloud Security**
Through providing data security and ensuring data is protected as per regulatory and commercial compliance frameworks.
- **Cloud Migration & Project Fulfilment**
From discovery and analysis, to developing a strategy and roadmap and ultimately executing the project, we will ensure you have a seamless and safe transition migrating your data and operations to the Cloud
- **User Experience Design**
Keeping the end user in mind, we are able to guide you through the technology design and build process as well as assist with change management strategy to ease with the adoption of this new technology.

Is your current IT setup delivering an extraordinary experience? If not, then we would love to show you how optimised technology can transform productivity, elevate the customer experience and free you to excel in business.

Let's Talk