

AN ARMA CT EVENT — COPING WITH COVID



Facilitator - Susan Gleason
Shipman & Goodwin LLP



Facilitator - Chris Bednar
Bain & Company



Guest - John "Jay" Leask
AvePoint Public Sector



BACKGROUND

- Coronavirus and the COVID-19 pandemic caused a rapid shut down of our daily lives
- Knowledge workers find themselves in a position of continuing to work
- Business are attempting to continue “business as usual” through new and often foreign solutions
- April 3: Zoom claims an increase from 10m to 200m daily users
- April 30: Microsoft claims nearly 100% increase in usage of Teams with “2 years’ Digital Transformation in 2 months”

As of Jan. 20: **4**



As of Feb. 15: **28**

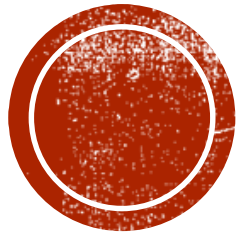


As of Mar. 1: **66**



As of Mar. 20: **165**

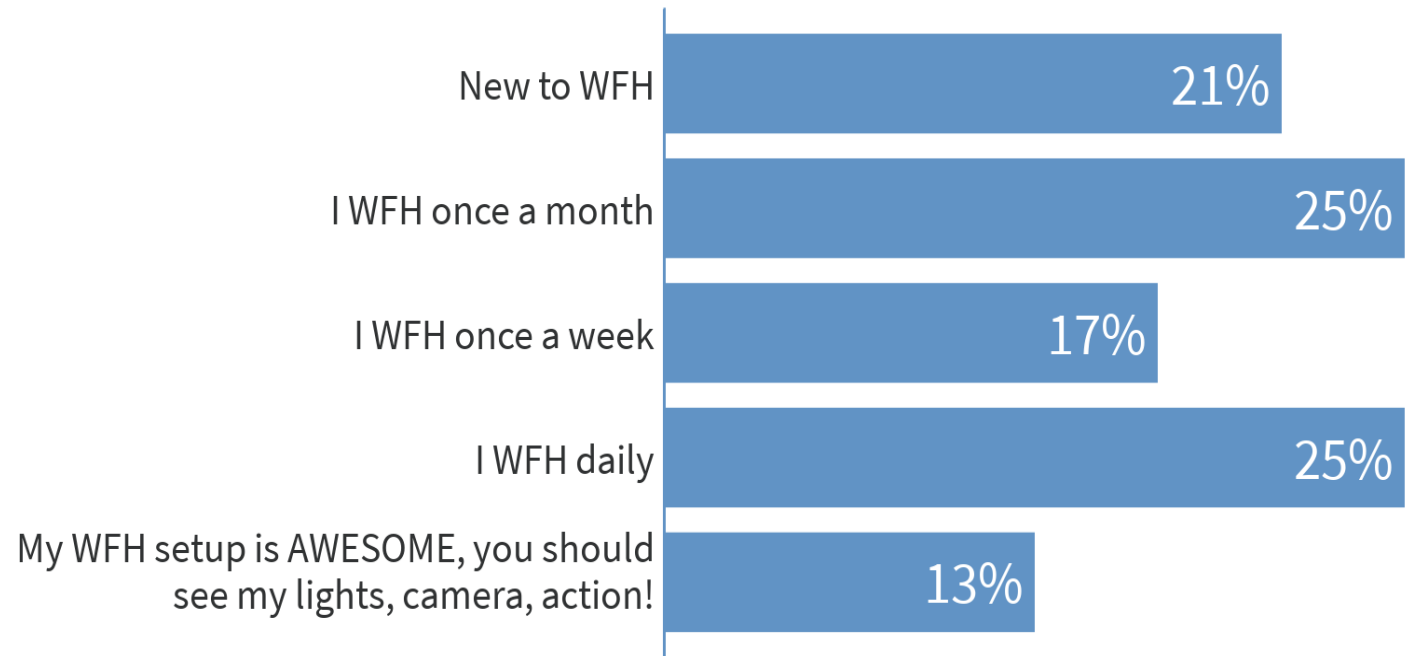




NEW TO #WFH?

4 Key Considerations in Successfully Working from Home

How would you categorize your WFH experience?



HOW DO I WORK?

“Experts recommend sticking to your daily routine, even while working from home”

New Yorkers:



- Keep your daily/ weekly routines
- Build a "wall" (virtual and physical) between private life and work
- Use time boxing for private tasks
- Do everything you do at 100%
- Get away from distractions
- Manage familial expectations



HOW DO I ACCESS INFORMATION?



- Establish an understanding of your available infrastructure
 - Do I have VPN?
 - Do I have a COMPUTER?
 - Do I have permissions?
 - What tools are available to me?
- Identify your data
 - What workspaces contain my data?
 - Is my information electronic?
 - Stay organized!



HOW DO I WORK WITH OTHERS?



- Define a cadence with your team
 - Do we/Why have standard working hours?
 - Update your calendar
 - Set your status
 - Agree on technology
- Ask questions and Clarify understandings!!!!
- Know how to get help
- Make plans



GOOD MEETING PRACTICES



- Send an agenda
- Keep them short
- Engage with Technology (video, polls, etc)
- Share your screen (and know how to share screen vs app etc)
- Wrap up loose ends and next steps
- Have a break
- Have fun

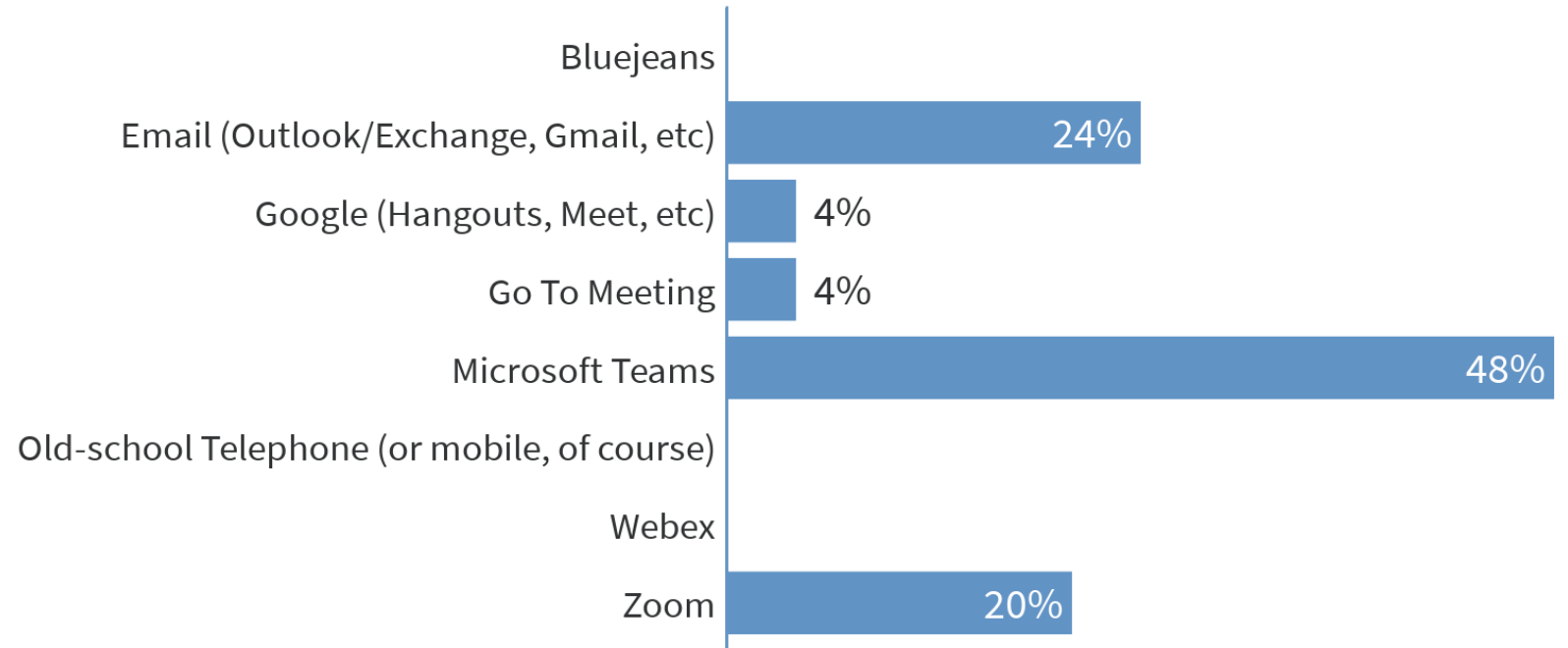




A NEW FRONTIER

Technology – and Physical Preparation – for the WFH Era

What is your primary WFH software?



ANATOMY OF TECHNOLOGY

Video Conferencing

- Video
- Computer Audio and/or Dial-in
- Meeting Chat
- Screen Sharing
- One-to-One or Group Chat
- Immediate need

Collaboration

- Shared Files
- Persistent Threaded Discussions
- Organized content
- Tagging (people and content)
- Platform and 3rd party solutions
- Long-term



ANATOMY OF TECHNOLOGY

GetApp 10 YEARS


GetApp 10 YEARS

GetApp 10 YEARS

GetApp 10 YEARS
RECOMMENDING SOFTWARE

Top Team Collaboration Software¹

Found 85 solutions

**Cascade Strategy**


Cascade brings planning, execution, dashboards, and people management into one seamless system with the aim of enhancing business performance

★★★★★

User reviews: 21
Average rating: 4.86

[VISIT WEBSITE](#)

[LEARN MORE](#)

**Upwave**


Upwave is a visual platform that helps businesses thrive on projects, track time, and progress. ...

★★★★★

User reviews: 9
Average rating: 4.33

[VISIT WEBSITE](#)

[LEARN MORE](#)

**GoProof**


GoProof is a cloud-based proofing solution which helps enterprises, using Adobe Creative Cloud, share and collaborate on projects with stakeholders ...

★★★★★

User reviews: 54
Average rating: 4.28

[VISIT WEBSITE](#)

[LEARN MORE](#)

**Unify**


Unify is the employee experience platform at the heart of your digital workplace that powers better work for everyone.

★★★★★


User reviews: 9
Average rating: 4.33

[VISIT WEBSITE](#)

[LEARN MORE](#)


**ProWorkflow**

[LEARN MORE](#)


**Zoom**

★★★★★ (24,338) 4.5 out of 5

[LEARN MORE](#)


**Cisco Jabber**

[LEARN MORE](#)

**GoToMeeting**


★★★★★ (10,714) 4.2 out of 5
Optimized for quick response

[LEARN MORE](#)

**Skype**

★★★★★ (16,787) 4.3 out of 5

[LEARN MORE](#)


**Microsoft**

Microsoft Teams is a chat-based workspace in Office 365. It brings together people, conversations and content along with the tools that teams need so they can easily collaborate to achieve more.

Read [Microsoft Teams Reviews](#)


☐ Compare

[Get a quote](#)

**Cisco Webex Meetings**


★★★★★ (10,425) 4.2 out of 5

[Get a quote](#)

**Adobe Connect**


★★★★★ (518) 4.1 out of 5

[Get a quote](#)

**Google Hangouts Meet**


★★★★★ (3,902) 4.3 out of 5

[Get a quote](#)

**join.me**


★★★★★ (17,001) 4.2 out of 5

[Get a quote](#)

**BlueJeans**

★★★★★ (3,406) 4.3 out of 5
Optimized for quick response

[Get a quote](#)

**Cisco Webex Teams**

are here to help you transform how work gets done, not just enable team chat. Webex Teams is an app for continuous teamwork that brings crystal-clear video meetings, group messaging, file sharing, calling and whiteboarding so your teams can work anytime, on any device, with anyone, across any workstream.

[Teams Reviews](#)

[Get a quote](#)



OVERWHELMED YET?

- Deep breath ...
- What has your organization provided you? Guidance? Technology?
- What personal needs do you have?
- What is your ARMA Chapter doing? Rest of your region?



PHYSICAL PREPARATION

The Workspace

- Monitors (2 is nice, 3 is heavenly)
- Video equipment?
- Handsets? Headphones? Or Speakers? Microphones?
- Lighting? Fans and Outside noise
- Clutter?
- Where do I look?

The Headspace

- Look like a Pro (at least half)
- Find a quiet space
- Give yourself time to breathe before and after calls
- Mute – Unmute, then Mute again!
- Expect Family Interruptions



EXPECT FAMILY INTERRU



Rachele with an e but p
my boss turned herself ir
meeting and can't figure
just stuck like this the ent

daniel taroy ✓
@danieltaroy

just started talking to my cat in the middle of a 68-person zoom meeting—and i wasn't muted!!! send the meteor!!!!

♥ 93 2:07 PM - Mar 16, 2020

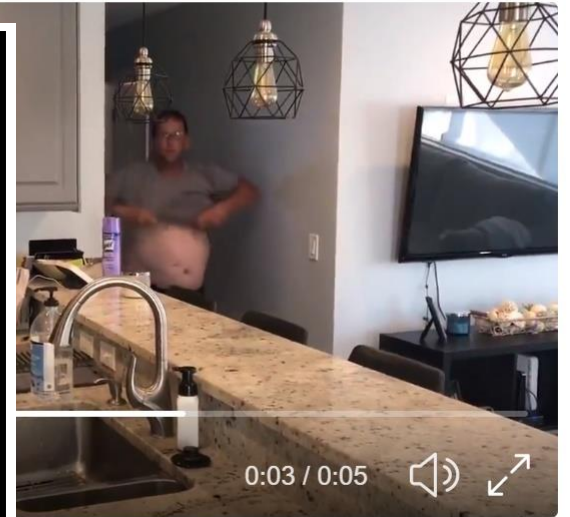
rimsha
@rimshutup

Day 3 of WFH and my family started screaming while I was in a meeting and my coworker remarked: "Now I understand why you prefer to go into the office everyday."

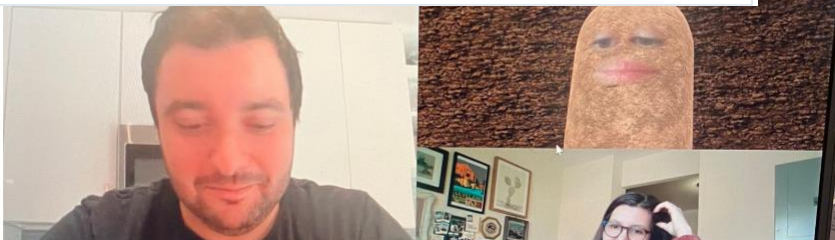
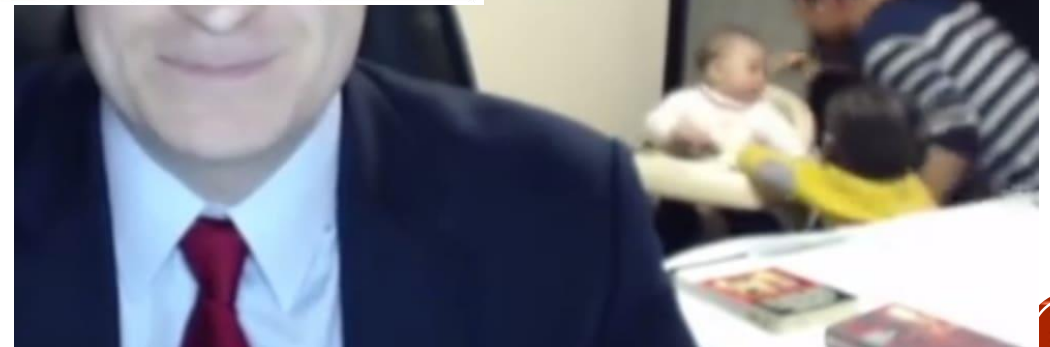
♥ 49 1:06 PM - Mar 18, 2020

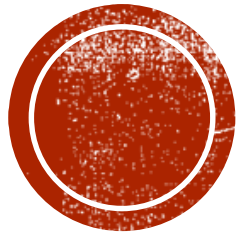
Jessica Lang
@jessdlang

Work from home they said, it'll be fine they said.



2020





THE IG PROBLEM

Information Governance and the WFH Era

Respond at [PollEv.com/jayleask809](https://poll-ev.com/jayleask809)

Text **JAYLEASK809** to **22333** once to join, then text your message

What IG/COVID concern keeps you up at night?

"Are companies really hiring during these hard times "

"how to get to the table when IT or LOB users want to roll out new software "

"how to manage records generated by Teams, Outlook that IT just rolled out?"

"Security of documents and information being transported between the office and home "

"Using new/unsanctioned tech for business "

"Finding the "right" information quickly "

"STATEARCHIVE240 "

"What are people doing with all of that printing they used to do? "

"Employees have too many options/places to store information. "

"We need a records management policy for email, chat, etc. "

"Emergency response records are permanent, almost everything we've been doing for the past 2 months might be considered an emergency response. "

"STATEARCHIVE240 "

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“STATEARCHIVE240 ”

CHANGE HAS COME — IT'S HERE TO STAY



- Accessing Paper Records
- Shadow IT
- Sudden surge to online tools
- Managing Your Data Map
- Executing Your File Plan on New Spaces
- Collaboration vs Records



RECENT RECORDS GUIDANCE

US National Archives Pandemic FAQ on Records Management

- **On email:** “Teleworking employees may find that they use personal email accounts ... to communicate for work. Please note the Federal Records Act requires federal employees ... to copy their electronic messages to an official account ... within 20 days”
- **On Teams, Zoom, etc:** “... continue to manage the records created with these tools as they would have had the meetings been held with the same technology while in the office.”
- **On printouts:** “If printouts contain unique information, including handwritten notes, they may need to be managed separately from electronic files that lack this information.”

2020 Australian Public Sector Records Readiness Report

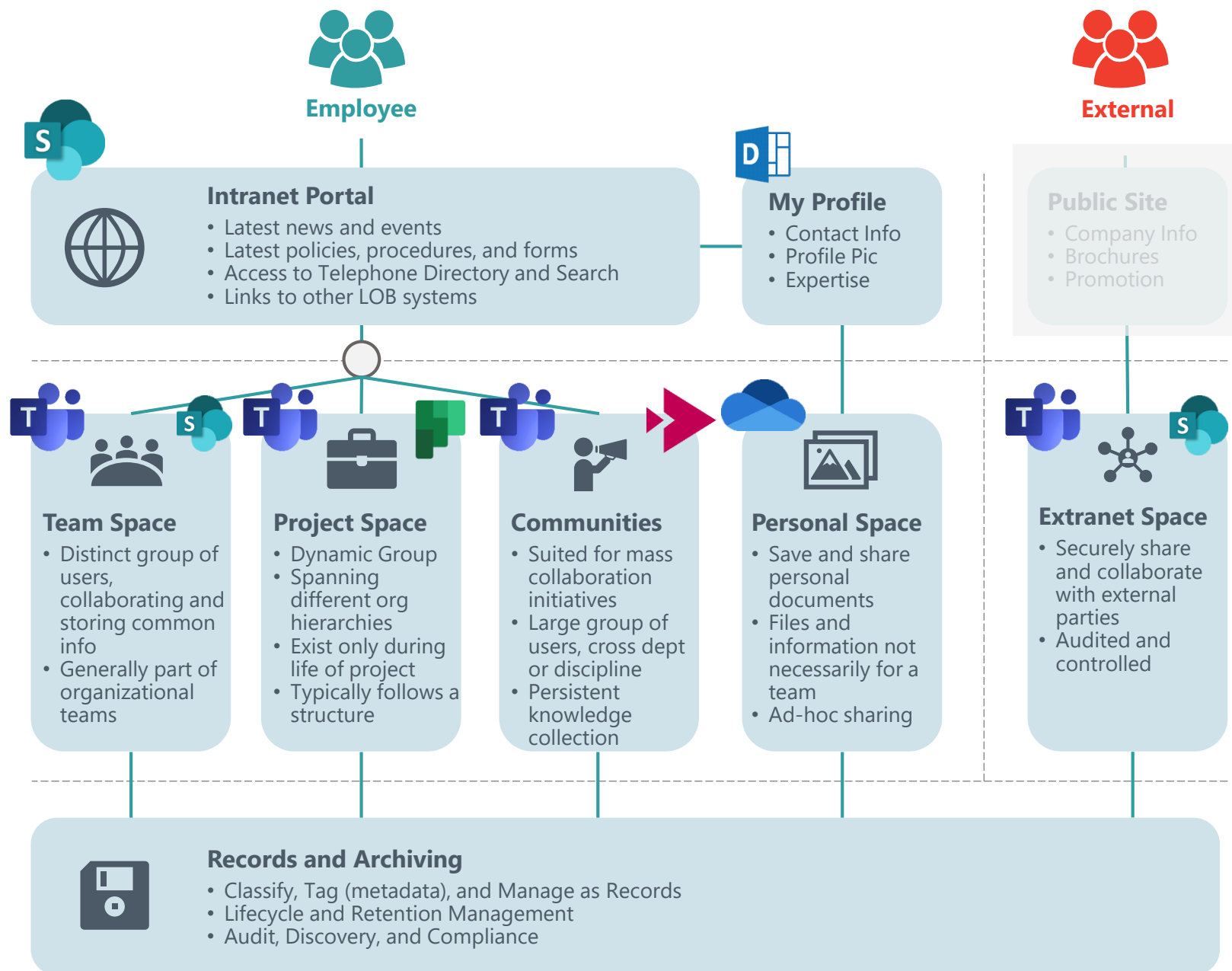
- Expand automation in records management processes, to avoid falling further and further behind in their efforts to classify and transfer records.
- Simplify or remove users altogether from records management processes, to lead to more successful information management outcomes.
- Address the information as part of a risk-value framework and invest appropriate effort, as only 13% of respondents said they have oversight of all information across their agency.



PUBLISH

COLLABORATE

RETAIN



I.T. IS CHOMPING AT THE BIT FOR GOVERNANCE

Office 365 and related Collaboration solutions have ushered in a new era of Governance for IT.

Don't try and organize your information by department... think about the information type instead.

The shift from Records Management to Information Governance is a great compliment to IT governance.



THAT'S A WRAP

1. Prepare yourself
2. Identify resources
3. Create a Plan (your team, your family, your workspace)
4. Accept Change
5. Bring Solutions to IT





Coping with COVID: Resources



Thank you for the opportunity to present to the Connecticut Chapter of ARMA International; I hope the presentation was beneficial and the conversation entertaining. Below you will find resources that have assisted our teams in successful collaboration during our digital transformation, as well as some of our favorite materials that have come out over the past few months.

If you found any of my information useful, have additional questions or comments, or otherwise wish to continue the discussion, please do not hesitate to reach out to me directly; my contact information is on the bottom of this document.

Working from Home Tips, Tricks, and Technology

[3 Ways to Improve Remote Worker Satisfaction](#) – Vault (2020 April 15)

[How to Look Better on Zoom and Other Video Conferencing Tips](#) – Vault (2020 April 27)

Download this Presentation and Resource Guide
at www.avepoint.com/presentations