



Taking Your Business Home

Tips To Digitally Transform Your Company Effectively

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Working Remote is Different

- Understanding the Differences
 - Motivation
 - Accountability
 - Communication
 - Billing, Invoicing, Purchasing and POs
- Preparing
 - Take stock of the things you use at the office
 - Test new processes and systems before you need them
- Adapting
 - Be open to change
 - You may find yourself with more attendees in a web conference than would show up to an person conference
 - Keep up the collaboration and use technology – Make it fun!

Remote work checklist



Set up your workspace

Find a space in your home where you can concentrate. If you're somewhere with background distractions, use background blur in Microsoft Teams to keep teammates focused.



Communicate often

Your rhythm with online work from home might look different than it does in the office. For example, you may be balancing work and childcare at the same time. Communicate your schedule to your coworkers so that they know when to reach out to you.



Maintain healthy boundaries

Without the normal workday signals, like a commute, it can be harder to unplug. Make sure to take breaks, stay hydrated, and give yourself opportunities to "clock out" from remote work at the end of the day.



Embrace online meetings

Make sure all meetings include a virtual "join" option so that team members can join from wherever they are working. Turn video on so your team can interact face to face and feel more connected.



Be mindful and inclusive

A crowded conference call can make it difficult for people to share their opinions. Pause frequently to allow time for questions and remind attendees that they can use the chat window to share their thoughts.



Record your meetings

When you start a meeting, hit "record." Team members who aren't able to join can watch later or search the automatically generated transcript for important information. That way, people can easily review anything they missed or need repeated.



Make up for missing hallway talk

The quick chat at the water cooler is what many people miss the most when working remotely. Instead, be deliberate about and connecting with your coworkers. Think about chat messages as your virtual watercooler and set yourself a reminder to check in with people regularly.



Bring the team together

Working remotely can feel a bit isolating. It's important to create opportunities for the whole team to virtually get together, whether it's large brainstorming with the Microsoft Whiteboard app or daily check-ins over a virtual coffee.



Have fun

Use Teams to encourage fun activities and challenges to maintain morale. Holding a photo contest or praising employees for creative ideas are great ways to help the team stay positive, engaged and energized.

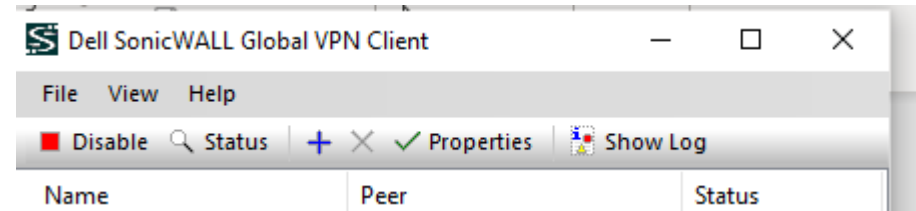


Remote Access Technology



Remote Access Technology

- Pick the Right Tools!
 - Systems Access
 - VPN
 - Remote Desktop
 - 3rd Party (LogMeIn, GoToMy PC, etc.)
 - Cloud access
 - Personal vs. Work Computers
 - Laptop vs. Desktop
 - Number of Screens



Remote Access Technology

- Convert to Digital Processes
 - Documents
 - Meetings (Client & Internal)
 - Communications
 - Invoices
 - Making payments
 - Receiving payments



Remote Access Technology

- How we do it
 - Use Office 365 Teams for
 - Daily whereabouts/status
 - Meetings
 - Sharing comment and files on a topic
 - Communicating with some clients
 - Use Remote Desktop – to assimilate exact work in office tech
 - Use SonicWall VPN to connect remote PCs to shared drives
 - Zoom for webinars and meetings with external parties
 - Forward Office phones to Cell/home phones
 - Hold regular Teams internal meetings for
 - Collaboration (including screen shares)
 - Fun (happy hours)
 - Updates



Remote Access Technology

- We make sure to have fun too!
 - Zoom & Teams meetings
 - For Business & Fun





Microsoft 365

Microsoft 365 Overview



- Microsoft 365 is a subscription service from Microsoft that provides users with productivity applications for use in both large and small organizations.
- The industry is trending to Microsoft 365 for email over the typical Exchange Server (on-premises version of Microsoft's email solution) for ease of deployment, long term management, and consumers' demand for cloud services.



Microsoft 365 Use Applications

- In addition to hosted email, Microsoft 365 offers SharePoint Online, which allows for collaboration beyond email and OneDrive.
- SharePoint Online can be used as a substitute or supplement an on-premises file server, depending on organization size and structure.
- Whittlesey has multiple clients setup with this approach with great success.
- Using Microsoft 365 hosted services is a great alternative for smaller organizations who may not desire the upfront and ongoing costs to maintain a physical server.
- Whether limited to working from home or when you're back in your offices, Microsoft 365 will be a great addition to your organization.



What If I already Use Microsoft 365?

- In many instances, Microsoft 365 is deployed to replace an on-premises Microsoft Exchange Server or as the go-to solution for new organizations requiring email functionality.
- Often times there are Microsoft 365 features that simply were not configured at the time of deployment.
- You may already have the proper licensing for use of other Microsoft 365 services – they may just need to be configured!
- Make sure security features are completely implemented. Often times we see business fail to “go all the way” with implementing features like 2-factor authentication. Very important to safeguard your business from email breaches!



How Can I Move To Microsoft 365?

- There are several tools available to afford successful migrations, (both large and small) to Microsoft 365.
- Every scenario is different. Be sure to consult with your IT department or IT support provider to discuss the specifics for your organization.
 - Whittlesey can also implement Microsoft 365 for your business.
- Microsoft is currently offering Microsoft 365 free for 6 months to new subscribers.

Microsoft 365 Editions

- There are several versions of Microsoft 365 available to fit your business needs
- Be sure to discuss your licensing needs with your IT department or IT support vendor to make sure your licensing selection is not too little or not enough services.
- If you don't have Microsoft 365, Whittlesey is happy to help!

The screenshot displays the Microsoft 365 pricing page with seven editions listed. Each edition includes its name, price per user per month (annual commitment), a 'Buy now' button, a brief description, and a list of included apps and services.

Edition	Price (user/month)	Annual Commitment	Key Features
Office 365 Business	\$8.25	Yes	Best for businesses that need Office apps plus cloud file storage and sharing. Business email not included.
Office 365 Business Premium	\$12.50	Yes	Try free for 1 month ¹ . Best for businesses that need business email, Office apps, and other business services.
Office 365 Business Essentials	\$5.00	Yes	Best for businesses that need business email and other business services. Office apps not included.
Office 365 ProPlus	\$12.00	Yes	Office applications plus cloud file storage and sharing. Office Online, meetings and IM, and more. Office applications not included.
Office 365 E1	\$8.00	Yes	Business services—email, file storage and sharing, Office Online, meetings and IM, and more. Office applications not included.
Office 365 E3	\$20.00	Yes	All the features of ProPlus and Office 365 E1 plus security and compliance tools, such as legal hold, data loss prevention, and more.
Office 365 E5	\$35.00	Yes	All the features of Office 365 E3 plus advanced security, analytics, and voice capabilities.



Microsoft 365 Resources

- [Microsoft statement on offering Microsoft 365 free for 6 months](#)
- [Microsoft 365 business subscriptions](#)
- [Microsoft Teams overview](#)
- [Microsoft Teams Training](#)
- [Microsoft OneNote Training](#)
- [Microsoft 365 HIPAA compliance information](#)
- [Microsoft 365 data protection information](#)
- [Microsoft 365 Remote work checklist](#)



Video Conferencing Solutions



Video Conferencing Solutions

- Microsoft Teams – great for internal use, great security in place.
 - HIPAA compliance already in place, covered by Office 365 umbrella.
 - Encryption of video conferencing
- Zoom, WebEx, etc. – great for webinars and external use





Security And Working Remotely



What Security Concerns Should I Have?

- Don't allow family members to use your work device(s)
- Be aware of other people around you when conducting conference calls or video meetings
- Use multi-factor authentication (MFA) to access any cloud-based or network resources
- Store your files in a secure cloud location rather than on a local drive or removable media
- Data Security
 - PII & PHI – Keep track of it
 - E-mail Encryption
 - Data Loss Prevention (DLP)
- Secure your home network
 - Change default password & admin password



Security And Working Remotely

- Compliance concerns while working remotely
 - Importance of having a Written Information Security Plan (WISP)
 - Can also guide you in setting requirements for a remote scenario
- Testing your applications before they are needed
 - Annually perform a DR test to ensure your plan works
 - Document results and adjust plan to meet required expectations
- Protecting client data - (Sensitive, Confidential, PII)
 - How to share data with external people – secure portals
 - Encryption
- Importance of selecting applications & services ahead of time
 - Select remote solutions that is both reliable and provides ease of access for end-users
- Continue to practice good security hygiene
 - Don't connect to public Wi-Fi
 - Continue to protect your passwords



Communication Is Key

- Constant communication with employees is a must to stay secure
- Security Awareness is the key to protecting the company data
- Phishing/Vishing attacks
 - Employees need to report any suspicious activity
- Ensure employees are aware of company policy and their responsibility
- Provide updates on current security concerns/current events



Questions?



Bonus Material!

WAdvising.com/WorkFromHome

- For participants only
- Microsoft 365 Best Practices Checklist
- WISP templates for reference that will help you better protect your business!





Thank You!

If you have any questions or would like to discuss your environment further, please feel free to reach out to Whittlesey Technology!



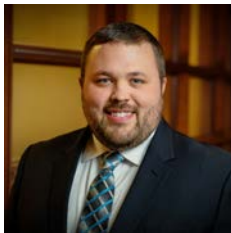
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