

Working Remotely

QUICK TIPS AND TOOLS FOR WHEN YOU'RE NOT IN THE OFFICE



Working remotely can offer you and your clients increased flexibility and comfort throughout the financial advice process. To leverage these benefits, it's important that you're set up properly. This flyer outlines some helpful tools and resources.

Communicating with clients

Communication

Collaborate with ease, using platforms for instant messaging and sharing.

- **Whatsapp:** <https://www.whatsapp.com/>
- **Slack:** <https://slack.com/intl/en-au>
- **Microsoft Teams:** <https://teams.microsoft.com/>

Video Conferencing

Add a human element to your meetings by setting up video conferencing. Each of the platforms below have helpful set-up guides available on their websites.

- **Zoom:** <https://zoom.us>
- **Skype:** www.skype.com/en
- **Go to meetings:** www.gotomeeting.com

Be professional by dressing for the occasion, maintaining good lighting, and ensuring your audio is clear.

Managing Teams

There are many digital resources available that can help your business operate remotely. We've listed some functional tools that are simple to use below.

Team Management

Stay on top of projects and deadlines with your team, by using simple board, lists and cards.

- **Trello:** <https://trello.com>
- **Asana:** www.asana.com

Productivity Management

Help your team stay focused, even when they're working remotely.

- **iDoneThis:** <https://idonethis.com>
- **hubstaff:** <https://hubstaff.com>

Cloud storage and collaboration

Keep everything in one place, where you and your team can share large files and update projects at the same time.

- **Google Drive:** www.google.com/drive
- **Dropbox:** www.dropbox.com
- **Google Docs:** <https://docs.google.com/>

Improving productivity when working remotely

Set up for success by ensuring you have the basics covered, that way you can focus on what matters most - your clients.

- ✓ Fast and reliable internet
- ✓ Access to a printer and scanner
- ✓ VPN access
- ✓ A webcam and microphone

Working from home

When you're working from home it's important that your workspace is set up correctly, so you can be productive and keep a clear mind.

To help, we suggest:

- Create a dedicated workspace, for example a study
- Consider investing in an ergonomic chair that will support your back
- Set up your workstation correctly

10 tips for working from home

1. Maintain regular hours
2. Create a morning routine
3. Schedule in and take your breaks
4. Keep a dedicated office space
5. Utilise technology to conduct digital face to face meetings
6. Socialise with colleagues and clients
7. Invest in office accessories to increase productivity
8. Stay hydrated
9. Don't work in front of the TV
10. Make to-do lists

For more information, contact your TAL sales representative or the Adviser Service Centre on **1300 286 937** (Monday to Friday 8am – 7pm AEST) or via email at acceleratedservice@tal.com.au

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