



VERLATA

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## BCP - Remote Working Checklist

The following checklist may assist as you roll out working from home across your firm in response to self-isolation measures relating to Covid-19. There are many technical, financial and cultural aspects to consider and this is not intended to be an exhaustive business continuity checklist but rather a guide on how you might manage a whole-firm work from home roll out.

### Technical

#### Equipment & Applications Review

- Unless you have a firm laptop for all team members, run a team survey on what equipment your team has at home currently. This should include at least the following:
  - PC or Mac or Other (tablet etc) and how old is it?
  - Is the device shared with others in the family or dedicated to the individual?
  - Do they have a dedicated work area with an office chair?
  - What is their internet connection and type (NBN, ADSL etc)
  - Would they need to tether to their phone to get internet? Do they know how to do this?
  - What other office equipment do they own? (Printer, headset for pc, headset for mobile, shredder, monitors, dock etc)
  - Personal mobile phone – you may like to take the opportunity to review personal mobile numbers and personal email address in the same survey.

- Review your firm laptop inventory – if a team member has a good work from home setup **and** a firm laptop, that laptop may be pulled into a communal pool to be distributed out. Laptops ordinarily set aside for meeting rooms etc. could be repurposed.

- Make a list of what applications are mandatory for carrying out each team member's day to day business. Each role needs to be considered, including Accounts, Secretaries etc

- Of those applications, note which ones require plugins to be installed and which ones are pure cloud – noting that plug ins may need to be installed on home PCs. You can contact Verlata for support with this.

#### Communication channels

- Do you have any sort of instant messaging application to use instead of email? This will improve collaboration, offer a virtual "water cooler" and save your mailboxes from greatly increased traffic? *See suggested applications on page 3*

- Do you have a method of video and teleconferencing for internal and external calls? *See suggested applications on page 3*

## Security and Support

- Do you have a plan for what occurs after someone is finished using home equipment for remote work? You will need to make sure they delete any firm IP from their PC, clear any applications that are no longer needed, return any equipment owned by the firm etc
- Can people access the passwords that they need in order to access their applications at home?  
*See suggested applications below*
- Do you have a plan in place if the device they are using at home stops working?
- Do you have a plan in place if home internet stops working?
- Have you checked with your current suppliers about supporting remote workers and devices that aren't firm managed devices? Are there any additional costs that you need to factor in?
- Review and note your support procedures for each application including contact details. For example, "For NetDocuments or Actionstep support, contact [insert name of power user in firm] first via Instant messaging. If they are unable to resolve, contact support@verlata.com"

## Cultural

### Team & Communications

- Do you have a firm directory of every team member's mobile number and personal email that can be easily distributed?
- How will you manage and support any isolation and anxiety that may occur due to working from home? Particularly for those team members who may not have worked from home before?
- Can you organise regular online team meetings to ensure that people remain connected, supported and aware of the daily goals to be achieved?
- Will you have a daily update from a dedicated person? What channel/s will be used?
- For those team members who work very closely together, e.g. lawyers and their secretaries, how will you support them?
- Can you pair a person who often works from home with a person who is new to working from home to provide support?
- Will you update your email signatures and website to reflect the actions your firm is taking in response to Covid-19?

## Financial

### Financial and Performance Measurement

- How will you manage and support any isolation and anxiety that may occur due to working from home? Particularly for those team members who may not have worked from home before?
- Do you want to adjust or extend your time recording policy?

- Can you organise regular online team meetings to ensure that people remain connected, supported and aware of the daily goals to be achieved?
- Arrange to meet with your accountant to discuss planning and future proofing your business financially

## Documents to Consider & Access

- Firm directory of every team member's mobile number and personal email
- Support Contact List for each application and direction on how to support equipment
- Your current work from policy - this may need to be reviewed in light of recent events
- Once you've put together your policy and supporting documents, ensure the team has read the detail and is onboard with it. Place it in an easily accessible location.

## Our Software Recommendations

### Instant Comms

- NetDocuments users could use ndThread
- Slack - free
- Office 365 users could use Microsoft Teams
- WhatsApp (mobile) – free

### Tele & videoconference

- Slack – free
- Office 365 users could use Microsoft Teams
- Zoom – limited use free

### Financial Measurement

- Power BI – talk to Verlata

### Security

- Online Password manager – LastPass
- True Cloud PMS and DMS