

TIPS FOR BUILDING YOUR COVID-19 OPERATING RHYTHM

Life has changed but business needs to go on. We need to quickly get structure and routines in place so we can maximise the time in our family bubbles. There is no denying that things will be difficult from a personal and business perspective- but the quicker we build routine and focus on positive things, then the easier it will be to get through the coming weeks and months.

If working from home, then try these tips we have applied in our own business.

Building the operating framework

We are expecting our team to continue working as normally as possible and deliver a productive day. We believe that being busy (that's effective busy as opposed to mucking around) is good for the mind and makes the bubble time pass quicker.

The items below are suggestions to implement over and above working with your clients.

Day	Activity
1	<p>Replicate your office and build the family rules</p> <ul style="list-style-type: none"> • Build a desk in as quiet a space as possible- requisition the garage or a bedroom so you have privacy • Use home wifi to access work network (if necessary, update the home data plan). Note: with all the video collaboration, relying exclusively on your mobile phone hotspot may result in high mobile phone charges • Have multiple screens, keyboard and mouse • Have a comfy work type chair (you are going to be sitting in it for a long time) • Have around you the things familiar from the office environment • Work out with the kids/partner the rules around not being disturbed during certain times • Share the family workload with your partner or the kids
2	<p>Cyber Security and client privacy</p> <ul style="list-style-type: none"> • Now has got to be hacker nirvana. The first few days working from home is when you are most susceptible to attack. Become overly conscious of scams, phishing, virus etc • Read your company cyber-security policy and confirm to management it is being implemented • Ban anyone other than you from using your work devices- no kids using your phone or laptop • Watch what you say to clients or work colleagues via phone/video calls. Client information is private and not for dissemination to other bubble members
3	<p>Personal discipline</p>

	<ul style="list-style-type: none"> • Publish a daily routine and stick it on the wall at your desk or have it on your phone with reminders. As much as you can, operate your normal daily route- ie get up at the same time, breakfast at the same time, start work at the same time, etc. But retain flexibility. • Get 1 hour of exercise EVERY DAY but stay solo or in your bubble. Exercise helps relieve stress and keeps you healthy. Report in your daily team meetings what your exercise was from the day before. We need to be accountable to everyone for getting that exercise done
4	<p>Build your project plan</p> <p>Build a three-tier personal project plan</p> <ul style="list-style-type: none"> • Work goals: Identify how you are going to maintain business revenue, increase client satisfaction, build closer client relationships, and think about how the business may evolve at the end of all this. If you are a business owner or compliance officer, then start work on licensing. The time frame may be pushed back but now is the perfect time to get a Strategi FAP operations manual and start customising to your business. • Study goals: This is the ideal time to develop your professional development plan, complete the New Zealand Certificate in Financial Services Level 5 (NZCFS5) via Strategi Institute, undertake CPD modules on RADAR, learn about technology, study time management, undertake another strand of NZCFS5. • Client and bubble relationship goals: Undertake research on how people react when under stress. Talk to colleagues who went through the Christchurch earthquake. They will have fantastic advice. Become knowledgeable on how you can support those who are stressed and then apply that to your clients and your bubble members. You need to provide calmness, rationality, positivity and leadership to clients and your bubble.
5	<p>Measuring productivity</p> <ul style="list-style-type: none"> • We all need daily, weekly and monthly goals. Build a productivity measurement framework to track how you are progressing with handling normal business workloads and your project plan. • There's an old saying "It's difficult to manage what you don't measure". Don't force measures on your staff. Instead, include them in your initial discussion. Staff will come up with some innovative ideas and when they contribute there is personal buy-in which results in better uptake. Get your staff to help build their own measures. • Focus on quantitative and not qualitative measures. Also focus on 'leading indicators' and not 'lagging indicators'. For example, just focusing on revenue, cost or profit is a lagging indicator as it takes a lot of time and other work is usually required before these measures are calculated. Instead focus on 'leading indicators' such as the number of online sales, website visits, enquires, phone calls, emails, video calls etc- can be easily tracked via technology such as Google Analytics and your CRM. These leading indicators ultimately result in good client outcomes which can result in revenue and profit. • Strategi is measuring this with our staff through zoom and team meetings all day long, timesheets, continuing to measure key performance indicators, CRM reporting dashboards, having daily management and team video meetings, daily reporting of exercise regime, monitoring the level of client calls, sales made, reports produced, audits completed etc.

Everything we are doing is test and measure. Nothing is perfect on day one, so we are constantly reviewing and amending as we go.

How to obtain more information

We are happy to talk through tips for operating your business in your new bubble. Just give us a call or check out our COVID-19 [resource page](#) on our website. Our list of resources will grow each week so check it regularly.

If you want a timesheet template, then [click here](#).

Kia kaha,



David Greenslade BA, MBA, Dip Mgt, Dip Bus Studies (PFP), MIML, MInstD, AFA
Executive Director, Strategi Group