



Navigating the
modern workplace

Insights and strategies for insurance and
mortgage brokers



Let's reimagine the workplace.



www.synnecorp.com/ca/modernworkplace

At SYNNEX Canada, we want to equip insurance and mortgage brokerages with the tools they need to adapt their workplace and keep employees productive and satisfied. Throughout this playbook, we will explore strategies to accelerate your workplace transformation.

CONTENTS

- 03 / The way we work is rapidly evolving
- 04 / A chance to innovate
- 05 / The modern workplace with Microsoft
- 06 / The future of brokerages
- 07-11 / Tips and strategies
- 12 / Simple, cost-effective solutions

MANAGEMENT TEAM



AMMAR AKBANI
Business Development Manager
Mobile: 647-866-3309



KIMBERLEY GODON
Senior Business Development Manager
Mobile: 514-333-4258

Email: MicrosoftBDM@synnex.com



We've seen two years' worth of digital transformation in two months.
- Satya Nadella, CEO, Microsoft

CONNECT

Digital platforms make it easier than ever to virtually connect with colleagues and clients.

ENGAGE

Discover new ways to keep employees informed, motivated and involved.

ADAPT


Shifting client and employee needs require innovative and flexible solutions.

SECURE

Access your work anywhere at any time knowing your files and data are safe and secure.

AUTOMATE

Simplify time-consuming workflows and processes with powerful automation tools.



The way we work is rapidly evolving.

Now, perhaps more than ever, we are all rethinking how we work. The idea of the typical workplace, with one physical location, daily face-to-face meetings, and long commutes into the office no longer fits into our new reality.

The nature of work and the workplace has shifted across all industries. So what does the modern workplace look like? Physical and digital workplaces will be flexible and inclusive, so employees can be more productive and satisfied. Digital workspaces will continue to grow. Businesses need to recognize the unique challenges of virtual teams and invest in ongoing training and support in order to realize the benefits.

SYNNEX Canada, along with our trusted partners, equips businesses with the tools they need to succeed. The world is changing at lightning speed. We want to ensure our customers are prepared to take on any challenge.

Among the top technologies transforming work are Microsoft Modern Workplace solutions. This suite of products and applications allows employees to work securely from any place, at any time, on any device. Through Microsoft's many tools and services, workplaces can become more unified and collaborative.

But creating a successful modern workplace isn't just about adopting new technology. It requires a cultural transformation—by being open to adopting new strategies and processes, organizations can position themselves to not only adapt, but to thrive.

SYNNEX Canada's extensive network of partners is dedicated to working with our customers to find the best solutions for their needs. As we all adjust to the modern workplace, we want to provide insight into what this may look like and tips on enhancing the way we work.


A chance to innovate

Since the pandemic began, there has been constant change within the insurance and mortgage industries. Across the country, habits and lifestyles transformed, and providers and lenders responded by adjusting policies and rates.

Insurance and mortgage brokers have been forced to quickly adapt—not only to changes within their industry, but also to changes within their workplace. For brokerages that had already adopted digital tools and flexible work arrangements, this was a seamless transition. For those who have maintained traditional models and methods, now is the time for transformation.

COVID-19 has illuminated the importance of digital literacy in insurance and mortgage brokers. In order to thrive in an increasingly digital world, brokers need to adopt tools that make their work more productive and accessible.

When it comes to loans or policies, brokers are skilled at responding to clients' needs. Now, this responsiveness needs to extend to changing demands in communication and service. In these challenging times, brokers can deepen their relationship with their clients and ultimately grow their business.



There is a huge opportunity to transform workplaces. Through enhancing communication, streamlining workflows, and digitizing processes, brokers can increase their productivity and create better client experiences. With the right tools and strategies, insurance and mortgage brokers can move towards a new, innovative future.

“

Microsoft 365 includes everything our business needs: email, collaboration tools, security, and cloud storage. It's the obvious choice for us.

The modern workplace with Microsoft

Microsoft's Modern Workplace is a suite of solutions that enhances productivity, communication, and collaboration. It includes operating systems, enterprise-grade security tools, and productivity apps. These tools can replace multiple unconnected technologies. Rather than switching between apps and services, Microsoft solutions form a cohesive ecosystem, with everything that an employee needs to work effectively and efficiently. A few of Microsoft's innovative technologies include:

Microsoft 365

Designed specifically for workplaces, Microsoft 365 Business combines cloud storage, Microsoft Teams, business-class email, and Office apps (including Word, Excel, PowerPoint, and OneNote). Basic, Standard, and Premium plans are available to fit the needs and budget of each company.

Microsoft Teams

Teams is a comprehensive digital communication platform to chat, host meetings, share files, and collaborate on projects. Colleagues in any location can work together in real-time through one central hub. Microsoft Teams is included with every Microsoft 365 plan.

Windows 10 Pro

This powerful operating system is the foundation of the modern workplace, helping teams work more effectively and collaboratively. With advanced protection, business-class tools, and flexible management, Windows 10 is the most advanced and secure Windows operating system to date.

Microsoft Power Automate

Rapidly adapt and automate your processes and tools. Power Automate makes automation possible for non-programmers. This low-code/no-code tool helps businesses modernize processes and streamline repetitive tasks.

Enterprise Mobility + Security (EMS)

EMS is an intelligent mobility management and security platform that protects users, devices, apps, and data. Employees can work in new and flexible ways knowing that their information is secure across their devices.

The solutions listed above are all included in Microsoft 365 Business Premium and Enterprise subscriptions.

[Contact us](#) to learn more about available subscriptions for:

Microsoft 365 Business Basic | Microsoft 365 Business Standard | Microsoft 365 Business Premium

The future of brokerages

As more insurance and mortgage services move online, brokers need to reevaluate how they can meet the new demands of digitally inclined consumers. Technology does not replace the expertise of a broker—but in order to improve their services, brokers need to embrace new tools that enhance how they work.

Let's imagine what this could look like with the help of Microsoft's Modern Workplace solutions.

To meet with clients, brokers send a link to a Microsoft Teams meeting, which would connect them via high-quality video and audio. The broker can share their screen and pull up policies or rates so the client can easily follow along.

During the meeting, the broker enters notes about the client and their meeting into Microsoft OneNote. Other team members can also add information to this shared digital notebook. Before their next meeting, the broker can refer to OneNote to see previous notes about policies or lenders that the client may have been interested in.

If the broker has a question for their colleague, they can quickly send a message or give them a call through Microsoft Teams. To collaborate on a project, team members can create a channel, where they can chat, share documents, and set up recurring meetings. With Microsoft Planner, teams can assign tasks and stay up-to-date on the progress of a project.

By adopting Microsoft solutions, any broker's workflow can look like this—more productive, more engaged, and more client-oriented.

We know this change won't happen overnight. Developing new processes and adapting to new technology requires time and training. But to get started, we want to provide some practical tips to help begin the journey.

GET STARTED

SYNNEX Canada provides best-in-class software and hardware to support workplace transformations. [Contact us](#) to learn about the latest offers and book a free consultation.

The modern workplace embraces new forms of connection.

Whether meeting with clients or collaborating with team members, digital platforms are making it easier than ever to connect.

OFFER VIRTUAL MEETINGS

With economic uncertainty, consumers now have heightened interest and concerns about policies and loans. Virtual meetings allow brokers to quickly connect with clients, address questions, and plan next steps. Even as some brokers return to the office, clients will have varying levels of comfort with in-person meetings. Virtual meetings will likely be a mainstay of the modern workplace.

By sending a [Microsoft Teams](#) meeting link, brokers can connect with clients over audio or video chat. Microsoft Teams is a safe and secure platform, and clients can easily join meetings even if they do not have a Teams account. With features like [screen sharing](#) and [Whiteboard](#), brokers can have engaging and informative client meetings.



UTILIZE DIFFERENT COMMUNICATION METHODS

As brokers continue to work remotely, strong communication between team members is more important than ever. By using different methods of communication—from emails and instant messages to audio and video calls—team members can stay connected throughout their day.

With [Microsoft 365 Business](#) brokerages get access to a range of communication tools, all in one convenient plan. This includes business-class email through [Microsoft Exchange](#) and audio and video conferencing through Microsoft Teams. Team members can even upload and co-edit Word, PowerPoint, or Excel documents directly on Microsoft Teams, making it easy to [collaborate on shared documents](#).

The modern workplace keeps us engaged.

As more employees continue to work away from the office, it's important to find new ways to keep them engaged with the company.



CREATE SPACES FOR CASUAL CONVERSATIONS

Prior to remote work, it was easy to pop over to a colleague's desk, grab a coffee, or chat during lunch. Now, brokerages need to create digital spaces where team members can interact outside of emails and meetings.

With Microsoft Teams, brokerages can set up [channels](#) for specific topics. This can be a great avenue for casual conversation. Consider having a "water cooler" channel, where team members can chat about topics unrelated to work. This can help create more personal, human connections between colleagues. [Yammer](#), a workplace social networking tool, can also help employees connect and engage.

KEEP EMPLOYEES INFORMED AND ORGANIZED

Ensure employees receive up-to-date news and information. Company-wide emails can easily be missed, especially when brokers are dealing with an increased amount of incoming client emails. Instead, develop a central portal to share files, news, and announcements.

To keep team members on the same page, brokerages can use Microsoft Teams to share industry news and workplace announcements. Team members can also upload and share common documents or resources, such as insurance forms or mortgage applications, which will then be stored on the team's [SharePoint site](#). To ensure communications are seen, team members can [mark their message as urgent](#) or use [@mentions](#) to send a notification directly to a colleague. With the Microsoft Teams mobile app, team members can stay informed, even when they are on the go.

GET STARTED

- Check out these [10 tips to collaborate for remote and onsite work](#).
- [Contact us](#) to see how Microsoft 365 can transform workplace engagement.

The modern workplace is adaptive and flexible.

As the insurance and mortgage industries shift, so do the requirements of clients. Brokers and their workplaces need to evolve alongside these changes and adapt to current needs.



KEEP IT IN THE CLOUD

Whether brokers are working in the office or remotely, they need convenient access to their files and documents. By keeping data on secure cloud storage, agents and brokers can access work when and where they need. This also eliminates or reduces the need for costly and high-maintenance on-premise servers.

[OneDrive](#) is a safe and secure cloud storage solution that is included with Microsoft 365 Business plans. Brokers can use OneDrive as a personal storage solution. By saving files to the cloud instead of their desktop or company server, brokers can access their information on any device, when and where they need it.

MAKE IT EASIER TO CATCH UP AND REVIEW MEETINGS

Remote work offers great flexibility, but it also comes with new challenges, such as managing childcare. Workplaces need to respond to the changing schedules of their employees. To support those who miss meetings, provide meeting notes or recordings to keep employees informed and included.

Meetings in Microsoft Teams can be easily [recorded](#) and then saved to the cloud. The recording includes audio, video, and screen-sharing activity, so team members can review any meetings they miss. Recordings can also be automatically transcribed. If a team member is looking for a specific topic within a meeting, they can simply search the transcript to locate important discussion items.

GET STARTED

- Learn about the [future of work and learning](#).
- Enable your team to do their best work from anywhere. [Contact us](#) to find out how.



The modern workplace prioritizes security.

Client confidentiality and privacy is a top priority. As more data moves to cloud-based services, brokerages need to implement best practices and the latest in cybersecurity technology.

SET UP MULTI-FACTOR AUTHENTICATION TO PROTECT AGAINST 99.9% OF ATTACKS

[Multi-factor authentication](#) increases security by requiring multiple credentials to verify a user's identity. This added layer of security is essential for protecting clients' information from unauthorized access. In fact, 99.9 percent of attacks on accounts can be blocked through multi-factor authentication.¹ Multi-factor authentication can be set up on all Microsoft accounts.

SECURE YOUR SYSTEMS AND NETWORKS

With more brokers working at home, it is essential that all team members access their work from secure systems. A simple but essential security practice is to turn on automatic updates. This ensures that all devices and applications have the latest security features. Updates for Microsoft 365 Apps are automatically downloaded by default, so users will always have the most secure version of Microsoft Apps.

Microsoft also offers other robust security tools and features. [Microsoft Defender for Office 365](#) safeguards against malicious threats that can emerge from email messages, URLs, or collaboration tools. It automatically investigates and prevents threats, as well as shows reports with real-time updates.

¹ Microsoft Security, One simple action you can take to prevent 99.9 percent of account attacks, August 2019.
www.microsoft.com/security/blog/2019/08/20/one-simple-action-you-can-take-to-prevent-99-9-percent-of-account-attacks/

The modern workplace automates everyday work.

Through digitizing time-consuming manual tasks, brokers can create more effective workflows and focus on creating better client experiences.



AGGREGATE AND ORGANIZE CLIENT INFORMATION

When clients interact with insurance or mortgage brokers, they are preparing for or dealing with the aftermath of a major life event. The client-broker relationship needs to be carefully managed and fostered. Maintaining detailed client notes can help brokers enhance client relationships, as well as simplify administrative work.

[Microsoft OneNote](#) can help brokers keep an organized record of all their interactions with clients. With this digital notebook, brokers can take notes during client meetings, highlight important items, tag to-do tasks, and insert files or audio notes directly into OneNote. Through the Outlook integration, brokers can send emails or meeting details directly to OneNote and keep all relevant information about a client in one place.

START BY AUTOMATING SMALL TASKS

Introducing automation can be intimidating, particularly if there are long-standing processes in place. To begin, identify time-consuming tasks that are manageable, but could be more efficient, such as sending emails or managing project tasks.

With tools like [Scheduling Assistant](#) in Microsoft Outlook, brokers can see when their colleagues are available and eliminate the back and forth of scheduling meetings. Microsoft 365 Business plans also include tools such as [Microsoft Lists](#), which can be used to maintain client lists, and [Microsoft Planner](#), a project management tool where team members can organize and assign tasks.

GET STARTED

- See how HAVI [increased their productivity](#) with Microsoft 365.
- [Contact us](#) to find out how your organization can quickly adapt to remote work and save money through automation.

Simple, cost-effective solutions

Across organizations and industries, this is a transformative time for the workplace. By implementing the right tools and strategies, insurance and mortgage brokers can adapt to new needs, stay resilient through challenges, and thrive in the future.

Technology will be a key tool as brokers transform their workplaces. This technology does not replace the expertise and personalized services offered by a broker. Rather, it is meant to empower brokers to become more productive and better engage with their clients.

Through this guide, we aimed to provide a better understanding of what the modern workplace looks like, as well as practical tips for brokerages.

SYNNEX Canada and our partners are here to equip insurance and mortgage brokers with the best tools to improve their work.

As a hybrid distributor, we offer a complete solution, with both the hardware and software needed to support a modern workplace transformation.

We understand that every organization has different needs. SYNNEX Canada and our partners will implement custom solutions that meet the requirements of each unique workplace.

Contact us to learn more and begin the journey towards the modern workplace.



Contact us

Ammar Akbani

Business Development Manager

Mobile: 647-866-3309

Kimberly Godon

Senior Business Development Manager

Mobile: 514-333-4258

Email: MicrosoftBDM@synnex.com

