



Navigating the
modern workplace

Insights and strategies for
real estate professionals



Let's reimagine the workplace.



www.synnecorp.com/ca/modernworkplace

At SYNNEX Canada, we want to equip real estate professionals 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.

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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. Companies 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 that are 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 technologies. 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 insights into what this may look like and tips on enhancing the way we work.


A chance to innovate

Similar to so many industries across Canada, real estate is facing a tremendous amount of change. Since the pandemic began, we've seen massive shifts in the market—from hitting historic lows, to rebounding within months to record-breaking highs.

Our interactions with physical spaces have completely shifted. Families are reassessing what they need in a home. Companies are evaluating their requirements for physical office space. Tenants and landlords are navigating uncertainty in rent payment and prices.

Perhaps what is certain is that the spaces where we live and work are at the top of many people's minds. The real estate industry needs to prepare for the evolving needs of buyers, sellers, lessors, and lessees. In a time of uncertain economic conditions, buying, selling, and renting are all high-stakes activities. Clients are looking for real estate professionals who can provide flexible options and suitable alternatives to traditional processes.

At the same time, real estate professionals need to prioritize the health and safety of themselves and their clients. In addition, they need to maintain their own work-life balance as they adjust to demanding schedules.



There is a huge opportunity to transform the real estate industry. Through hosting virtual open houses, streamlining workflows, and digitizing processes, real estate professionals can increase their productivity and create better client experiences. With the right tools and strategies, the real estate industry can move towards a new, innovative future.

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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 real estate

Between market fluctuations, housing trends, and new developments, real estate professionals are used to working in a constantly changing environment. But this adaptability also needs to extend to their workflows and processes.

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

Real estate professionals can host virtual open houses through the live event feature of Microsoft Teams. The event can be open to the public or invite-only. By enabling the Q&A feature, prospective buyers can interact with the agent or broker and send in their questions about the property.

To follow up with an interested buyer, an agent or broker can schedule a meeting through Microsoft Teams. In preparation for the meeting, they open up OneNote to see all their past meeting notes in one place, including relevant files and links to properties the client has shown interest in.

The client simply clicks on the meeting link to instantly connect to the real estate professional. The two can chat via audio or video, and the agent or broker can share their screen to show further details about the property, such as photos or a floor plan.

By adopting Microsoft solutions, any real estate professional'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 with each other.

UTILIZE DIFFERENT COMMUNICATION METHODS

As more interactions move online, strong communication with clients and 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](#), real estate professionals 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](#). Real estate professionals can even grant [guest access](#) to a client. This means that the agent and client can have a shared portal to store documents, such as property listings, and to chat or set up meetings



HOST VIRTUAL TOURS

Virtual property showings ensure the safety of agents, brokers, buyers, and sellers. Understandably, prospective buyers will want to see a property in-person before committing to such a significant purchase. However, virtual tours, live streams, and video calls can help clients narrow down their selection and reduce the number of in-person showings.

With Microsoft Teams' [live event](#) and video conferencing features, real estate professionals can offer their clients a variety of safe viewing options. The agent or broker simply sends a meeting or event link, and the client, whether they have a Teams account or not, can easily join from their device.

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. Seeing colleagues everyday may not be a viable option anymore, but engagement in the modern workplace can take on new forms.



SHARE AND UPDATE INFORMATION

To keep employees engaged, they need up-to-date information on what is happening within the company. Rather than sending emails that can easily be missed, consider having a portal to share files, news, and announcements.

To keep team members on the same page, real estate professionals can use Microsoft Teams to share industry news and workplace announcements. Team members can also upload and share common documents or resources, such as purchase or listing agreements, 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.

CREATE SPACES FOR CASUAL CONVERSATIONS

The varying schedules of real estate professionals combined with team members working across locations can make it difficult to connect. To boost engagement, find avenues where colleagues can have different types of interactions outside of emails and meetings.

On Microsoft Teams, [channels](#) are sections that are dedicated to specific topics or projects. Channels can be used to set up communities of practices or to discuss current trends. Consider also having a “water cooler” channel, where team members can chat about unrelated topics. This can help create more human connections between colleagues.

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.

Not only do real estate trends shift, but the requirements of clients are constantly evolving. Real estate professionals and their workplaces need to evolve and adapt to current needs.



KEEP IT IN THE CLOUD

In the modern workplace, it's important that files and documents can be accessed anywhere, especially if employees are working remotely or travelling between different properties. By keeping data on secure cloud storage, agents and brokers can access work when and where they need.

Microsoft offers a variety of cloud storage solutions, such as [OneDrive](#), which is included with Microsoft 365 Business plans. OneDrive allows users to save and access files and photos across their devices, so their information is accessible wherever they're working.

MAKE IT EASIER TO CATCH UP ON MEETINGS

Real estate professionals have busy and varied schedules. Now, there are also the added challenges of working remotely, such as coordinating childcare. Workplaces need to respond to the changing schedules of their employees. To support those who may not be available for meetings, provide meeting notes or recordings to keep employees informed and included.

Meetings in Microsoft Teams can be [recorded](#) with a few clicks of a button. The audio, video, and screen sharing activity are then saved to the cloud. Team members can access recordings when they need to catch up on a meeting. Recordings can also be automatically transcribed. If a team member is looking to review a specific portion of the meeting, they can easily search the transcript to locate important discussion items.



The modern workplace prioritizes security.

Maintaining confidentiality of clients' information is a top priority. As more data is being stored in cloud-based services, new security risks have to be managed. This involves understanding the procedures and standards that will protect data, backed with the latest in cybersecurity technologies.

SECURE YOUR SYSTEMS AND NETWORKS

Cloud storage allows real estate professionals to work and access files anywhere. This means that all systems that are accessing this data—whether in the office or at a remote location—need to be secure. Turning on automatic updates ensures that all devices have the latest security features. Another good practice is enabling antivirus solutions and configuring firewalls.

Microsoft offers 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.

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.

GET STARTED

- Read about [11 security tips to help stay safe](#).
- [Contact us](#) to learn about the latest cybersecurity technology.

² 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.

Important steps need to be followed within the buying, selling, and renting process. With the right tools, real estate professionals can digitize and streamline these processes to create more effective workflows.



AGGREGATE AND ORGANIZE CLIENT INFORMATION

Building strong relationships with clients is critical to the success of real estate companies. These relationships need to be carefully managed and fostered. Maintaining detailed client notes can help real estate professionals enhance client relationships, as well as simplify administrative work.

With [Microsoft OneNote](#), real estate professionals can keep an organized record of their interactions with clients. Real estate professionals can take notes during client meetings, highlight important items, tag to-do tasks, and insert files or audio notes directly into their digital notebook. Through the Outlook integration, real estate professionals can also send emails or meeting details directly to OneNote and keep all their notes, meetings and files 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, real estate professionals 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

- Read about how Microsoft Power Platform has helped [transform these organizations](#).
- [Contact us](#) to find out how automation can save you time and money.

Simple, cost-effective solutions

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

Technology will be a key tool as real estate companies transform their workplaces. This technology ultimately empowers agents, brokers, and realtors 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 those working in the real estate industry.

SYNNEX Canada and our partners are here to equip real estate professionals with the best tools to improve productivity and create better client experiences. 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.



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