CHAT NOTES FROM 04-23-20 IDEA EXCHANGE

**Managing your Remote Secretarial Staff – Tools to keep them Engaged, Productive, Efficient and Effective!**

12:10:29 From Pat: We have a weekly MHH connects. Everyone sends in pictures on different topics like Music Monday, exercise routines etc. People love seeing pictures of everyone, even our managing partner participates

12:10:58 From susan: thats a great idea

12:11:46 From Pat : there is a Monday slide show of everyone who sent in pictures the week before

12:12:17 From John: Nellie is right, communications is important, I make the rounds. Simple questions like "How are you doing" can open up things or it might like be fishing in a pond that has not fish. But touching base is so important, you never know if you get someone at the right time. Listen to their concerns without passing judgement

12:13:17 From rick: John,you are so correct.....doing a good , good...job!!!!

12:13:50 From John: Lydia, we do the same thing with the good morning email, or IM. Some of our team are doing their hellos in a foreign language or accent. promotes some levity

12:14:23 From Natalie: Great article from HBR today emphasizing how important those small conversations are, even with those whom we may not have strong relationships with....sharing as an FYI

12:14:27 From Natalie: <https://hbr.org/2020/04/why-you-miss-those-casual-friends-so-much?>

12:16:07 From CampbJe : Love the welcome back emails on Monday

12:16:08 From John: Has anyone tried "Goat-to-meeting?"

12:16:47 From Maria: I have a roll call each morning and a signoff at the end of the day. They submit daily logs of tasks accomplished throughout the day. As they are asked to keep track of their time, their lunch punch out/in is also tracked. Yesterday I sent them all an ecard for Admin Prof day. This Friday we are having our weekly wine zoom meeting to celebrate birthdays. I've asked staff to rotate their joke of the day; workstation pics. I am going to setup a yoga hour next week - and suggested tutorials on Microsoft Teams if they have time.

12:17:28 From John: teams is great, Maria.

12:17:38 From Pat : I did live WebEx with groups last week and our practice groups have weekly live WebEx meetings.

12:17:44 From Jennifer: I have a daily zoom check in with my staff to help trouble shoot issues, discuss work, and just check in with everyone as group. Being able to check in with a group helps solve problems easier (I let various assistants who have found work arounds with different tech issues take the lead in helping their teammates find solutions.) I also call everyone individually through out the week to touch base & maintain/keep developing those personal connections with my team. It's been so important!

12:19:30 From CampbJe : I have a weekly call with my staff. Tomorrow I will have a WebEx call in celebration of Staff Week :)

12:20:12 From steinm : Will you continue remote working for staff once we return to work?

12:22:13 From JACQUELYN: We are doing anonymous surveys along with a bi-weekly zoom hosted by firm leadership every other Friday to touch base with all of the business staff members.

12:23:04 Is any firm considering asking staff to give up some PTO or stopping accrual of PTO?

12:24:41 From Shari : Would you mind sharing the survey?

12:24:55 From Jennifer: can you share this survey?

12:26:01 From Bob: We are in the middle of a tech survey to get a sense of how people are managing, tech-wise, from home. Separately, we are certain, we will not be tied to a common physical work space after we return to normal. Further, even when the firm is ready to get back to office (Summer?) many not yet with antibodies will not be eager to travel and work together.

12:28:00 From John: yes, Rick, agree, you need to go back the second or third time. right on

12:31:29 From John: yes, I reach out to all attorneys but not as frequently as attys

12:32:00 From John: as secretraries

12:33:10 From anna: Reminder to send out emails letting everyone know the EAP resources that your firm offers. Some people are scared, lonely and need someone to talk to. Providing them an outlet to speak to someone and get the support they need is so important!

12:33:29 From camille : We are giving the secretaries more billing responsibilities

12:35:37 From Gina: has anyone thought to have secretary enter their time as attorneys to track as discussed.

12:39:22 From John: If you do that, you have to be careful about threading the needle with labor and employment issues (wage and hour)

12:43:25 From John: I have the receptionist and Office Services Coordinator catching up on cleaning up contacts, updating instructions on how to operate tech, etc

12:45:39 From John: good opportunity to hone record retention issues

12:51:57 From Theresa: I onboarded someone right after we went remote

12:54:00 From John: We've done a paralegal. Microsoft Teams screen sharing came in handy, lots of training, get them involved in Zoom/Teams meetings. Generally went very well but this person was well seasoned. A "newer" unexperienced professional could be a challenge

12:54:42 From JACQUELYN: I would encourage assigning a secretarial buddy/team members to have regular interactions with your new hire secretary

12:56:05 From anna : Use WebEx Lydia to Screen Share so that your buddy secretary can actually show your new secretary the tools and resources needed to do their job.

12:56:15 From Patricia: I've done system training with 4 new hires since we've been off site and used Zoom for all. I think it went well, but I am following them more closely than I have with those in the past I met with personally.