

# Software, Policies, and Security For Remote Teams

Overview of Working  
Remotely

March 25, 2020 @2pm ET

**[tinyurl.com/remote-work-nystech](https://tinyurl.com/remote-work-nystech)**

# Presented by:

The organizing committee for the NY Statewide Technology Conference  
And the Access to Justice Commission

Chris Schwartz, Implementation Specialist, LegalServer

Jeff Hogue, Director of Operations, LegalServer

Anna Steele, Director of Consulting, Just-Tech

Jon Snell, Lead Developer, LegalServer



# Software Tools

# Taking Inventory

What do we have now that is working well?

What tools do we use that may have additional features?

What does our staff struggle with in an office environment?

Are our vendors offering any additional licensing/features at low/no cost during this crisis?

# Tools We Use

## Software

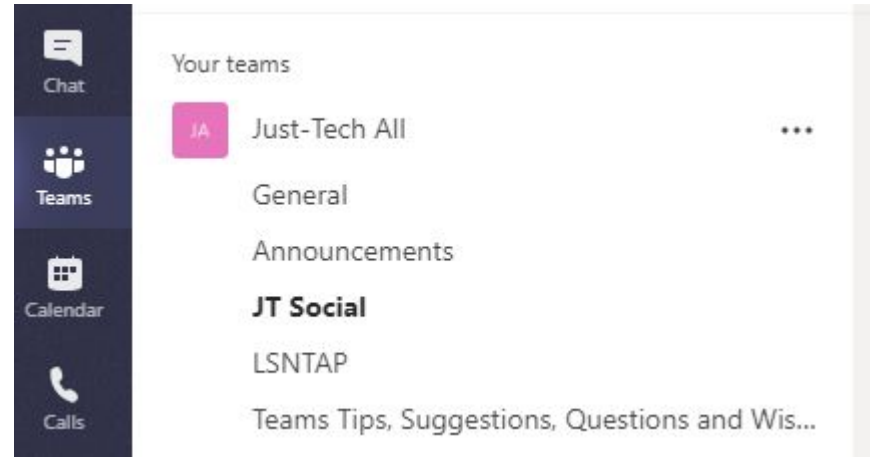
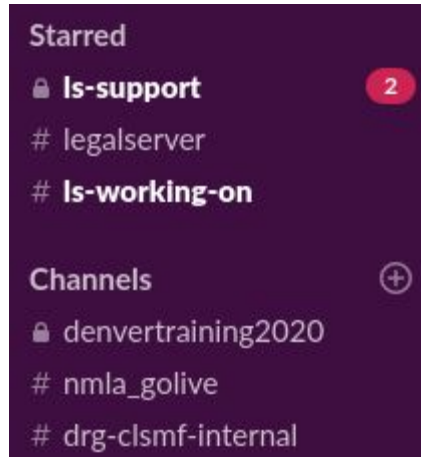
- Slack/Microsoft Teams
- Zoom/Google Hangouts
- Google Calendar/Outlook
- Google Drive/SharePoint/One Drive
- Softphone App (Desktop or Mobile)
- Well-made shared spreadsheets

## Equipment

- Mic & Speakers / Headset
- Webcam
- Quality Router
- Decent broadband

\*note that others in the household streaming can significantly impact quality, especially with webconferencing

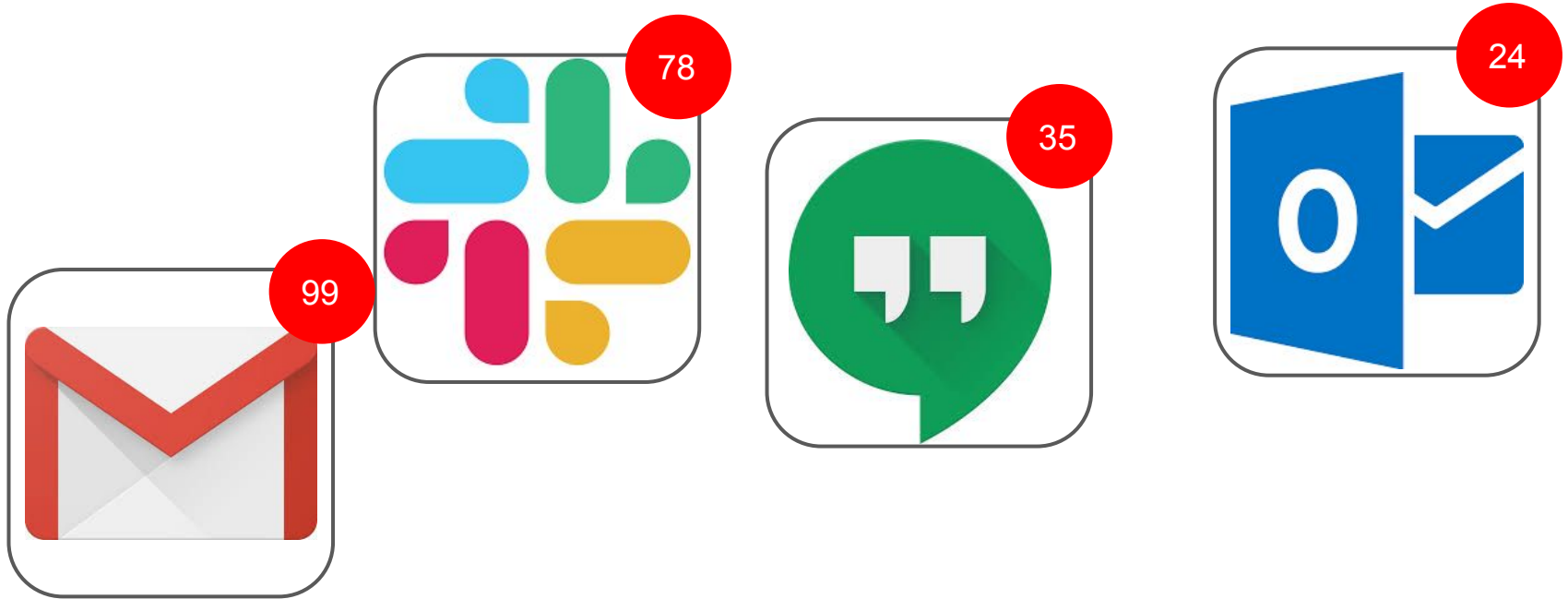
# Real Time Collaboration



Pro Tip: Generally, no selfies in main work channels.

Pro Tip2: Think hard about what channels you want to have.

# Collaboration – Notification Fatigue



# Collaboration – Chat Etiquette

## DO

@mention individuals to get their attention.  
Use @ accordingly and don't overuse it.

Use private chat for high-priority questions or just to ping someone to alert them.

Don't @mention an entire Team or Channel unless you need to. That's a lot of alerts.

Some notifications can just be turned off.

## DON'T

Don't make project decisions in private chat if it is a group project. Bring it back to a group Channel.

Don't go overboard on memes, emojis, gifs, etc., keep them within organization culture



# Run Better Meetings

(Please)

It is an art worth self-reflection.

Especially for those with the power to call a meeting.

# Collaboration – Webconferencing Tips

Convenors, practice using the **mute all** button. Explain at the top of every call how participants mute themselves

Always attach the **call-in** info to the calendar invite

For newbies, stress that they can dial in **by phone** and encourage them to do so

Consider making at least one meeting a week absolutely essential, and conducted via webinar

Use the attendee list to remind you who is there, and call on the people who are being quiet. They just might need a polite invitation to share!

As with all meetings, plan to end 10 min before the end of the hour, and recite decisions made, tasks, assignments

# Calendar



Make the software calendar authoritative

Let others fill your free slots & create events without email chatter

Attach the webinar/call-in info to the event notes

Attach the purpose of the call to the invite in the notes

Calendar individual long breaks as well to not waste time looking for people

# Collaboration – Documents



Shared drives



API Integration Projects



Change Requests Signed

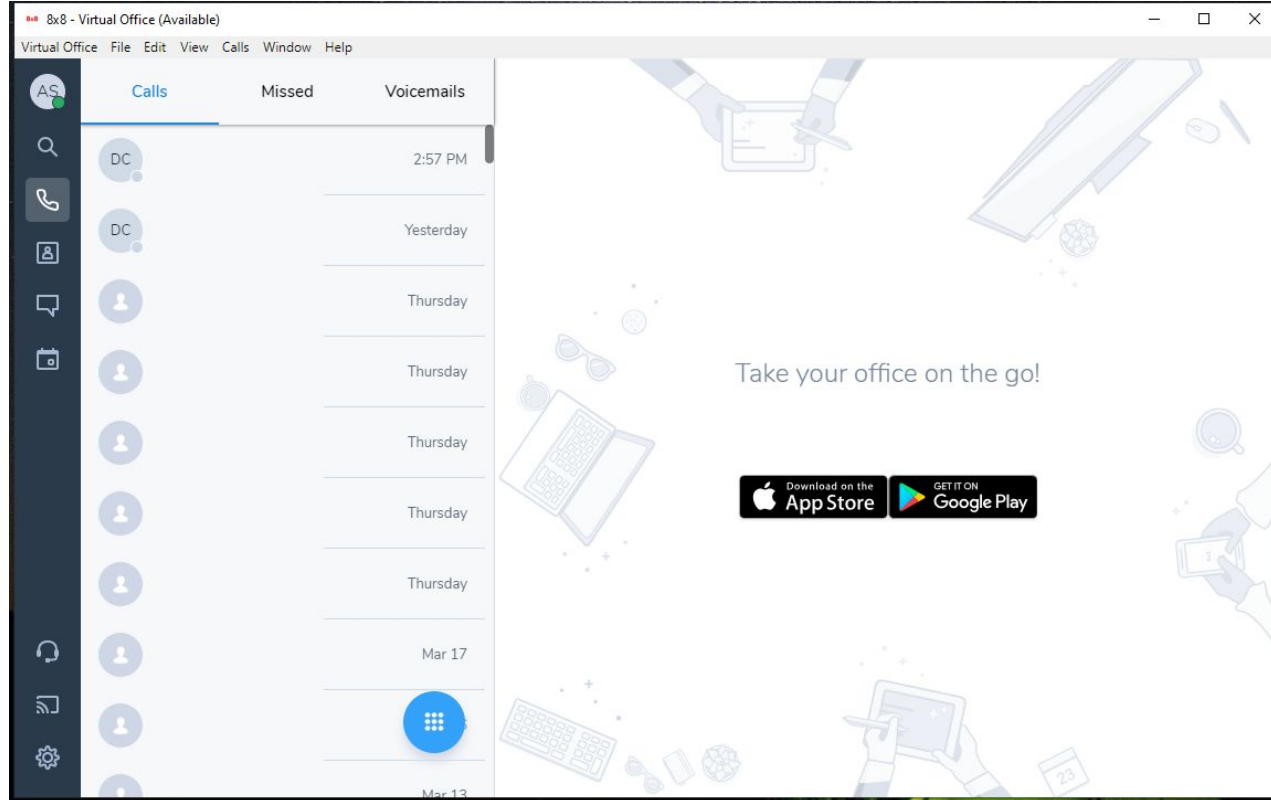
## Housing

Name ▾	Topic ▾	Document Type ▾	Modified By ▾	Modified ▾
Bar Association Housing CLE.docx	Eviction	Training/Reference	Darius Lind	March 11
CA LETTER.docx	Eviction	Letter	Darius Lind	March 11
City Court 11.2.docx	Eviction	Decision	Darius Lind	March 11
Closing Letter.docx	Eviction	Letter	Darius Lind	March 11
Housing Special Rules.pdf	Eviction	Rules and Directives	Darius Lind	March 11
Letter to Bank.docx	Foreclosure	Letter	Darius Lind	March 11
Letter to Landlord.docx	Eviction	Letter	Darius Lind	March 11
Motion to Dismiss.docx	Eviction	Pleading	Darius Lind	March 11
Tax Foreclosure Info.pdf	Foreclosure	Training/Reference	Darius Lind	March 11
Trial Prep.pdf	Eviction	Training/Reference	Darius Lind	March 11

# Collaboration - Equipment



# Collaboration – Softphones



A **softphone** is a virtual telephone that only needs your computer to function.

It is a software phone with no headset.

Microphone and headphones or speakers required.

# Collaboration – Spreadsheets & Shared Docs

## Client / LegalServer Onboarding Project Management Checklist

*This document tracks meeting topics, tasks and overall progress. Contact your LegalServer project lead at LegalServer with questions.*

Tickets and Modules		
Demo Site	89598	SMS/HotDocs/E-transfer: 89840
Convert to demo/ Analysis	90073/90074	Additional Module
Test Import to Demo	90075	Additional Module
Clean Up Tickets on Demo	TBD	
Live Site	90072	
Final Import of Data	90076	
Clean Up Tickets on Live	TBD	

Project Initiation		
Contracts	Contract Executed	▼
Kick Off Call	Kick off Call Held	▼ RP
Discovery Configuration & Quality Assurance		
Project Plan	Planned	▼ This document
Module Specific Work	Planned	▼ All configurations tracked in log
Report Building	Planned	▼
Additional Modules	Planned	▼
Data Testing	Planned	▼
Training/Go-Live!		
Go Live Preparation	Planned	▼
GoLive	Planned	▼
Refinement		
Follow-up training	Planned	▼
Feedback / Validation	Planned	▼

Schedule of meetings	
<a href="#">Friday Training</a>	<a href="#">KickOff Call</a>
<a href="#">Friday Training</a>	<a href="#">Life cycle of a case</a>
<a href="#">Friday Training</a>	<a href="#">Site Admin Training</a>
<a href="#">Friday Training</a>	<a href="#">Feature Tour</a>
7/16/19	Intro to demo site
7/16/19 - 10/1/19	<a href="#">Data Migration Mapping</a>
—/—	How LegalServer Hangs Together
—/— - —/—	<a href="#">Intake</a>
—/—	<a href="#">Action on a Case</a>
—/—	<a href="#">Closing Cases</a>
—/—	<a href="#">Report Building</a>
—/—	<a href="#">Features Tour Follow Up</a>
—/—	<a href="#">Data Testing</a>
—/— - —/—	SMS
—/— - —/—	Hot Docs / E-Transfer
—/—	Final configurations due
—/—	Configurations Validation
—/—	Configurations Stop
—/—	<a href="#">Final Data Upload</a>
—/—	<a href="#">Golive</a>
—/—	<a href="#">GoLive Training</a>
—/— - —/—	<a href="#">Refinement Meetings</a>

# Remote Desktop & VPNs vs Cloud-native software

Cloud native applications need only a browser to function

Can be secured with https and reasonable security precautions

Entirely device agnostic

Get an expert's opinion on remote desktop solutions, and talk to an agency who uses the solution you are considering.

Examples of remote desktop access software you may have heard of:

Logmein  
Microsoft Remote Desktop  
VNC (many versions)  
Citrix



For the newly remote worker...

# Motivation, Distractions, & Sanity

Motivation while working at home isn't hard if you feel invested and have **goals to accomplish**

Document tasks for workers, with an estimated time effort and a deadline, if you haven't yet described work in terms of goals and measures

Structure your day around your goals/tasks

Take breaks and change positions!



# Creating a Workspace

If possible:

- Find a designated space where you can be productive
- Prioritize ergonomics
- Create your “work bubble” - when I am here, I am working
- Set aside separate reward time for the things you know will distract you
- Set boundaries!



# Coordinating the Work of a Remote Team

# Challenges of Remote Coordination & Supervision

Getting on the Same Page: Week ahead/calendaring meetings

The importance of Presence: Showing you are In, reporting Tasks Done

Not available? Put it on the calendar

Communication styles must account for the tone issues in chat and email. Have a voice call if something bothers you

Lack of a water cooler for reinforcing info exchange, maintaining trust  
(Unfortunately, also warn against bad jokes, controversial subjects)

Conduct regular check ins. Create them as recurring meetings, even if sometimes you have to cancel



# Consider Setting 'Open Door' Hours

Consider having 'open door hours' each day or each week, on the calendar, with a conference link.

Defer questions relevant to just one person, to that time if they can wait, rather than engage in a 1-1 conversation in a meeting.

"I sit with my video on, answering emails, until one of my supervisees joins to ask their random questions. If there are people I particularly want to touch base with, I'll ask them to 'stop by!'" - Xander Karsten, Project Manager



# Keep it Social – Even at a Distance!

Social isolation is ... well... isolating!

Organize your own remote 'happy hour'

(Alcohol free if you are LSC-funded, of course)

- Find a time to hang out
- Circulate a video meeting invite
- Ask people to have their video on
- Have some questions prepared to break the ice (for extra credit, ask a few people ahead of time to be ready to share) and just see each other for an hour.



Security



# Remote Worker Security Top Tips

**Encrypted** workstations - FileVault on Macs, BitLocker on Windows

**MFA** - (Multi Factor Authentication) If single sign-on is set up, enable this

**MDM** - (Mobile Device Management) Use a PIN. We recommend at least 6 digits or letters. Only devices that are still current receive security updates.

Up to date **router** software - Hardware from your internet provider is most likely great. Otherwise, verify. If updates are no longer released, time to buy a new one.

Wifi **passwords** - Less than 7 years old and requiring a password is probably sufficient and likely uses WPA2



# Challenges

# Remote Challenges

Physical mail

Dedicated staff vs Special service  
([postalmethods.com](http://postalmethods.com))

Printing/Scanning

Internet Access

Affidavits/Wet Signatures/Notarization



# Summary Takeaways

# Remote Technology Shortlist

Set policies on hours, presence, and calendaring

Pick a real-time chat platform and use it

Encourage users create a productive workspace at home

Create a BYOD policy and checklist

Utilize cloud based workspaces where possible

Start putting important stuff users want to see in your new workspaces to attract usage

# Remote Work Mental Shortlist

- [ ] You CAN get lots and lots of work done as an effective remote team
- [ ] You CAN maintain visibility into what people are doing, and a team spirit
- [ ] Get mentally limber: Success lies in staff and leadership adopting the same core tools and procedures
- [ ] Get motivated to tackle projects you can effectively complete remotely
- [ ] Bring on the opportunity: some workers will flourish in this environment! Some clients will have improved access to your services

# Further Reading

# Further Reading



<https://blog.techsoup.org/posts/nonprofit-resources-for-remote-work-during-the-covid-19-outbreak>



Working from home tips from our experienced remote employees - Stack Overflow Blog

REMOTE LEGAL  
SUPPORT



<https://www.connectingjusticecommunities.com/remote-legal-support/2020/03/>



<https://mielegalaid.org/library/covid-19-resources>



Legal Services National  
Technology Assistance Project

[LSNTAP.org](https://LSNTAP.org)