



# **COVID-19 Rainmaker Virtual Roundtable**

## **March 26<sup>th</sup>, 2020 | 11:00am CST**

**From Jim Hechtman to Everyone: 11:07 AM**

Is anyone taking on responsibility to help clients apply for the SBA disaster loans? If so, how are they pricing and what are they doing to protect themselves from related liability?

**From Jennifer French to Everyone: 11:10 AM**

Working remotely -

**From Slater Solomon to Everyone: 11:11 AM**

Microsoft Teams has been such a huge help for us to stay in communication with Staff and work collaboratively

**From Richard Kvorka to Everyone: 11:11 AM**

Our firm uses "tax buddies" where managers are assigned 1 or 2 buddies and check in with them daily

**From Jennifer French to Everyone: 11:12 AM**

We are doing video chats a couple of times week. We have IS support available and tips and tricks on our website.

**From Michael Violano to Everyone: 11:12 AM**

How are people finding remote working efficiency form a utilization standpoint?

**From Paul Spindler to Everyone: 11:13 AM**

do you ask everyone to use an ethernet cable to their router rather than wifi? especially for video calls?

**From Gail Perry to Everyone: 11:14 AM**

We're hearing about two types of remote classes - those who are comfortable in this environment and those who are first-timers. Communication technology like Slack or Teams is a huge help. A big challenge is parents with children at home, needing parent time, and needing to share computer time with children who have school hours online.

**From Christina Sanders to Everyone: 11:14 AM**

I don't think working virtual is as much of a strain on our firm's billable hours as is trying to learn all of the recent changes in this new business environment.

**From Jason Boyd to Everyone: 11:14 AM**

Video Chats with teams that aren't specifically business related have been very helpful in keeping teams connected.

**From Chris Lazzuri to Everyone: 11:14 AM**

We have heavily utilized Teams. which we had been using for months, but adoption of all it's capabilities coming much faster by broader group.

**From Jason Boyd to Everyone: 11:15 AM**

Teams and Jabber have been critically important tools.

**From Mike Barber to Everyone: 11:16 AM**

Can someone share the main differences between Zoom and Microsoft Teams?

**From Ila Kharbush to Everyone: 11:17 AM**

Thomson Reuters thought leader Will Hill published a special podcast episode earlier this week on this topic! Will Hill interviews practitioner Paul Miller during the episode and gains insights about and how his CPA firm moved all of their operations to a remote/virtual world. In the episode Paul shares the impact on work routines and rhythms, and together Will and Paul discuss leading clients through these kinds of challenging times. Find the episode here: <http://pulseofthepactice.thomsonreuters.libsynpro.com/potp-episode-39-going-remote-as-firms-deal-with-covid-19>

**From Jason Boyd to Everyone: 11:18 AM**

Mike, with Teams, we have standing chat channels that entire teams join and it becomes a quick, constant communication channel, especially for our IT Support teams.

**From David Botzis to Everyone: 11:18 AM**

Virtual Happy 1/2 Hours have been effective to catchup with teammates and are fun too

**From Kari Hipsak to Everyone: 11:19 AM**

Mike - Zoom is primarily for video conference. Microsoft Teams is a more integrated platform with file storage and app integration such as calendars and other Microsoft tools.

**From Chris Lazzuri to Everyone: 11:20 AM**

I refuse to call this the new normal it is the current or present normal. majority of my coaching calls have been geared toward the psychology of the present normal and the upheaval more so than anything BD as of right now. I think having someone to talk too about whatever comes to mind is important.

**From Debbie McGraw to Everyone: 11:20 AM**

We would buy them, but can't find the cameras now, according to our IT guy. Demand is so high right now. They do make communicating more personal.

**From Amy Selich to Everyone: 11:25 AM**

ADP is updating adp.com/covid-19 daily and we are currently carving out a special accountant section

**From David Botzis to Everyone: 11:26 AM**

too many calls to keep up

**From Chris Lazzuri to Everyone: 11:33 AM**

we are doing a series of webinars around various legislation constantly being issued and have similar resource center to what you posted.

**From Jen Hamberger to Everyone: 11:34 AM**

We are trying to find the balance between being the trusted advisor reaching out proactively in 1:1 calls (doing a lot of that) and managing the work flow (many people are adjusting to working remotely) with our BD efforts. Our thought leaders are very busy so we have an outside resource/writer assisting with blogs etc.

**From Angie Grissom to Everyone: 11:41 AM**

Everyone-What are you currently doing in regards to marketing and BD right now and what do you plan on doing?

**From Lisa Benson to Everyone: 11:42 AM**

I have been reaching out to each of my prospects just the same way as my membership

Just sending notes to make sure they are safe and ask if there is anything I can help them with. I have had a reply from every note I have sent

**From Paul Spindler to Everyone: 11:47 AM**

I have many of my prospects on Whats app, and using it as a means to send a personal message to just ask how are you has brought in some great conversations

**From Lisa Benson to Everyone: 11:49 AM**

Severe, could be huge positive changes

**From Slater Solomon to Everyone: 11:49 AM**

I believe this will be very impactful, but in a good way.

**From Teri Samples to Everyone: 11:51 AM**

we have worked with several of these SBA processes. one of my partners has been very involved. if you have net worth of any size it will be difficult to get these loans. we will be doing a webinar on this.

**From Debbie McGraw to Everyone: 11:57 AM**

Unfortunately, we will likely see more opportunities for turnaround/restructuring again.