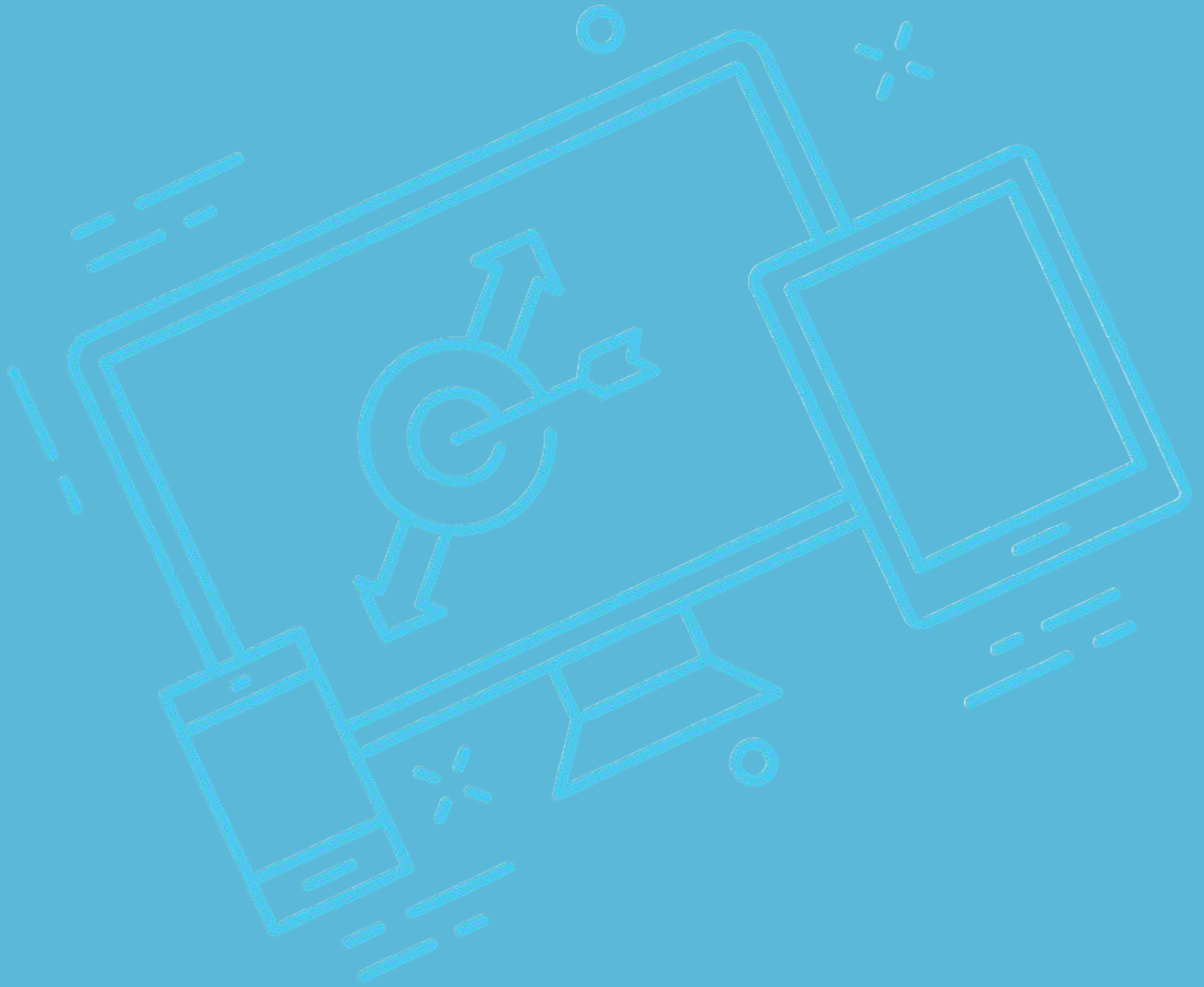


# WORKING SMARTER: USING TECHNOLOGY TO YOUR ADVANTAGE

McAndersen International Limited

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Career Development Series

# **Working Smarter: Using Technology to Your Advantage**

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## How to Use This Guide

This Self-Study Guide is designed and laid out in a way that will guide student learning much in the same way that an instructor would. This workbook is comprised of modules called *Sessions*. Each Session focuses on a major concept in the course.

In each *Session*, we have included short-answer and (in some instances) multiple-choice questions which relate directly to the session material. Throughout the guide, you can take the opportunity to internalize what you have learned by completing various self-reflection exercises.

## Session One: Course Overview

### Course Overview

Rudeness in the workplace is increasing to the level that universities are studying it. Everyone is busy, everyone is stressed, and most people take it out on their colleagues at one time or another. We've all been in a situation where we need to print something ASAP and someone has left the printer jammed, or we need coffee and the coffeepot is empty. Technology is supposed to make life easier and simpler, but most managers find themselves cleaning up the messes caused by too many gadgets. This course will show you how to leverage technology to work smarter, not harder.

### Learning Objectives

After you complete this course, you will be able to:

- Make your workplace a technology-friendly place
- Make the most of computers, telephones, instant messaging, e-mail, contact management applications, and scheduling software
- Communicate better with the IT department
- Make the best software and training choices
- Set an IT budget
- Set expectations and responsibilities for security and privacy
- Keep employees safe and healthy
- Develop and implement a system usage policy
- Implement policies for dealing with company property
- Decide whether or not employees should telecommute
- Make telecommuting work
- Deal with workplace rage
- Address technological issues

**Why did you take this course? Use this opportunity to consider your personal learning objectives and reasons for taking this course.**

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### Pre-Assignment

Please answer these questions prior to the course.

**What do you want to get from this course?**

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**What technology challenges do you face?**

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**What e-mail application do you currently use? What applications have you used in the past? Which do you prefer and why?**

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**What tips do you have for managing e-mail?**

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## Session Two: Making Your Company a Technology-Friendly Place

All workplaces have technology at work, from telephones, to copiers, to the most sophisticated computer systems. Making your workplace a technology friendly one allows people to leverage resources and do great work.

*In this session, you'll learn tips and tricks to make technology fun, and to make the most of it in our workplace.*

### Tips and Tricks

#### Tips for the Workplace

The key to creating a technology-friendly workplace is open-mindedness. Technology is evolving at an ever-rapid pace and it is necessary to be able to consider alternatives even if you're not a person who can easily adapt to change.

The first step to making your workplace a technology-friendly one is to include employees in the process. Have a meeting to talk about technology and discuss:

- What do you use technology for?
- What is frustrating?
- What is helpful?
- What would you like to use technology for?

#### Tips for Employees

As well, make sure employees have adequate resources.

- If possible, set up a computer or two in the break room that employees can use for personal or experimentation purposes.
- Have a library of computer books that employees can take out and read.
- If a library isn't possible, offer a list of free websites that employees can go to for help.
- Let employees know where they can get training, whether it be in-house or at the local community college. Where possible, offer incentives (such as paid time off or subsidized training) for employees to enhance their knowledge.

To go a step further, try these tips.

- Have in-house experts that staff can go to. (Make sure that this person can still do their job duties.)
- Have a suggestion box for employees to submit questions, concerns, or training tips.
- Involve employees in software purchases. For example, if you're purchasing a new accounting package, speak to your accounting department. They will be more open to using the new software if they feel that they had a hand in the decision to buy it.

## Tips for Managers

If you're a manager, it's even more important to stay open-minded.

- Lead by example. Use the devices that you're comfortable with and be open to new ideas.
- Be sensible in your standards. While you can't have all of your employees using different word processing programs, if Bob feels better hand-delivering a memo to you rather than e-mailing it, why not let him?
- Talk to employees about technology. Let's say your bookkeeper absolutely refuses to use the accounting package you purchased. Talk to him and find out why this is. Maybe the employee just isn't comfortable with the program, maybe they're afraid, or maybe they need training.
- Remember that technology doesn't have to be used for everything. For example, some beauty salons use computers to book appointments, while others just use a paper calendar. It all depends on what your needs are, what your budget is, and what the comfort level of yourself and your staff is.
- Ensure that purchases are made intelligently. If you have children, you know that if one child gets an iPod, they all want an iPod. You don't want to invest in technology for employees just so they have the latest and greatest; you want your purchases to change the employee's job in some way.

## Ten Easy Ways to Use Technology to Make Work Fun

1. Send employees online articles or newsletters about their field or technology. (Hint: Woody's Office Watch, David Pogue's column in the New York Times, and Windows Secrets are fantastic resources.)
2. Find free webinars and encourage staff to attend.
3. Have a staff meeting where everyone brings or shows their favorite gadget (not necessarily work related).
4. Add animations, movies, sounds, schemes, voiceovers, and effects to PowerPoint presentations. Just make sure it doesn't detract from the message.
5. Set aside five minutes during the day for a team Minesweeper or Solitaire contest. Prizes to the winner!
6. Have your meeting outside... it's possible with laptops!
7. Have a staff meeting to compile a list of the top ten ways technology can ruin your day. This can then act as an off-the-cuff needs assessment. (For example, let's say that everyone agrees that waiting ten minutes for their e-mail to open puts them in a bad mood. This can be a clue to you that systems may need an upgrade.)
8. Remember how much fun extracurricular activities were in grade school? Set up a club for online gaming (off work time of course!).
9. Turn an unused PC into a Friday afternoon jukebox. Everyone in the department gets to add a certain number of tracks to the list... and then put it on random!
10. Set up an internal-only blog or forum where everyone can vent on random topics... the weather, the current state of zebras, and the deplorable condition of orange juice these days. Just make sure conversation stays civil and posting is done on breaks.

## Acme Consulting, Part One

Read each case study and then answer the questions.

### Scenario One

#### Background Information

Fifty-two-year-old Tom Pipes runs a plumbing business that has been in the family for decades. He often gets last-minute calls, so he uses a small appointment book to track where he needs to be and when. He does have major projects to complete (like the plumbing for the new school), but since his staff is small, he finds it easy to get everything done on time, even if everyone has to pitch in a few extra hours. His wife, Martha, is convinced that he needs to join the 21<sup>st</sup> century and invest in some computer software. She thinks Tom needs a better way of managing his time and resources, and that a computer with scheduling software would be a good tool. Tom doesn't have a computer in office or in his home, and is reluctant to make the investment.

**What solutions would you propose for Tom?**

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**What reasons would you give him and Martha?**

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## Scenario Two

### Background Information

Mark Monson owns and runs a small advertising firm. His staff of six has struggled long and hard through the first few years of business. Now that they're turning a profit, he has treated them all to new computer systems and software that can make designing ads a lot easier. After this huge investment, he's noticed production is down and employees aren't using the new tools. He's come to Acme Consulting for some help.

### Why might staff not be using the new tools?

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### What can Mark do to help them?

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### What could Mark have done to make the process smoother?

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### Scenario Three

#### Background Information

The CEO of Acme Consulting has entrusted your team with a top-secret project. She is looking into purchasing mobile tools such as smartphones and tablets for the consulting staff. She has a lot of information but she's not sure she's ready to make the decision. She's asked your team to make sure she's covered all the bases.

**What information would you make sure the CEO had obtained?**

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**How should the CEO share this project with staff members?**

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**What can the CEO do to make sure the tools are used properly?**

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## Scenario Four

### Background Information

For three months, Lisa Leeds has been looking for a manager to oversee her company's production floor. She's finally found the right person, but he has no computer skills, which she feels are essential to the job. She's asked Acme Consulting for their input on the problem.

**What would be your basic message to Lisa: hire the person or keep looking?**

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**What compromises can both Lisa and the potential staff member make?**

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**If they choose to hire this employee, how can the company make his transition easier?**

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## Session Three: Conquering Computers

New computer systems are constantly being released, contributing to a constant learning curve. Are you someone who loves working with computers and enjoys exploring new features and benefits?

*In this session, you'll explore the idea of making the most of computers, while also reducing the accompanying distractions.*

### Setting Expectations

Computers are the biggest aspect of technology and can be the most difficult to manage. First and foremost, take care of the employee.

- Make sure employees have adequate training and resources.
- Make sure employees know what is expected of them and where the limits are. It may be useful to set up a computer usage policy and have everyone read and sign it. (We'll discuss this in more detail later on in the workshop.)
- Make sure employees know where to get help.
- Mistakes will happen and things will break. Treat accidents as accidents and learn from the experience.

### Upgrading Software

Another issue is software upgrades. When you make the decision to upgrade software in particular, you must take into account the time and money that will be spent training staff and the productivity lost while they learn the software. Depending on the scope of the upgrade, this can translate into many dollars and hours lost. It is absolutely essential that employees receive some form of training whenever new software is introduced. (We will discuss training and upgrades in more detail later on in the workshop.)

Imagine that someone handed you the keys to a brand-new Lamborghini that would do everything for you, including make you breakfast. However, you don't know how to drive a standard, so you can't even turn the thing on. That means it's no good to you, and you may break it in the process of trying to figure it out. You'll probably also get frustrated and be less likely to try new things in the future.



## Stretch!

Make sure that your employees stay healthy, especially if they sit at a desk for most of their day. There are software applications that you can purchase that will remind employees to get up and stretch once an hour (or another pre-set period of time). Alternatively, encourage everyone to get up once every hour and take a short break, even if it's just a walk around their cubicle. Not only does this help prevent repetitive strain injuries (such as carpal tunnel syndrome), it can prevent people zoning out and can stimulate creativity. (We'll discuss ergonomics in more detail later in this course.)

## Staying Focused

Another common problem with computers is that they can be a distraction. To minimize this, try these steps.

- Make sure everyone knows what is acceptable, what isn't, and why.
- If possible, control application installation and website access over a network.
- Offer employees alternatives, such as a public computer in the break room or coupons to a local Internet café.
- Let employees know what they can do in their downtime: read related articles online, do training, or read related books.
- Let employees know that every single thing they do can be monitored. This is one place where it's OK to tell a little white lie! Explain that these policies are for their security, too. For example, if they log into their banking site online and do some transactions, that information can be viewed over the network. What if someone hacks into the network?

## Case Study

Let's look at the cost of distractions. Let's say that Erin visits a gaming site and spends half an hour playing a game. Unknown to her, this site installed malicious software on her computer. Once she discovers this, she spends an hour trying to fix it. When she can't fix it, she calls the IT department. They spend another three hours trying to fix it, calling technical support in the process. Tech support gives up and asks that the machine be returned to the factory for a reformat.

Here's a breakdown of what this cost the company:

Employee	Time Spent	Wage Per Hour	Total
Erin	1/2 hour on game	\$10.00	\$5.00
	1 hour fixing	\$10.00	\$10.00
IT Department	3 hours fixing	\$50.00	\$150.00
	Call to tech support	\$20.00	\$20.00
			\$185.00

Add the figure of \$185 to the cost of returning the machine, the cost of service, and the productivity lost, and you have a considerable sum of money. Although this may seem like an uncommon occurrence (and it is to some extent; usually the IT department would be able to resolve the issue), let's say that the spyware didn't happen and we only lost \$5 for Erin playing the game. If we have 100 employees a week doing this, that's \$500.

### Have Fun With It!

Humorous signs around the workplace can help reinforce computer smarts and relieve tension. Some examples:

- Kicking your computer won't fix it. Calling IT at extension 55 will.
- Is the Office Assistant bugging you again? Call Extermination at extension 55, or visit the Clippy Support Group on Wednesdays at 2 p.m.

## Session Four: Communicating with the IT Department

If you were to rate your own communication skills, how do you do? What are your relationships like with the people you work with? Building relationships makes sense so that people can work well throughout our workplace.

*In this session, you'll explore establishing a strong working relationship with your IT department and the individuals there.*

### Communicating with the IT Department

Many people have incorrect assumptions about IT staffers, including that they lack social skills, are unclean, are arrogant... the list goes on. The key to communicating with IT personnel is the same as communicating with anyone else: be respectful and treat them as people, not robots made to do your bidding.

A policy should be in place for how requests for IT help are made. Whether it's via phone, e-mail, or in person, make sure you respect the process. Also make sure you provide as much information as possible. Telling them, "My computer is broken," won't help them identify the problem or identify the problem's priority. Telling them, "I get a blue screen when my computer starts," is a lot more useful. Writing down the exact error message and/or steps that caused the problem is even better.

Make sure you respect the IT department's boundaries. Most departments request that employees not try to fix their own computers, simply because it often creates more problems. If you're not sure whether or not you're supposed to perform a task, ask!

On the other hand, be willing to learn. If the IT department is OK with you changing the ink in your printer, then learn how to do this task. Most IT staffers are willing to share their knowledge, especially if it's a simple task that can save them and you time in the future.

Try to have an understanding of how the internal IT process works. Certainly it's frustrating when you need your printer fixed NOW, you go to IT, and the staff member says they'll get to it when they can, all the while tapping away on their computer. It may not seem like they're doing anything, but a lot of IT work is done in the background. Without this background work, it's entirely possible that the entire company would grind to a halt.

Also remember that you're asking the IT person for help. Let's say that you need your e-mail password reset. This seems like a simple task to you and you get upset when it's not dealt with immediately. Think about what is involved in the process of resetting a password; the truth probably is that you have no idea how your IT person does such a thing. Give them time and space to do their job.

Remember as well that even though you're a manager, you probably don't have any direct control over the IT staff. Would you appreciate it if the IT manager stormed into your department, commandeered an employee, and demanded that they drop everything they were doing? You'd probably be upset and your employee probably would be too. If you have an issue with how IT processes are handled, or you feel your request isn't given enough priority, talk to the manager of the IT department.

## Session Five: Choosing Software Wisely

What software are you currently using? Do you know if your software is up to date and really meets your needs? Software is a large purchase that can also require fees for licensing, training, and technical support.

*In this session, you'll learn a three-step process to assist you in your software selection.*

### The Three-Step Process

Everyone loves software! However, a software investment is a big purchase. Software purchases should never be done impulsively, even if you get it at a bargain price. After all, it's not a deal if you end up paying out for technical support or training.

#### Step One: What Do You Need?

For the first step, you as a manager should make a list of the things you need the software package to do and things you want it to do. Then, consult with employees to find out their wants and needs. Make sure you consider future wants and needs, too. For example, if you only have a few staff right now, collaboration tools probably aren't high on the list. However, if your department or business is going to grow significantly, you may include that as a requirement.

Once everything has been considered, make a master list of wants and needs.

#### Step Two: Evaluating the Software

Now, choose at least three software packages that are in the general area of what you're looking for. If possible, get trials and have a few staff members test them out.

Once you've evaluated the package, write down some basic information about each.

- Why do we want to use this software?
- What is the initial investment? (Make sure you include the cost of software and the cost of installation time. Also consider any computer upgrades that will be necessary, as well as time or resources needed to set these components up.)
- What will the cost be later on? (Make sure you consider upgrades or annual fees.)
- Will we need training? How much will that cost in time and money?
- What support options are available? (We suggest talking to people who have used this software and dealt with their technical support.)
- Will this software improve my company's productivity? (In the short term, probably not, but in the long term, the benefits should be significant. Otherwise, it's not worth it.)
- Will this software grow with my company?

Then, compare the software's list of features with your list of wants and needs. Any package that doesn't cover all of your needs should be disqualified automatically.

What if none of the packages you evaluate seem right? Well, the good news is that there are thousands of different software packages out there. Determine why none of the packages suited your needs. If there's a single feature that you want and none of them seem to have, you may want to look for a product that has that feature and then see how it stacks up against your list of wants and needs. In the unlikely event that no product exists to do what you want, you'll have to consider alternatives: combining several pieces of software, paying someone to develop the software, or doing the task by hand.

### **Step Three: Making the Purchase**

Before you make the big buy, talk to your IT department. They may want to do the actual purchasing, or they may be able to get the software at a discount. If purchasing is left in your hands, get prices from at least three places: software stores, big-box stores, and many websites all sell software. A caveat about ordering from the Web: stick with names you trust.

### **About Upgrading**

Rather than purchasing a whole new software package, you can choose to upgrade your existing software. Yes, I said choose: upgrading is always a choice. Don't let anyone make you feel that you have to upgrade. In some situations, it makes more sense than others, and upgrades are usually an improvement to the software. As well, staff may require less training if they're already familiar with the software. (Even if you're just upgrading, we still suggest some training, even if it's just an hour's briefing session on what's new in the package.)

When considering an upgrade, make sure you have answers to these questions.

- How many versions am I upgrading? (For example, if you were upgrading from Message Plus 1 to Message Plus 6, you'd be upgrading 5 versions. Keep in mind that often the bigger the version leap, the bigger the learning curve.)
- What new features are added to the product?
- What features have been removed?
- What is the initial investment?
- What hardware or software (operating system and supporting applications) changes will have to be made if I upgrade?
- Are there any hidden costs?
- How do support options change? (Many companies stop supporting software when it reaches a certain age.)
- What known issues exist with this upgrade?
- On a scale of 1 to 10 (with 1 being extremely unnecessary and 10 being vital), how important is this upgrade?

## Acme Consulting, Part Two

### Case Study

#### Tom's Situation

The Acme Consultants have been called in to solve a thorny technological issue! Tom Tornado is going to upgrade his accounting department to a new software package. Here is a list of his wants and needs.

Needs	Wants
<ul style="list-style-type: none"> <li>○ Sharing capabilities that support at least 10 computers</li> </ul>	<ul style="list-style-type: none"> <li>○ Ability to include graphs and charts</li> </ul>
<ul style="list-style-type: none"> <li>○ Compatible with Macdos X5</li> </ul>	<ul style="list-style-type: none"> <li>○ Voice commands</li> </ul>
<ul style="list-style-type: none"> <li>○ Interacts with Word Plus 5 or newer</li> </ul>	<ul style="list-style-type: none"> <li>○ Customizable interface</li> </ul>
<ul style="list-style-type: none"> <li>○ Ability to input accounts receivable, bills to pay, and generate invoices</li> </ul>	<ul style="list-style-type: none"> <li>○ Archive and file management capabilities</li> </ul>
<ul style="list-style-type: none"> <li>○ Budgeting tools</li> </ul>	

He's looking at three different packages and frankly, he's pretty confused.

#### Option One: Accounting Plus

- Compatible with Macdos X3 and up
- Plugs into Word Plus 5 and up
- Sharing capabilities for up to 15 computers
- Input your accounts receivable and generate invoices
- Create charts and tables
- Free upgrades for five years!

#### Option Two: Super Numbers

- Compatible with Macdos X6 and up
- Plugs into all Super Office applications
- Customizable interface
- Supports voice commands
- Fantastic charting capabilities



**Option Three: Amazing Accounting**

- Compatible with Macdos X3 and up, Super Office 4 and up, Word Plus 3 and up, and Open Office Kappa and up
- Sharing capabilities for up to 10 users, and a server version is available that supports up to 99 users
- Budgeting, account receivable, and invoicing tools
- Graphing tools
- Command the application with voice, keyboard, or a combination
- Off-site archiving available for an additional fee

**Questions**

**What would you recommend for Tom?**

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**Why?**

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## Session Six: Technical Training

As technology advances, some of it is quite intuitive. You may not need additional training to install, set up, and start using it. However, you will want to make sure you are using it to its full advantage and getting your money's worth.

*In this session, you'll consider different types of training that are available and explore some tips for training in your organization.*

### Types of Training

No matter what technological upgrade or purchase you invest in, it is crucial that staff receive training. Here are some of the common types of training.

#### Self-Led

This can include reading books or articles.

#### Instructor-Led

This is the typical type of training, where an instructor teaches students. Students typically have materials to follow along with.

#### Computer-Based (E-Learning)

Electronic training is becoming more popular. Students use a computer program or interface to learn about a topic. This interface may allow them to read material, watch videos, or take tests.

## Training Tips

Here are some tips to make the most of training.

- Similar to purchasing software, you'll want to do a needs assessment. What do employees want to learn about? What do they need to learn about? There's no point training an administrative assistant how to create complex databases if it's not part of his job.
- Make sure the trainer has experience with technical training and with the software in question.
- If you're outsourcing training, make sure you get at least three references.
- Review the training material that will be used before training takes place.
- Make sure staff will be getting training for the proper software version.
- Time training right. Start training staff before they start using the software. And, try to train everyone at once to save on training costs.
- Management should take part in the training too.
- Encourage staff to continue learning after training is over.
- Office Online (<http://office.microsoft.com/training>) offers a fantastic wealth of articles, demos, walkthroughs, and short courses for Microsoft Office products.
- In most applications, you'll see a Help menu at the top. If not, try pressing F1.
- Training on operating systems can also be useful.

## Session Seven: Setting an IT Budget

It all comes down to money in one way or another. What's your budget like? Does it allow you to keep up with changes in technology, or do you like to stay behind the leading edge while the bugs are worked out?

*In this session*, you'll explore a process for setting up an IT budget, as well as how to handle shrinking budgets.

### Budget Basics

Some managers are responsible for deciding how much their department can and will spend on technology. Often, managers put down guesstimated amounts, only to find that they've actually underestimated costs, and they quickly run out of funds.

There are a few basic steps to setting your IT budget.

#### Step One: Preparing a Draft

First, pull out your budget from last year. If you didn't do a budget, try to make a list of the IT expenses that were incurred. Second, determine what expenses will reoccur and what will not. (For example, if you had to pay an outside company to do yearly maintenance, that expense will likely recur. If you had a special project to install flash card readers in all the computers, that expense will not recur.) Third, determine what projects will be coming up that may require extra expense (say, two employees will be joining the team and will need new equipment).

Item	Budget
Software upgrades	\$125,000
New staff setup	\$250,000
Training	\$300,000
<b>Total</b>	<b>\$675,000.00</b>

In this case, we're assuming that we have an IT team to help us with the work, so we have not included the cost of their time. This policy will differ between companies. This budget is also drastically oversimplified.

Costs you will want to think about include:

- Staff time to learn new software programs or attend training classes
- Costs to back up hardware and software
- Monthly updates to anti-virus software
- Security patches
- Creating and updating an operations manual
- Network connectivity costs such as an ISP for Internet connection, and routers and cables for internal networking
- Application service provider costs such as secure servers for credit card donations, or e-mail list services
- Technical support
- Hardware and software replacement

## Step Two: Looking at Reality

Now that we've got a draft budget, let's try to make it as realistic as possible. For our sample budget, we've listed software upgrades as the first item. We'll want to make a list of what software will need to be upgraded and how much each item will cost.

Item	Item	Amount	Number Required	Budget
<b>Software Upgrades</b>	Office Plus annual fee	\$599	10 users	\$5,990
	New Office Plus edition	\$5,999	10 users	\$59,990
	New Windows editions	\$7,999	10 users	\$79,990
			<b>TOTAL</b>	<b>\$145,970</b>
<b>New Staff Setup</b>	New computers	\$5,500	2 new staff	\$11,000
	Software licenses	\$19,000	2 new staff	\$38,000
	New tablets	\$2,500	2 new staff	\$5,000
	New smartphones	\$100	2 new staff	\$200
	Training for new staff	\$100,000	2 new staff	\$200,000
			<b>TOTAL</b>	<b>\$254,200</b>
<b>Training</b>	Lost time	\$1,000 per student per session	4 training sessions with ten users each	\$40,000
	Materials	\$5,000 per student per session	4 training sessions with ten users each	\$200,000
	Instructor cost	\$5,000	4 training sessions	\$20,000
			<b>TOTAL</b>	<b>\$260,000</b>
			<b>GRAND TOTAL</b>	<b>\$660,170</b>

### Step Three: Finalizing the Budget

Now that we know what we want, we need to adjust for what we're actually getting from the company. We also need an emergency fund of at least \$50,000 to account for unexpected expenses (trust me, they'll happen!). So, let's say that we're only getting \$600,000 for our technology budget. We need to shave off approximately \$60,000 from our draft budget to get there, and \$50,000 more if we want an emergency fund. Don't go about this randomly. Carefully look at the budget and decide where you can cut and where you can't. For example, if we reduce training to three sessions, we save \$65,000.

Item	Item	Amount	Number Required	Budget
<b>Software Upgrades</b>	Office Plus annual fee	\$599	10 users	\$5,990
	New Office Plus edition	\$5,999	10 users	\$59,990
	New Windows editions	\$7,999	10 users	\$79,990
			<b>TOTAL</b>	<b>\$145,970</b>
<b>New Staff Setup</b>	New computers	\$5,500	2 new staff	\$11,000
	Software licenses	\$19,000	2 new staff	\$38,000
	New tablets	\$2,500	2 new staff	\$5,000
	New smartphones	\$100	2 new staff	\$200
	Training for new staff	\$100,000	2 new staff	\$200,000
			<b>TOTAL</b>	<b>\$254,200</b>
<b>Training</b>	Lost time	\$1,000 per student per session	3 training sessions with ten users each	\$30,000
	Materials	\$5,000 per student per session	3 training sessions with ten users each	\$150,000
	Instructor cost	\$5,000	3 training sessions	\$15,000
			<b>TOTAL</b>	<b>\$195,000</b>
			<b>GRAND TOTAL</b>	<b>\$595,170</b>

Note: Training is often the first thing to be cut when it comes to budget time. You cannot afford to skimp on training for new software!

You may also want to look at alternatives or research discounts. For our example, let's say that we've found a 20% off coupon for Windows if you buy a license for 10 or more users. That saves us over \$15,000 right there! And, let's say our trainers have developed an online course for new staff, reducing training costs by 25%.

Item	Item	Amount	Number Required	Budget
<b>Software Upgrades</b>	Office Plus annual fee	\$599	10 users	\$5,990
	New Office Plus edition	\$5,999	10 users	\$59,990
	New Windows editions	\$6399.20	10 users	\$63,992
			<b>TOTAL</b>	<b>\$129,972</b>
<b>New Staff Setup</b>	New computers	\$5,500	2 new staff	\$11,000
	Software licenses	\$19,000	2 new staff	\$38,000
	New tablets	\$2,500	2 new staff	\$5000
	New smartphones	\$100	2 new staff	\$200
	Training for new staff	\$75,000	2 new staff	\$150,000
			<b>TOTAL</b>	<b>\$204,200</b>
<b>Training</b>	Lost time	\$1,000 per student per session	3 training sessions with ten users each	\$30,000
	Materials	\$5,000 per student per session	3 training sessions with ten users each	\$150,000
	Instructor cost	\$5,000	3 training sessions	\$15,000
			<b>TOTAL</b>	<b>\$195,000</b>
			<b>GRAND TOTAL</b>	<b>\$529,172</b>

We now have achieved our budget, plus an emergency fund of approximately \$70,000. It won't always be this easy, but just make sure your estimations are realistic and doable!



## The Shrinking Budget

### Case Study

Your department has always been the top technology dog. Every year staff got the newest software and gadgets and training to go with it. Each employee also had a discretionary fund to use as they wanted. The company also covered the costs of IT staff and connections. Oddly enough, you always ran out of money before the end of the year.

### Task

Unfortunately, this year the profits of the company have taken a serious drop and your technology budget has been drastically reduced to \$175,000. (The company will still cover infrastructure costs.) As manager it is your job to allocate the available funds and develop a budget to provide the best resources you can. Be creative and invent solutions!

Item	Last Year's Budget	Your Budget
Discretionary Fund (\$5,000 x 10 employees)	\$50,000	
Hardware and Gadgets (\$25,000 x 10 employees)	\$250,000	
Software Upgrades	\$48,000	
New Software	\$250,000	
Training	\$250,000	
Emergency Technical Support	\$100,000	
<b>Grand Total</b>	<b>\$948,000.00</b>	

# Session Eight: Security and Privacy

We place a high regard on security and privacy of information both in our workplaces and our private lives. Employees have been dismissed for their behavior and their lack of attention to the information they share through their employer’s equipment.

*In this session, you’ll consider the effect of security and privacy from the employee’s and employer’s perspective.*

## An Employee’s Rights

**What expectation to privacy does an employee have in the workplace?**

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## Session Nine: Uncontrolled vs. Controlled Networks

If you access the Internet from a coffee shop and have to enter a password, this is an example of a controlled network. A network that does not allow you to access certain sites is an example of a restricted network.

*In this session, you'll learn factors related to controlling and restricting access to your workplace network.*

### Two Network Types

If you're in an office environment, you're likely connected to a network. For our purposes, there are two main types of networks: controlled and uncontrolled.

#### Uncontrolled Networks

An uncontrolled network is one where there is no central server in place. Each computer may be connected through a router that provides Internet access, but there is no main computer that each computer is connected to.

In this type of environment, the employer's control over individual machines is limited.

- Software preventing the installation of applications can be installed on each computer.
- Software controlling Internet access can be installed on each computer.
- System usage policies can be put into place detailing what computer activity is acceptable and what is not.

#### Controlled Networks

A controlled network is more common in medium to large offices. In this scenario, each computer is connected to a central server and is part of a domain. The system administrator can use the domain to control the attached computers. For example, they can:

- Set Internet restrictions (more on this in a moment)
- Monitor Internet traffic
- Control security policies (such as software and operating system updates)
- Control software installation
- Control users and what they have access to

Not only does a domain help the administrator control the state of the connected computers, it can make administrative tasks (such as installing new software) easier.

## About Restricting Internet Access

The Internet can be a great resource, but it can also be a great time waster. Many employers today are looking for ways to control their employees' access to the Internet.

There are a few ways to restrict Internet access. The least invasive is to have employees sign a policy stating what they will and will not use the Internet for. This typically relies on the honor system. You can also block particular websites either via a domain or via software installed on the individual computer. (This is usually most effective when done via a domain, as it reduces the risk of the user tampering with the application.) Another option is to install Internet time management software, where the user has an allotted period of time to spend on the Internet as they please.

The most restrictive option, of course, is to block all Internet access except for sites hosted on the local network. Remember that the more restrictive you get, the more employees are likely to resent you and the system administrator.

## Session Ten: Ergonomics

As an employer, we need to make sure we reduce the risk of injuries or illness that result from our decisions. When purchasing new equipment and furniture, we also have to think about how it can affect people.

*In this session, you'll learn the definition of ergonomics as well as some great applications that you can take back to work with you.*

### What is Ergonomics?

Ergonomics is the study of using computers in a healthy manner to avoid hurting our bodies. Repetitive Strain Injuries (RSI) have increased, and so have employer's expenses as employees need time off work, medical treatment, and physiotherapy.

Things we must remember when using the computer include:

- Sit up straight with feet flat on the floor or on a footrest.
- Keep your lower arms level with the table and wrists straight.
- Always keep correct posture.
- Sit close enough to the keyboard to eliminate stretching but far enough away to avoid leaning.
- Tap the keys on your keyboard lightly.
- Place your mouse within easy reach of the hand you write with.
- Hold the mouse loosely. (You do not need to squeeze it.)
- The top of your monitor should line up with the top of your head.
- Take a short break every half hour or so. (You can stretch but do not disturb any other employees.)

## Stretch!

Try some of the following exercises to help reduce the risk of repetitive strain injuries.

### Head Turn

1. Slowly turn your head all the way to the left.
2. Pause.
3. Slowly turn your head all the way to the right.
4. Repeat process three times.

### Shoulder Shrug

1. Relax shoulders.
2. Roll shoulders forwards, up to your ears, and then back down (to make a complete circle).
3. Repeat process three times forwards, three times backwards.

### Arm Whirl

1. Make sure you are standing in a comfortable position with legs spread slightly apart.
2. Raise arms straight out until parallel with the floor.
3. Rotate arms, making ten large circles forward and ten circles backward.
4. Swing arms over head so that arms are perpendicular to ground. Hold for 20 seconds.
5. Lower arms and dangle below waist.

### Tension Release

1. Sit on the floor and remove your shoes.
2. Start by wiggling your toes.
3. Kick legs three times.
4. Shake arms and head to finish the process.

### Waking Up

1. While still sitting, close your eyes.
2. Yawn as wide as possible!
3. Open eyes.



## Session Eleven: System Usage Policies

If you look around your workplace (or check your intranet site), there are probably lots of policies already in place. We need system usage policies for the same reason the other policies exist: so that people know what is expected of them.

*In this session, you'll learn why a system usage policy is essential and what the important components are. You will also consider what will work in your workplace.*

### What is a System Usage Policy?

A system usage policy is a contract between the employee and the employer detailing what the employee can and cannot do with the technology provided by the employer. Every organization, no matter how small, should have a policy in place. Be proactive: make sure everyone signs, reads, and understands the terms of use and why these policies are in place.

Topics that you should cover include:

- Appropriate Internet, software, e-mail and instant messaging usage
- If applications can be installed on company systems and what procedure must be followed to do so
- Employee's responsibilities regarding their systems (i.e. keep antivirus software up to date, don't open strange attachments, have strong passwords)
- What systems will be provided to the employee (cell phones, tablets, laptops, etc.) and what their responsibilities are with these systems
- What additional systems can be brought into the workplace (Some employers don't allow personal laptops or cell phones)
- Appropriate telephone usage (Are any personal calls allowed? Are long distance calls allowed?)
- No food and drink near electronics (cell phones, laptops, tablets, keyboards)
- Employee has no expectation of privacy when using company systems (meaning instant messaging, Internet surfing, e-mail, and phone conversations can all be monitored)
- Policy can be revised at any time (also explain how employees will be notified)
- What the consequences will be if policy is not adhered to
- Who to contact with system issues

Your system usage policy should reflect the organization. If you're a small company with only three employees, a short policy based on the honor system should be fine. If you're a larger company, then you need a larger policy. You should also make plans to periodically review the policy with either your internal system administrator or an external expert.

Remember, the policy needs to be enforced to have any weight. Consequences for breaching the policy should be outlined in it. Supervisors must have the weight to both monitor the conditions outlined in the policy and discipline staff as necessary. If changes are made to the policy, each supervisor should review the changes with their team and have each member re-sign the policy.

## Sample Internet, E-Mail, and Computer Usage Policy

### Policy Statement

The use of XYZ Company (Company) automation systems, including computers, fax machines, and all forms of Internet/Intranet access, is for company business and for authorized purposes only. Brief and occasional personal use of the electronic mail system or the Internet is acceptable as long as it is not excessive or inappropriate, occurs during personal time (lunch or other breaks), and does not result in expense to the Company.

Use is defined as "excessive" if it interferes with normal job functions, responsiveness, or the ability to perform daily job activities. Electronic communication should not be used to solicit or sell products or services that are unrelated to the Company's business; distract, intimidate, or harass coworkers or third parties; or disrupt the workplace.

Use of Company computers, networks, and Internet access is a privilege granted by management and may be revoked at any time for inappropriate conduct carried out on such systems, including, but not limited to:

Sending chain letters or participating in any way in the creation or transmission of unsolicited commercial e-mail ("spam") that is unrelated to legitimate Company purposes;

Engaging in private or personal business activities, including excessive use of instant messaging and chat rooms (see below);

Misrepresenting oneself or the Company;

Violating the laws and regulations of the United States or any other nation or any state, city, province, or other local jurisdiction in any way;

Engaging in unlawful or malicious activities;

Deliberately propagating any virus, worm, Trojan horse, trap-door program code, or other code or file designed to disrupt, disable, impair, or otherwise harm either the Company's networks or systems or those of any other individual or entity;

Using abusive, profane, threatening, racist, sexist, or otherwise objectionable language in either public or private messages;

Sending, receiving, or accessing pornographic materials;

Becoming involved in partisan politics;

Causing congestion, disruption, disablement, alteration, or impairment of Company networks or systems;

Maintaining, organizing, or participating in non-work-related Web logs ("blogs"), Web journals, "chat rooms," or private/personal/instant messaging;

Failing to log off any secure, controlled-access computer or other form of electronic data system to which you are assigned, if you leave such computer or system unattended;

Using recreational games; and/or

Defeating or attempting to defeat security restrictions on company systems and applications.

Using Company automation systems to access, create, view, transmit, or receive racist, sexist, threatening, or otherwise objectionable or illegal material is strictly prohibited. "Material" is defined as any visual, textual, or auditory entity. Such material violates the Company anti-harassment policies and is subject to disciplinary action. The Company's electronic mail system, Internet access, and computer systems must not be used to violate the laws and regulations of the United States or any other nation or any state, city, province, or other local jurisdiction in any way. Use of company resources for illegal activity can lead to disciplinary action, up to and including dismissal and criminal prosecution. The Company will comply with reasonable requests from law enforcement and regulatory agencies for logs, diaries, archives, or files on individual Internet activities, e-mail use, and/or computer use.

Unless specifically granted in this policy, any non-business use of the Company's automation systems is expressly forbidden.

If you violate these policies, you could be subject to disciplinary action, up to and including dismissal.

## **Ownership and Access of Electronic Mail, Internet Access, and Computer Files**

The Company owns the rights to all data and files in any computer, network, or other information system used in the Company. The Company also reserves the right to monitor electronic mail messages (including personal/private/instant messaging systems) and their content, as well as any and all use of the Internet and of computer equipment used to create, view, or access e-mail and Internet content. Employees must be aware that the electronic mail messages sent and received using Company equipment are not private and are subject to viewing, downloading, inspection, release, and archiving by Company officials at all times. The Company has the right to inspect any and all files stored in private areas of the network or on individual computers or storage media in order to assure compliance with policy and state and federal laws. No employee may access another employee's computer, computer files, or electronic mail messages without prior authorization from either the employee or an appropriate Company official.

The Company has licensed the use of certain commercial software application programs for business purposes. Third parties retain the ownership and distribution rights to such software. No employee may create, use, or distribute copies of such software that are not in compliance with the license agreements for the software. Violation of this policy can lead to disciplinary action, up to and including dismissal.

## **Confidentiality of Electronic Mail**

As noted above, electronic mail is subject at all times to monitoring, and the release of specific information is subject to applicable state and federal laws and Company rules, policies, and procedures on confidentiality. Existing rules, policies, and procedures governing the sharing of confidential information also apply to the sharing of information via commercial software. Since there is the possibility that any message could be shared with or without your permission or knowledge, the best rule to follow in the use of electronic mail for non-work-related information is to decide if you would post the information on the office bulletin board with your signature.

It is a violation of Company policy for any employee, including system administrators and supervisors, to access electronic mail and computer systems files to satisfy curiosity about the affairs of others. Employees found to have engaged in such activities will be subject to disciplinary action.

## **Electronic Mail Tampering**

Electronic mail messages received should not be altered without the sender's permission; nor should electronic mail be altered and forwarded to another user and/or unauthorized attachments be placed on another's electronic mail message.

## **Policy Statement for Internet/Intranet Browser(s)**

The Internet is to be used to further the Company's mission, to provide effective service of the highest quality to the Company's customers and staff, and to support other direct job-related purposes. Supervisors should work with employees to determine the appropriateness of using the Internet for professional activities and career development. The various modes of Internet/Intranet access are Company resources and are provided as business tools to employees who may use them for research, professional development, and work-related communications. Limited personal use of Internet resources is a special exception to the general prohibition against the personal use of computer equipment and software.

Employees are individually liable for any and all damages incurred as a result of violating company security policy, copyright, and licensing agreements.

All Company policies and procedures apply to employees' conduct on the Internet, especially, but not exclusively, relating to: intellectual property, confidentiality, company information dissemination, standards of conduct, misuse of company resources, anti-harassment, and information and data security.

## **Personal Electronic Equipment**

The Company prohibits the use or possession in the workplace of any type of camera phone, cell phone camera, digital camera, video camera, or other form of image-recording device without the express permission of the Company and of each person whose image is recorded. Employees with such devices should leave them at home unless expressly permitted by the Company to do otherwise. This provision does not apply to designated Company personnel who must use such devices in connection with their positions of employment.

Employees should not bring personal computers to the workplace or connect them to Company electronic systems unless expressly permitted to do so by the Company. Any employee bringing a personal computing device or personal imaging device onto Company premises thereby gives permission to the Company to inspect the personal computer at any time with personnel of the Company's choosing and to analyze any files, other data, or data storage media that may be within or connectable to the personal computer in question. Employees who do not wish such inspections to be done on their personal computers or imaging devices should not bring such items to work at all.

## Policy Enforcement

Violation of this policy, or failure to permit an inspection of any device covered by this policy, shall result in disciplinary action, up to and possibly including immediate termination of employment. In addition, the employee may face both civil and criminal liability from the Company or from individuals whose rights are harmed by the violation.

Employee Signature: \_\_\_\_\_

Date: \_\_\_\_\_

## Acme Consulting, Part Three

The folks that we consulted for yesterday have taken our advice, thought about it, and come up with solutions to their technical problems. Now they want our help in writing a system usage policy.

### Scenario One

Fifty-two year old Tom Pipes runs a plumbing business that has been in the family for decades. After his discussion with Acme Consulting, he decided to purchase a computer for his office and get some training. He now uses Microsoft Outlook to track his appointments. Each of his plumbers has a smartphone that syncs with the main computer every morning. They also have cell phones to help keep them connected with the office.

**Create the basic outline for a system usage policy.**

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## Scenario Two

Mark Monson owns and runs a small advertising firm. His staff of six has struggled long and hard through the first few years of business. Now that they're turning a profit, he treated them all to new computer systems and software that can make designing ads a lot easier. He's also connected all the systems to a domain and hired a system administrator.

Software that the staff uses includes:

- Word Plus (a word processing program)
- Ad Plus (a design program)
- Photo Plus (an image processing program)
- Messages Plus (an e-mail program)
- Internet Explorer

Of course, his employees each have an office-based phone that they can use. Cell phones are not provided by the company.

**Create the basic outline for a system usage policy.**

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**Scenario Three**

After much discussion with a consulting team, the CEO of Acme Consulting has decided to purchase mobile tools (smartphones and tablets) for the consulting staff. She wants to have a system usage policy in place that will be issued with the tools.

**Create the basic outline for a system usage policy.**

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### Scenario Four

During her struggle to find the perfect manager, Lisa Leeds has realized that her whole company needs some help dealing with technology. All employees have a phone and fax machine in their cube. As well, all staff have a desktop computer connected to a router.

Software they use includes:

- Word Plus (a word processing program)
- Numbers Plus (a spreadsheet program)
- Time Plus (a scheduling program)
- Messages Plus (an e-mail program)
- Internet Explorer
- Windows Messenger (an instant messaging program)

**Create the basic outline for a system usage policy.**

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## Session Twelve: Taking Care of Company Property

If you loan someone your camera, you probably expect them to return it in good working condition. If they damage it, do you expect them to pay for repairs or replace it? How about if they damage something at work?

*In this session, you'll explore the basic rules of etiquette in terms of using company owned equipment.*

### Basic Rules of Etiquette

Laptops, tablets, and cell phones have become essential tools, especially for business travelers. Sometimes, companies will provide these tools to take off-site.

#### The Manager's Role

If you're the manager, set expectations about proper use of the device. When and where will it be used? As well, deal with financial issues before they arise. For a cell phone, if there are extra charges, who will pay? Or if the device is broken, who will pay? (Note that usually it's the employer who is responsible for repairs.)

You will also want to make sure that devices are tracked properly. If no company standard is in place, you may want to set up a simple table listing the device name, serial number, phone number (if applicable), what condition it was when it was issued, and the date that it was issued. If repairs are your responsibility, make sure you keep good records.

#### The Employee's Role

If you're the employee, there's some good news! This responsibility means a bit more flexibility. For example, I have colleague who works from home. Her personal computer has games and music on it as well as her work, as it's her own system. However, her company purchased her a laptop, and this only has work applications on it: no games, and only classical music to help her concentrate. However, when she travels, she does use it to check her personal e-mail on her own time. You must be respectful of these perks at all times; after all, it's still someone else's property.

Even if you don't travel, you still use company property at work, whether it's a computer, a coffee maker, a fax machine, a printer, or a telephone. The key thing to remember about these devices is that it's all someone else's property and that you are being allowed to use it.

Never, ever leave something broken. If you arrive at the printer and it's jammed, you should try to fix it. If you can't fix it or don't have time, leave a sign on it that says it's out of order and let someone who can fix it know about the problem. It's just common courtesy.

## Making Connections

### Choose a scenario from the list below.

- An employee left the coffee pot on with no coffee in it. The pot broke and another employee stepped on the glass and was injured.
- You have borrowed your manager's cell phone for an out-of-town meeting. You notice that there are some personal pictures on the phone.
- You've just gotten the cell phone bill for one of your staff members. There are some long distance charges on there and you're not sure if they're work-related or not.
- An employee is trying to print an important document but someone has left the printer jammed. S/he has a suspicion about who it is, and it's not the first time this has happened.
- Employee A has come to you about Employee B making personal calls at work. Employee A says that Employee B is constantly on the phone and speaks loudly about personal issues. This distracts other employees and causes awkwardness as everyone knows about this employee's personal life. How do you deal with Employee B?
- You've noticed that one of your staff members is in the washroom an awful lot and that s/he brings their personal cell phone with them.
- The employer has been kind enough to provide a computer with Internet access in the staff break room. However, one employee monopolizes the computer to work on their resume and hunt for a new job.

### Next, outline how you would handle the situation.

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## Session Thirteen: Time-Saving Tools

The invention of automatic clothes washers was supposed to save us lots of time because we no longer had to scrub our clothes. E-mail would save us time because we would not have to write full letters. What happened?

*In this session, you'll learn some helpful techniques for getting control of your time by using scheduling applications and e-mail effectively.*

### E-Mail Applications

Once upon a time, e-mail was a new thing. It was heralded as a way to reduce paper waste, improve communication, and make the world smaller. Those people should see you now, with 639 new messages to go through on top of all your other work!

### Making Connections

**What e-mail application do you use?**

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**What tips do you have for managing e-mail?**

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**What could you do in the future to make working with e-mail more efficient?**

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## Tips and Tricks

E-mail can be a great tool, but it can also negatively affect productivity. Set your e-mail program to only check your e-mail once every hour. Some time management experts even suggest dealing with e-mail only once or twice a day.

To help you stay organized, create folders to organize your messages, just like you organize files on your hard drive. Most applications also feature the ability to configure rules to automatically move e-mails with a particular subject or sender to a particular folder.

Save your inbox for action items. Move items you have read or dealt with to a folder for that sender or subject or delete them.

As well, take the time to learn how to make the most of your e-mail application. If the program supports reminders, categories, follow-up flags, or any other time-saving organizational features, take a few minutes to learn how it works and use it.

Create and update your address list. This will save you time when addressing messages, and make sure you get the address right. As well, make use of mailing lists. No more wondering if Barb is on the social committee... just punch in the list name and send!



## E-Mail Etiquette

Like instant messaging and the telephone, e-mail should not be used for personal issues. There are also some etiquette rules to follow when using e-mail.

- Address people properly.
- Don't type in all capitals; this is the equivalent to shouting.
- Use proper spelling and grammar; most e-mail applications include a spell checker.
- Avoid using acronyms.
- If you're on an e-mail discussion list, don't send e-mails that just say, "I agree." Make sure your posts have some value.
- Make sure your contact information (phone numbers as well as e-mail address) is included in each message.
- Know when to use the phone!

There are a few things to keep in mind when sending attachments, too.

- Check the size of your file. If it is too large, some people might not want to receive it, or it might not send at all.
- Make sure your file doesn't have any viruses in it.
- Title your attachment properly (by changing the file name in your operating system) so people won't think it's a virus.
- Try to send files that can be opened by common programs.
- Most e-mail applications will block certain kinds of files that can be harmful, like executable (.exe) files.

## Scheduling Applications

You can also use the computer to schedule your time and keep on top of tasks. The Active Desktop Calendar program is one of the simplest applications out there: it displays a calendar on your desktop (right on top of your wallpaper) and allows you to add tasks and appointments. (Some applications even have a calendar built right in – just make sure you use something you can synchronize all your tools with!)

Another option is integrated scheduling applications. Microsoft Outlook and Lotus Notes are examples of this type of scheduling program. These programs allow you to access e-mail, schedule time, and manage contacts (more on that in a moment) all from one place. They also have advanced scheduling features; Outlook, for example, allows you to schedule meetings and send invitations.

Here are some tips for using computer-based scheduling software.

- Like e-mail applications, take the time to learn how the scheduling software works. You will quickly recoup the initial time investment.
- If an activity (such as a task, meeting, or appointment) will take longer than 30 minutes, schedule it.
- Use the application consistently. Track all appointments and tasks in the same location; don't use a day planner for tasks and some appointments and the software for the rest. Keeping things consistent means you will get things done.
- Use the alarm feature so that you're reminded of tasks and appointments.

## Contact Management Applications

Most e-mail applications feature a way to manage contacts. This is a great tool to make use of; adding people to your contacts keeps all your information in one place, makes it searchable, and makes addressing e-mails and scheduling meetings easier.

There are also some advanced applications that are designed for more advanced contact management and communications tracking. These tools are typically aimed at salespeople.

**What tips do you have for using contact management software?**

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## Session Fourteen: Telephone Etiquette

What are the telephone habits like in your workplace? Is the telephone used as a tool in an optimal kind of way or is it used mainly for personal contact?

*In this session, you'll learn some basic tips and techniques for improving the telephone efficiency of your workplace.*

### Basic Tips

Even if your business doesn't use computers, laptops, or tablets, everyone has a telephone. The key to managing the telephone is the same as using any other device: keep it work-related.

### Cell Phones

Cell phones can be harder to manage than a typical office phone as they're often attached to our hip. If you're in the office or in a meeting, set your phone to vibrate. Even better, have the calls forwarded to your office phone; this way you won't be distracted as easily. And, remember that when you're using a cell phone, you're not in a soundproof box: everyone around you can hear the conversation.

### Voice Mail

You probably don't think of it, but voice mail can save you tons of time. Like other technologies, it only works if you use it properly.

To start, make sure your voice mail is set up properly. This will help reduce phone and e-mail traffic and save you time pushing buttons. Things to check include:

- Can you save messages easily?
- Can you access new and saved messages easily?
- Does your greeting tell people who you are, what you do, and what information should be in their message? Some people even change their greeting every day, detailing where they will be and what their schedule is like.

If you're going to use voice mail, you need to have a system for recording and returning messages. Above all, make sure you return your messages as quickly as possible. As well, pay attention to the content of the message. For example, if the caller is requesting a document, perhaps that could be sent via e-mail.

Here are some tips for leaving messages:

- Don't start speaking until the machine beeps.
- Be clear, concise, and speak slowly.
- If you find that you get flustered while leaving a message, write down and practice what you're going to say beforehand.
- Give your phone number at the beginning and the end of the call.
- Let the person know when you'll be available. (Example: "I'm usually in my office from 9 a.m. until noon. The rest of the time, I'm on the road.")

## Session Fifteen: Instant Messaging

Are you using instant messaging at work? Do you use it at home? Nowadays, applications seem available everywhere: from one phone to another, between tablets and computers, and over the Internet or your intranet.

*In this session, you'll learn about instant messaging etiquette, including the use of constantly evolving acronyms.*

### Instant Messaging Etiquette

Instant messaging allows people to communicate real-time through a computer application. The upside is that it allows people to communicate quickly and effectively. The downside? It can be distracting and rude. You should have policies in place to establish when (and if) instant messaging is allowed. Like the telephone, non-work related messages should be discouraged.

You need to be careful what you say via instant messenger. Sarcasm, innuendoes, and jokes can all be taken the wrong way. Remember, the receiving person will only see your words, not your facial expressions or your body language. Keep instant messages at work short, professional, and to the point.

Controlling instant messaging is a challenge. You can simply ask employees to use messaging software only for work purposes. You can also block messaging websites. Or, if you're in a controlled network environment, you can install enterprise messaging tools so that employees can only communicate within the network.

## Understanding Acronyms

Because the focus of instant messaging is quick communication, people often use acronyms. For example, someone might write “BRB” for “Be Right Back” or “TY” for “Thank You.” These kinds of acronyms are acceptable, as they are polite and widely used. However, if I type, “Last nite I => 2 da movies, twas gr8!” you may have no idea what I’m talking about. (Translation: Last night I went to the movies. It was great!)

**Look at the list of acronyms below. Write down what you think each one means in the space provided.**

Acronym	Meaning
LOL	
BBIAB	
TTYL	
@TEOTD	
2MI or TMI	
LMAO	
ROTFL	
OMG	
BRT	
BTW	
CUL	
2NITE	
CYA	
BBL	
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## Session Sixteen: Telecommuting

Have you ever worked from home? Avoiding traffic, long bus rides, or crowded trains makes telecommuting very appealing. While some employees love it, some employers are not so keen. How do you feel about it?

*In this session, you'll explore the idea of telecommuting and how to make it work for everyone involved.*

### What is Telecommuting?

The world of technology opens a whole new spectrum of possibilities for workers. Consider these scenarios:

- You have hired a husband and wife, but they don't feel comfortable working in the same small office together.
- You have too many employees and not enough office space.
- You have just found the perfect employee... but they're on a different continent.

In each of these situations, the opportunity to work from home could be offered. Consider how valued you would feel if your boss trusted you enough to give you that kind of freedom! In addition to the employee feeling valued, telecommuting has these benefits:

- One less person going to work is better for the environment
- Decreased expenses for the employee (such as clothing, food, and travel)
- Tax benefits
- Better ability to balance home and work life, leading to less stress

However, telecommuting can have its downsides.

- Employee must be dedicated and trustworthy as they will not be supervised.
- Employee may find it difficult to switch from work mode to home mode (or vice versa) as there is no separation between the two.
- Less social interaction with other staff can decrease loyalty.
- Some roles are not suitable for telecommuting, such as most management positions.
- Other employees may feel that the employee is getting a free ride, harming workplace relationships.

There is also the question of distractions, and which environment is more productive.



## Preparing for Telecommuting

For those interested in switching to telecommuting, ask them to write a brief document explaining why they want to telecommute and how they would plan out their work day if they were at home. Think it through: if no one else was telecommuting, would you allow this person?

Then, meet with the staff member. Ask them how they would deal with particular situations: distractions at home, needing a resource that is in the office, or getting up late. Ask how they think their job would change and what alterations they would have to make to execute their responsibilities.

If you do decide to offer telecommuting as an option, here are some things to consider.

- Make your employees accountable. Have them provide weekly progress reports, or have them check in and out online.
- Set expectations regarding work hours and productivity. Have a plan in place if these goals are not met and make sure these consequences are shared with the employee.
- Make sure employees know that this is a privilege, not a right.
- Include your employees in staff meetings and other workplace events, even if it's just a get-together after work.
- Offer the employee the same sick days/personal days as other staff. Set expectations for how these will be handled and how you as the manager will be notified.
- Communicate with the employee via instant message, phone, and e-mail; make sure they're connected.
- Make sure the employee has enough resources (see the checklist below).

### A Resource Checklist

Employees who telecommute will need some or all of the following resources, depending on their role in the company. Make sure your company is prepared for some expenses!

- Computer
- Printer
- Scanner
- Laptop
- Tablet
- Cell phone
- Desk and chair
- Office supplies (pens, pencils, notepads, etc.)
- Books and other resources
- Something to keep them company (a fish is always a nice office-warming present!)

Employers often pay the telephone and Internet bills for a home office, but if they don't, telecommuters can usually claim these expenses on their taxes. Telecommuters should also keep all receipts related to home office work (including mortgage, rent, heat, lights, office supplies, and furniture) and business travel.

### Other Notes

Make sure that there is a contingency plan in place. What will happen if the power, the Internet, or the phone goes out at the employee's house?

There is also the option of combining telecommuting with a typical office environment. The employee could work from home part of the time, and from the office the rest of the time. Or, work from home options could be offered on storm days or for personal reasons (say, a sick child or a doctor's appointment). You may also want to have the employee telecommute on a trial basis, or begin at one day a week and work their way up to a full-time telecommuter. Whatever your decision, make sure it makes sense for both the employee and the employer.

## To Telecommute or Not to Telecommute

### Scenario One

Karen and John are your team’s star performers. They have been married for ten years and there has never been an issue with them working in the same office. However, Karen and John recently filed for divorce. Understandably, they no longer want to work in the same office. If you can’t come up with a solution, one of them will leave the company.

**If you were the supervisor, which employee would you allow to telecommute?**

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**Why?**

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## Scenario Two

Lisa is your company's top salesperson. She has some friends who own their own businesses, and she likes that they can set their own schedule, meaning they often work less than eight hours a day. She has approached you and asked you if she can work from home to take advantage of this flexibility.

**If you were the supervisor, would you allow the employee to telecommute?**

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**Why or why not?**

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### Scenario Three

Your customer service representative, Sam Smith, has just welcomed a new baby into his family. His wife had to go back to work earlier than expected, and he wants to work from home so he can take care of his children and save his family money.

**If you were the supervisor, would you allow the employee to telecommute?**

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**Why or why not?**

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### Scenario Four

Andy Winsome is your company’s only software developer. For the past year, he has been working from home 75% of the time and in the office the remaining time. He has done an excellent job of managing his time, and his productivity is outstanding. His wife just received an amazing offer to relocate to the Bahamas for the next year. She will only accept if Andy can go with her. Andy has approached you with the rationale that electronically speaking, working from the Bahamas is no different than working from home.

**If you were the supervisor, would you allow the employee to telecommute?**

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**Why or why not?**

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### Scenario Five

Your administrative assistant, Susan Jones, has just found the home of her dreams. The problem is that it's an hour from the office. She really doesn't want to add two hours to her day so she has asked you if she can telecommute.

**If you were the supervisor, would you allow the employee to telecommute?**

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**Why or why not?**

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## Session Seventeen: Workplace Rage

Adjusting to new technology at work can frustrate even the most patient person. Whether it is a new computer, a telephone with multiple buttons, or an encrypted drive, it seems that we are always learning.

*In this session, you'll learn about rage, what makes it contagious, how to prevent it, and how to deal with it effectively.*

### Preventing Workplace Rage

Here's an easy five-step plan for preventing workplace rage.

- Before you start using any device or program, make sure you understand how to use it. Don't blow past the instructions and then get mad because you can't use it. (This goes for simple devices such as printers; a lot of printers today can do a lot of things!)
- Have patience when using the device or program, especially if it's your first time.
- If you start to get frustrated, take a deep breath.
- If things aren't working out, take a step back. Don't blame the machine; it's just following your instructions. Start from the beginning and take steps slowly, one at a time.
- If the process has been taking too long, or you feel like you're about to blow your top, step away from the task. When you've cooled off, ask someone for help. If you take this step, watch the person carefully and ask polite questions. Don't take your frustration out on them.

If you as a manager see that an employee is frustrated or angry with a device or program, it needs to be dealt with. If the employee damages the equipment (intentionally or unintentionally), it can cost the company. (A person I once worked with went through three laptop hard drives in a month. Turns out, he threw his laptop every time he got frustrated... which was a lot.) If a device needs to be repaired, it costs the company in time lost and in actual repair costs.



## Session Eighteen: It's Not Working!

It's entirely possible that you will encounter times when your technology does not work. Systems of all sorts fail, machines break, tools get old, and sometimes people are not using things as intended.

*In this session, you'll learn what to do when things are not working as expected, from reviewing your policies to getting things fixed.*

### Introduction

So far, we've talked about how you as a supervisor can make your workplace technology-friendly and how you can use technology to make life easier for everyone.

But what happens when it doesn't work? When employees start abusing telecommuting privileges? When employees start spending all day on instant messenger instead of working? When cell phones start taking over your meetings?

First and foremost, be proactive. Have a system usage policy in place. Make sure everyone understands and signs it. It's never too late to employ such a policy or to revise it. Just remember to communicate those changes.

Next, make sure you deal with issues. If a staff member is constantly making personal calls, you could have a private meeting with him and say something like, "John, I noticed you're on the phone a lot lately. Is there an issue at home that you need time off to deal with?" This is a simple management practice, but it's especially important with technology issues to nip it in the bud.

Let's look at some sample scenarios.

### Your system usage policy isn't working.

This happens a lot; a policy is put in place and then forgotten about. First, look at why the policy isn't working. Is it unenforceable or not being enforced? Do managers practice it as well? Are exceptions made? Is the policy outdated?

Once you've got an idea of the problem, look at some solutions. If the policy isn't being enforced, why not? If exceptions are being made, why? If it's not enforceable, then it needs to be changed. If it's out of date, it needs to be updated. Once the changes are made, managers should have a meeting with staff to review and re-sign it.

### **You've been too flexible.**

You've been pretty lax, allowing cell phones, instant messaging, and web browsing. Unfortunately, you've noticed lately that communicating with the outside world seems to be the priority... not working.

The first step is to acknowledge the problem. It's never too late to fix it! Draw up a system usage policy and try to plan for the future. (Employees might be getting tablets soon? Include guidelines for those as well.) Then, meet with staff, explain why the policy is being instituted, and have everyone sign off on it.

### **Telecommuting has turned into a permanent vacation.**

You've allowed several employees to telecommute, and now everyone wants to do it. Plus, a few of the telecommuters seem to be "Away" more than they are "Online."

Our suggested solution? Have a meeting with all staff, telecommuters included. Explain the reasons why someone would be able to telecommute and the responsibilities that they have. (They may even have extra responsibilities, such as online task tracking or progress reports.) Make sure it's clear that telecommuters work as many hours as everyone else, just not in the same location.

For the telecommuters that are slacking off, make it clear that telecommuting is a privilege, not a right. Their abuse of the privilege could result in it being revoked for everyone else. Then, set clear goals, work hours, and responsibilities. Outline consequences if these requirements are not met.

### **Cell phones rule your meetings.**

There are a few ways to deal with cell phones. The best bet is to be proactive; once you're in the meeting, ask everyone to turn their phones off.

If you've forgotten to do this and people start getting phone calls in the meeting, deal with it right away. Ask everyone to turn their phones off immediately and apologize for not having done so already.

If it's not possible to turn phones off during the meeting, participants should set their phones to vibrate and only take calls if absolutely necessary (we're talking life and death here!). They should also step outside the room to take their call.

In any meeting, it's critical for the meeting leader to have his/her phone turned off and to be free of distractions.

## **Employees are careless with equipment.**

A keyboard ruined by coffee. A run-over laptop. A cell phone chewed by a dog. You spend half your time requisitioning extra equipment, your IT expenses are through the roof, and if you hear the phrase, “I had an accident...” one more time you’ll probably go through the roof yourself.

Sounds familiar? You need to make sure employees are aware that they are responsible for their equipment. They must treat it as if it was their own, paid for from a year’s worth of hard savings. You may want to outline this in a policy and have everyone sign it.

If things get too out of hand, you may have to outline who is responsible for what. If the hard drive on the laptop fries, the employer will be responsible for that. But if your dog eats your smartphone, you’ll be responsible for paying for the replacement. This is a drastic solution and shouldn’t be implemented without some serious thinking.

## Session Nineteen: A Policies and Procedures Checklist

When we are making changes, it helps to have something quick and easy to refer to. Are you someone who likes lists and checkboxes, or do you prefer an electronic type of list?

*In this session, you'll get a quick look at a policies and procedures checklist to help you manage technology efficiently.*

### A Policies and Procedures Checklist

To manage technology efficiently, the following policies should be in place.

- System usage policy
- Device responsibility policy (may be included in system usage policy)
- Ergonomic guidelines

You'll also want the following procedures:

- Procedure for reporting system issues
- Telecommuting responsibilities
- Telecommuting progress reporting
- Device tracking system
- Requisitions (for repairs or new equipment)

## Recommended Reading List

**If you are looking for further information on this topic, we have included a recommended reading list below.**

Blanchard, Ken, Tim Burrell, Vicki Halsey, and Mike Song. *The Hamster Revolution: How to Manage Your Email Before It Manages You*. Berrett-Koehler Publishers, 2008.

Dul, Jan, and Bernard Weerdmeester. *Ergonomics for Beginners (3rd Edition)*. CRC Press, 2008.

Guerin, Lisa. *Smart Policies for Workplace Technology: Email, Blogs, Cell Phones & More*. NOLO, 2009.

Guerin, Lisa, J.D. *Smart Policies for Workplace Technology: Email, Blogs, Cell Phones & More*. NOLO, 2013.

Merson, Len. *The Instant Productivity Toolkit*. Sourcebooks, Inc., 2005.

Miller, Paul. *The Digital Workplace: How Technology Is Liberating Work*. Dog Ear Publishing, 2012.

Morgenstern, Julie. *Never Check E-Mail In the Morning: And Other Unexpected Strategies for Making Your Work Life Work*. Touchstone, 2005.

Rayburn-Trobaugh, Catherine. *The Field Guide to Telecommuting*. Word Branch Publishing, 2012.

## Personal Action Plan

Now that you have completed this course on **Working Smarter: Using Technology to Your Advantage**, how will you use the things you have learned? Creating a personal action plan can help you stay on track and on target. When you take responsibility for yourself and your results, you get things done!

*In this session*, you will be asked questions to help you plan your short-term and long-term goals. This final exercise is a way for you to synthesize the learning that you have done and to put it into practice.

**I am already doing these things well:**

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**I want to improve these areas:**

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**I have these resources to help me:**

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<b>As a result of what I have learned in this workshop, I am going to...</b>	<b>My target date is...</b>	<b>I will know I have succeeded when...</b>	<b>I will follow up with myself on...</b>