SHORELINE
MEDIA MARKETING SOLUTIONS

Remote Work Checklist
5 Steps to Ensure Business Continuity

STEP 1

Set up your remote work environment

- ☐ Run our browser test to make sure your internet connection is adequate for managing calls via the softphone.
- ☐ If needed, reference our network recommendations and best practices.
- ☐ Make sure your team also has all the equipment they need, such as headsets, to function remotely.

WORK FROM HOME PACKING LIST

- · Headset / Earbuds
- · Power cords & cables
- · Computer mouse
- · Comfy computer chair (it's worth it!)

Check out our team's must-haves for working from home →

STEP 2

Add new users onto the platform

- ☐ With more employees needing to access your tools, you may need to upload new users to CTM, which you can do in bulk or by individual.
- ☐ Update the user profile with the agent's contact info and add them to appropriate schedules or queues based on their availability.

STEP 3

Update call routing and queues

- ☐ If not using the softphone, you can change your receiving numbers so that calls go to the cell phones of individuals working remotely.
- ☐ Or, simply re-route your calls by organizing into queues within CallTrackingMetrics.

STEP 4

Implement additional methods of contact

- ☐ Open up live chat as a method for customers to communicate with you directly.
- ☐ Utilize bulk text messaging to communicate service changes to both your team and customers.

STEP 5

Streamline communications

- ☐ Consider setting up a separate information phone line.
- ☐ Or, create an IVR to play different messages to your customers to keep them informed until you return to business as usual.