

# THE NUTS AND BOLTS OF TRANSITIONING TO A REMOTE OFFICE:

## Logistics and Vendor Guide



# Table of Contents

---

<b>3</b>	<b><u>5 Essential Elements of an Optimized Distributed Workforce™</u></b>
<b>6</b>	<b><u>Transitioning to a Distributed Workforce</u></b>
<b>7</b>	<b><u>Vacating Your Office Space</u></b>
8	<u>Sample Move Out Plan</u>
11	<u>Move Out Checklist</u>
<b>13</b>	<b><u>Vendors</u></b>
14	<u>Accounting</u>
16	<u>Collaboration</u>
19	<u>Document Management Solutions</u>
21	<u>Fulfillment Services</u>
22	<u>Flexible Office Space</u>
24	<u>Secure Online Document Portals</u>
25	<u>Phone/Communication Support</u>
27	<u>Virtual Mailbox</u>
28	<u>Managed Services Providers</u>
<b>29</b>	<b><u>How to Get Help</u></b>



# 5 Essential Elements of an Optimized Distributed Workforce™

---

Successfully transitioning your office to operate remotely can feel overwhelming. Many offices have been functioning virtually temporarily for well over a year. Leaders have seen that their teams are more productive working from home and are now looking for guidance on making a permanent leap to remote work. Researching and implementing the necessary tools and practices can itself become a full-time job. The key to successfully implementing such a change is to mindfully and deliberately develop a plan.

Setting your team up for success involves consideration of staff, organization-wide, and member/customer needs. Balancing these factors requires exploration and research to determine the best fit for your group. Focusing on the **5 Essential Elements of an Optimized Distributed Workforce™** can make the transition smoother and result in the successful functioning of your distributed team.



## 1. Communications



Communication, especially in a distributed workforce, can be challenging. Organizations need to strike the right balance between communicating too much and not enough and between communicating via too many channels and not using communication tools effectively. Everyone must be clear on the rules and standard practices for when, where, and how to best share information and where, when, and how to best respond. Leaders must communicate their vision, strategy, and expectations clearly and effectively to a broad audience of employees, customers, partners, and investors. Managers must communicate effectively with all organization levels – sharing the leadership’s vision with colleagues while simultaneously sharing work issues with leaders to ensure an authentic dialogue. Finally, employees must have tools and training to effectively communicate with each other and at all levels of the organization.

## 2. Operations



Transitioning from a conventional business model with all employees located in physical facilities to one with remote employees creates the need to take a fresh look at internal operations. This includes knowledge management, policies, practices, and the overall functions of your office, whether staff members are in-person or remote. While the main purpose of this guide is to address the logistics portion of ‘Operations,’ ***we strongly recommend that you take this time to review your office policies and practices.*** If you have not updated your organization’s documents, specifically your Employee Handbook, to address remote work, this should be high on your list of priorities. If you don’t have a full HR department or legal counsel, you will want to consider engaging these services with a consultant like Achurch to ensure your policies align with your new workforce model.

## 3. Manager Development



The management of distributed teams often requires a more tactical approach to accomplishing strategic initiatives than when all staff members work side-by-side in a physical space. Effective management in this environment is a learned skill that requires coaching, development, and feedback even for managers who are highly effective in person. As you move to a distributed workforce, consider investing in training for your managers so that you are setting your entire staff up for success. Behaviors like focusing on managing to outcomes rather than managing staff input (e.g., the specific number of hours they worked in one day) and creating accountability without micromanaging should be part of your manager development training. You can reference some management tips by going [here](#).

## 4. Employee Engagement



Overall, surveys and data show that engaged employees are happier, healthier, and [more productive than their less-engaged counterparts](#).

Employers can support employees best by providing programs to help improve their well-being and encourage regular 1:1 meetings with their managers. If used effectively, these efforts help to reduce absenteeism and burnout and promote a more positive work experience. You can learn more about how to keep your team engaged by going [here](#).

## 5. Culture



The 2020 shift of many organizations to a distributed workforce exposed the outdated notion that teams need to operate in-person to get work 'done.' Optimizing work well 'done' means your organization's culture should include words like Agile, Supportive, Collaborative, Innovative, Transparent, and Trusting. If you are not doing that, then it's time to reconsider your approach to team dynamics. The aforementioned words are characteristics that many now seek out in a remote workplace. The pandemic gave many workers the chance to step back and re-evaluate their professional life. Studies show many are intentionally focusing on office culture as they look to new positions and new companies to meet their personal needs. Don't neglect your culture and risk losing your top talent.

In every organization, aspects of each of these elements will be core strengths, while other aspects may present challenges. Each element is essential to address individually so that when placed together, your organization has a cohesive structure that encourages trust, accountability, and productivity organization wide.

While each element is important, this guide will focus on the element of "Operations" as it relates to the logistics of transitioning to a remote work environment. It is designed to provide tips and information on processes, functions, vendors, and timelines that can help you successfully transition your office to a fully remote workforce environment.

# Transitioning to a Distributed Workforce

---



Transitioning to a fully remote team (aka distributed workforce) involves more than just packing boxes and ending a lease. Whether you have 30-days to vacate a space or time to make more calculated decisions about the process, there are many factors to consider. Many of the tools outlined in this guide are processes that can be put into place regardless of the [workforce model](#) you have chosen to implement.

We anticipate the COVID-19 pandemic will impact decisions on office space use and allocation for years to come. Many organizational leaders will compare the cost benefits of operating in a brick-and-mortar space vs. operating remotely. So, whether you are taking things a year or two at a time or have made the final decision to operate remotely permanently, there is much to consider when ensuring the continued success of both your organization and your team.

## Evaluate

If you have decided to operate your workforce remotely permanently, you will want to fully evaluate the tools you use daily to determine what you can outsource. There are various outsourced vendors depending on your needs. Once you have made the decision to outsource a specific task or series of tasks, depending on the scope of work, sending a request for proposal (RFP)<sup>1</sup> to a vendor who services that task(s) might be the best next step. Like the selection process for other crucial tools, you will need to invest some time initially to ensure you have found the best option for your organization.

In addition to the resources and vendors listed here, your organization may need to reevaluate current systems or tools used to ensure functionality aligns with the needs of a distributed workforce. Organizations are just beginning to learn about the multiple

---

<sup>1</sup>If you are struggling with how to assess the scope of work and/or create the RFP [contact us](#). We can help.



layers of everyday processes that are changing rapidly due to distributed workforces. With increased numbers of remote workers, typically standardized tasks - such as I-9 forms – may have new requirements for completion and filing. We recommend that your organization's HR department pay close attention to these updates or enlist a service/vendor to assist them with this process. Due to each organization's HR-specific requirements and the process involved in finding the right match, we have not included vendor details here. However, if you need help selecting an HR vendor, reach out to Achurch for direct assistance.

While outsourcing certain business functions might lull you into an 'out of sight, out of mind' attitude, outsourcing rarely means you can completely wash your hands of the task's responsibilities. Be sure there is a team 'owner' for each tool/technology/process that you are changing. Designate a 'point-person' on your staff to serve as the main contact for the new service(s) who can evaluate the quality and value of the vendor to the organization on an annual basis. In this constantly evolving arena of remote office services, new businesses pop up regularly. While you don't want to continually change systems, you do want to ensure the vendor continually provides tools that meet your needs. Be sure the vendor(s) you have selected serve(s) this purpose within your budget over the life of your contract.

## Vacating Your Office Space

---

### The Move Out

The most tangible aspect of transitioning to a distributed workforce is the physical move out of your office space. Whether you have one or several offices, putting a plan in place around deadlines is often the most pressing task. Many tasks need to be coordinated so that your team can communicate and work efficiently and effectively during the move — the less disruption to your staff, customers, members, and other constituents, the better.



# Sample Move Out Plan

Asking these questions will help you determine your timeline and specific needs.

## #1 STAFF NEEDS





## #2 OFFICE FURNITURE

Will the current office furniture (conference tables, chairs, cubicles, etc.) ever be used again?

YES NO

Whether your initial response to this question is yes or no, we suggest you start by doing a high-level cost-benefit analysis. This should include costs such as:

- ▶ The value of your furniture and equipment
- ▶ Storage unit for a specific or extended time period
- ▶ Moving items from the current location to the storage unit
- ▶ Moving items from the storage unit to another space

Consider the size and type of storage unit needed (temperature-controlled, accessibility to staff, etc.).

Determine if your hired movers will be able to access the storage unit, or if a point person from your organization will need to be present during the move.

Determine who from your organization will have access to the storage unit and control that access.

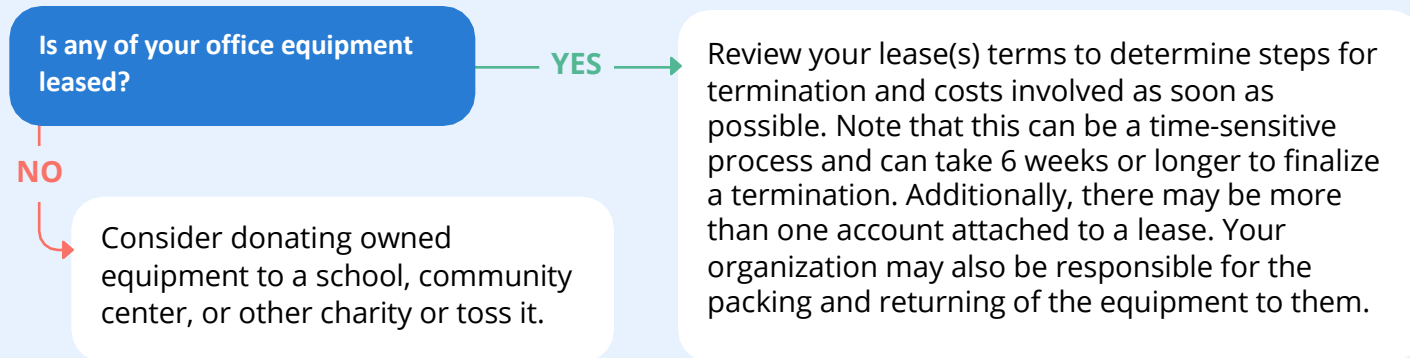
Determine how you will dispose of your unwanted furniture and equipment. While most buildings will NOT handle this for you, it never hurts to ask your building manager as a starting point.

Look to local charities who may be interested (houseless shelters, community centers, etc.). Many will come to you and handle the removal of the items.

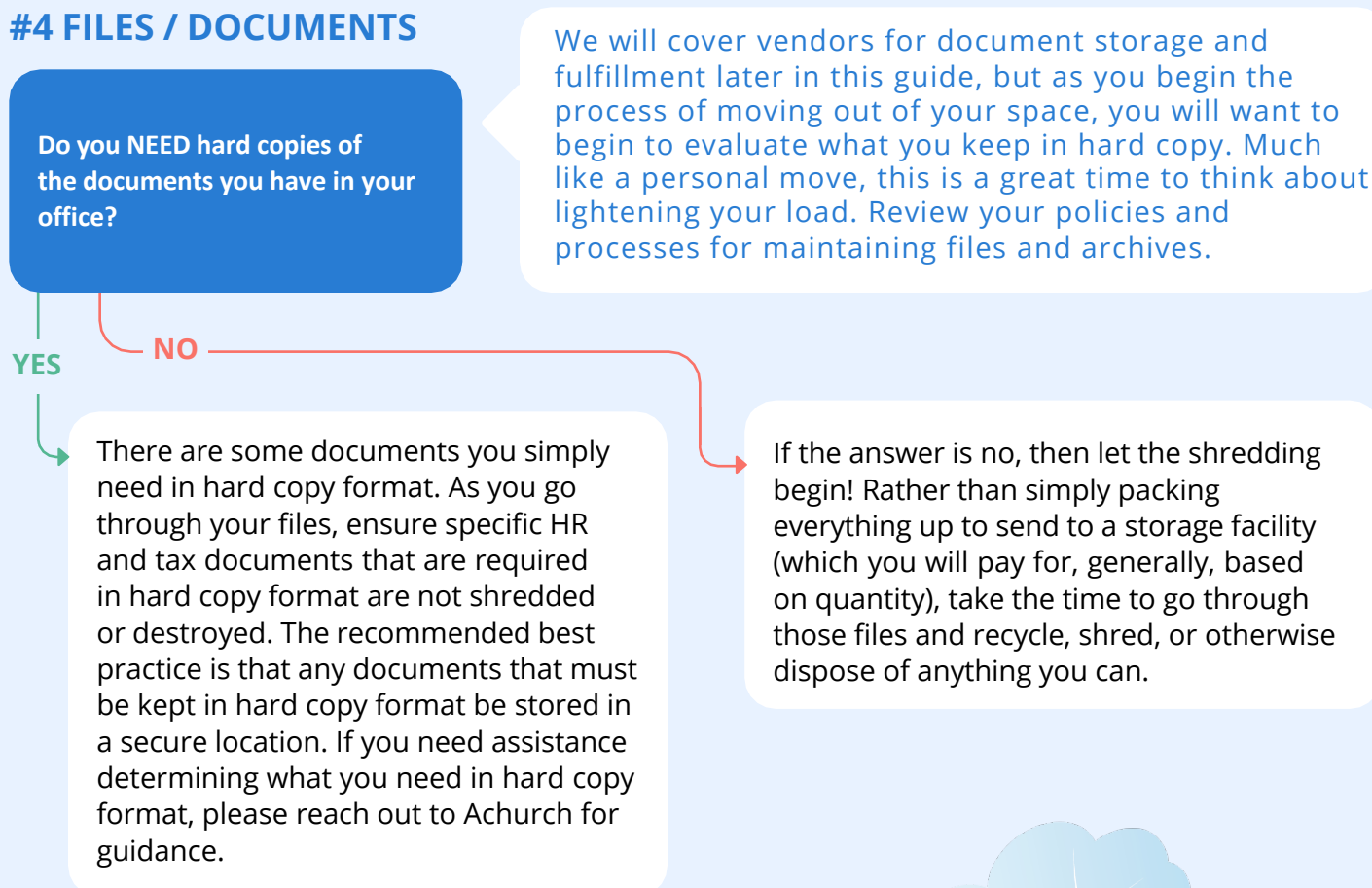
Junk removal companies will haul items for a fee. Many charge by the amount of space the items occupy in a truck, so it can be difficult to estimate costs. There are junk removal companies that will also donate items that are in 'good' condition. Most do not provide tax receipts if items are donated, but the benefit is the upcycling.



### #3 LEASED EQUIPMENT



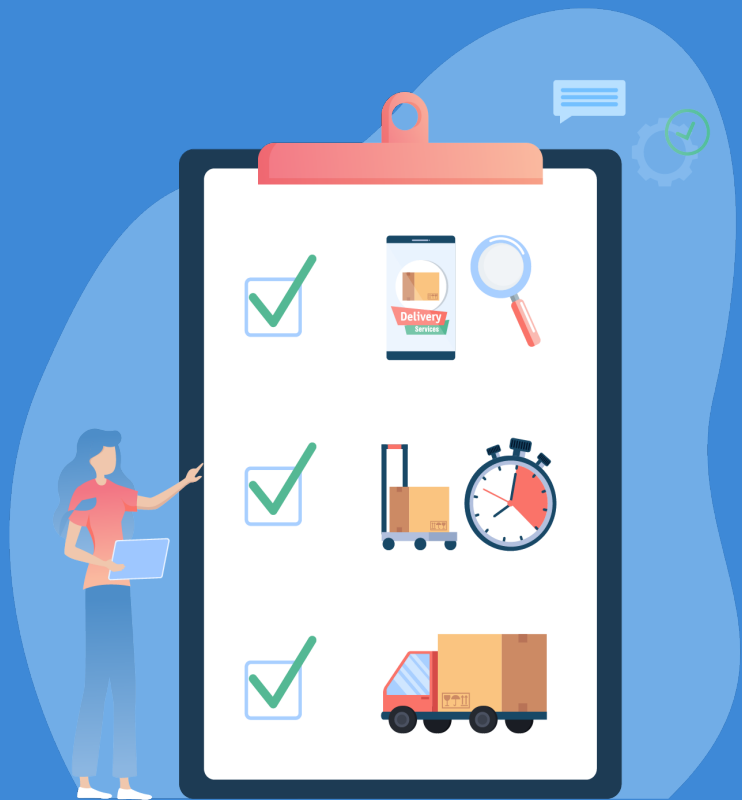
### #4 FILES / DOCUMENTS



# MOVE OUT CHECKLIST

---

Ideally, you will have several months – even a year - to prepare for an office move. Priority ONE should be focusing on the terms of your building/space lease or sale. Those terms must be negotiated, and your move-out timing should be finalized before moving forward with most of the tasks on our list. As with any major project, the more time you have to plan, the better for everyone on your team. There are some tasks listed throughout this document (think file storage and cleanup) that can (and should) be done regularly by your staff – not just in advance of a major move.



The more you have to condense the timeline, the more staff and staff hours are required to complete the move out quickly and thoroughly. If you have less than 60 days, be mindful of the fact that the staff member(s) assigned to coordinate the move will need a significant portion of their time resourced to this effort.

The last 90-days is often considered the final countdown, and this checklist is based on those final 90-days. It is designed as a general guide for the tasks that should be at the forefront of your mind as you complete your transition. Please note that some services for consideration listed in this eBook may require more investigation (i.e., finding a fulfillment provider) and are NOT included in our checklist as they require more steps and may also require buy-in for completion from multiple departments and/or stakeholders. If you have less than 90-days to move out, condense this list to a timeframe realistic to your move-out requirements. If you are having difficulty or are looking for assistance with your move, [contact Achurch](#) for help.

## 90-days out



- ☐ Contact your bank to begin the process of establishing a lockbox (consider setting up a lockbox TODAY – even if you do not plan to transition to a fully remote environment)
- ☐ Copy machine lease termination
- ☐ Postage machine lease termination
- ☐ Fax machine lease termination
- ☐ Scanner lease termination
- ☐ Teleconference equipment (phones) lease termination

## 60-days out



- ☐ Select and sign contract for a Document Storage Facility
- ☐ Select and sign contract for storage unit (for furniture/equipment if you are keeping anything)
- ☐ Cable/Internet services lease termination
- ☐ Determine new mailing address and select Virtual Mailbox or USPS Post Office Box
- ☐ Contact Building Manager to arrange move out days/times (especially important if you need to reserve a loading dock or elevators)



## 30-days out



- ☐ Select and confirm a Moving Company (if needed). Your building may also require a Certificate of Insurance
- ☐ Organize paper files/documents to include in the Document Storage Facility
- ☐ Contract with a shredding service to destroy unnecessary paper documents (if needed)
- ☐ Complete form USPS Application for Delivery of Mail Through Agent authorization form 1583 if using a virtual mailbox provider. (Note: form must be notarized)
- ☐ Complete Standard Forward Mail & Change of Address request with the USPS
- ☐ Schedule staff pick up of office supplies (if you are allowing staff to take equipment from your office, set a schedule of who will come in and when)

## 14-days out



- ☐ Schedule transition of paper files/documents to storage facility/fulfillment center
- ☐ Ensure delivery/shipping instructions for all leased equipment is confirmed

## 7-days out



- ☐ Share move out schedule with Building Management
- ☐ Confirm elevator reservation/loading dock reservation if needed
- ☐ Confirm movers/junk removal if needed

## \*Tips for Move-Out Week\*

- Have a dolly, extra packing tape, scissors, and boxes on hand
- Always have cash on hand for tipping movers or other delivery workers
- Feed your staff if they come in to help with the move



## Vendors<sup>2</sup>

---

Without outside vendors, there would be no way for organizations to operate virtually. We have separated virtual workforce vendors into the following categories and will explore their uses within each one:



Accounting



Flexible Office Space



Collaboration and Task Management Technology



Secure Online Document Portals



Document Management Solutions



Phone/Communication Support



Fulfillment Services



Virtual Mailbox



Managed Services Providers



### DISCLAIMER

*Our lists are not exhaustive as several categories can have hundreds of vendors within them. Instead, this guide is meant to serve as a starting point for you to narrow your focus. We have included hyperlinks to each website so you can easily gather more information from the solution provider.*

We have developed a general scale to help narrow the scope of pricing provided by vendors. Depending on the service, these fees could be per user/per month, annually, or overall. The \$ scale is simply meant as guidance to help inform preliminary exploration of the tools listed.



\$0 - \$25



\$25 - \$100



\$100+

<sup>2</sup>Note: Cost ranges and features listed in this section are subject to change at any time by the vendor.

## Preferred Partners

Highlighted vendors are Achurch Consulting preferred partners. By mentioning Achurch when contacting these vendors, you may be eligible for discounts based on our relationship. If you have any questions about our preferred partners, please [contact Achurch](#).



## Accounting

If you haven't already discussed your internal accounting processes, now is the time. What is your process for accounts payable and receivable – especially around payments made by mail? How does a distributed workforce impact that process? If your workflow involves the manual entry of data or in-person approval of payments and invoices, consider implementing a system like the following suggested options that will automate much of these tasks (and reduce or eliminate human error as a bonus!).

In addition to digitizing your accounts receivable and accounts payable processes, begin using a lockbox utility. The lockbox utility is a service offered by commercial banks to simplify the collection and processing of account receivables by having those organizations' customers' payments and remittance documents mailed directly to a location accessible by the bank. Organizations can list the address (likely a P.O. Box) on invoices so your customers know where to send payments. Lockbox banking is a cash flow improvement technique in which you have your customers' payments delivered to a special post office box instead of your business address. Depending on the nature of your business, the contents of your lockbox can be removed and processed once a day or more often if required. Your bank opens the payments and then processes the payments for deposit directly into your bank account.



Whether your office is operating remotely or in-person, a lockbox is a secure and effective accounting best practice tool

Platform Name	Primary Use	Cost	Platform Highlights
<a href="#"><u>Bill.com</u></a>	AP/AR automation	\$\$	Manual data entry is eliminated with Bill.com. It automatically captures data from invoices, intercepts and recognizes human errors, and starts the approval process automatically. It recognizes workflows, such as bill approval routing and thresholds for payment, and automatically creates those business rules on behalf of customers. It integrates with Sage Intacct, Oracle netSuite, QuickBooks and Xero. It supports ACH/International payments.
<a href="#"><u>Nvoicepay</u></a>	AP automation	\$\$	Nvoicepay is a payables automation solution that streamlines all your invoice payments into a single digital workflow, across multiple locations, bank accounts, payment methods, and approval hierarchies. When it's time for a payment run, you submit and approve payments in the software, and Nvoicepay pays vendors according to their remit-to instructions and in their preferred method. Manage payment data for all of vendors and proactively reach out to resolve unprocessed payments.
<a href="#"><u>OnPay Solutions</u></a>	AP automation	\$\$ (Offers free trial)	OnPay Solutions automates and streamlines your accounts payable invoice and payments processes. From automating and digitizing incoming invoices to disbursement of payments; everything is automated. Issue checks, ACH, wire transfers, and virtual cards regardless of your accounting system limitations. It works with any accounting or ERP system (claim), VCard, ACH, or wire.
<a href="#"><u>PN<sup>3</sup> Solutions</u></a>	AP automation	<a href="#"><u>Contact for pricing details</u></a> (Offers free trial)	Links into your existing financial systems enabling you to rapidly implement and deploy electronic purchase and payment authorization workflows configured to adhere to your policies and procedures. It integrates with Sage Intacct and Microsoft Dynamics.
<a href="#"><u>Versapay</u></a>	AR automation	\$\$	Versapay is a cloud-based accounts receivable (AR) automation platform designed to help automate the invoice-to-cash cycle and eliminate manual tasks. Versapay aims to streamline AR processes with invoicing, collaboration, payment, and reconciliation tools, while supplier and customer portals give users quick and centralized access to all customer, invoicing, and payment information.





## Collaboration and Task Management Technology

In a distributed workforce setting, collaboration needs nurturing, diligence, intention, and the right tools. Face-to-face meetings around a conference room table with a whiteboard to jot ideas and brainstorm will not happen in a distributed workforce setting. Yet, your team will still need to collaborate, track progress, assign tasks, and note timelines and deadlines. Numerous technology solutions offer ways for teams to work seamlessly - both internally and externally - without relying on emails and phone calls. There are various tools available for both planning and project management (including for non-project managers) that can help keep a team on track and in sync. It requires a mind shift to examine individual tasks and organize them under different 'projects,' but by doing so, everyone becomes their own 'project manager' tracking and responding to assigned tasks. The platforms in this section help to facilitate this effort by automating and streamlining workflows which ultimately increases transparency into accountability and task management. Because no one tool is right for every organization, take the time to assess how each department is involved in organization-wide projects to ensure the technology you implement meets your needs.

Platform Name	Primary Use	Cost	Platform Highlights
<a href="#"><u>Asana</u></a>	Planning & Project Management	\$\$	Asana is a web and mobile application designed to help teams organize, track, and manage their work. You can use rules to automate routine tasks, so your team doesn't have to think about them. Your team has one shared space for all your work. You can switch between project views, set task assignees, and specify due dates.
<a href="#"><u>Basecamp</u></a>	Planning & Project Management	\$\$	Basecamp is a real-time communication tool that is designed to help teams stay on the same page using to-do-lists, calendaring, due dates, and file-sharing, and more. It offers messages, real-time chat, to-do lists, schedules, file storage, document sharing, and check-ins. They are currently offering a flat rate for an unlimited number of users.

Platform Name	Primary Use	Cost	Platform Highlights
<a href="#"><u>Chanty</u></a>	Chat and Document Sharing	\$	Chanty is a simple team chat powered by artificial intelligence. Its Teambook feature is a single hub for neatly organized tasks, conversations, pinned messages and all the content you share. Get quick access to an entire message history and easily find people from your team. You can also activate Conversation actions when in conversation via a three-dot menu to pin messages, rename or leave conversations in a single click.
<a href="#"><u>Flock</u></a>	Chat and Document Sharing	\$	Flock organizes all your conversations, productivity tools, and apps in one place. Its features include: video conferencing, channel messaging, voice notes, integrated search, file sharing, to-dos, polls, reminders, security, and integrations. You can share files hosted on a cloud storage service such as Google Drive, Microsoft OneDrive, and Dropbox. Files shared directly in Flock (from local storage) count towards your team's storage limit.
<a href="#"><u>Google Drive</u></a>	Document sharing	\$\$	Google Drive is a file storage and synchronization service developed by Google. Share documents and files, build out spreadsheets and make presentations with Docs, Sheets and Slides apps.
<a href="#"><u>Jira</u></a>	Planning & Project Management	\$	Jira plans, tracks, and manages your agile and software development projects. Top features include: scrum boards, flexible Kanban boards, roadmaps, and agile reporting.
<a href="#"><u>Microsoft Teams</u></a>	Chat and Document Sharing	\$	Teams allows you to chat, video meet, call, and collaborate on documents all in one place. Offered as part of Office 365 subscription, it has seamless integrations with ALL Microsoft products including Planner, Forms Pro, Power BI, and more. It also offers extensive extensibility through countless integrations to other apps such as Trello, Jira, and Zoom.
<a href="#"><u>Monday.com</u></a>	Planning & Project Management	\$\$	Everything starts with a board, or a visual super table. Start with one of 200+ templates or drag and drop 30+ column types to customize workflows. Groups, items, sub-items and updates are synced in real time. You can also notify team members, add files, and link boards together to keep track of what's going on.


Platform Name	Primary Use	Cost	Platform Highlights
<a href="#"><u>Podio</u></a>	Chat and Document Sharing	\$\$	Podio is a collaboration software that helps teams communicate and organize to facilitate the completion of tasks and projects. It does this through a system that puts content, context, and conversations in one place.
<a href="#"><u>Slack</u></a>	Chat and Document Sharing	\$\$	Slack facilitates teamwork in channels — a single place for messaging, sharing tools and files to help everyone save time and collaborate together. You can share channels with outside organizations and vendors with whom you regularly work. You can talk over voice or video calls directly from Slack, and you can share your screen, too.
<a href="#"><u>Smartsheet</u></a>	Planning & Project Management	\$\$	Smartsheet is a dynamic workspace that helps you manage projects, automate workflows, and rapidly build solutions at scale. It integrates with many platforms like GoogleDocs, Salesforce, Teams, Slack and more.
<a href="#"><u>Trello</u></a>	Planning & Project Management	\$\$	Trello is an online tool for managing projects and personal tasks. You can add comments, attachments, due dates, and more directly to Trello cards. You can use built-in workflow automation with their “Butler.” You can also integrate the apps your team already uses directly into your workflow.
<a href="#"><u>Viber</u></a>	Chat	\$	Viber is a calling and messaging app that connects people with a free and secure connection worldwide. All Viber calls and chats are protected by built-in end-to-end encryption. It can be used on desktop and mobile devices and has been used for teams during trade shows to replace walkie talkies. They also allow for communities, and to promote your ecommerce and business messages on the app to a global audience.
<a href="#"><u>Wrike</u></a>	Planning & Project Management	\$\$	Wrike is an online project management software that gives you full visibility and control over your tasks. It offers Gantt charts, status reports with auto-updates, and more. You can also coordinate your entire marketing department to produce high-impact, multi-channel online campaigns. You can coordinate internal and external teams.



## Document Management Services

In your physical office space, you likely have filing cabinets and storage areas containing years' worth of documentation. Transitioning to a remote office structure is a great time to thoughtfully determine what you actually need to keep in paper form and what can be stored electronically. Consider how much paper you truly need to access; it's probably not as much as you think.

For the documents you do need available to specific staff members, be sure to discuss with staff how those documents are stored in their remote office space. Do staff have (or need) file cabinets in their workspace that can be locked? ***Our recommended best practice is to store all confidential information in a secure location rather than in an employee's home office.*** For sensitive documents that must be maintained in hard copy, there are various solutions. Store your archives with a document management company that specializes in storage (temperature controlled and secure). Should you need to access a document, submit a request for a specific item to be scanned and sent to you for secure online storage. As a bonus, as documents age out of their requirement to be kept in a physical form, shredding is an option with most of these companies.

Platform Name	Primary Use	Cost	Platform Highlights
<a href="#"><u>GRM Storage</u></a>	Document storage	\$\$ 	GRM's robust, cloud-based content services platform serves as the centerpiece of the digital solutions that GRM provides its clients. Serving a diverse base of industries such as healthcare, government, legal, finance, and human resources services include digital conversion, advanced data capture solutions, document management systems, workflow automation, legacy data archiving, compliance and governance, business process management, and advanced analytics capabilities, as well as a full suite of document storage, scanning, and physical document management services.


Platform Name	Primary Use	Cost	Platform Highlights
<a href="#"><u>Digital Documents LLC</u></a>	Document storage	\$\$	Serves as Business Process Outsourcing (BPO) partners to organizations that need a more cost-effective approach to managing large-scale critical document collections. Over 30 years of experience successfully designing and implementing paperless office solutions and managing file conversions for public and private companies in industries ranging from financial services to products, and verticals ranging from accounts payable to legal.
<a href="#"><u>Iron Mountain</u></a>	Document storage	\$\$	Global leader in information management, digital transformation, secure storage, secure destruction, data centers, cloud services, art storage, and logistics. National and worldwide locations.
<a href="#"><u>Record Nations</u></a>	Document storage	\$\$	Extensive, nationwide network of document management, scanning and storage companies allows them to be a one-stop shop for all record storage and scanning services, no matter where you are in the United States. Tape rotation and tape back-up services are also offered.
<a href="#"><u>Vital Records Control</u></a>	Document storage	\$\$	A leader in providing high-quality records and information management (RIM) solutions, including document conversion services, cloud hosting, paper shredding, and hard drive destruction. Server-based system for electronic record storage. <i>*Only service provider in Alaska, Bahamas, and Hawaii.</i>
<a href="#"><u>Washington DC Scanning</u></a>	Document storage	\$\$	Serving the Greater Washington, DC area. Offering high-quality document scanning solutions at your office or at a premier conversion facility. Services include document scanning, microfiche scanning, microfilm conversion, architectural drawing conversion, cloud storage, and retrieval solutions.



## Fulfillment Services

Do you have an online store? If so, how are you sending items like publications to members? Many organizations and associations are moving more and more toward downloadable documents for books and publications, but for items like those branded coffee mugs, t-shirts, and other items that you sell or give away, how will those get to your members/customers?

Fulfillment services are a one-stop option for storing your inventory and shipping it to customers on-demand. Many integrate e-commerce platforms (i.e., Shopify) and association management systems (AMS) for seamless service. User-friendly portals provide near-real time updates on inventory and orders, as well as projections for future inventory needs.

Platform Name	Primary Use	Cost	Platform Highlights
<a href="#">ShipMonk</a>	e-Commerce/ Fulfillment	\$\$\$ 	ShipMonk lets customers easily manage their supply chain and take a proactive approach to inventory management, so that everyday challenges never slow down growth. Automatically import orders from all of your sales channels with pre-built integrations. Track inventory levels in real-time and know exactly when to reorder product. Pricing plans for smaller - organizations with limited monthly shipping available.
<a href="#">PBD</a>	e-Commerce/ Fulfillment	\$\$\$	Integrated technology paired with PBD's worldwide footprint brings efficiency to the order fulfillment process and streamlines costs. Offering same-day shipping from their six facilities throughout the United States and most packages are delivered within two business days. Six domestic distribution centers totaling in over 550,000 square feet of space. Their nationwide fulfillment network provides two-day delivery to almost anywhere in the U.S. and allows you to split inventory across facilities to provide faster shipping options to customers at a reduced cost.


Platform Name	Primary Use	Cost	Platform Highlights
<a href="#"><u>SFG Network</u></a>	e-Commerce/ Fulfillment	\$\$\$	With deep experience in the Association space, SFG's order management system streamlines and simplifies the fulfillment process. SFG ships worldwide daily with all major carriers and utilizes a co-ship partner for volume-based shipping discounts where possible. SFG's operations team continually evaluates shipping options and rate shops for the most cost-effective methods. Also offering next-day and same-day rush shipment options for those last-minute orders.
<a href="#"><u>ShipBob</u></a>	e-Commerce/ Fulfillment	\$\$\$	Global logistics platform that fulfills ecommerce orders for direct-to-consumer brands. Provides best-in-class fulfillment so customers get fast and affordable shipping. With reliable fulfillment services, warehouses across the U.S., and connected technology that powers the ShipBob fulfillment network, they help improve transit times, shipping costs, and the delivery experience for your customers.



## Flexible Office Space

Defining and intentionally enacting a distributed workforce culture is an exciting endeavor. Still, there may be times when your team would benefit from face-to-face interactions. You may also have team members who are not quite ready to completely abandon the idea of working from an office outside their home. In each of these cases, there are various options for weekly, monthly, and even daily/hourly reservation options in flexible workspaces. These spaces are purposefully designed to stimulate creativity, collaboration, and productivity without the need for long-term leases and/or furnishings. While many white-glove services are well-known in this sector, smaller workspaces are opening up regularly across the country as organizations that have decided to remain remote begin leasing their spaces to bring in income. Sites like [officelist.com](#) serve as a clearinghouse for both flexible workspaces as well as short- and long-term options, as needed. Conversely, you will find sites like [liquidspace.com](#), where you can list your available space if you're considering that option.




Platform Name	Primary Use	Cost	Platform Highlights
<a href="#"><u>Launch Workplaces</u></a>	Flexible office space	\$\$\$ 	Launch Workplaces was founded with the mission of creating inspiring spaces where solo professionals, satellite teams, growing businesses, and established enterprises could thrive. They offer the environment, the tools, and the professional community that empowers you to get work done. Add-ons include mail and shipping services and live-phone receptionist services, if needed.
<a href="#"><u>Carr Workplaces</u></a>	Flexible office space	\$\$\$	With a wide variety of product offerings, flexible terms to accommodate your needs, and nationwide locations within some of the United States' largest markets, Carr Workplaces is an ideal workplace destination. They offer private offices, team spaces, meeting rooms and concierge level services.
<a href="#"><u>Regus</u></a>	Flexible office space	\$\$\$	Fully serviced private office spaces give teams of all sizes space to focus, collaborate, and work. Membership options give you the flexibility to choose how, when, and where you work. Global network of business lounges, coworking areas, or office spaces. Drop-ins to a location of your choice as available.
<a href="#"><u>WeWork</u></a>	Flexible office space	\$\$	Private offices, collaboration space, suites and full floor offices can be secured. You can also access desks in WeWork office buildings across the country with onsite staff. Tiered monthly memberships offer varying benefits including high-speed internet, business-class printers, and conferencing A/V so you and your team have the tools to get 'to-dos' done.



## Secure Online Document Portals


Now that you are likely getting rid of the file cabinets in your office, how does a staff member access a necessary document? Are you already using a portal for this? If so, maybe you will need to add an SOP so that all staff members know where to go for access. Create a process so that all staff members save documents using the correct tool to upload and access an easy task. If you are operating remotely or remote-hybrid and are not using a portal, now is the time to put one in place.

Platform Name	Primary Use	Cost	Platform Highlights
<a href="#"><u>DocuSign</u></a>	<b>File sharing and e-signing</b>	\$ 	<b>Allows organizations to manage electronic agreements securely.</b>
<a href="#"><u>Send Files Securely</u></a>	File sharing; online document storage	<b>Basic plans are free</b>	Allows you to send and receive any type of file over the internet securely. Unlike email attachments or other non-secure file upload sites, Send Files Securely uses strong encryption to protect files both in transit and storage. Simply upload your files and use or share the provided download link. Features Include: Encryption; Secure cloud; Password Protection (optional); Larger Files & More Storage (Pro & Dedicated* Only); File Management (Pro & Dedicated* Only); Upload Portal (Pro & Dedicated* Only).
<a href="#"><u>Share File</u></a>	File sharing; content collaboration; e-signing	\$\$	A secure content collaboration, file sharing and sync software that supports all the document-centric tasks and workflow needs of small and large businesses. The company also offers cloud-based or on-premises. Features Include: Client Portals; Secure File Sharing; Approval Workflows; eSignatures; Cloud Storage; Secure Mail; Email Large Files; Secure FTP Site storage, virtual data rooms, and client portals.
<a href="#"><u>Smart Vault</u></a>	File sharing	\$	SmartVault is the all-in-one solution for online document storage and secure file sharing. SmartVault Features: Online document storage; Client Portal; Secure File; Sharing; eSignature; Workflows. Integrates with: QuickBooks; Outlook; Docusign; Lacerte; ProSeries; Hubdoc; and more.



## Phone/Communication Support

How will your team handle incoming calls if they are not located in a central office setting? Are there physical phones in your current office? Have you traditionally had an “operator” option that a staff member always answers to provide live support to callers? Are you equipped to continue to operate this way, or will you need to reexamine this process? There are multiple levels of communication options and services that incorporate calls/call centers, video conferencing, messaging, and more. If you rely on a 3rd party technology partner (see Managed Services Provider section), be sure to discuss with them your plans for how your team will handle the phone system in a virtual setting and involve them in your discussions.

Platform Name	Primary Use	Cost	Platform Highlights
<a href="#">Zoom Phone</a>	Phone, webinars, meetings	\$ 	Seamlessly make and receive phone calls, share content, participate in video meetings, and send chat messages. Easily elevate phone calls to a Zoom Meeting without requiring participants to hang up and dial-in to a separate conference bridge. Native apps for Windows, MacOS, iOS, and Android are designed for ease of use while maximizing voice and video quality of service. You have the option to use your current phone service provider to power the Zoom Phone cloud. PBX service in virtually any country.
<a href="#">8x8</a>	Phone, meetings	\$\$	They integrate voice, video, chat, contact center, and enterprise-class API solutions into one global, secure, reliable cloud communications platform. Analyze data from across all your communication touch points for unique insights that drive productivity improvements, cost savings and revenue growth. Integrates with Microsoft Teams, Salesforce, ServiceNow, and more.
<a href="#">Intermedia</a>	Phone, webinars, meetings	\$\$	Fully integrated cloud-based unified communications platform for small to medium businesses. Combines phone system, chat, video, screen sharing, file management and conference calling into a seamless experience that fits with your business size, needs, and work style. Customizable, scalable cloud-based services.

Platform Name	Primary Use	Cost	Platform Highlights
<a href="#"><u>Line2</u></a>	Phone, meetings	\$	Line2 lets you move your phone system, conferencing and call center to the cloud. Support your modern, mobile workers. Adds 2nd line to existing mobile phone and moves traditional hard-wired on-premises PBX to the cloud. Customers can assign additional phone numbers to phones, transfer calls between team members, set up an auto-attendant function, and even create virtual call center with the ability to dynamically distribute calls to agents.
<a href="#"><u>Microsoft Teams</u></a>	Phone, webinars, meetings	\$	Highly customizable, tightly integrated with other Microsoft Office apps and plentiful integration options are included with Microsoft 365 business accounts. Microsoft has done significant work outfitting Teams with video conferencing and voice over IP (VoIP) telephony features. Teams is a top choice for those already using Microsoft products.
<a href="#"><u>Ooma</u></a>	Phone, meetings	\$	From a Virtual Receptionist to help callers find the person or department they want to reach, to mobile or desktop apps that enable you to work from anywhere, you will be more efficient while reducing costs. It requires little to no technical knowledge to set it up. It should take you less than 15 minutes to set up our small business phone system. Options to keep your number or request a new one are available.
<a href="#"><u>RingCentral</u></a>	Phone, meetings	\$\$	All in one team, video meeting, and a business phone. It offers business phone or toll free numbers, unlimited calls with the U.S. and Canada, unlimited SMS, voicemail-to-text, team messaging, and more. It integrates with office 365, Google Workspace, Slack, and more.
<a href="#"><u>Vonage</u></a>	Phone, meetings	Call for pricing	Services include: virtual receptionist, click-to dial, paperless fax, voicemail to email, call follow me, call monitoring, and Vonage Meetings (which offers voice and video collaboration as well as team messaging). Accessible via desktop or mobile app, or web browser. Mobile apps and softphones let you make and receive calls from your business phone number on any device, as long as you're connected with high-speed internet.



## Virtual Mailbox Service

Even remote workplaces will need to receive mail. You will need to consider various requirements related to what you will need from your mail service, including whether you need a physical address and evaluating how much ‘real’ mail you receive regularly. First and foremost, consider whether you will have a staff member responsible for mail, including pick up and staff distribution. To help facilitate mail receipt, consider the following questions:

- ▶ If you will not be returning to a central office location, where will your mail be delivered?
- ▶ Does your postal address need to be listed in a specific city, state, or region?
- ▶ Do you receive packages/boxes often?
- ▶ Can mail be scanned for team members to access?

Virtual mailbox providers offer services that include accepting mail, shredding junk mail, scanning documents, and forwarding important pieces along to the designated staff. Many even provide check depositing and storage or shredding services depending on your needs. Wherever you opt to receive mail once your move is complete, you will need to submit the following forms:


- a.** USPS Application for Delivery of Mail Through Agent authorization form (1583) this grants your virtual mailbox provider the authority to accept mail on your behalf (must be notarized).

- b.** Standard Forward Mail & Change of Address request with the USPS – This ensures your mail is delivered to the required destination.



n o t e

Due to remaining issues related to the pandemic, the USPS frequently experiences delays. Therefore, be sure to submit these forms as early as possible.

Platform Name	Primary Use	Cost	Platform Highlights
<a href="#"><u>Anytime Mailbox</u></a>	Mail receipt, check deposit (at certain locations), scan, sort, shred, forward	\$\$  PREFERRED	Allows you to manage your postal mail, anytime anywhere. Check your postal mail on your smartphone, and decide to open, scan, forward, or recycle. Check deposit option available at certain locations. Independently operated branches may have different pricing than on the website. Expect monthly base charge with additional fees based on the amount of mail and processing requests.

Platform Name	Primary Use	Cost	Platform Highlights
<a href="#"><u>Docufree</u></a>	Digital mailroom, e-signing services, business process automation, document management	\$\$\$	Services include: document scanning, digital mailroom automation, electronic signature services, business process automation, and document management system. Capture incoming documents and data from every source, intelligently distribute it across your organization and provide faster access to the information your workforce needs. Capture and manage content, accelerate processes, and provide global wide, secure access to the right information when and where it's needed.
<a href="#"><u>Physical Address.com</u></a>	Mail receipt, scan, sort, shred, forward	\$\$	A cloud-based virtual mail and virtual mailing address service. The secured streamlined service provides access to high-quality mail scans in a client's private online virtual mailbox. Access to mail is available across multiple platforms, including iOS and Android. The service allows clients to view, open, shred, store, and forward mail from anywhere at any time. There are monthly base charge with additional fees based on the amount of mail and processing requests.
<a href="#"><u>Virtual Post Mail</u></a>	Mail receipt, scan, sort, shred, forward	\$\$	Provides a commercial business address, not a PO Box, to receive postal mail and packages. Unopened envelopes are scanned so you can view your mail online at your convenience. Decide whether to have the mail opened and scanned, forwarded, or destroyed.



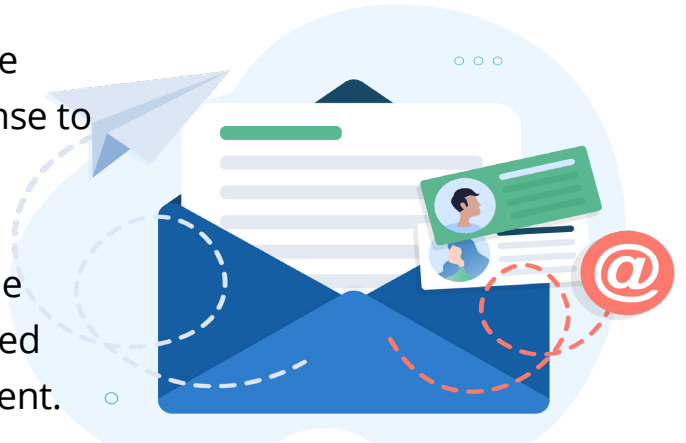
## Managed Service Providers

Finding the managed service provider that fits your needs will take some time. This is not a task that should be rushed or taken lightly. The right managed service provider will act as an extension of your team. Take the time to interview several as finding the right partner is vital. Many options across the country cater to specific types and sizes of organizations. Achurch has relationships with MSPs across the country and would be happy to help you find the right match. If you would like more information on our preferred providers, please [reach out to us directly](#) to schedule a time to talk with you.

## How to Get Help

---

Achurch Consulting initiated our Remote Workforce Consulting services in response to seeing our current clients and others struggling with distributed teams. We observed teams trying to apply the same rules and practices for remote/distributed work they did with in-person management.



We knew that with our collective backgrounds and expertise in systems and process design, legal and operational management, and assessment and curriculum development, we could help organizations design successful workforces, regardless of their employees' locations.

In short, we help organizations institute effective, research-based methods to facilitate remote work. If you feel overwhelmed by the process of taking your organization remote, have additional questions, or want to learn more about how Achurch can help your organization, please contact us at

[info@achurchconsulting.com](mailto:info@achurchconsulting.com)



achurch  
CONSULTING



[www.achurchconsulting.com](http://www.achurchconsulting.com)