



# Leverage Data and Technology to Support Business Continuity

## Situation

As the World continues to combat the **COVID-19** virus, environments have changed overnight. **Supporting family, friends, employees, customers, and prospects** is paramount during these uncertain times.

Our country is using **technology, innovation, and creativity** to communicate economic change and maintain **continuity** throughout our communities. As many countries establish a remote workforce, the value of **data** and new **insights** will be critical to the decision-making process.

Our nation will be required to develop **visionary plans** that are **unique, responsive, and flexible**. During difficult times, **leadership, teamwork, and resilience** will provide new opportunities to shape the future of the United States.

## Response

Employers are creating new strategies to support employees, customers, and prospects. Many employees are not familiar with a **remote work environment**. Employees may not understand the technology and data available to assist their job function. **Education and training** will ensure the organization is equipped to respond quickly to customer and prospect requests.

The use of **analytical insights, data, and technology** will greatly improve communication and planning.

### Analytical Insights

- Review **existing** performance metrics pre COVID-19 and evaluate current data insights
- Determine if **new** performance measures are needed post COVID-19 to support customers
- Identify available data sources and **new analytics** to manage anticipated business challenges

### Data Management

- Evaluate customer and prospect data to identify **trending metrics and new insights**
- Align data (quickly) to provide **early warning signals** of potential communication breakdowns
- Design **real-time dashboard visualization** that compiles data into performance analytics

### Customer Relationship Management (CRM) Technology

- Isolate customer and prospect **account and contact** information for communication planning
- Build metrics related to new customer boarding, customer cases, and upcoming renewals
- Configure digital marketing and **business development technology** within CRM framework

### Communication and Planning

- Educate and provide technical support for conference call, video, and screen share technology
- Organize (in advance) concise **written communication** related to meeting focus and agendas
- Provide **written summary** of actions, next steps, ownership roles, and **schedule follow up**

## Closing Thoughts

The current situation has challenged the world, our country, and employers to **collaborate** and use all available information (**data**) to support **innovative** solutions. Employers and communities are using **compassion, insights, and technology** to accelerate communication and ensure continuity.

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**“Take advantage of every opportunity to develop your shape and sharpen your serving skills”**

– Rick Warren, *The Purpose Driven Life*