

# 10

Technologies That Can Instantly

# IMPROVE YOUR BUSINESS

In this short guide, we'll go through the technologies that have made some of the quickest impacts for our clients. Those easy to implement "aha" technologies. **Let's jump right in!**

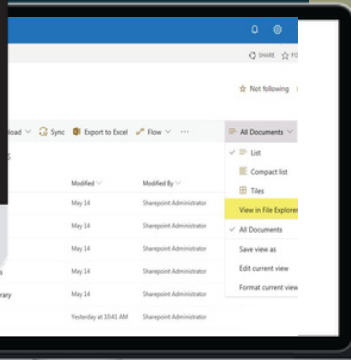
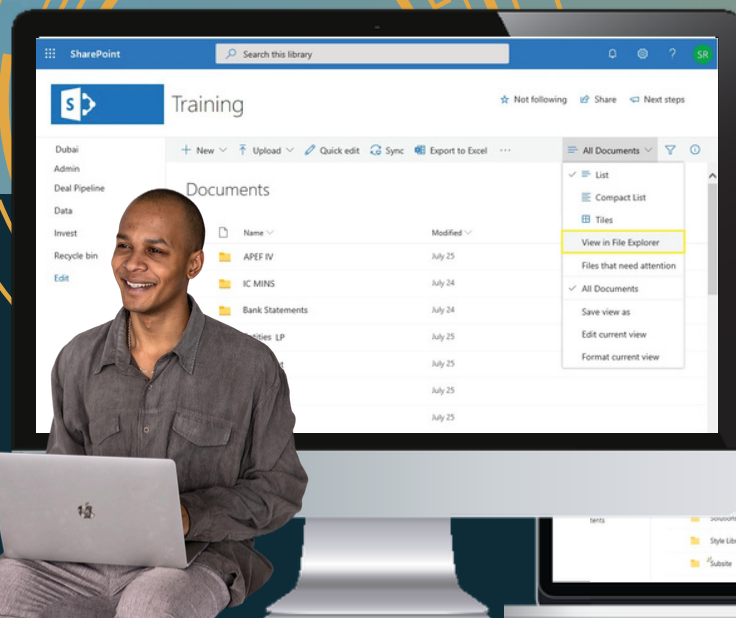
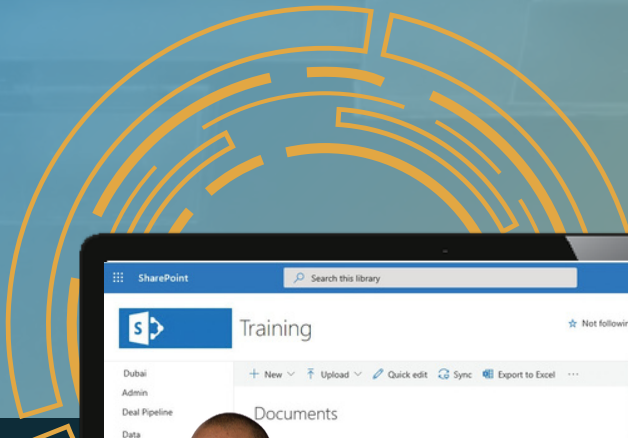




# SharePoint

Most professionals have heard of SharePoint, **but many still think of it as an intranet site or online file storage.** SharePoint has come a long way in security and ease of use. Moving files from an on-premise server or another cloud storage **to SharePoint can have an instant productivity boost.**

Files are easier to find, individuals can work on them together, SharePoint saves revisions of each file, **and your IT Provider can often secure it even better than a server!**



*As you can see, your file structure looks just like it did before. No need to go to a browser to access your data. Unless you want to!*

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## Signature Managers

The marketing team always gives us praise when this one is recommended. There are many signature managers, including Exclaimer. These managers pull from your contact directory to **automatically populate users contact information, like title and contact info.**

From there, the marketing team (or you) can update with webinar banners, company anniversary, accolades, etc. **No more manually updating signatures!** This inexpensive technology proves to be very valuable to professionalism for your company and marketing to clients and prospects!



# Exclaimer



# Intune

Okay, this one is a little technical, but stick with me.

Think of Intune as a central manager.

Do you need all your computers to have one specific application? **Intune can roll it out.**

Do you want only company devices to access your sensitive files (no mobile device access)? **Intune can put the policy in place.**

Do you want to roll out new computers with a click of a button! **Intune can do that.**

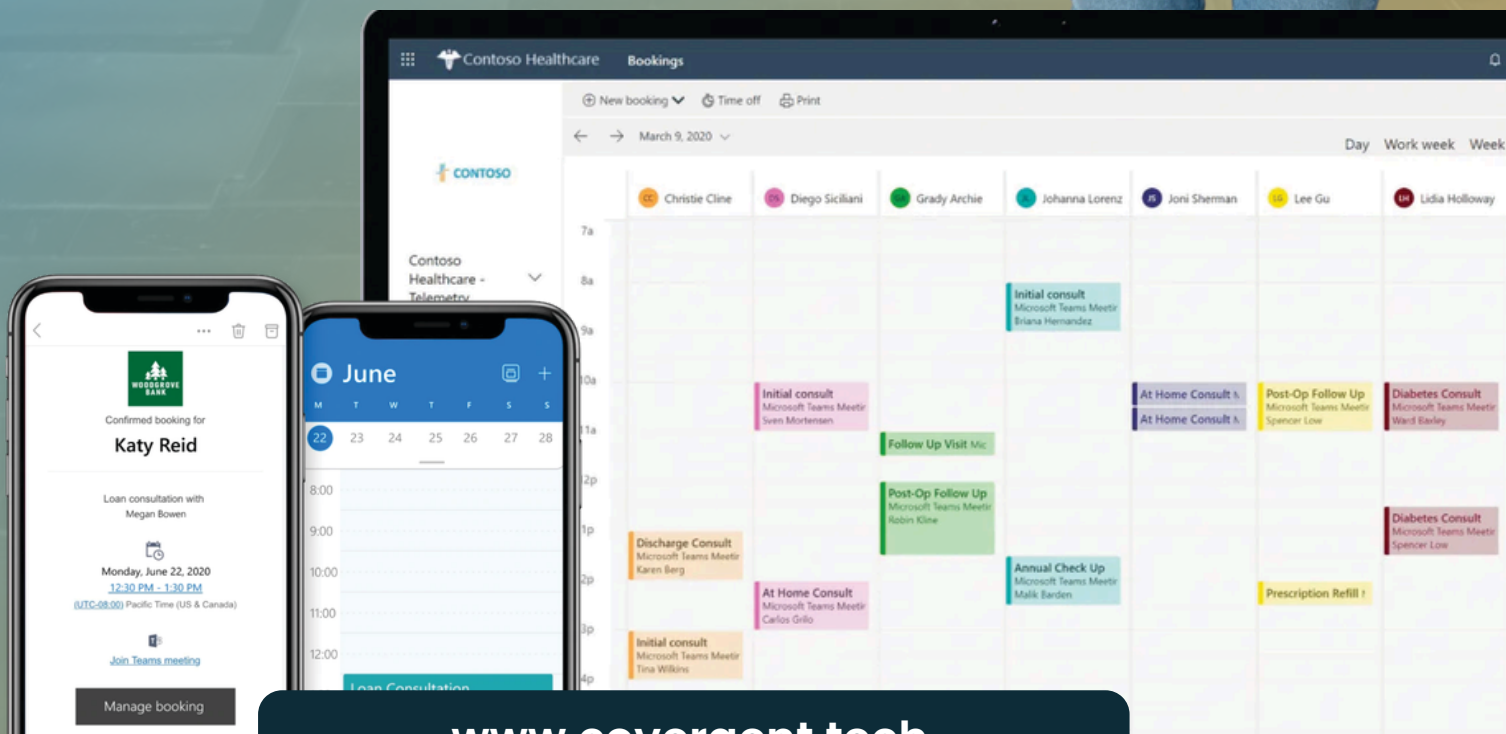
While Intune has more technical applications, it's a fantastic investment that helps to standardise your computers, security and new device deployments.



# Microsoft Bookings

This may be the simplest recommendation but has many applications. Bookings is a direct competitor to Calendly. Being part of the Microsoft 365 ecosystem, it makes it extremely easy for prospects or clients to book on an individual or shared calendar.

It's also very helpful for internal meeting bookings and more! This is included with your Microsoft 365 subscription. **Why not put it to use?**





# OneDrive Sync

What happens if your computer crashes right now?

Is everything saved on the server or cloud storage?

Or are there document, pictures, and videos that you would be scrambling to try and recover?

**That's where sync comes in.** Sync your computer to OneDrive and you're good to go with your local files. You can turn on a brand new computer, login to OneDrive, and your background, settings, Documents, Pictures, and Videos will be right where you left them.

Another nice benefit is you can free up space on your computer. Hard drive getting full? No problem. Click "free up space" and your files will be moved to cloud only until you need to use them again. You still see them there, but the cloud icon will display, instead of the green check mark. **That just means they're not on your local hard drive but still completely accessible.**

## Green Tick Icon:



With Storage Sense turned on, the files downloaded to your device will become online-only files after the time period you've selected with.

## Green Checkmark Icon:



When files are in this status, they will not become online-only files in the system setting.

## Blue Cloud Icon:



A blue cloud icon next to your OneDrive files or folders shows that the file is only available online. Online-only files don't take up space on your computer.

## OneDrive Sync Icon:



OneDrive will check for file or folder changes and may show the sync icon. If OneDrive shows this icon for a long time, it could be because you have an online file open or large file syncing.





## Managed Detection and Response

Cybersecurity can be daunting, as there are many elements you need to understand. Managed Detection and Response is a high value technology that essentially involves a 24/7 Security Operations Centre that monitors logs at your business to identify anomalies or threats.

“What, how can I afford a 24/7 security team??” **Don't be ridiculous!**

No worries. **These services are often relatively inexpensive.** One agent can monitor the logs of many businesses. The service is usually provided through an IT Provider that has many clients on the service. The economies of scale with this technology make it extremely advantageous for small and medium businesses.



## Conference Room Systems

It's shocking to me how many people still run conference rooms with webcams and HDMI cords running across the room... **Don't be that person.**

Conference rooms are relatively easy to install nowadays and brings the **professionalism** and **quality** of your conference meeting up a lot.

Not much else to say here except this small change will make a big impact on your business.



# Microsoft Teams Integrations

I don't want to say Microsoft Teams because that's too obvious. **You're likely already using it**, so let's get to the good stuff.

Teams allows you to integrate with a ton of applications. Marketing team needs Facebook reporting? Great. **It integrates right into a Teams channel.**

Accounting needs to sync with their application so they can get meaningful info every day without needing to login into multiple sites? Also great. **Teams will likely have an integration with that app.**

Need to manage vacation times and calendar? Here comes the cliché” **There's an app for that.**

The best part is: it's EASY. You just add the app right into Teams, login, and identify what you need to be displayed.



**EMPLOYEE OFFBOARDING FORM**

LOGO HERE

000-000-0000  
info@company.com  
www.company.com

Name: \_\_\_\_\_

What date with this need to be completed: \_\_\_\_\_

User role: \_\_\_\_\_

**MANAGED SERVICE PROVIDER TASKS**

1. Remove Microsoft 365 account  
Turn into shared mailbox and forward to: (manager email account)  
\_\_\_\_\_
2. Remove user from (Practice Management Software)  
\_\_\_\_\_
3. Remove phone license  
Route this number to: \_\_\_\_\_
4. Remove Adobe license  
\_\_\_\_\_
5. Does Wi-Fi password need to be changed?  
\_\_\_\_\_
6. Remove user from (Web based application #1)  
\_\_\_\_\_
7. Remove user from (Web based application #2)  
\_\_\_\_\_
8. Notify (Vendor #1) to remove user  
\_\_\_\_\_

**LAW FIRM TASKS**

1. Disable door key cards / change door access codes (if applicable)  
\_\_\_\_\_



## Onboarding/Offboarding Checklist

I can almost guarantee you're not doing this one. **I hope you are, but statistically... you aren't.**

Every time a new employee is coming onboard or an employee is leaving, a checklist must be completed.

Having a standard checklist for each role **is a fairly quick thing to set up with your IT team.**

Surgeons in the operating room made mistakes at **an unacceptable albeit low rate in the past.** The Checklist Manifesto illustrated the power of checklists in reducing variation and error. That same principle can easily be applied to your businesses productivity and security by ensuring new people have what they need and exiting people don't have what they don't need.

If surgeons make this error, chances are your team will too **without a good checklist to follow.**

Route this number to:

4. Remove Adobe license  
\_\_\_\_\_
5. Does Wi-Fi password need to be changed?  
\_\_\_\_\_
6. Remove user from (Web based application #1)  
\_\_\_\_\_
7. Remove user from (Web based application #2)  
\_\_\_\_\_
8. Notify (Vendor #1) to remove user  
\_\_\_\_\_

**LAW FIRM TASKS**

1. Disable door key cards / change door access codes (if applicable)  
\_\_\_\_\_



## Content Filtering

Saving the most boring for last! Content filtering stops users from going to sites they shouldn't. That's it. In the past this was handled on the network level (the office). However, with the increased prevalence of remote work, **moving the content filtering to the endpoint (computer/laptop) is an easy change your IT team (or us) can help you with.**


No naughty sites. No surfing social media all day. No fill in the blank. It can also be applied per user based on their role. It's purpose is to create a force function to prevent people from intentionally or accidentally getting into trouble while working. It also has many cybersecurity benefits I won't bore you with **(unless you're interested because I could talk about it all day).**



## Conclusion

When you're ready to start building your technology roadmap, start with the capabilities that would most benefit your organization, and work down your list from there. If you're looking for an IT partner that actually understands your needs, **we're here when you need us.**



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