

# COVID-19 RE-ENTRY CHECKLIST

MAY 2020

## DEDICATION TO CLIENT SERVICE

We anticipate further announcements and guidance from government authorities to safety protocol changes due to COVID-19, and we have prepared a checklist to help you navigate through opening your business to your staff and the public. As the situation continues to evolve, please reach out to your Gillons advisor at any point with your questions or concerns.

### PHASE 1

### PHASE 2

### PHASE 3

### PHASE 4

DATE WHO COMPLETED

DATE WHO COMPLETED

DATE WHO COMPLETED

DATE WHO COMPLETED

## Communication

### Internal communication plan

Establish a plan for consistent leadership communication

Reactive resources for employees to pull information

Proactive communication plan for regular updates and check-ins

Establish ways to ensure consistent communication across teams and between colleagues

Do you have all cell phone numbers and other means to connect

# COVID-19 RE-ENTRY CHECKLIST

MAY 2020

## PHASE 1

## PHASE 2

## PHASE 3

## PHASE 4

DATE WHO COMPLETED

DATE WHO COMPLETED

DATE WHO COMPLETED

DATE WHO COMPLETED

### Communication

Establish permissions to share cell phone numbers and for what uses and timeframes

Review cell phone, video chat, internet, wi-fi, etc. payment or reimbursement policy

Establish a plan for colleagues to maintain regular contact with each other

Social and wellness checks for socially distanced and remote workforce

Establish regular work communication timeframes

### External communication plan

Define your external communication plan for clients and prospects who may visit your office

# COVID-19 RE-ENTRY CHECKLIST

MAY 2020

## PHASE 1

## PHASE 2

## PHASE 3

## PHASE 4

DATE WHO COMPLETED

DATE WHO COMPLETED

DATE WHO COMPLETED

DATE WHO COMPLETED

### Communication

Define your plan to provide information, blogs, resources and other digital content for clients and prospects to consume

Video client experience.  
 Identify clearly how video will play into the client experience on every video touch.