Re-Opening post COVID-19 - Canadian Client Re-Entry Checklist

It is recommended that this checklist be reviewed completely with each Phase change of re-opening and with any material change or update in guidance from Public Health Agency of Canada, provincial and local public health agencies, Legal, Regulatory, CCOHS (Canadian Centre for Occupational Health & Safety) as well as other significant change that may not be predictable in advance.

MAGNES
An Assurex Global Partner

	PHASE 1		PHASE 2		PHASE 3		PHASE 4	
	Date	*Who completed*	Date	*Who completed*	Date	*Who completed*	Date	*Who completed*
Physical Office								
Office sanitation plan								
Review stock of sanitation supplies								
Signage for internal and external visitors so rules are clear								
Social distancing markings								
Check office ventilation systems and filters								
Entrance and Exits: Open, closed, locked (with appropriate emergency exit enabled), other needs								
Bathrooms stocked for sanitation and signage for handwashing guidelines								
Breakrooms								
Chairs removed								
Signs posted for maximum occupancy for social distancing requirements								
Review rules for food, coffee, tea service storage and preparation								
Review rules for cleaning of dishes, utensils, equipment, microwaves, coffee makers, water service, dishwashers, sinks, counters, etc.								
Cubicle and office workspace cleaning requirements								
Common area cleaning and social distancing requirements								
Printer/copier/office machines cleaning plan								
Touch screen/keyboards/mice/pads/desk phones etc. cleaning plan and requirements								
Minimize sharing of equipment policy with cleaning of surfaces requirement before and after use								
Employee								
CERB (Canadian Emergency Response Benefit)								
Review impacts to employees who may have been negatively impacted by unemployment compensation.								
Layoffs and downsizing								
Guard against disparate impact								
Review Federal/Provincial Law for laying off employees.								
Develop plans to protect employees medical information while ensuring the health and safety of overall workforce								
Confirm security of location where private and protected information is stored on and off site								
Review Pension Plans								
Impacts to Pension/RRSP plans will come under scrutiny								
Review and update employee safety plans								
Sanitation policies in the workplace								
If use of mask and/or ventilators are required, provide proper education and training per CDC, Public Health Agency of Canada and provincial and local public health agencies.								
Review reporting and work release protocols (i.e. lawsuit already pending for wrongful death of a Walmart employee who complained of symptoms but was not released from work)								
Review, update and communicate clear policies for salaried and hourly employees, time tracking and overtime								
Communicate break, lunch and hour expectations								
Determine time tracking changes that may be needed for remote workers								
Review Sick Leave policies (consistent with public health guidelines and should not serve as a significant deterrant to employees calling in sick) and Paid Time off Policies								
Communicate overtime request/approval plan								
Financial assistance and training for employees								
Investment councillors for assistance with retirement planning								
Budgeting assistance counseling								

What financial fears or concerns can you reduce or eliminate to allow increased productivity								
Wellness plan review and updates								
Mental health resources								
On-site or telehealth access for mental health resources								
List of resources to access for improved mental health and wellbeing								
Employee Assistance Program Hotline								
Wellness Together Canada - ca.portal.gs / 866-585-0445 - resources, e-courses, free counselling								
E-couch (a self help interactive program with modules for depression, generalized anxiety & worry, social anxiety, relationship breakdown, loss and grief).www.ecouch.anu.edu.au								
Canada Suicide Prevention Service (CSPS) 1-833-456-4566, available 24/7, bilingual service								
The Lifeline Canada Foundation - thelifelinecanada.ca - a cross-Canada directory of Mental Health/Crisis Services								
Education on mental health benefits available on employer plan								
Posted reminders of resources and health checks								
E-mail tag lines to report concerns or link to resources								
Mindfulness training, newsletters, blogs, etc.								
Calmness apps								
Training of managers and employee volunteers on Mental Health First Aid. www.mhfa.ca								
Provide calm spaces for self care/Recharge Room								
Physical health resources								
Exercise reminders and access to space/time for physical activity								
Ergonomics training and review of workspaces								
Sleep tips and reminders								
Personal hygiene reminder signage								
Dietary tips								
Water challenges and reminders								
Remote Workforce								
Review remote workforce plan								
Ordering of supplies procedure								
Technology equipment inventory and use policy								
Policy for providing internet and cell services								
Internet and data security procedures and protocols								
Remote access, retrieval and wipe capability for company data								
Video meeting access and policies								
Plan for employee check in to proactively understand needs for support/assistance								
Virtual ergonomic check of home office set up								
Inventory and decisions/policy on any longer term furniture, equipment, supply needs								
Productivity KPI's, measures and communication plan								
Physical and mental wellness checks and resources								
Ideas for regular connection/collaboration with in-office colleagues for productivity, engagement and culture								
In Office Workforce								
Social distancing rules for the office								
Rules for entering office…what is your policy								
Mandatory self report of symptoms or vulnerabilities per The Public Health Agency of Canada/provincial and local public health guidelines								
Temperature checks prior to entry: required, encouraged, optional, other								
Masks: required, encouraged, optional, other								
Gloves: required, encouraged, optional, other								

Testing: required, encouraged, optional, other							
Rules for testing, contact tracing and reporting if someone is positive							
Make sure it is compliant with current privacy laws and HR regulatory guidance							
Rules for reporting, responding to concerns and sending employees home when necessary without fear of losing job							
Ideas for in-office employees to maintain connection/collaboration with remote workers to maintain productivity, engagement and culture							
Rules for former break rooms, conference rooms and other social communing areas							
Sanitation requirements							
Staged work and break hours							
Traveling Workforce							
Decide if the travel is necessary/essential or if it could be accomplished in another way							
Between offices							
Policies for travel and re-entry into office							
To/from client/carrier/vendor locations local							
Policy to ensure your employees adhere to safest standards of yours vs. other place visiting (use The Public Health Agency of Canada/provincial and local public health guidelines as minimum required)							
Make sure any visitors understand your expectations							
Interprovince/National travel							
Review the Government of Canada travel health notices before planning/undertaking any travel.							
Know the Phase/open/close status of other provinces visiting or passing through							
Review travel policies and costs of travel plan changes							
Review travel insurance plans							
International Travel							
Review the Government of Canada travel health notices before planning/undertaking any travel.							
Review and decide/follow Federal/Provincial policy for any quarantine requirements before return to office							
International medical plans and access							
Policy for closed travel or stay in place orders							
Policy for repatriation							
Review travel policies and costs of travel plan changes							
Review travel insurance plans							
Client Related Issues							
Introductions to income opportunities and referrals							
How can you help your clients make more money							
Introduction to resources							
What resources are you using to run your business that may be helpful to your clients							
tools or resources, etc.							
Pandemic tip sheets for some higher risk and essential occupations & industries)							
Human Resources tools and strategic guidance							
Review and discuss ways to enhance client experience							
Review, understand and advise on client supply chain issues and concerns							
Carrier Non-Travel Related Issues							
Plan to keep up to date on most current coverage offerings							
Plans for efficient carrier/product training for a distributed workforce							
your clients							
Vendor non-travel related issues							
Ask vendor prior to interaction what are their workforce guidelines i.e. temperature, masks, gloves, etc.							
Ask for policies on no-contact or limited contact delivery							

Confirm delivery options for office AND remote workforce								
Technology								
Update IT inventory of assets								
Cyber security plan reviewed								
Review access speeds for office and remote locations								
Video capabilities								
Review, define and train on collaboration tools and platforms								
Stress test systems								
Update password, encryption, phishing and other cybersecurity training and testing given new access devices								
How must the IT budget be reallocated for greater efficiency and enhanced client experience?								
Addressing and instituting online learning systems now that people are culturally accepting of that style								
Crisis Planning								
Internal - Review and update your plan								
Clients - Offer to review and update their plan								
Vendors - Ask for a copy of their plan								
Financial								
Assess new costs								
Review book of business and estimate potential revenue losses from exposure decreases, business failure, etc.								
Create new revenue streams that add value post COVID-19								
Look for expense savings								
Office lease review								
Equipment lease review								
Shore up funding sources, debt consolidation and financing								
Review all public funding grants and loans that may be advantageous for you or your clients								
Update KPIs and monitor more frequently. Client count is king!								
Lean Systems thinking								
more efficient ways.								
Innovation								
How will you use this opportunity to innovate?								
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								
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								
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. Differentiate and bring value.								
Sales								

Discuss and define new prospecting needs and how to accomplish them								
Supporting a remote and mobile sales force								
What KPI's are most meaningful to measure and how will you gain consistency								
Review sales goals and objectives to proactively predicting other resource demands that will be needed								
Differentiation - How will you cut through the noise and differentiate your team now? Be specific.								
Specialization								
Are there new areas of specialization that should be invested in and developed?								
Regulatory/Legal/Compliance								
Who will monitor and communicate updates in the legal/regulatory and compliance arena?								
Define your credible sources								