

Asset Managers Tech

AMT'S "WORKING FROM HOME" GUIDELINES, 4/2/20

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ASSET MANAGERS TECH BELIEVES THE FOLLOWING SUGGESTED "WORKING FROM HOME" *GUIDELINES* WILL FOSTER THE INVESTMENT MANAGEMENT INDUSRY'S COMMON GOALS. WE WELCOME COMMENTS FROM ALL PARTIES!

...COMMON SENSE APPROACH TO "WORKING FROM HOME" IN 2020

- 1) – BE PREPARED, KEEP CURRENT AND IMPORTANT FILES AT HOME.
- 2) – PLAN MEETINGS VIA CONFERENCE CALLS AND BY VIDEO WHICH CAN BE SAVED. ZOOM HAS MUCH POTENTIAL & IS VERY POPULAR AT THIS TIME.
- 3) – TELECOMMUTING IS ANOTHER WORD FOR "WORKING FROM HOME". MAKE UP YOUR MIND TO MAKE TELECOMMUTING WORK WELL!
- 4) – DO NOT MIX BUSINESS AND PERSONAL LIFE, TRY TO AVOID DISTRACTIONS (KIDS & PETS) DURING WORK TIME.
- 5) – KEEP WORK AREA AT HOME WELL LIGHTED AND CLEAN, JUST LIKE YOUR OFFICE.
- 6) – KNOW WHO TO CALL IF YOU ENCOUNTER TECH PROBLEMS.
- 7) – ASSET MANAGERS TECH, A TRADE GROUP, SUGGESTS STAYING CONNECTED WITH COLLEAGUES IN YOUR FIRM, "HOW ARE THINGS GOING" TYPE OF EMAILS. CHAT WITH YOUR PEERS, AS YOU NORMALLY WOULD DO.

...TEAM GOALS APPLY @ EACH HOME DURING CORONAVIRUS CRISIS

- 1) – KEEP YOUR FIRM'S BROAD GOALS IN MIND AT ALL TIMES @ HOME.
- 2) – FOLKS @ HOME NEED FREEDOM TO ACT, VERSUS PRIOR APPROVALS.
- 3) – EVERYONE @ HOME NEEDS TO KNOW THE FIRM IS RELYING ON THEM.

- 4) -- SHARE SOMETHING NEW (FACTS, IDEAS) DAILY WITH GROUP COLLEAGUES.
- 5) – YOUR GROUP MUST HAVE TRANSPARENCY TO ACHIEVE COMMON GOALS.
- 6) – MAKE UP YOUR MIND TO PURSUE PROFESSIONAL EMPOWERMENT @ HOME.
- 7) – TRUST TELECOMMUTING & YOU WILL HAVE CONFIDENCE IN YOUR FIRM!

...MODERN TECHNOLOGY: A NEW PARADIGM FOR “WORKING FROM HOME”

- 1) – BE FULLY UP TO DATE REGARDING YOUR FIRM’S SIGNIFICANT CLOUD COMPUTING & AI ACCOMPLISHMENTS AS YOU BEGIN WORKING FROM HOME.
- 2) -- MAKE EVERY EFFORT TO CONTINUE TO PARTICIPATE IN ANY COMBINED “TECH DEVELOPER / INVESTMENT PROFESSIONAL” TEAMS WHILE @ HOME.
- 3) -- IT IS IMPORTANT TO WORK FROM HOME WITH FULL KNOWLEDGE OF YOUR FIRM’S 3 TO 6 MONTH MODERN TECHNOLOGY GOALS AND PLANS.
- 4) – CLICK ON ALL RELEVANT REGULATORY PRONOUNCEMENTS AND OFFICIAL UPDATES CONCERNING COVID – 19. AGENCIES, MAJOR LAW FIRMS AND TRADE GROUPS ARE COMMITTED TO THE HIGHEST STANDARDS REGARDING PROVIDING UPDATES TO THEIR CONSTITUENTS. THESE PRONOUNCEMENTS COULD AFFECT BUSINESS PRACTICES IN THE INDUSTRY OR AT YOUR FIRM. EQUALLY IMPORTANT, SOME OF THESE PRONOUNCEMENTS MAY HAVE TECHNOLOGY IMPLICATIONS FOR CERTAIN MARKETS. EMPLOYEES WORKING FROM HOME SHOULD BE ENCOURAGED TO CHECK WITH THEIR OWN TEAM MEMBERS REGARDING HOW BEST TO PURSUE THESE POSSIBLE CHANGES IN BUSINESS PRACTICES.
- 5) – MODERN TECHNOLOGY IS CHANGING RAPIDLY. THEREFORE, SENIOR MANAGERS @ HOME NEED TO USE AS MUCH INGENUITY AS POSSIBLE TO KEEP ALL MEMBERS OF THEIR FIRM APPRISED OF MAJOR MODERN TECH INNOVATIONS – IT’S TRICKY BECAUSE THE TENDENCY WILL BE TO WAIT UNTIL THE CRISIS IS OVER!
- 6) – TECHNOLOGY PROFESSIONALS WORKING FROM HOME SHOULD REGULARLY COMMUNICATE & MAKE A SPECIAL EFFORT TO ENSURE THAT MISSION CRITICAL FUNCTIONS ARE BEING ADDRESSED. FOR EXAMPLE, WHO IS MONITORING HOW VARIOUS SERVICE PROVIDERS, SUCH AS VALUATION SPECIALISTS, CLOUD COMPUTING PROVIDERS, CUSTODIANS AND OTHERS, ARE BEING AFFECTED

DURING THE CRISIS? THIS COULD BE PARTICULARLY IMPORTANT REGARDING DATA-DRIVEN SERVICES THAT RELY ON API'S.

7) – FINALLY, IT WOULD BE ADVISABLE FOR YOUR OWN *WFH TEAM* TO HAVE A “GO TO” PERSON IN THE IT DEPARTMENT. MAKE IT YOUR BUSINESS TO FIND OUT WHO YOUR CONTACT IS & REACH OUT TO THAT PERSON! Amtdraftdoc4/2