

COVID-19

Small and medium business roadmap for
recovery and beyond: Workbook

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The outbreak of COVID-19 is continuing to cause disruptions for many small to medium businesses. It's fundamentally changing the way you do business, now and in the future. It can be overwhelming for business owners to keep up with the new laws, rules, and regulations, let alone work out an action plan for their business.

We see three phases that all resilient business owners must face to recover from the COVID-19 crisis:



No doubt many business owners have spent the last few weeks in respond mode, but now is the time to turn your attention toward recovery, to ensure your business is ready to thrive.

As the backbone of the Canadian economy, it is imperative that our small and medium businesses not only adjust and recover, but are also set up for success for the “new normal.” Every decision made now could affect a business’s ability to thrive in the future. This will require extraordinary flexibility, coordination, and resilience during what may be a protracted period of recovery.

That’s why we have created this workbook: to take some of the complexity out of the situation and give small and medium companies some of the tools needed to drive the business through recovery and beyond.



It is an unfortunate reality of this crisis that not every small or medium business will recover. But what will be a common characteristic of those that do will be the ability and desire to take charge of their business's future, with a sense of optimism about what lies ahead.

We believe that business strategies in the **recovery phase** will be best orchestrated through three critical actions: **reflect**, **restart**, and **revitalize**. These actions can help businesses to bridge the crisis response to a successful future, by laying the foundation to thrive in the aftermath of the event.



Keeping these three critical actions front and centre, the *Small and medium business roadmap for recovery and beyond: Workbook* is intended to support small and medium business owners as they navigate their way through the pandemic, highlighting the areas that require attention across the dimensions of **customer, cash flow, supply chain, workforce, digital enablement, and workplace**.

Scenario planning

This will not be a typical recovery: COVID-19 is unlikely to end suddenly, given the evolving nature of the virus and the uncertain prospects and timing of a vaccine. Business owners must plan for multiple scenarios and time horizons, as they shift from crisis response to recovery. They should also plan for the possibility of multiple waves of the pandemic and its continuing global—and uneven—footprint, and establish critical priorities for the next 12 to 24 months as they position for new realities.



[What is the future of work? Redefining work, workforces, and workplaces](#)



[COVID-19 Economic cases: Scenarios for business leaders](#)



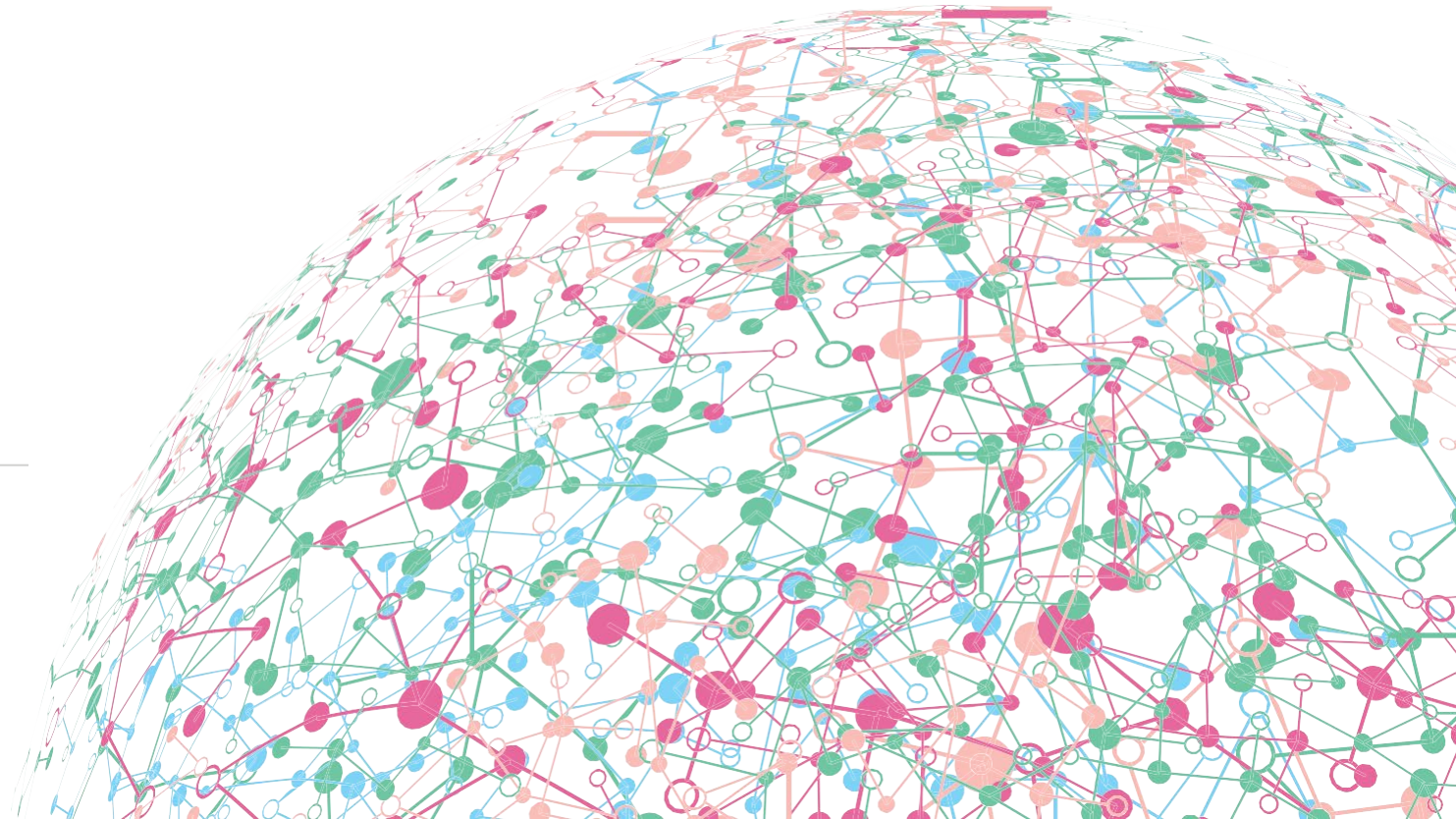
Much remains uncertain, but one thing is clear: customers, workers, suppliers, and competitors are watching. How a business handles its recovery will in part define its reputation and performance, potentially for years to come.

This workbook is intended for small and medium business owners like you to work through what is required to manage business continuity, and to look for opportunities to **reflect, restart, and revitalize** your business through the **recover** phase. There is a lot of content, but not all of it will be applicable to all businesses. Determine which dimension you need to focus on first, and then which action is most relevant to your business's progress.

Note: The workbook is intended to be a framework and a starting point that should be adapted to each unique environment—not all of its questions will apply to every business. While comprehensive, this workbook is not intended to be exhaustive, nor is it meant as advice; it too will evolve as circumstances change.

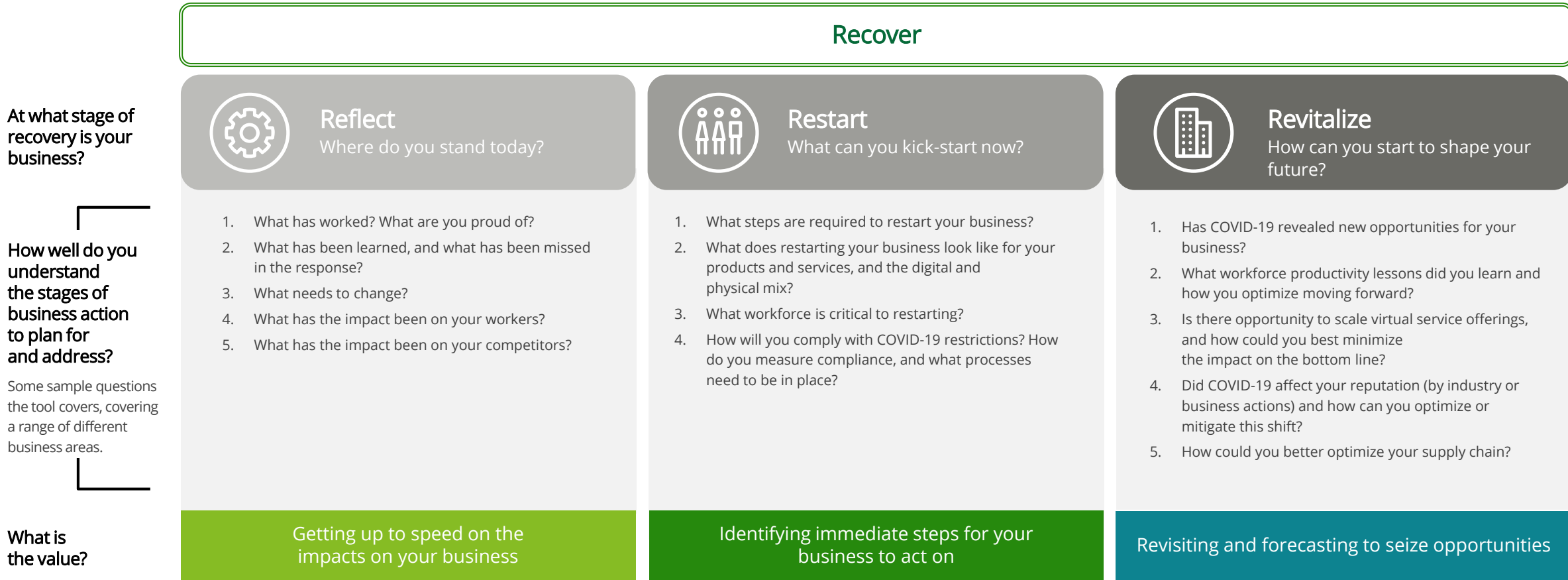


If you have any feedback about this workbook, please send your comments and suggestions to covidconciierge@deloitte.ca so that we can continue to improve the content. We look forward to receiving your feedback.



A framework to help your business through its recovery phase

There are many ways for small and medium businesses to recover from the changes brought on by COVID-19. To help, we have created a framework to help your business get up to speed with what’s changed, mobilize what you can control, and understand opportunities for growth in the future.



Use this framework to assess your business across priority areas

This workbook is segmented into the areas of your business that are likely to have been critically affected by COVID-19 and may be a priority for recovery planning. The workbook will walk you through assessment criteria and questions to help you kickstart planning and activating your recovery. It uses language that a small and medium business can use with its people to create ownership of tasks as well as acceptance that navigating the response to COVID-19 will take effort from everybody.

Across each of the six areas, where can you **reflect**, **restart**, and **revitalize**?





1. Understanding your customers' needs

How have expectations changed, and how do you communicate?

Reflect

Changes to your business

Customer changes

Business implications

Restart

Connecting with customers

Customer opportunities

Business channels

Revitalize

Business implications

Customer implications

Digital opportunities





Understanding your customers' needs: How have expectations changed, and how do you communicate?

Reflect—Where do you stand today?

Are your customers aware of the impacts on your business?

- ☐ Who are your customers? Have they changed? How well do you know your customers and do you understand their needs and wants at this time?
- ☐ Are your customers aware of the potential impact or disruption COVID-19 has had on your business?
- ☐ Are you proactively communicating with clients and customers to understand and manage their expectations?
- ☐ Have you checked your contractual obligations with your customers?

Are you aware of the impacts on your customers?

- ☐ How have customer consumption patterns changed?
- ☐ How reliant is your business on direct customer contact to continue trading?
- ☐ Are you dependent on a limited number of customers? What are the consequences if they shut down?
- ☐ Do you understand the changes that need to be made to match changing consumer behaviours over time?

Are you aware of how this affects your business?

- ☐ How has your customers' behaviour changed in the immediate market, and how can you adapt to these changed behaviours?
- ☐ How do you attract, sell, and deliver to customers in an all-virtual world?
- ☐ How do you engage with customers with a capacity-constrained on-site/virtual customer service team?
- ☐ Has your reputation changed through the crisis (your actions or your industry?) How will you optimize or reverse this shift?
- ☐ How can you retain and serve your existing customers with limited or no physical store fronts?

Your plan—Getting up to speed on the impacts on your business.





Understanding your customers' needs: How have expectations changed, and how do you communicate?

Restart—What can you do now?

How are you connecting with your customer base effectively?

- ☐ How should your offerings differ between the digital and physical customer?
- ☐ How do you provide a digital equivalent of your existing products or services?
- ☐ How can you communicate your business changes to your customers as quickly as possible?
- ☐ How many customers can you have on your business premises at one time? Can you change your demand/supply profile to enable physical distancing, and are there peaks and troughs of activity that you can make smoother?

What are the customer opportunities facing your business?

- ☐ How do you redefine your customer strategy to take advantage of shifting customer preferences? How can you sustain your business by shifting your approach in stages to meet these changing expectations?
- ☐ How can you reconnect with your customers from yesterday, while maintaining your newly found customer base of today?
- ☐ What are the most promising marketing opportunities your business could capitalize upon?
- ☐ How do you build customer trust and loyalty in a digital or blended business model?
- ☐ Can you provide additional reassurance about supply compared to your competitors?

What are the channels your business could adopt moving forward?

- ☐ How do you optimize your customer sales and service channels for the 'new normal'?
- ☐ What are the new channels available to your business and which are to be maintained and/or adapted moving into a post-COVID-19 world?
- ☐ Can your business meet the needs of remote customers? Is this an area where you can improve?

Your plan—Identifying immediate steps for your business to action.





Understanding your customers' needs: How have expectations changed, and how do you communicate?

Revitalize—How can you start to shape your future?

What are the long-term implications for your customer base?

- ☐ How will your revenue model change, based on your changing relationship with your customers?
- ☐ What are the relevant industry that will be maintained or expanded upon? What can your business learn from and take with it moving forward?
- ☐ How do you make sure you are maintaining and elevating your customer and brand loyalty across your current and future prospects?

What are the digital opportunities moving forward?

- ☐ How do you reinvent your business to take advantage of a digital world?
- ☐ How do you reinvent your products and services to be relevant in a predominantly digital world?

Your plan—Revisiting and forecasting to seize opportunities.





Planning for your customers' needs:

What are some of the top priorities?

Use the workplan to map them week by week.

It's time to put your plan to paper. For best use, print this sheet out in 11x17 format.





2. Getting your cash flow in order

Understand the health of your business to prepare for the "new normal."

Reflect

Business health

Level of liquidity

Planning next steps

Restart

Cash flow management

Financial management advice

Cash flow priorities

Options for assistance

Revitalize

Sustainable growth

Financial support

Business efficiency

Long-term improvements





Getting your cash flow in order: Understand the health of your business to prepare for the "new normal."

Reflect—Where do you stand today?

Do you have a sound understanding of where your business stands?

- ☐ How can you accurately diagnose the current health of the finances and liquidity of your business?

What is your business's level of liquidity at this time?

- ☐ Which cash and credit facilities do you currently have access to?

- ☐ Bank accounts
- ☐ Credit cards
- ☐ Line of credits/overdrafts
- ☐ Creditor terms
- ☐ Debtors
- ☐ Access to equity in other assets

How is this likely to change in the immediate future?

- ☐ What do the next three to six months of operating cash flow look like for your business?
 - ☐ What are your known cash inflows (revenue)?
 - ☐ What are the known fixed and variable expenditures?
 - ☐ If there is a negative cash-flow gap, how many months before your business uses all available cash and facilities?
- ☐ What will be the cash-flow impact on your business when government stimulus ceases for you, or for your customers and suppliers?

Your plan—Getting up to speed on the impacts on your business.





Getting your cash flow in order: Understand the health of your business to prepare for the "new normal."

Restart—What can you do now?

How are you planning to manage your business cash flow moving forward?

- ☐ What actions can you take to tightly manage cash flow to ensure you can continue trading?

Who have you spoken with about managing your finances?

- ☐ Have you spoken to your bank or finance provider about increasing your facility limits or obtaining loan repayment holidays?
- ☐ Can you negotiate favourable terms with suppliers to allow your business to sell products?
- ☐ Have you called in outstanding debts or agreed to collection terms with your customers?
- ☐ Are there any inventory/assets that can be converted to cash quickly?
- ☐ Do you have access to cash reserves you can call upon for a short period of time?

What are your highest priorities for maximizing cash flow?

- ☐ How can you improve your cash-flow management?
- ☐ What activities can be initiated to secure/improve the demand for your products/services to increase revenue more quickly?
- ☐ How can you manage demand through changing pricing structures?
- ☐ What costs do you need to stop or defer until trading improves?
- ☐ If your forecasted cash-flows are insufficient to meet your trading requirements, have you explored with your advisor what options are available to you?
- ☐ Have you undertaken scenario planning to allow for a delay in COVID-19 recovery, or conversely, a rapid recovery?

Are there forms of assistance you haven't yet considered?

- ☐ Have you determined your eligibility to access the government economic stimulus packages and relief programs available?
 - ☐ Canada Emergency Wage Subsidy (CEWS)
 - ☐ Canada Emergency Business Account (CEBA)
 - ☐ Canada Emergency Commercial Rent Assistance (CECRA)
 - ☐ Business Credit Availability Program (BCAP)
 - ☐ Regional Relief and Recovery Fund (RRRF)
 - ☐ CRA income tax deferrals
 - ☐ GST/HST tax deferrals
 - ☐ Provincial government programs and relief
 - ☐ Search the [Small Business Relief Tool](#)

Your plan—Identifying immediate steps for your business to action.





Getting your cash flow in order: Understand the health of your business to prepare for the "new normal."

Revitalize—How can you start to shape your future?

What are your next steps for growth?

- ☐ How can you manage sustainable growth in your business with your cash-flow needs? Can you apply new pricing structures to drive demand in quieter times, or for slower-moving products?
- ☐ In determining your post-COVID-19 cash-flow requirements, have you allowed for the repayment of any deferred costs provided under the stimulus packages?

How will you secure the financial support required?

- ☐ What level of banking or alternative finance support will you require to support your growth after the crisis?
- ☐ Have you prepared the required supporting information (financials, tax returns, forecasts) to have discussions around funding support from banks and had the discussions?
- ☐ What ongoing reporting requirements will you need to meet to secure additional growth funding from banks?
- ☐ What procedures can you put in place to allow you to operate within your business's facility limits?
- ☐ How can you ensure you operate within agreed supplier and customer terms? (e.g., to avoid selling goods to a customer who fails to pay within terms or at all.)

Are there ways you can make your business more efficient?

- ☐ What operating cost structure do you really need? Has COVID-19 identified inefficiencies or waste in your business?
- ☐ Is there a new way of operating your business, and how does this affect your cash flow?
- ☐ What will customer demand and loyalty look like post-COVID-19 and on future revenues?
- ☐ What operating costs are required to be switched back on and what will be the impact ? (e.g., IT, marketing, HR, production, logistics)
- ☐ What products/services are going to generate the quickest and best margin for your business?
- ☐ Are there elements of your business that you should discontinue to preserve cash flow?
- ☐ Which of your suppliers need immediate support?
- ☐ Which of your customers need extended credit?

Where and how should you look to improve your business for the long term?

- ☐ What investments do you need to incur to future-proof your business?
- ☐ When should you make these investments and to how significant should they be?
- ☐ Have you got the right internal support team and external advisors to navigate challenges?

Your plan—Revisiting and forecasting to seize opportunities.





Planning your cash flow

What are some of the top priorities you need to plan for? Use the workplan below to map them out week by week.

It's time to put your plan to paper. For best use, print this sheet out in 11x17 format.

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3. Reorganizing your supply chain

How to evaluate your supply landscape, understand how it's changed, and forecast your future needs.

Reflect

Supplier impacts

Supply operations impacts

Working capital/inventory

Restart

Supplier network

Supply chain operations

Tech and infrastructure

Revitalize

Immediate learnings

Supply chain optimizations

Supply chain investments





Reorganizing your supply chain: Evaluating your supply landscape and future needs based on changes in demand.

Reflect—Where do you stand today?

What do you currently know about your suppliers?

- ☐ Who and where are your (key) suppliers?
- ☐ What do you know about them (and their suppliers)?
- ☐ How are they supporting you through this period?
- ☐ How have your suppliers (and their suppliers) been affected?
- ☐ Where do you sit in their priorities?
- ☐ What lead/economic indicators can you use to predict changed demand to your supply?

How well do you predict the impact of changed demand on your supply?

- ☐ Which areas and geographies of your operations have been impacted?
- ☐ How will the impacted operations affect your ability to produce and deliver your goods/services?
- ☐ How will you preserve the safety of your staff in the operations?
- ☐ What impact will all this have on costs?
- ☐ How well are your existing facilities and supply lines set up to address post-COVID-19 regulations/expectations?

What is your business's working capital/inventory?

- ☐ What visibility do you have of your current working capital/inventory and what is in the pipeline?
- ☐ What tax considerations do you need to reflect on to balance the cost and timely supply of key goods and services?
- ☐ What inventory excesses/shortages do you have as a result of recent activity?

Your plan—Getting up to speed on the impacts on your business.





Reorganizing your supply chain: Evaluating your supply landscape and future needs based on changes in demand.

Restart—What can you do now?

What have you learned about your supplier network?

- ☐ What are the (priority) products and services you will need from your suppliers to restart your operations?
- ☐ Will your existing suppliers be able to adequately support your operations when you restart?
- ☐ What additional suppliers do you need? Which suppliers do you no longer need?
- ☐ What/how do you communicate with them?

Where should you focus on supply chain operations?

- ☐ How do you ensure that your operations are robust and resilient as you plan to restart your business?
- ☐ What can you do to keep costs under control?
- ☐ What adjustments and changes will need to be made to inventory and production plans to effectively restart operations and meet customer demand?
- ☐ How do you effectively manage cash with customers and suppliers (while keeping your business viable)?
- ☐ How do you dispose of aged inventory cost-effectively?
- ☐ What can you do to start generating and replacing lost revenue and sales quickly, and what are the supply impacts?

What is the technology and infrastructure supporting your supply chain?

- ☐ Do you have enough visibility of the supply chain and what is moving through?
- ☐ Are your planning processes robust and agile enough?
- ☐ What is the cybersecurity exposure created by your trading partners?
- ☐ What patches or enhancements are required?
- ☐ What are the minimum enhancements/changes required to restart?

Your plan—Identifying immediate steps for your business to action.





Reorganizing your supply chain: Evaluating your supply landscape and future needs based on changes in demand.

How can you start to shape your future?

What immediate lessons should you address?

- ☐ What is the cybersecurity exposure created by your trading partners?
- ☐ How do you maintain/improve visibility of inbound materials and advance warning of any shortages/problems?
- ☐ What does the transition period after September look like for your business?

What COVID-19 lessons can you use to optimize your supply chain network?

- ☐ How can you best manage your supply chain moving into the post-COVID-19 economy?
- ☐ What collaboration may be required with your strategic suppliers to ensure you are able to restart operations efficiently?
- ☐ What changes to the supply chain network, including inventory, are required to address new demand and supply patterns?

How can you invest in your business's supply chain to better mitigate future risks?

- ☐ What investments (e.g., automation, remote operations) are required to maintain staff safety?
- ☐ What changes to layout and ways of working at your facilities are required to maintain staff safety?

Your plan—Revisiting and forecasting to seize opportunities.



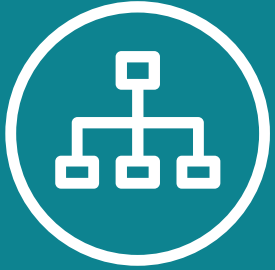


Your supply chain workplan

What are some of the top priorities you need to plan for? Use the workplan below to map them out week by week.

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4. Rethinking your workforce

How does the crisis affect the capacity, capability, and affordability of your workforce?

Reflect

Workforce capability

Workforce ways of working

Workforce communications

Restart

Workforce costs

Workforce supply

Virtual workforce

Revitalize

Workforce productivity

Future workforce





Rethinking your workforce:

How do impacts from the crisis affect your workforce?

Reflect—Where do you stand today?

How has capability been affected across your workforce?

- ☐ What capability gaps were revealed by this crisis? What hidden strengths emerged—how do you capture these for the longer term?
- ☐ How will workforce changes influence your capability across the business? What capability will be needed immediately and in the longer term?
- ☐ How do you channel resources to recovery planning while meeting day-to-day business-as-usual needs?
- ☐ Do you need to consider alternative talent pools to supplement the workforce? E.g., gig workers, casual staff, partnerships?

How have the ways of working been affected across your workforce?

- ☐ How can your business keep focused on employee health and mental well-being? What is your approach, and what policies do you need to have in place to abide by government guidelines and employee well-being needs?
- ☐ What approach tools are available to best manage performance in a dispersed, virtual workforce (e.g., Slack, daily stand-ups, etc)? Or is your business using them well?
- ☐ Have you determined which kinds of work will remain virtual and which will return to the office, on a temporary or permanent basis?
- ☐ What processes and practices are anchoring your employees to the physical workspace? Can these be changed?
- ☐ Have you had to make any changes to team structures, succession plans, or reporting lines?
- ☐ How do you make sure the business is anticipating work refusals before they happen?

How is your business supporting open communications with the workforce as the business reopens?

- ☐ Do you need to adjust plans to increase flexibility/sick leave?
- ☐ Are you remembering and devoting enough time to checking in on your employees during these uncertain times?
- ☐ What message is the business sharing in relation to job security?
- ☐ Can employees and managers access new government mental health support programs, tools, and resources?

Your plan—Getting up to speed on the impacts on your business.





Rethinking your workforce:

How do impacts from the crisis affect your workforce?

Restart—What can you do now?

What major costs does the business need to consider in financial planning?

- ☐ What is the total cost of your workforce, and what options are available to support and retain it? E.g., CEWS, other government incentives.
- ☐ What further changes in demand to your services do you anticipate and how will that affect workforce requirements?
- ☐ Do you delay scheduled new hires or revisit other recent offers? Do you need to re-evaluate salary increases for the coming year? Have you considered alternative options to redundancies, including reduced schedules, shutdown periods, or financial assistance packages?

What workforce is critical to restarting?

- ☐ How do you plan for potential shortages in talent supply? Can you consider a new source of talent, e.g., contractors?
- ☐ What is your employee value proposition in the new normal? How does the business address concerns on job security and uncertainty over the future?
- ☐ How do you manage volatility in work activities or shifts in your business to redeploy skills where they are needed most?
- ☐ How do you ensure people get the information they need as they start returning to work?

How are you supporting your workforce to return to a 'new normal' in a virtual world?

- ☐ What support will be available for employees to support mental and physical health and well-being?
- ☐ How do you connect, engage with and support your virtual team? Are you equipping leaders and managers with the resources they need to support teams and instill trust in a virtual/hybrid workforce?
- ☐ Do you have enough two-way communication channels in place to manage employee questions, concerns, and remote working support?
- ☐ How do you support those requiring increased flexibility? (e.g., working parents with kids schooling from home)
- ☐ What tools and platforms continue to be effective in supporting physical and virtual work?

Your plan—Identifying immediate steps for your business to action.





Rethinking your workforce:

How do impacts from the crisis affect your workforce?

Revitalize—How can you start to shape your future?

What new opportunities did your business discover?

- ☐ What is your ideal workforce size to enable flexibility and sustainability in the current environment and that allows you to move forward?
- ☐ What capabilities are most valued as your work priorities and outcomes evolve?
- ☐ What skills do you need to grow or invest in?
- ☐ What have you learned about effective collaboration and productive ways of working?
- ☐ How can you embed these practices moving forward?
- ☐ Are there persistent challenges your business is facing with existing collaboration and technology platforms? Do platforms need an upgrade to support new behaviours? Are you considering employees preferences?

What workforce productivity lessons did you learn and how can you optimize moving forward?

- ☐ How does your business need to adjust or reprioritize your people and operating plans?
- ☐ What have you learned from the crisis about effective work practices for your environment?
- ☐ Do you need to update or rethink succession plans, particularly for key roles?
- ☐ Are there opportunities to cross-train your employees so they can perform a variety of roles and future-proof your business?
- ☐ If you scale or continue virtual work after the pandemic, do you need to revise employee processes such as induction, onboarding, access to remote hardware, performance criteria?

How do you improve your workforce response for future crises?

- ☐ What has your business learned from its response to this crisis, and how are you updating your emergency response protocols for the future?

Your plan—Revisiting and forecasting to seize opportunities.





Your workforce planning

What are some of the top priorities you need to plan for? Use the workplan below to map them out week by week.

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5. Digitally enabling your business

How your business can make use of digital tools and assets to increase growth.

Reflect

Digital enablement

Security risks

Platform optimization

Business processes

Restart

Digital touchpoints

Digital ways of working

Virtual enablement

Revitalize

Productivity optimization

Infrastructure optimization

Future digital opportunities





Digitally enabling your business:

How can you make use of digital tools and assets to increase growth?

Reflect—Where do you stand today?

How can your business enable digital ways of working?

- ☐ Has your organization deployed hardware and software to support remote working, and are staff enabled to access it?

What security risks do you need to consider?

- ☐ Does your network, hardware, and applications have appropriate security in place for remote working, e.g., encryption, multifactor authentication?
- ☐ Have you considered the security implications of a flexible working environment?
- ☐ Do you have a business continuity plan and an incident response plan? Are they up to date?

How can you optimize your digital platforms to sustain your business?

- ☐ How do you manage the increased demand on your e-commerce and digital operations?
- ☐ Can your IT infrastructure handle the increased number of remote connections if the majority of your organization has to work remotely?
- ☐ Will the speed of your IT infrastructure provide a suitable work experience for your organization? What upgrades can you make?
- ☐ Have you spoken to your outsourced IT vendors, managed service providers, and other relevant third parties regarding their readiness and availability given the potential impact from COVID-19? How will your IT teams deliver on-site support if it is required?

How can your business enable seamless digital processes?

- ☐ Are there shortcuts that were developed during the crisis that need to be reversed? Are there any behaviours you need to promote with employees to ensure the continued reliability of your systems and infrastructure? (e.g., direction to preserve bandwidth)
- ☐ What processes and practices are anchoring your employees to the physical workspace? Can these be changed, or made virtual?

Your plan—Getting up to speed on the impacts on your business.





Digitally enabling your business:

How can you make use of digital tools and assets to increase growth?

Restart—What can you do now?

What ongoing security risks does your business need to address?

- ☐ Have privacy concerns been adequately addressed?
- ☐ Have cybersecurity concerns that come with a dispersed and remote workforce been effectively addressed?
Do you foresee others?
- ☐ Will you allow the continued use of personal equipment that may cause security risks?

How can your business make the most of digital touchpoints?

- ☐ How do you provide a digital equivalent of your existing product or service?
- ☐ How do you differentiate your product or service with limited or no physical touchpoints?
- ☐ How do you transform and optimize your digital platforms to sustain your business?

How can you improve your digital ways of working?

- ☐ What features do you feel will be most important to enable continued connectivity of your dispersed workforce? (e.g., video, whiteboards, simultaneous document editing)
- ☐ Have you introduced new software to enable your employees to work from home? Moving forward, should your people use a common collaboration platform or will you allow individual teams to choose?
- ☐ What tools and platforms continue to be most effective for supporting a blend of physical and virtual work?
How are you considering employee preferences?

Where does virtual enablement need to be addressed?

- ☐ What hardware challenges have your employees encountered while transitioning to remote work (e.g., difficulty procuring office tools)? Have these challenges been addressed?
- ☐ Was any hardware provided to employees that needs to be returned? (e.g., monitors)
- ☐ Are there any persistent challenges your employees are facing with existing platforms? Where can you make enhancements?
- ☐ What work can still not be completed because information or resources have not been fully digitized, and how can these challenges be remedied quickly?

Your plan—Identifying immediate steps for your business to action.





Digitally enabling your business:

How can you make use of digital tools and assets to increase growth?

Revitalize—How can you start to shape your future?

What digital lessons can you scale to optimize your productivity?

- ☐ How do you remain on the cutting edge of remote working and other types of software offerings, to increase productivity and keep your business prepared for future disruption?
- ☐ How can your business best work with IT to anticipate use patterns and needs in mobile devices as you shift your patterns of working? (e.g., continued prevalence of remote work, less travel, return to physical workspace)
- ☐ Should you invest in remote work technologies or expand use-your-own-device programs, including via subsidies (e.g., for laptops) for workforce segments that did not have them before?
- ☐ Which of your employee processes are ripe for greater digitization? (e.g., recruitment, onboarding)

What is your business strategy to optimize digital infrastructure and processes moving forward?

- ☐ Do you have sufficient infrastructure (e.g., bandwidth, access licences) to manage remote work?
- ☐ Do you need to revise the processes you have in place to provide easier access to remote-work hardware (e.g., monitors, printers, docks, headphones) in the future?

How can you design a virtual workplace ecosystem that is more resilient to change?

- ☐ How does your business ensure that workers have access to the right support and equipment if there is a recurrence of COVID-19?

What are the digital opportunities for your business structure?

- ☐ How do you reinvent your business to take advantage of a digital world?
- ☐ How do you reinvent your products and services to be relevant in a predominantly digital world?
- ☐ What investments do you need to make in cybersecurity with your trading partners?

Your plan—Revisiting and forecasting to seize opportunities.





Your digital workplan

What are some of the top priorities you need to plan for? Use the workplan below to map them out week by week.

It's time to put your plan to paper. For best use, print this sheet out in 11x17 format.

[illegible]



6. What's changed for your workplace?

How does COVID-19 affect your approach to managing physical and virtual workplaces, and address risk and compliance?

Reflect

Public health requirements

Legal and compliance obligations

Restart

Workplace costs

Travel policy

People and culture

Revitalize

Real estate strategy

Virtual and non-virtual design



What's changed for your workplace?

How does COVID-19 affect your approach to risk and compliance?

Reflect—Where do you stand today?

How are you ensuring workplace practices continue to align with public health directives to protect both customers and employees?

- ☐ How is your business managing staff and customer numbers on your premises to comply with both provincial and federal government obligations?
- ☐ Are your sanitization processes sufficient and in line with COVID-19 recommendations?
- ☐ Do customer-facing employees need any additional personal protective equipment (PPE) when engaging with clients in your workspace, or theirs?
- ☐ Are you and your employees aware of the health and safety policies applicable to home working?
- ☐ How are you staying on top of regulatory changes in other jurisdictions that may have implications for your business?

What are your updated legal and compliance obligations?

- ☐ Do you understand your legal obligations as an employer or business, and those of your visitors, contractors, suppliers, and volunteers?
- ☐ Do you have the right incident-reporting and prevention channels in place to manage your workplace risk strategy?
- ☐ Do you understand the licence and registration requirements that might have changed before undertaking business-as-usual activities?
- ☐ Do your employees and customers feel safe?

Your plan—Getting up to speed on the impacts on your business.





What's changed for your workplace?

How does COVID-19 affect your approach to risk and compliance?

Restart—What can you do now?

What major costs does your business need to consider to plan effectively?

- ☐ Is your physical workspace sufficient to address social distancing recommendations for all your staff? Do you need to consider rotations, shift patterns and reconfiguration of workplaces (e.g., ensuring desks do not face each other) to maximize safety?
- ☐ What investments do you need to make to support and enable virtual ways of working and customer channels and collaboration tools?

When business operations are up and running, do you need to update your business travel policy?

- ☐ Do you need restrictions on who travels and how often?
- ☐ Do you need to develop guidance for personal travel (e.g., requirement to flag travel to high-risk locations)?

How do you keep your staff connected when they may not always be in the office?

- ☐ How can you build an approach to keep employees engaged and informed, and to build the trust and community necessary for effective re-integration and new ways of working?
- ☐ Does your business need to more deliberately design inclusive practices and focus on culture so as to keep teams connected?

Your plan—Identifying immediate steps for your business to action.





What's changed for your workplace?

How does COVID-19 affect your approach to risk and compliance?

Revitalize—How can you start to shape your future?

What new opportunities did you discover?

- ☐ Do you need to adjust your premises strategy for the longer term?

How are you positioning your internal and external brand and purpose to thrive in the future?

- ☐ How do you position yourself to thrive in the future and help your teams redesign and de-risk operations?

How will you reimagine your workplace to ensure heightened safety in the future, and enable the right balance across a virtual and non-virtual workforce?

- ☐ What physical space best supports your business needs and operating model?
- ☐ How does your space allow for collaboration, innovation, productivity, comfort, and safety?
- ☐ How are technology, tools, and other ways of virtual working enabling increased collaboration with a remote workforce?
- ☐ How can the workplace be optimized for parts of your business, and how will processes be digitized?
- ☐ How important is physical proximity to the work your business does?
- ☐ What barriers impede employees' ability to work across geographies?
- ☐ Are there opportunities to adjust the working space if working times for employees change? (e.g., staggering start and finish times so employees don't need to travel during peak hours)?

Your plan—Revisiting and forecasting to seize opportunities.





Your workplace planning

It's time to put your plan to paper. For best use, print this sheet out in 11x17 format.





COVID Concierge

This workbook has been curated for you by our COVID Concierge team. For a discussion about how we might help you with your Recover Plan, contact us at covidconcierge@deloitte.ca

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Looking for more?

Our team has created Covid-19 business support tools to help you access further support on...



Financial assistance

Find out which assistance is right for you on our [Small Business Support Navigator](#) or our [Government Relief Measures Summary](#) page



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