

A woman with her hair in a bun, wearing a white lab coat, is looking intently at a laptop screen. The scene is set in a laboratory or office environment with warm, golden lighting. The background shows a white cabinet and a colorful geometric patterned cup on the desk.

Modern tools to keep your RIAs connected and productive

How to equip your
team for success

Teams don't connect personally and share ideas enough these days, especially as more teams become dispersed and travel budgets remain minimal. This disconnect can significantly affect the quality of work that gets done and the time required to complete it.

For too long, rigid collaboration tools have held us back from doing our best work, no matter our location. The phone and email are inefficient and lead to confusion and wasted time, but no one will adopt a more advanced tool if it's difficult to use. What's left is a world where it's hard for remote teammates to effectively collaborate and produce without constant meetings.

The modern answer to effective collaboration between dispersed team members is a comprehensive set of tools, tools that are easy to use both on their own and together. Citrix collaboration tools offer solutions to an array of collaboration requirements, including meeting online, sharing and accessing large files and keeping track of projects and people—all while seamlessly working together.

Meeting online with GoToMeeting

To effectively work together, your RIAs needs to be able to communicate at any given time. **Getting everyone into the same conference room is usually expensive or inconvenient, or both**, so more and more businesses are taking meetings online. High-definition video conferencing from GoToMeeting allows your team to meet online and talk as if you were in the same room. With just a click or a tap, you get the non-verbal communication and relationship building of in-person meetings without the inconvenience of expensive travel costs or relocating to the office. GoToMeeting offers these business features to enhance your online meetings:

- HD video conferencing on your PC, Mac or iPad
- Mobile apps so you can attend meetings from your Android, iOS or Windows device
- Recording function to save your meeting content for future reference
- Screen sharing and on-screen annotation tools to replicate the in-person meeting experience
- Integrated VoIP and toll-based audio conferencing with the option of adding toll-free and international toll-free numbers

Sending files securely with ShareFile

Inevitably your team shares, revises and reviews documents across the group, and chances are you do a lot of that sharing through email or, for larger files, client file-sharing tools. And **that means your files and data are not being sent securely.**

ShareFile is as easy to use as consumer-grade file-sharing tools, but its security is IT-department-approved. It also includes these robust business features:

- Secure sharing and syncing for files up to 10 GB
- Automatic desktop sync and data backup between the folders on your desktop and your ShareFile account in the cloud
- Custom-branded web portals for clients, vendors and other external partners to securely access and share files
- Confirmation messages of received files with extensive tracking options
- Microsoft Outlook plugin to send and request files directly from your inbox
- Mobile apps for iOS, Android, Blackberry and Windows Phone tablets and smartphones

For client meetings and meetings with global stakeholders, toll-free and international audio options make accessing the meeting easy and convenient for your participants.

Keeping track of people, processes and projects in Podio

Think about the programs and documents you use to keep track of people and projects for your team—there's probably a host of them that you regularly reference scattered around your company's server. Moving these processes and documents to the cloud is how modern managers keep track of their teams and projects.

Podio is the social work platform that unites your team, data and processes in one place. Rather than working in spreadsheets to keep track of your project statuses and sending meeting notes and slide decks through email, all of **your team data can live in one online environment for the team to access and update whenever they need to.** Podio organizes teams into workspaces and then allows teams to build custom apps for housing their data and processes there without any technical know-how necessary. Building an app is a matter of dragging and dropping, no coding or advanced technological skills necessary. Additionally, Podio integrates with ShareFile, so large files can be hosted

and shared within the Podio environment. To make your team even more effective, Podio also features these business functions:

- Private and customizable workspaces so your team can manage everything from finance reports to CRM and sales leads
- Task management and the ability to assign tasks to other teammates
- Integrated instant messaging for quick updates between team members
- Mobile apps for iPhone, iPad and Android so your team can access and upload data, communicate and update project statuses from anywhere
- Ability to share select projects with external partners

Working together with Citrix collaboration tools

Working together these days is about being able to meet easily as a group, securely share documents and monitor team data in a private, cloud-based environment. Your meetings, files and processes belong in the cloud, because that's how modern, dispersed teams get things done.

[Contact us](#) today to get started.

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