A Guide to Working Remotely, Efficiently and Securely
Best Practices & Practical Tips to Build Your Roadmap

Whether or not you believe remote work is the future of work, here it comes. Recent events have brought remote work into focus, and every employer will have no choice but to react.

For many, the future of work is remote and mobile. In the past few years, most employers have at least experimented with remote working. Some have implemented enterprise-wide programs. For some, it has worked out amazingly well, while for others the experience was not as rewarding. After launching their programs, some larger companies like IBM and others backed away from remote work.

At IT World Canada (ITWC), we’ve been working at this for a few years. We’ve seen some great results, and we’ve had some challenges. But the ability to work remotely became core to the digital transformation strategy we wrote about in our book “Digital Transformation in the First Person.”

When we moved into our new offices, our aim was to adopt a hybrid strategy. Some work remotely, some come into the office regularly, and others have a mixed schedule of both. Our program has been largely very successful. It has increased productivity, allowed us to hire and retain some employees outside the expensive GTA, and, we think, helped many achieve or get closer to a work-life balance.

It took some time for us to get it right. For many companies, the new pandemic has thrust them into remote work. Companies large and small have little option but to rush headlong into the future of work.

This Guide to Working Remotely, Efficiently and Securely is based largely on our own experience. But being a publisher, we’ve also learned from other companies and experts. We wanted to share what we’ve learned for many employers. Our goal is to give you some tips and best practices to help make your experience as valuable as ours.

We’ll begin with a checklist. For those who want more context, we’ve put a lot of “first hand experience” into the rest of this document. There's contact information at the end, in case you want to suggest your own tips or let us know about learnings from your experience. We'd love to hear from you.
A Quick Checklist for Working Remotely, Efficiently and Securely

1. Set goals for your remote working strategy

2. Establish a remote work policy setting out the rules:
   - Maintain a regular workday with availability during work hours
   - Use video for calls (rather than email) and meetings to improve interpersonal communications
   - Report sick or personal days to managers
   - Maintain a proper workspace
   - Continue to hold regular in-person meetings

3. Review management practices and processes
   - Hold regular focused meetings with clear objectives
   - Apply agile techniques to break large projects into smaller ones with defined outcomes
   - Require weekly reporting from employees on the outcomes achieved

4. Develop an integrated technology plan
   - Establish a dedicated team to roll out and support remote work capabilities
   - Choose standard systems to be used by all remote workers
   - Establish one central data source
   - Provide technical support and training

5. Select the technology tools
   - High-speed reliable Internet connections
   - Collaboration and storage tools
   - A phone system that follows users
   - A messaging system
   - Video conferencing
   - Time and task management tools
   - Security
   - Endpoint and anti-malware protection for laptops
   - Backup systems for employee equipment
   - Secure storage
   - A secure remote access solution
   - Wi-Fi security
   - Acceptable use policy on devices

6. Patience - with everyone being stressed, take a deep breath and think carefully about everything you say.
The first step for us was to set some goals. Who needed to be on site? Who didn’t? How would we manage our employees while they were remote? This exercise was not only technical and logistical, but changed our fundamental work habits and our culture.

As experts will tell you, and our experience bears out, habits and culture are the two most difficult things to change in a company. What looks simple on paper is often much more difficult to put into practice than you could imagine. Resistance, conflict, and even subtle sabotage appear for a variety of reasons, and from the people you would least expect. Preparing for these obstacles is essential.

Successful remote workforces don’t just happen — they’re built. You don’t just hook someone up to your office systems and expect top performance; it comes out of a carefully crafted and executed strategy.

But you probably don’t have a lot of time to plan. And there’s a lot going on. Here are the essential questions to ask during your 10-minute brainstorming session:

- What type of work is going to be easy to do remotely?
- What is going to be more difficult?
- What is going to be an obvious problem?
- What seems simple to do but might disrupt behaviours, habits, or personal/social interactions?
- What rules do we need to put in place from the start?
- How will this change how we manage our staff?
- How will we monitor productivity and quality?
- What impact will it have on individual people?
Daily routine. We maintain a predictable workday that accommodates our clients and the needs of other staff members. Routines and norms are a part of how we manage our working lives, but in a virtual world this can easily disappear. With mobile devices and remote access, there is no start and no end to the day like there is in an office. We took action to preserve at least some of our routine. One key item was to ask our staff to have a quick virtual call with video cameras on at the beginning and end of the day. This single action has a lot of benefits. It gives some sense of having one time when everyone is available for announcements and news.

Although this met with initial resistance, we insisted, and as leaders of the company, required that we were also invited to “drop in” to ensure these new habits were built.

Availability. One of the key issues that surfaced almost immediately was the question of availability. When someone is at the office you know they’re at least physically available, and we have visual cues that they’re working. However, when you can’t see them or contact them right away, it has an immediate negative impact. We might begin to wonder if they’re really working.

We reminded our employees that during office hours they’re expected to be “at work.” They’re expected to respond to people who are trying to contact them within 15 minutes.

It’s equally important to minimize interruptions. Constant calls or long emails can be serious interruptions. People don’t see the “heads down do-not disturb me” body language when someone is busy or tied up on a call. While it might seem counter-intuitive, we urge people to stay connected on chat or with text. You can dive in easily, especially when there are (inevitably) long virtual meetings or conference calls. With some of these tools, if you miss a conversation, you can easily catch up. A glance and a few points in a virtual conversation can be a nice break before you get “heads down” to focus on the next unit of work.
Email. While email is invaluable in some cases, in others it’s destructive to communication and productivity. Few among us have never received or sent an email which, while innocuous to the sender, brought a flaming response. Many of us have sent a simple question and gotten back a three-page response.

When things get tense, email can be like pouring gasoline on a fire. That’s the normal state of affairs. When everyone is suddenly remote and doesn’t meet for days or weeks at a time, this gets worse. And even when the message is clear, a series of long emails as a way of collaborating is just not effective. We ask staff not to use email when a call will do. Our twice-daily quick meetings also reduce the need for endless emails.

Video. Our rules demand “camera-on” video calls whenever possible. This isn’t about whether staff spend all day in their pajamas, although getting dressed and ready for work does provide an essential routine. Rather, it restores interpersonal communications. You can see people’s expressions, and hear their voices. It’s essential to good communication, and helps to provide personal contact with another human being on an otherwise virtual day. A “smiley emoticon” simply doesn’t bring the joy of a human smile or a bit of laughter.
Absenteeism. Keeping track of sick days or personal days for remote workers can be difficult. If employees are not available for any reason, they must report it to their manager before work starts. There's nothing worse than not being able to find a remote worker, only to hear that they "were resting because they weren't feeling well." We want to know when employees are off sick, so that we can ensure someone is covering for them in their absence.

Proper work space. Employees need a quiet space with as few distractions as possible. While there are some distractions at work, they can be seen and managed. For some, the home is not a great place to work. We acknowledge that kids may be home at this time, deliveries happen, and pets may make noise. Some of this is unavoidable. Nonetheless, we insist our staff maintain a workspace that allows them to focus on and complete their work. Providing equipment like home whiteboards, stand-up desks, or big screen monitors helps to establish a real work space.

Regular in-person meetings. We try to create a break from remote work by bringing people together regularly. For example, although our development team works mostly remotely and has daily meetings, we have a “developer day” at least once a month with everyone there. We do group work that brings in some who always work outside the office, combined with some social activity such as a lunch or just getting out in the summer. That might not work for everyone, but if it’s possible, it’s a great break from being home all of the time. In the days of COVID-19, we're trying to recreate some of this with extended video calls.

Remote work policy is critical. Whatever you do, publish a policy, updating it as needed. Put it out there for all employees to read. Above all, reinforce and, if necessary, enforce it. Senior management must set an example with their own behaviour, and constantly monitor whether the policy is being followed. New habits will form eventually, but it takes time.
Much of what we’ve learned in management disappears in a virtual environment. We’ve discovered that agile principles fill the void.

Agile was developed to address issues in IT projects. It promotes teamwork, and breaks large projects into many small ones with clear and meaningful outcomes. It has spread to many other places in organizations. We use agile extensively, including:

- **Standup meetings.** We have "standup" meetings regularly for staff members who are largely remote. "Standups" take their name from the idea that if people stand during a meeting, it will be focused and quick. While we can’t insist that people stand, we apply our own version of this for remote work. We insist meetings have an objective (not just an agenda). You have to accomplish something at a meeting. We often work from a shared document to keep on track. These are shared in advance as a way to ensure people prepare for a meeting. We take large discussions “offline” to other venues to ensure the right people — and only those needed — are there. Our management team meets for a daily standup, and we do the same with other groups as well. We use video conferencing for this.

- **Agile techniques.** In addition to the standup, we use a lot of agile techniques to manage remote workers. We set weekly goals for our teams, and ask them to present their results at least weekly. Agile methods should produce a continuous stream of measurable outcomes of value to the user or the customer. A series of small but valuable incremental improvements flow from a properly trained and functioning agile work team. Even if they are “out of sight,” there is a regular reminder of the value provided by remote workers, and a constant challenge for that group to achieve results.

- **Weekly reporting.** We have time reporting in place where applicable, but for most staff we rely on the daily standups to help maintain collaborative teams. For individuals, we have simple weekly reporting:

  - What did I plan to do?
  - What did I get done that I planned for?
  - What did I not get done that I planned for?
  - What was unplanned that I did?
  - What am I planning for next week?
This report focuses on real outcomes and not just on the time spent on a task. It forces people to set goals in advance. It’s not always a replacement for time reporting. You may still want to know how much time people spend on particular items. But it focuses on the value that is created — how productive the time is — and not just on the time spent. The key, again, is execution. Our leadership team is expected to read and reply to these weekly reports.

**Processes**

- **Identify and adapt.** Make a list of the processes needed to get work done. It will surprise you. Think each one through. What will you have to do differently to make it work in the remote world? You may not be able to do this immediately, and you may miss a lot of them, but try. It’s better to identify some key ones than none at all. Then establish a group that is committed to process improvement for remote work.

- **Management.** Our process management tool breaks everything down into little projects with a series of steps. Staff can be assigned work directly or they can get the next piece of work from the system. For this technology tool to work, you first have to break down your work into smaller projects with clear outcomes. The approach and process came first.

- **Defined outcomes.** Establish the principle that everyone has the right to know exactly what completion means, and to have all the information needed to achieve it. If you think this is easy, you haven’t thought about it enough. It’s harder than it seems to describe the real outcome you want and not just the steps to do it.

"Establish the principle that everyone has the right to know exactly what completion means, and to have all the information needed to achieve it."
It’s common to hear people say today “the people, processes and goals are important and difficult. The technology is easy.” While we understand the sentiment, this statement is nonsense. It’s true there are many tools, and they’ve become more affordable because of the cloud, but let’s not fool ourselves — putting it all together and having it work in a reliable production environment is NOT easy. You need the right tools, and some good planning and execution in the following areas:

**Dedicated team.** At least initially, you need a dedicated team that can roll out and support your remote work capabilities. Again, borrowing from the Agile model, you need a team with technology, process, and people skills. Ideally, this team will not just be power users but also patient communicators. While you may not wish to reinvent your processes, you must be prepared to adjust them. As you implement the policy, you will have to solve key problems, and bring along people who are at many different levels of comfort and ability to work remotely with technology. Your success depends not on those who can adapt quickly but on how well you can move the rest of your employees along.

**Standards.** If staff are going to work remotely, it’s essential that, wherever possible, everyone uses the same systems. Remote collaboration is ineffective if people are using different tools and still insist on sending documents with revision marks on them. Wherever you can, pick a standard and work with it. Fewer variations will mean better support. As well, all your staff can support one another when systems are more uniform.

**One data source.** Even when colocated, the “Excel” jungle of data and siloed systems introduces enormous inefficiencies and errors. With remote work, the situation just gets worse. Establish one “source of truth” for data. Leverage technology to get you there. We use one tool that takes its data from central datasets and reports, whether employees are accessing them from their home office or the main office. As we expand our analytics capabilities, we have been building a single access point for all analytics data. Even if employees are working remotely, we know they are getting secure access to the right data, presented in a way that makes it easy to understand.

**Patience.** With a wave of new users, your staff will need patience under pressure. Patience is necessary to ensure those who need help aren’t afraid to ask for it. It’s also a two-way street. IT staff members
are going to need patience and cooperation from the business users as issues arise. In the current world, where so much remote work is launching at the same time, we can and should expect issues with system providers to arise. We are currently seeing even major providers struggling to cope with the increase in usage and demand for remote systems.

With those foundations in place, consider what tools and services you will need. Here’s our view on the minimum technology tool kit:

- **High-speed reliable Internet connections.** Most of your staff should have sufficient bandwidth and speed to meet their needs. Today, it’s not uncommon to have fibre service to the home. But don’t assume everyone has the throughput and speed to allow them to work effectively. Some may have to change or upgrade service to support large files, video conferencing, and Voice over Internet (VoIP) phones. In addition, people who live in rural areas are notoriously underserved. If the connections won’t support the work or are unreliable, productivity will suffer. While it may be a small percentage, you will need a strategy for those who have problematic networks or connections.

- **Virtual desktop solution.** While there are a wide range of tools out there, consider an all-in-one platform, like BlackBerry Digital Workplace, to give users secure access to email, corporate websites, servers, content and files on their personal or non-corporate managed Windows or Mac devices. This solution integrates easily with existing Microsoft Office or Microsoft 365 investments. This is a good way to simplify your BYOD and remote work programs for both traditional and non-traditional employees, such as contractors and partners.

- **Collaboration for documents including storage.** This could be covered by software like Office 365 with One Drive or Google Docs. These two office software packages have collaboration tools built in along with file storage and sharing which do an acceptable job for many businesses. But you may want to consider alternatives. As you consider your remote working software options, you need to be mindful of the level of security each offers.
Most importantly, there must be a clear way to manage security and access issues.

On the consumer end, Dropbox is very popular, and has a plan for businesses with some great features for sharing files and easily rolling back to prior versions. If an inexperienced co-creator deletes or corrupts the file you took so long to create, you can roll back to a prior version. Dropbox is not to be confused with Box, which offers feature-rich collaboration software aimed at the enterprise level.

There is also a very sophisticated document sharing offering from BlackBerry, which has useful security and sharing features, including the ability to safely recall a document that has been shared with an external company or user.

All of these collaboration/storage options allow employees to create and edit with any office suite or other tools while enabling secure collaboration. No matter what solution you take, you must have “versioning” to see comments or to track changes made by someone. The ability to “rewind”, if necessary, is a must. Most importantly, there must be a clear way to manage security and access issues. While Google and Office 365 are strong offerings, from a security perspective, they are no match for the higher-end enterprise content management and collaboration systems. Even if you decide to stay with the simpler alternatives of the integrated office suites, you should educate yourself on all the options.
A phone system that can seamlessly follow you, and which brings your office phone with you. We use VoIP phones that forward to, or hunt for, the user as needed. If you still have one of those old PBX systems, it’s relatively easy to convert to the newer cloud-based VoIP systems. If you don’t have a phone system that can follow people wherever they are, finding them when you need them can be an issue.

At a minimum, you’ll need a contact list with alternate phone numbers to ensure you can reach a coworker when needed, wherever they are. The advantage of VoIP is that anyone with a decent Internet connection can connect at home as if they were in the office. Soft phones and packages to allow employees to use their mobiles as office landlines are very useful. All the major telcos have cloud offerings available. As well, there are service packages from firms like Avaya and others which include installation and management. Look for something that integrates your cell phone, landlines, and even soft phones from computers.

Messaging allows you to easily text, voice, or video message each other. As we pointed out earlier, without these options you can literally drown in email. You’ll be reading long documents where a sentence would do.

An added benefit is that a well-designed messaging system can make even remote workers feel they are having a conversation with someone at the next desk. You can stay “plugged in” all day, with the added advantage of being able to scroll back and see what you missed in a conversation.

In the absence of face-to-face communication, many tools can fill the gap. Microsoft Teams is part of every Office 365 subscription, which most companies already provide. Google Hangouts is available with any Google Apps installation. Slack and Skype are other tools that work exceptionally well. The trick is to have one and use it effectively.

Agile tool sets provide great ways to collaboratively work and manage activities remotely. Trello is one of the top software tools in this category, but there is also Asana and others. These are very effective at keeping small agile projects on track, and are, themselves, a great way to collaborate.
Teleconferencing and face-to-face collaboration that is easy to use and ubiquitous for everyone is a foundation of remote work. It provides video conferencing and screen sharing to replace the boardroom and whiteboard. Zoom.us has emerged as a real leader in this area, joining a host of other credible tools like Cisco’s Webex, GoToMeeting, and Microsoft’s Teams. They all offer video conferencing, meeting recording, and screen sharing, while most have a virtual whiteboard and other similar tools.

We cannot stress enough how much seeing a person’s face while talking changes the nature of communication and collaboration.

Time and task management. With people off-site, it’s essential to monitor progress, effort, and efficiency. In an office, you may spot that someone is spending far too much time on one task, or with a problem client. Remotely, you might not know until it’s too late and the hours are long gone. Time recording is one way to keep track of how people are spending their time.

Tracking Tools that enable Business Continuity. While Agile tools work for mini-projects, managing ongoing repetitive processes requires specialized tool sets. With the right tools, you can see the status of each project and who is working on it. Staff can take the next piece of work from a queue. There should be alerts to let you know if anything is stalled or held up in the processes. Without the ability to just walk over and ask, you’ll need an easy way to see that work is progressing, or to quickly find out who to ask about a piece of work.

Consider having the ability to be proactive during uncertain times by being able to send alerts and critical communications to all stakeholders and employees, and automate and track replies so you can respond to who needs help and track the status of them. There are a number of tools out there like BlackBerry AtHoc that can assist with communication, awareness and continuity. The trick is to know the options and find out what works best for you in your particular circumstances.
As you can imagine, moving your company from one or more central locations to a large number of decentralized locations changes your security exposure, and has implications for your Business Resumption/Disaster Recovery planning.

On one hand, having many decentralized operating units spreads your risk. If one home office gets hit with an outage or a denial-of-service attack, it affects only one of many users. However, troubleshooting that problem may be much more difficult. Once again, you need to think through what you will do before a problem strikes.

Here are some of the security and continuity issues you might need to manage when people work from home:

- **Security.** Once people are off your network, or not under the same roof, some of your existing security plans may not work. Employee laptops must have endpoint and anti-malware protection. If you don’t already have these tools or (more likely) if they aren’t kept up to date, you need to make this a priority. If you use URL filtering as an added layer of protection against threats or as a control to keep users from wandering into malicious sites, it’s not going to work as configured when employees are not in the office. The same challenge applies if you monitor malicious traffic and hacking attempts.

Software updates are another issue when employees are not in the office. If employees are using home computers, even occasionally, you’ll need to provide protection and possibly backup for them as well. With so many of our applications being web-based and accessible from anywhere with mobile devices, you should immediately put two or multi-factor authentication in place. It’s a low-cost and highly effective way to improve security on your devices.

- **Backup.** A working and tested backup of employee equipment is also essential. With more staff working from home for extended periods of time, it’s vital to have cloud backup or some other easily used remote system. Remember that even in environments where all work is done in the cloud (Google Docs or Office 365/OneDrive), files are still downloaded to physical computers. It’s important to realize that just because it’s in Google Docs or Office 365, it is not automatically backed up. If you have to restore a prior version or get a file that was deleted or corrupted, you still need a proper backup. Even if you had an automatic backup onsite, computers at home will not be backed up unless you
manage that directly. And while you might test your backups regularly (and we hope you do), will your remote employees do the same? We have seen some near-disasters when users didn’t use the backup systems we provided, or when they malfunctioned and nobody knew. Like the anti-malware software, you must constantly test and inspect to make sure both are functioning and up to date.

- **Secure Storage.** You need to make your storage available securely wherever people are. Google Drive and OneDrive are great, but as we noted earlier these toolsets are limited in terms of their ability to manage and control secure collaboration. If you’ve ever tried to find files or folders that are shared outside your organization, or automatically track or even shut down access to your data, you will appreciate that enterprise-level tools like BlackBerry’s Workspace or Box and other true collaboration systems offer better ways of addressing these challenges. For very secure work with a range of organizations, solutions like Box or BlackBerry’s Workspaces provide the next level of secure sharing and managed collaboration.

- **Easy and Secure Access to Corporate Resources.** It is vital to ensure employees have secure access to company email, intranet and apps. Employees working from home will not be protected by your corporate firewall. Traditionally, organizations have been using VPNs and VDIs to provide secure access. However, you can eliminate the cost and administrative burden of managing a VPN by opting for a secure browser based solution, like BlackBerry Digital Workplace. Based on BlackBerry’s Zero Trust Architecture, it provides secure access to corporate on-premises or cloud content by using multi-factor authentication, analytics for continuous threat protection and encryption. Users can securely work with their corporate tools and apps anytime and from any device, whether or not it is a traditional corporately owned and managed computer.

- **Wi-Fi security.** Depending on your level of security, letting people work from home may put your corporate information on a horribly insecure network — your employee’s home Wi-Fi. Home networks are notoriously prone to vulnerabilities. They provide easy access via factory-set or easily cracked passwords and technical flaws. In some

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cases (unless WPA2 or higher levels of security are set), compromising a home network is a piece of cake for the average hacker. You might wonder why anyone would go through all of the trouble to hack a remote worker. But we live in a world where cybercriminals increasingly target specific employees, particularly those who have wide security access, to leverage for their often sophisticated “spear phishing” attacks. In today’s world, finding out where someone lives is also an easy task.

The cost of a security breach can cripple a company. You need to understand your risks and, if necessary, ensure home networks are secure. Encourage your staff to contact their ISP by phone or chat to confirm they are at least WPA2 enabled. Reinforce the need for secure passwords. If necessary, even for just key employees, be prepared to send someone to inspect their system.

**Disaster Recovery.** There is a new range of threats (e.g., ransomware) that can hit workers. But there are also classic attacks such as denial-of-service and others that a home user may not be able to adequately defend against. Add to that other issues like house fires, robberies, or other home-related disasters and you are suddenly exposed to a whole new set of failure points that could interrupt work, particularly for key employees. Take a modified “zero trust”
approach. Assume everyone will be hacked, will have outages, or will have a disaster. Which employees will present the greatest risk or issues if they are unavailable or experience a security breach?

- **Shared machines and threats.** Last but not least is the issue of equipment in someone’s home. A company laptop can be a security nightmare if it is used by anyone other than your employee or if it is used by an employee for personal use. Malicious sites and social media are only two of the issues that you must worry about. You need a strong “acceptable use” policy, and ways to monitor and enforce it. Despite any pushback, it may be better to insist that work laptops be used only for work. Ask yourself whether you’re prepared to let shared and potentially compromised machines access your systems and data.

- **Technical Support & Training** Your staff are going to need a different type and level of IT support when working remotely. They may need remote software like Teamviewer or be able to use Zoom or other tools. Some of the anti-malware and endpoint protection tools, like Avast, have secure remote access tools built in. Without this, your IT staff will do a lot of travelling.

With your teams working from home, it’s important to provide access to excellent support. But prepare for a higher volume, at least initially. Remind employees how they can submit support tickets. Let them know how to reach IT quickly when needed for urgent/emergency issues. Ensure they can get a quick answer on key issues like security or when equipment is down. You don’t want someone clicking on a strange attachment because they didn’t feel there was anyone to ask. And you don’t want that big proposal to be lost because a key person was offline for a day. Support, prioritization, and escalation are essential.

It will also be important to remind your IT teams to triage support requests, and if you’re not already aware, find out how they currently do it.

Finally, you need effective training for your employees. We all know that security issues can be greatly reduced with training. So can other support issues. With technical staff stretched to provide support to a vast number of endpoints, training could be one of your best investments as your staff migrate from the office to the home office.
Never Waste a Crisis

While for many, remote work is not a choice in the current environment, it does present a real opportunity. For years, we’ve heard about “the future of work” and the need to rethink how work is done. Digital transformation, exceptional customer experience, lower costs, and increased productivity are all potential benefits of a work-from-home strategy.

While no one wanted change to be imposed on us in this way, the urgency and necessity of having a work-from-home strategy present us with a challenge and an opportunity. With a little thought, some creative approaches, and leveraging today’s technology, you may in fact turn this into a positive benefit for your company.

In our various publications like ITWorldCanada.com, ITBusiness, and Channel Daily News, our writers cover all of these issues and more. Keep reading us to get additional information on how you can leverage technology to address these and other business challenges. And feel free to drop me a line at jlove@itwc.ca if you have questions, comments, or additions. We’ll use these to issue subsequent updates to this paper.
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