



## Victories & Challenges: A Year in Review

By Hannah

One whole year, and what a year it has been! This week marks the anniversary of our work-from-home staff rotations in response to the novel coronavirus COVID-19 pandemic. Shortly after making this transition, we started publishing “COVID-19-free” blog posts in which we posed a question/topic to the P&A team and shared their individual responses; you can reread them [here](#), [here](#), and [here](#). In the spirit of these posts, I asked the P&A team to reflect over this past year of transitioning between the office and home and tell me a challenge and a victory they’ve experienced. These were their responses, in no particular order:

### E

Challenge: Missing out on learning opportunities from in-office conversations.

Victory: Problem-solving skills increased 10-fold. Had to get creative!

### Blake

Challenge: I have really missed and struggled with the limitations on meeting face-to-face with clients. Video conferencing technology is great, but nothing can replace being able to sit across from the client and have a discussion. I also greatly miss those casual interactions – running into them out and about in town or getting together for lunch or coffee.

Victory: I have drastically improved my home office set-up; making it easier to work remotely during the pandemic and get work done during non-business hours. As a bonus, it has given me an opportunity to share with my children exactly what I do at work in more detail.

### Shane

Challenge: Constantly transitioning from in-office to at home... Just when I get used to being in-office, I have to be ready to work from home again. And vice-versa.

Victory: Figuring out that we can work remote, which has been a blessing for work/life balance.

### Hannah

Challenge: Transitioning between the office and home; I just can’t quite seem to properly prepare for one or the other. I miss everything being consistent and consolidated at the office.

Victory: All the problem solving I’ve had to do on my own with what resources are available to me in a home setting. I’ve learned oodles of information over this past year, and it’s well-solidified in my mind because I had to be the one to figure it out instead of being given an answer by one of my coworkers.

### Kristin

Challenge: Keeping track of what everyone has going on!

Victory: I’ve learned to take life slower and learned how to be more intentional with my time.

### John D.

Challenge: I’ve found it quite challenging to “get in a groove” with rotating in and out of the office. By the time I get used to the rhythms of my home office, it’s time to go to THE office, and vice versa.

Victory: Although I’m an extrovert and was worried I’d go nuts without office socializing, I became quite accustomed to a full day of excel, loud music, and little people interaction.

### Brea

Challenge: Learning and tackling new things on an every-other week basis, while training.

Victory: Figured out this online ordering thing!

### **Audrey**

Challenge: Feedback is critical in learning new processes & procedures. Our Service Advisor training concluded right before the shut-down, making the new role key from a remote working environment and team perspective. There also isn't a substitute for time – meeting virtually with our team and clients is more challenging than in-person.

Victory: I've enjoyed being involved in the on-boarding process from all angles, being more involved with operational tasks, and day to day client engagement which has led to better client service (the goal)! I hope I have gotten better with trouble-shooting join.me meetings, pausing during presentations, and connecting virtually in general.

### **Jon S.**

Challenge: Networking was a bigger challenge for me in 2020 than any other year. Opportunities were limited to get together for a chunk of time, unless it was on the golf course, and I didn't play much golf last year. I'm looking forward to reconnecting face-to-face with friends and acquaintances this year.

Victory: Over the last year, I had many meaningful conversations with clients, in which we delved way beyond the portfolio or financial plan. With life and our daily routines interrupted, it proved to be a good time to refocus and discuss the values and priorities behind the money.

### **Pitt**

Challenge: Keeping everyone in the loop. I know my processes are more aggressive than most staff, and by not having earned the business from the start, they tend to be less aggressive. This can be good and bad. We are going through a period where fixed income does not diversify the way it once did. Like it or not, we will have to consider newer non-correlated asset classes as well as higher equity allocations. I am not totally sure of the hows and wherefores of crypto assets, but I can see that they work. The education will not be easy.

Victory: I have been working from remote locations for some time...Minnesota, California and 2201 Winding Ridge Road. The victory falls in the validation of installed equipment, remote procedures, client adaptation and co-worker delegation. I can't continue to support the clientele I have without help from my friends. Clients have been told to expect touches from my associates, whose abilities I respect. Clients love to report back and say "Yep, she's a lot better than you....Stay on vacation." Believe it or not, this has been a long process and not without a great deal of effort....I am pleased with all.

### **Diane**

Challenge: On the days my high schoolers are home, I struggle with them arguing with each other (for the absolute most ridiculous things) for 20 minutes during lunch period.

Victory: For my birthday, my husband's gift was noise cancelling headphones. Now my children can argue all they want about Tik Tok and I don't have to listen to it during my workday.

### **Trey**

Challenge: The limitations on in person client meetings and daily interactions with our P&A team. Phone and video conferencing just aren't the same...

Victory: I have become much better at delegating tasks and initiatives to our very capable P&A staff. This has freed up time and capacity for me to spend more time doing what I enjoy most, interacting with clients and prospective clients.

### **Dan**

Challenge: The Covid 19 pandemic has changed many things forever, much like the events of 9/11/01 changed the way we look at our safety.

Resolution: The realization of how fragile the physical health of the people of the world is. We as a society are going to have to be much more diligent going forward dealing with health crises. The commitment with which we act to fight a health crisis is of utmost importance. We all have to participate and take precautions for the benefit of the whole. The disease impacts everyone differently, just like a cold or headache.

And there you have it! A big thank you to all our clients for navigating these unprecedented times with us. As always, we couldn't do this without you, and we are grateful to have your business and your trust. Here's to 2021 and new challenges and victories that come with it!

*The views and opinions expressed in this blog post belong solely to the individuals who provided them and do not represent the official positions or policy of Pittenger & Anderson, Inc. as a whole. For the full Terms & Conditions of using the Pittenger & Anderson, Inc. website, [click on this link](#).*

*Pittenger & Anderson, Inc. does not provide tax, legal, or accounting advice. This material has been prepared for informational purposes only, and is not intended to provide, and should not be relied on for, tax, legal, or accounting advice. You should consult your own tax, legal, and accounting advisors before engaging in any transaction. Additionally, the information presented here is not intended to be a recommendation to buy or sell any specific security. To learn more about our firm and investment approach, check out our [Form ADV](#).*

To view this article and others like it online, visit the P&A blog at <https://pittand.com/blog/>.