

IMPROVE YOUR WORKFLOW: Collaboration Tips and Tools

Purpose: You know you want and need to get input from staff, and want to be able to work together on projects...but how? Instead of sending a confusing number of versions of a document back and forth, losing track of which one is the “final” vs “final final” document, check out some of our favorite best practices for collaborating, and our favorite FREE tools.

More emPower Tools
+ learn more about each topic
thecapacitycollective.org/resources

CREATE A COLLABORATIVE CULTURE

Compelling Mission

- Help staff connect to the mission (and even help create it, when possible)
- This keeps staff motivated, especially when they can see how the mission connects to their values

Build Strong Teams

- Include staff in decision-making. Builds commitment. Shows ideas valued.
- Give staff opportunities to bond and work together
- Consider quick daily group check-ins, and/or or weekly group meetings to check in and discuss goals.

Clear Expectations

- Clearly communicate that collaboration is an expectation of the job from the very beginning
- Put it in job descriptions, and consider asking a question during interviews

Encourage Innovation

- Encourage and give opportunities for team to brainstorm in a non-judgmental atmosphere
- Cultivate a “can-do” attitude where everyone is encouraged to pitch ideas (see [Improve Your Workflow: Conduct a Process Review emPower Tool](#))

Set Team Goals

- Set measurable goals together quarterly
- Successfully achieving goals together inspires more collaboration and builds positive momentum to continue collaborating

Keep Promises

- Do what you say you are going to do
- Treat staff with as much respect as you do clients
- If you can’t do it, explain why, and apologize when appropriate
- Be timely in your responses and with your follow up

Use Staff Strengths

- Empower staff to share and use their strengths
- Have staff share their strengths.
 - Assign tasks based on strengths and their goals for personal development

Reward Collaboration

- Recognize, reward and celebrate collaboration
- Have the team debrief how they made it happen at the next staff meeting
- Show your staff they are part of something meaningful

Work on Documents Together

Google Drive

Google Drive (web + apps) is a free suite of cloud-based tools (word processor, spreadsheet, etc.) connected to your Google account. All tools are great for collaborating; multiple people can make changes in the same file in real time, see who else is editing, leave comments, and use “track changes.” Admins can give varying levels of access to control who can see/edit.

- **Google Docs:** works like an online Word document
- **Google Sheets:** like Excel spreadsheets, including ability to make and share tables, charts and graphs
- **Google Forms:** make quick, easy questionnaires or surveys to gather info; data goes into Google Sheets
- **Google Slides:** works like online PowerPoint

Dropbox

Dropbox (web + app) is an online share drive, where users can store and organize files to be able to share them.

- No need to keep multiple versions of files; users are notified when another person has the same document open and has made edits.
- Users can access the files from anywhere, not just at the office, as long as they have Internet
- Admins control which users have read-only access to certain files/folders, and access to edit others
- Integrates well with many other software platforms, and has a phone app as well as browser access
- Share folders with people outside of the organization

More Collaboration Tools

slack

Slack is a platform (web + app) that allows you to communicate to whole teams or groups or individuals

- Organize your conversations into “channels” (news, training, projects) to keep topics clustered
- As easy to use as sending a text!
- Everything is searchable; no more digging through emails to remember that one thing...
- See the [Improve Your Workflow: Communication Tips and Tools](#) for more information about #Slack

OneNote

One Note is an intuitive system for keeping track of notes in what looks like a virtual notebook. It allows for organizing and sharing notes with collaborators who can edit in real time.

- Can create personal to-do lists with icons, colors, etc.
- Can write notes at meetings and link them directly to calendar events (works best with Outlook)
- Can create process notes with attachments (screenshots, documents) – it’s all searchable!
- Good for an online training manual – tab for each process, organized into themes, topics or weeks

TECH TOOL



Cost: FREE (plenty of functionality for most organizations)
 “Gold” level gives the whole team access to cool functions
Tip: have 1 person start board + invite everyone – free Gold level!

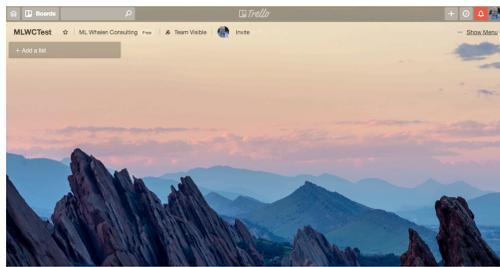
Available
 ✓ Browser
 ✓ iOS ✓ Android

Why Trello?

- ✓ Trello is a visual way of organizing projects—like **virtual post-it notes!**
- ✓ Trello is very **flexible**; you can organize your cards and lists in any way that works for your group; easy to make changes.

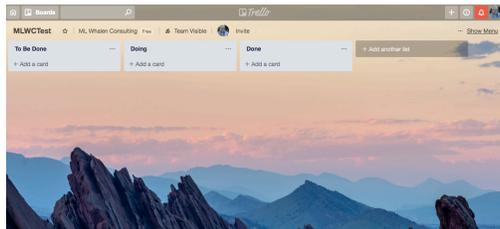
- ✓ Trello uses **color labels and assigned members**—each card quickly shows see what you need to work on, and how it fits in.
- ✓ You can **attach** documents, images and links (even to Google Drive!) to cards – and everything is **searchable!**
- ✓ Trello cards have **check lists, comment boxes, and due dates** so you can contain all of the info for that task together.

How to Set Up a Trello Workspace



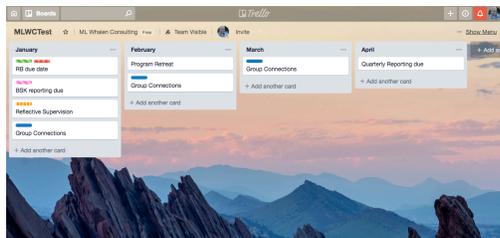
Create a Trello Board

- 1 Go to trello.com
Get more information and watch tutorials at trello.com
- 2 Click the “+” Create button (top right), then “Create Board”
 Name the board. *The name will stay at the top left of the board*
- 3 Give the board a color or photographic background:
 Click “Show Menu,” (upper right) then “Change Background”
- 4 Give the board a description:
 Click “Show Menu”, then “About This Board”



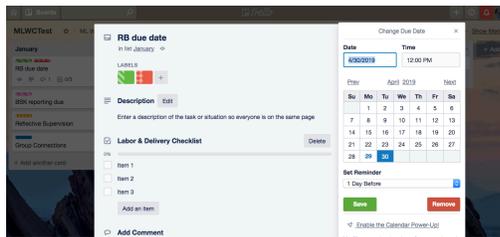
Create Card Lists on the Board

- 5 Decide how to organize your work into lists
Think through how best to organize cards into tasks/processes
- 6 Click “enter list title...” and give it the list name you want, like “Client forms”.
- 7 *To add more lists, click “+Add another list” button, upper right*
- 7 Organize lists by timeframe, step, project, or...?
Find a system that works for you—feel free to try and adjust



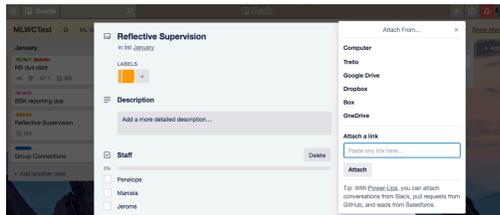
Create Cards in the Lists

- 8 Click the “+Add a card” button on a list
A “card” is like a visual Post-it note for tasks, clients, processes, etc.
- 9 Give each card a unique and descriptive name
Be sure you know what the card means; use initials if using people
- 10 Drag and drop to change card order or move a card to a different list. *Cards can be used like the order of steps in a process.*



Customize Cards to Maximize Information

- ✍ Use **color labels** to quickly show important info
Ex: Green = upcoming births, Red = high risk pregnancy, Pink = BSK
- ✉ Use **checklists** to track steps on a card, people, etc.
Tip: You can reuse checklists on other cards
- 🕒 Use **due dates** to keep track of what is due next
Tip: You can flag next due date or due date for whole card
- 👥 Add **members** a card to assign them to the task
They will now receive notifications if the card changes or due soon
- 🗨 Add **comments** to cards for all to be able to see
Tip: tag a person directly (@raja) to ensure they see the comment
- 📎 Add **attachments** to cards for all to be able to see
You can attach documents or links so others can work on shared documents or see online resources



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