

FAQs FROM LEVERAGING TECHNOLOGY FOR REMOTE WORK WEBINAR

- 1) We're using Slack, but some users post excessively, making it hard to keep up with and not productive. How can you address this situation?

Make sure that the intended uses of slack are clear to all staff and that it's understood that this is a work-related system, not a social media channel. Have training and guidelines that spell out and teach staff what the tool should be used for and to ensure that people don't abuse. It's okay, and even healthy for company morale, particularly when people are all working from home, to have some fun channels but make sure that it is used as a business tool for your organization and direct people as such.

- 2) Do you have any recommendations/best practices on how to take part in a trial offer to determine if a best fit for your organization?

The danger of trial periods is that we are all very busy and the trials elapse before we've had a chance to complete our evaluations. Before starting the trial, establish a testing plan with dates and objectives. Put the plan on the calendars of all people participating in the evaluation. A benefit of cloud-based software is that you can start the subscription with a handful of licenses, test and deploy the system, then add more. This gives you as long as you want to evaluate and configure the software for either a low cost (Office 365 has free versions for nonprofits, and the standard offering is only \$4.50 a month) or for free (Box and Salesforce each give away ten licenses to a nonprofit).

- 3) Do you have examples of how to set up an organization wide file naming convention?

I developed [this Knowledge Management Toolkit](#) for [Idealware](#). While this was targeted for the legal aid sector, it is broad enough for any organization to use. It has clear examples and worksheets on how to establish document management conventions such as filenames and folder structures, and goes on to discuss Sharepoint and other software with more advanced document management features.

- 4) We have a small team of 10. We use one organization SharePoint and have all our projects and files in one folder in a shared folder that is all our Project files. We had a hard time finding out how to use channels and OneDrive vs SharePoint. Is there a useful cheat sheet for how to set up Teams and channels for file and document management? That way we have a historical record once any particular project is over. We also use project charters!

[This Managing Documents With Office 365 whitepaper](#) offers some tangible suggestions as to how you can use Sharepoint, Teams , and Onedrive, either in conjunction with each other or individually.

- 5) Are there any additional security measures you would suggest in working with youth remotely? For example, we're preparing to launch online educational programming, and we're concerned about the security of using Google Classrooms, Zoom, etc.

Look at the platforms (Zoom, Google Classrooms) site and recommendations for advanced security settings. For instance, Zoom recently has taken measures to increase security as well as share additional tips to help secure meetings. At a minimum, require a password along with

an access code to attend a meeting, and put a limit on the time that an attendee can join the meeting before they are locked out. Additional examples of good Zoom security practices are here.

- 6) Any recommendations on how to use technology specifically for board engagement?

Wonderful use for Teams or Slack tools. Teams allows a site with the video, the chat, and a document folder which can be helpful when sharing information across multiple users.

- 7) We use a CRM, but only our communications and fundraising staff have a license. Is it worth it to require all staff that develop relationships (outreach team, policy team, campaign team) with folks to input their interactions into the CRM, given that we would have to pay for licenses and training?

Talk to your Salesforce Account rep about licensing options. In addition to the \$30/month enterprise license, they have two [“Lightning platform” licenses](#) available that are more restrictive than the full enterprise license, but quite sufficient for your needs. The Lightning Platform Starter license is \$6/month for nonprofits, and would allow your light users to manage contacts, print reports and view dashboards, and do other basic CRM tasks. There is value with having all the staff interact with the CRM, both because it gives you a complete picture of your constituent relationships, and because it centralizes all contact information in one system. It doesn't require everyone to have the same access and license given the individual roles/responsibilities.

- 8) Advice for the most important things that nonprofits should be doing now as it relates to technology given our current context.

If not using the cloud, now is the time – the cloud will generally keep you safer and in our current situation makes it much easier for people to log in and work. Secondly, multi factor authentication is needed – the second verification protects the organization.

- 9) Where can we find all the virtual town hall materials on the website?

<https://www.gnof.org/covid19-nonprofits/>