

Modern Strategies for Communication and Workflow Management

SWREDA Conference 2018
South West Regional Economic Development Association

Tweets can be made to [@NADOWeb](#) [#SWREDA18](#)





Intro

“We all want to work smarter not harder. Explore the current advancements in online technology supporting that ideal. Get an overview of how some of the largest companies in the world are increasing productivity and minimizing the need for time spent on mundane tasks. Explore how conversations are changing the economic ecosystem and discover how your organization can benefit from these modern strategies. Discussion includes Workflow Management, Communicating Content, Social Media Management, and a bit of Q&A.”

Speaker:

Lori Grimm,
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Service sponsored by a grant to the EDA, Region 6 from CNCS,
Corporation for National and Community Service
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Moderator:

Renee Dycus,
SWREDA Vice Chair
Executive Director, Southwest Arkansas Planning & Development District, Inc.
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Poll: Who said it?

“...automation applied to an efficient operation will magnify the efficiency... (and) automation applied to an inefficient operation will magnify the inefficiency.”

- a) Bill Gates
- b) Henry Ford
- c) Elon Musk



What is Workflow Optimization?

Workflow optimization is the overall improvement of an existing workflow system by:

- 1) **Reducing operating costs and labor capital** by improving the efficiency of labor performance output by using less time and gaining increased accuracy, preferably by utilizing available resources.
- 2) **Allowing for growth** by adding new functions and resources to an existing workflow to reduce time taken to complete the task and to ensure the workflow performs as efficiently as possible.

Keep the costs down.

Work smarter not harder.

Maximize current resources.

Keep current with industry advancements.



Poll: What's it worth?

How much revenue is lost due to inefficiency?

- a) 10% - 20%
- b) 20% - 30%
- c) 30% - 40%



Keeping the Costs Down

According to market research firm IDC,
companies lose **20-30%** in revenue
every year due to inefficiencies.

“Productivity can seem like just another business buzzword, but it is actually a concrete metric that you can track and assign value to. The more frequently you calculate productivity, the easier it will be to identify patterns and avoid mishaps, increasing employee, organizational, and software success.” ~SmartSheet



Maximize Current Resources

Be resourceful
using what you have
to the best of its ability.

Keyboard Shortcuts

Microsoft Office Tutorials

Apple iWorks Tutorials

In a league of its own...

Google Drive



Poll: Keyboard Wizard

How do you create a hyperlink using shortcut keys?

- a) Ctrl + l
- b) Ctrl + h
- c) Ctrl + k



Poll: History Lesson

What year was Microsoft released?

- a) 1988
- b) 1990
- c) 2005

Microsoft Office Tutorials

It was first announced by Bill Gates on 1 August 1988, at COMDEX in Las Vegas. Initially a marketing term for an office suite (bundled set of productivity applications), the first version of Office contained Microsoft Word, Microsoft Excel, and Microsoft PowerPoint. Initial release was November 19, 1990; 27 years ago. (Wikipedia)

Helpful Resources:

[Office 365 Training Center](#)

The official Microsoft Training site.

[30+ Excel Shortcuts in 12 minutes](#)

YouTube video with valuable tips.



Apple iWorks Tutorials

iWork is an office suite of applications created by Apple Inc. for its macOS and iOS operating systems, the initial release was on January 11, 2005; 13 years ago. (Wikipedia)

Helpful Resources:

[Pages 101 for Mac](#)

[Numbers for Mac 2015](#)

iWork



Pages



Numbers



Keynote

Google Chrome Browser

Extensions are used to enhance the functionality of the Chrome Browser, web apps run within the browser having a different user interface.

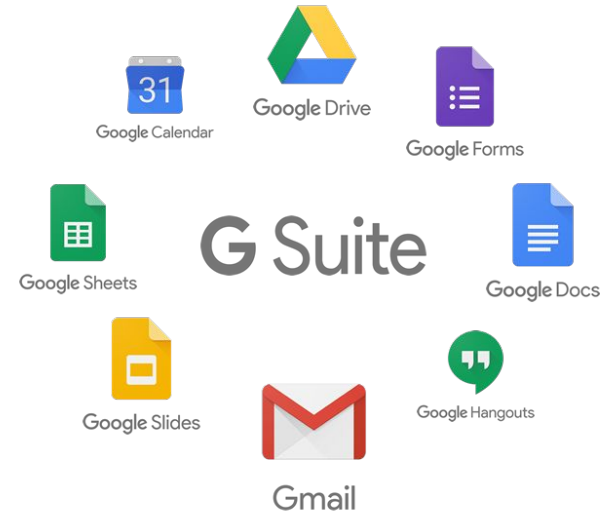
Accuracy beyond spell check

[Grammarly](#)

Time management stopwatch

[Toggl](#)

[Preview Economic & Environmental Scan](#)





Google Domains and Sites

Step up your business game!

Google Domains

Google Sites 



Work Smarter Not Harder

The largest companies in the world are increasing productivity and minimizing the need for time spent on mundane tasks.

There's an app for that!

*Top 3 Productivity Tools of
Fortune 500 Companies:*

Slack

Zapier

Trello



Staying in the Loop



Inc.com Company of the Year 2015
IBM uses Slack for 380,000 employees

Search turns conversations into common knowledge

- Search everything that's been posted in channels or your messages. Learn the context of past decisions or see if someone's already solved the problem at hand.
- Even if you archive or leave a channel, its contents are searchable for future reference. Your conversations become common institutional knowledge.

Face-to-face and -screen

Talk it out over voice or video calls directly from Slack. And if you need to show your work, you can share your screen, too.

Collaboration beyond colleagues

Share channels with companies and businesses you regularly work with – like clients, vendors, and partners – to bring all the right people into the same room.

Integrated file sharing

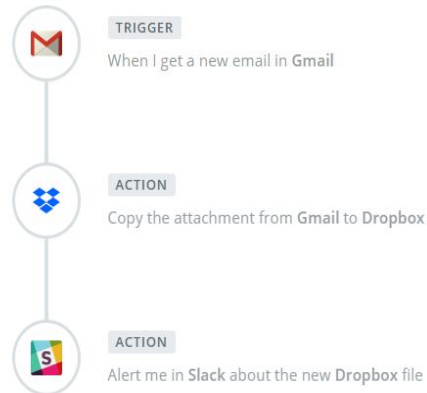
Drag-and-drop PDFs, images, videos and other files directly into Slack. Get feedback on your work and create an archive of your progress. Keeps your data secure.



Zapier Makes You Happier

Easy automation for busy people. Zapier moves info between your web apps automatically, so you can focus on your most important work. More than 1 million people rely on Zapier to take care of their tedious tasks.

Zaps Connect the Apps You Use Every Day



Start Workflows from Any App

Pick a Trigger that sets your Zap into motion.

Finish Routine Tasks Automatically

Zaps complete Actions, while you solve more important problems.

Simple, Fill-In-The-Blank Setup

Point, click, automate. Go from idea to workflow in minutes.



*This is Taco,
the official Trello spokes-husky*



Trello lets you work more collaboratively and get more done.

Trello's boards, lists, and cards enable you to organize and prioritize your projects in a fun, flexible and rewarding way.

The screenshot shows a Trello board titled "Company Overview" with a search bar and user profile "Chanelle". The board is divided into four columns: "Teams", "Priorities", "Current Projects", and "Completed Projects".

- Teams:** Lists "How To Use This Board", "Product", "Marketing", "Sales", and "Support".
- Priorities:** Lists "Increase sales revenue by 30% in Q3" (due Sep 30), "Launch first international expansion" (due Jul 22), and "Test new messaging for SMB market".
- Current Projects:** Lists "Website Redesign" (4/5 progress), "Ship iOS app" (due Aug 1), "Analytics Data" (due Jul 13), and "Increase conversion rate by 20% by Q3" (due Sep 30).
- Completed Projects:** Lists "Social Media Campaign" (due Mar 31) and "Update Help Documentation" (due May 17).

At the bottom of the screenshot, there is a dark blue banner with the text: "From startups to Fortune 500 companies, Trello is the most visual way for teams to collaborate on any project."

Database Extraordinaire!



Create, your way.

Part spreadsheet, part database, and entirely flexible, teams use Airtable to organize their work, their way.

[Take a tour!](#)

[See an example of Gallery View!](#)

A screenshot of an Airtable database interface showing a table of event activities. The table has columns for ID, Activity, Date & Time, End Time, Type, and Location. The data is organized into rows, each representing a different event activity with its corresponding date, time, and location. The interface includes a purple header bar with navigation options and a table toolbar with various filters and sorting options.

| ID | Activity | Date & Time | End Time | Type | Location | Speaker(s) |
|----|---------------------------------------|-------------------|-------------------|------------------|-----------|---------------|
| 1 | Registration | 9/19/2018 2:00pm | 9/19/2018 2:59pm | Registration | Mezzanine | |
| 2 | Opening Address | 9/19/2018 4:00pm | 9/19/2018 4:14pm | Opening Address | | Rodney Larsen |
| 3 | Guest Speaker | 9/19/2018 4:15pm | 9/19/2018 5:59pm | Keynote | | SIRHQ |
| 4 | Reception Dinner | 9/19/2018 6:00pm | 9/19/2018 8:00pm | Meal | | |
| 5 | Rise and Shine Power Walk | 9/20/2018 6:00am | 9/20/2018 7:00am | Fitness | | |
| 6 | Continental Breakfast | 9/20/2018 6:00am | 9/20/2018 8:00am | Meal | | |
| 7 | Registration | 9/20/2018 7:30am | 9/20/2018 8:15am | Registration | Mezzanine | |
| 8 | Welcome Address from the Mayor | 9/20/2018 8:30am | 9/20/2018 8:44am | Opening Address | | |
| 9 | General Session I | 9/20/2018 8:45am | 9/20/2018 10:14am | General Session | | SIRHQ |
| 10 | Break | 9/20/2018 10:15am | 9/20/2018 10:29am | Break | | |
| 11 | General Session II | 9/20/2018 10:30am | | General Session | | SIRHQ |
| 12 | General Session III | 9/20/2018 11:15am | 9/20/2018 11:59am | General Session | | SIRHQ |
| 13 | Lunch | 9/20/2018 12:00pm | 9/20/2018 1:29pm | Meal | | |
| 14 | Breakout Sessions I | 9/20/2018 1:30pm | 9/20/2018 3:14pm | Breakout Session | | |
| 15 | Workforce Development Track I | 9/20/2018 1:30pm | 9/20/2018 3:14pm | Workforce Track | | |
| 16 | Community and Economic Development I | 9/20/2018 1:30pm | 9/20/2018 3:14pm | CEB/SW Track | | |
| 17 | Finance/HR/IT Track I | 9/20/2018 1:30pm | 9/20/2018 3:14pm | Finance/HR Track | | |
| 18 | Break | 9/20/2018 3:15pm | 9/20/2018 3:29pm | Break | | |
| 19 | Breakout Session II | 9/20/2018 3:30pm | 9/20/2018 4:59pm | Breakout Session | | |
| 20 | Workforce Development Track II | 9/20/2018 3:30pm | 9/20/2018 4:59pm | Workforce Track | | |
| 21 | Community and Economic Development II | 9/20/2018 3:30pm | 9/20/2018 4:59pm | CEB/SW Track | | |
| 22 | Finance/HR/IT Track II | 9/20/2018 3:30pm | 9/20/2018 4:59pm | Finance/HR Track | | |
| 23 | Dinner on your own | 9/20/2018 5:00pm | 9/20/2018 8:29pm | Meal | | |
| 24 | Reception (Rodney After Party) | 9/20/2018 8:30pm | 9/20/2018 11:00pm | Networking | | |
| 25 | Rise and Shine Fitness | 9/21/2018 6:00am | 9/21/2018 7:00am | Fitness | | |



Keep Current with Industry Advancements

Workflow Solutions

Artificial Intelligence

Product Management

Surveying

Communicating Content

Email

Web Conferencing

Presentations

Creating Images

Social Media Management

Cybersecurity

AI Artificial Intelligence

[Cortana](#)

[Siri](#)

[Alexa and Echo](#)

[Google Assistant](#)

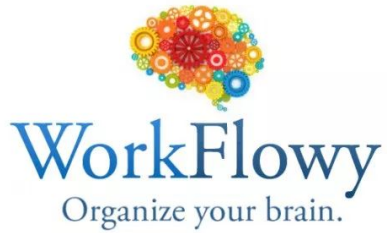
OCR Optical Character Recognition
(converts printed text into a digital, editable format)

AI scheduled meetings
for smarter work days.
The future is here.



ASTRO
HOW TO SEND LATER

Project Management





Surveying





Email Organization

zapier



Boomerang

HubSpot

Web Conferencing Resources



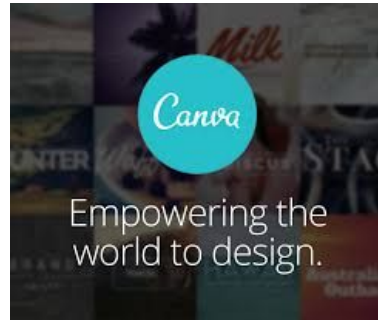
Presenting Beyond PowerPoint



[Presentain Tutorial](#)



Creating Stylish Posts



Social Media Management

Top 5



Tips:

Communicate and earn engagement with **Storytelling**.

Know the current **Algorithms**.

Whether it's email, social media, or content management, delivering your message is your responsibility. Strive to be accessible, accurate, and enlightening in your communications.

SMM
Social Media Management

 **buffer**
A Smarter Way to Share

 **hootsuite**[™]
Social Media Management

 **Loomly**



Tip:
The Federal Government has passed new laws mandating business and organizations have a cybersecurity system in place. You can find more information from the U.S. Department of Justice.



Tips for Improving Adoption

- Get everyone's support. If only a few are using the office productivity tool and not all, then you won't be measurably successful. The key to workflow optimization is to ensure widespread engagement and adoption. If everyone is using the same tool, your team can move faster and get more work done while increasing output, better serving your customers, and minimizing costs.
- Train and invest in time to practice regularly. If employees don't understand how to use a tool, they won't want to make the time to learn it. Be careful not to overwhelm with too much information in the beginning. Offer ongoing training sessions to keep skills fresh and current with new trends.
- Explore integrations: Employees use dozens of different apps on a daily basis and if a new tool doesn't connect or work with the apps they already use, they'll forget about it. The good news is that most productivity tools offer integrations with Zapier and others.



Mindfulness





LoriGrimm.com

Opportunity Explorer



Thank you for sharing your time with me. I hope some of these resources can become solutions to fit your professional workflow optimization needs.

*Smiles,
Lori Grimm*

