Tools and Techniques to Boost Efficiency

Presented by Karen Graham for the Hartford Public Library and the Hartford Foundation for Public Giving

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I'm a nonprofit leader and technology strategist who loves helping people solve problems–from making their work easier and more enjoyable, to enabling their organization to more effectively achieve its mission.

I am a frequent writer and speaker on technology leadership, software selection, user adoption, innovation, and strategic IT alignment.
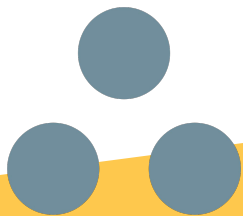
Pronouns: She/Her

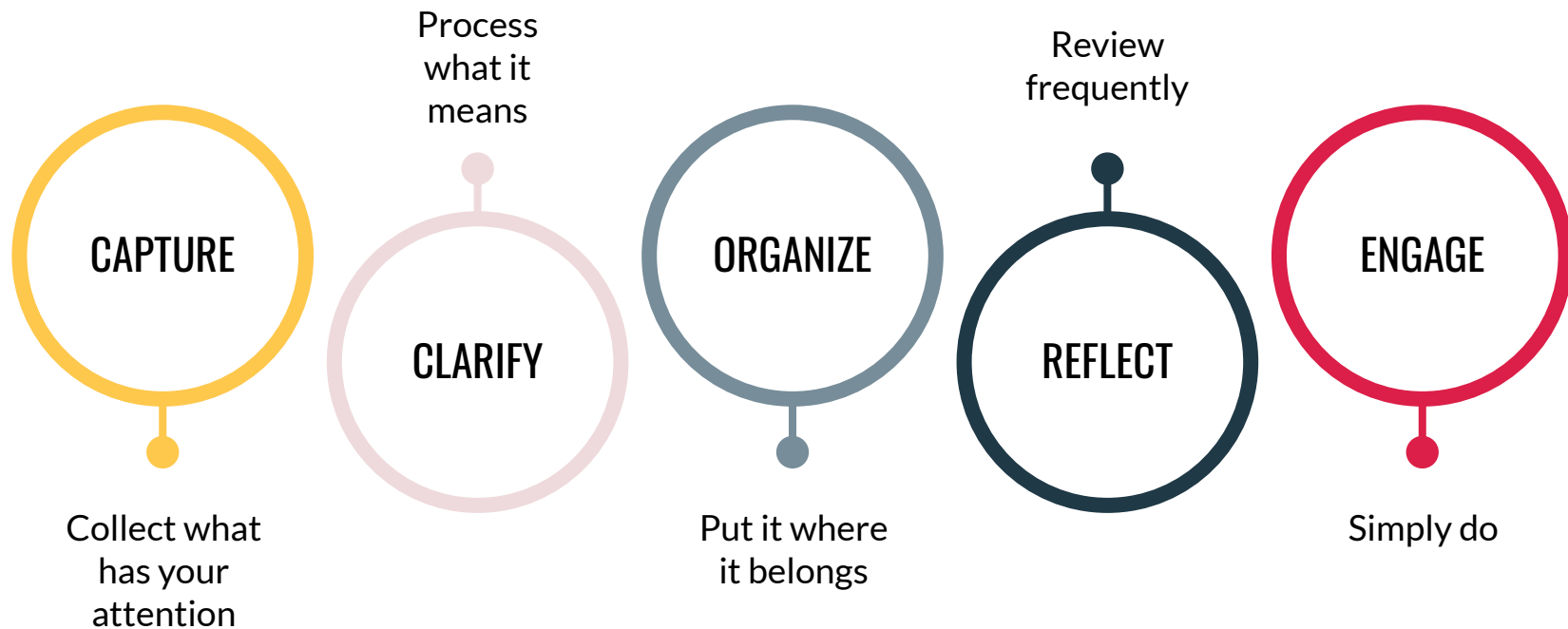If you could find 10 extra minutes a day, what might you do with that time?

Today's Agenda

1. Welcome
2. Managing your inbox
3. Automation and artificial intelligence
4. Process improvement
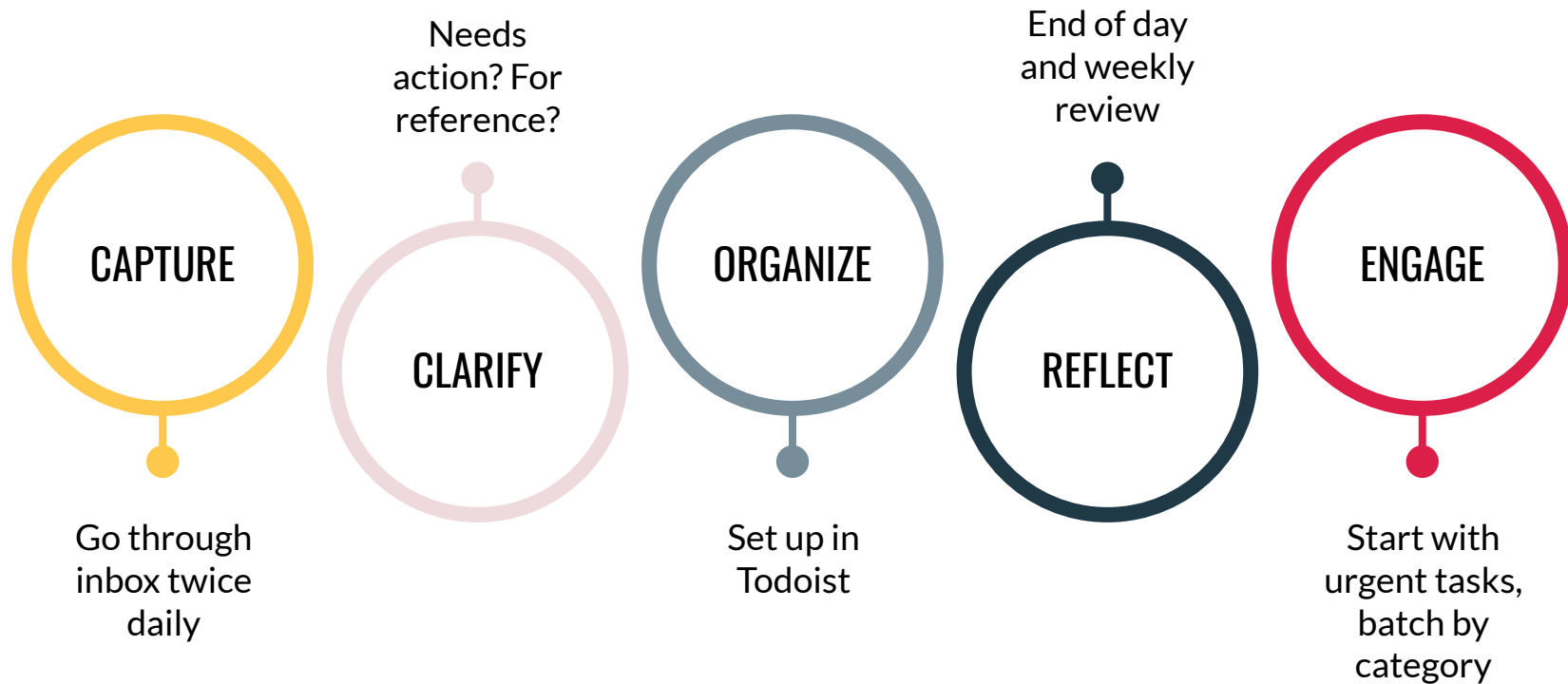5. More techniques and tips
6. Wrap-up activity

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Managing Your Inbox

Getting Things Done

GTD is a productivity method based on a book by David Allen.

Process what it means

Review frequently

CAPTURE

CLARIFY

ORGANIZE

REFLECT

ENGAGE

Collect what has your attention

Put it where it belongs

Simply do

Getting Things Done: Applied to Karen's Email

CAPTURE

Go through inbox twice daily

Needs action? For reference?

CLARIFY

ORGANIZE

Set up in Todoist

End of day and weekly review

REFLECT

ENGAGE

Start with urgent tasks, batch by category

Folders

— — —

...are a waste of mental energy.

Instead, archive everything, and learn to use advanced search features.
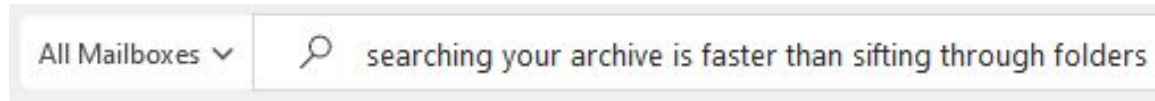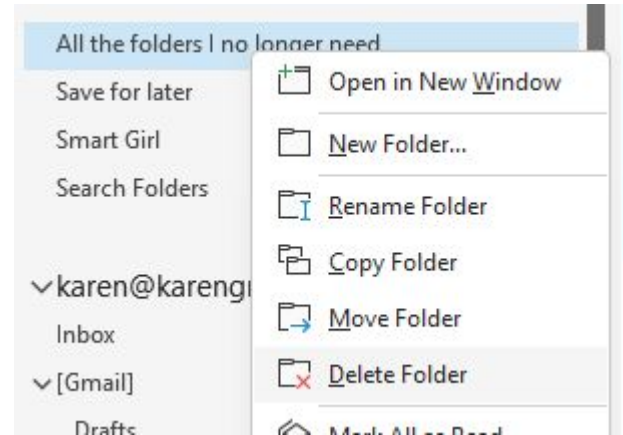
Task Apps

Prioritize integration and portability

Tool reviews (including Todoist, Asana, OmniFocus, TickTick, Things 3, Toodledo)

Others: ClickUp, Trello, Remember the Milk, Microsoft To-Do
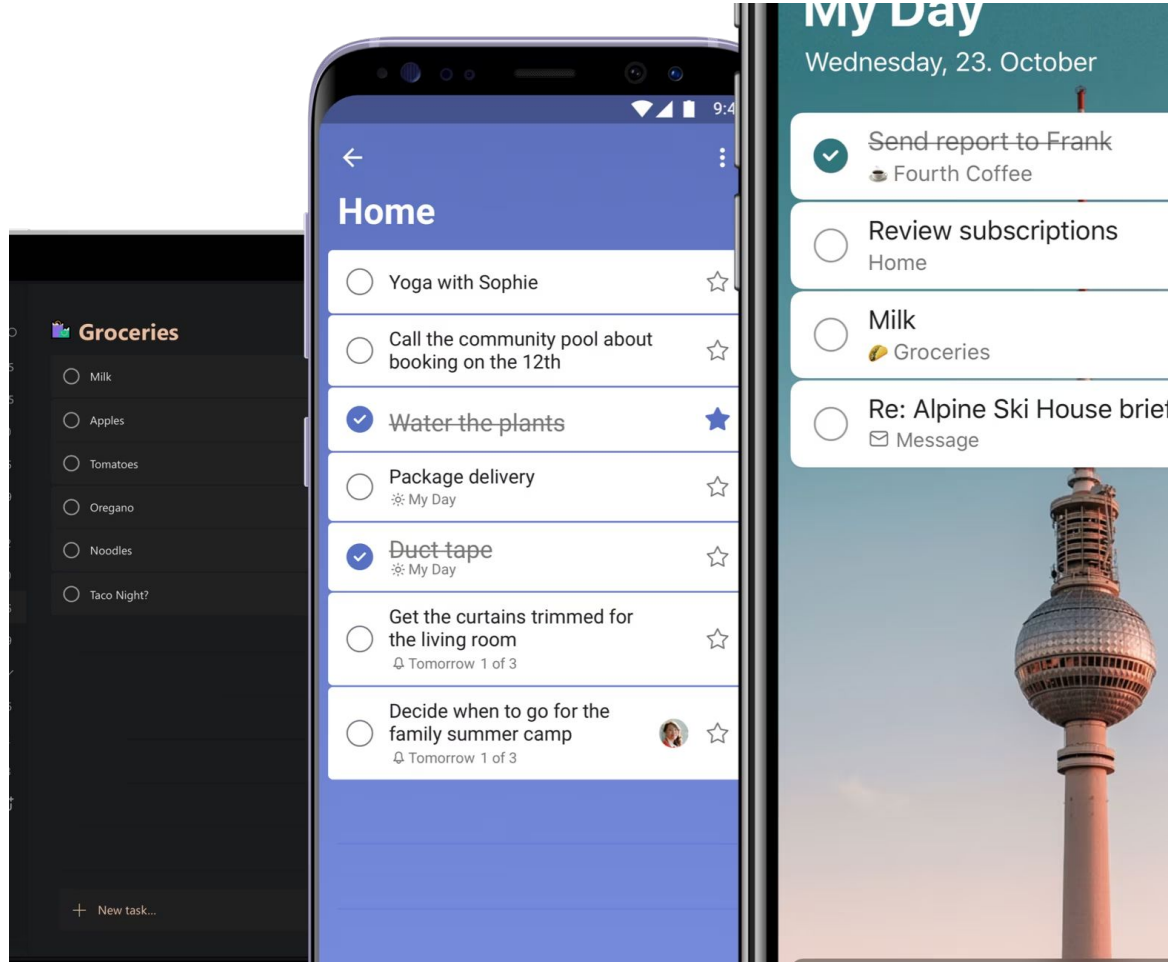
Try advanced features

Image credit: Microsoft

Boomerang Gmail Extension

Third party app

Set reminders to follow up

Schedule emails to send later (also a native feature)

Streamlined meeting scheduling

Video credit: Boomerang for Gmail

Alternatives to Email
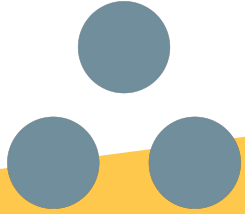
Slack

Teams

Discord

Meet for coffee!

Video credit: Slack

Group Activity

Write down up to three time-wasting activities related to email. Add your juiciest one to the chat.

Automation and Artificial Intelligence

Zapier for sharing data

Example:

New learner registers in LMS >> Add contact to CRM >> Email welcome message >> Send Slack notification

Create task

Create or update deal

Create task

Add spreadsheet row

Create opportunity
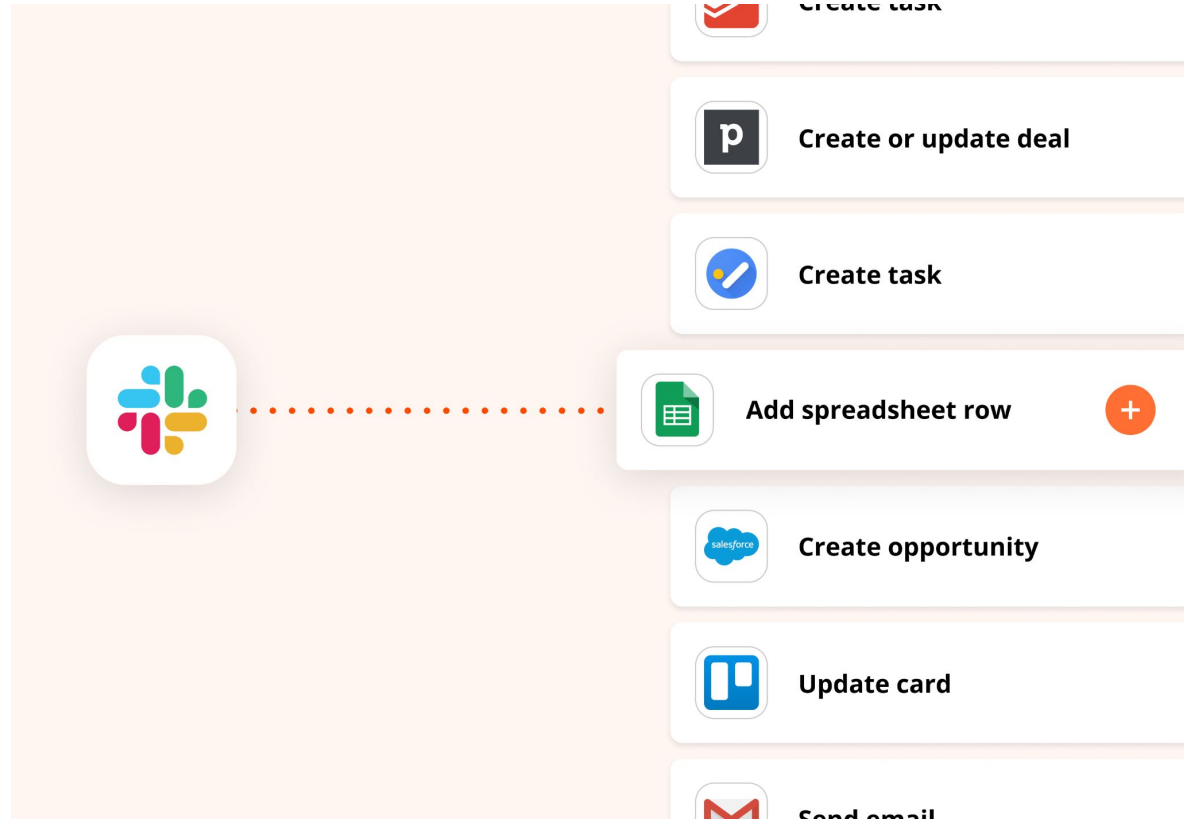
Update card

Send email

Image credit: Zapier

Zapier for sharing data

Another example:

Volunteer fills out interest form >> Send booking invitation via Calendly >> Create Google Doc based on intake template >> Create task to prepare for meeting
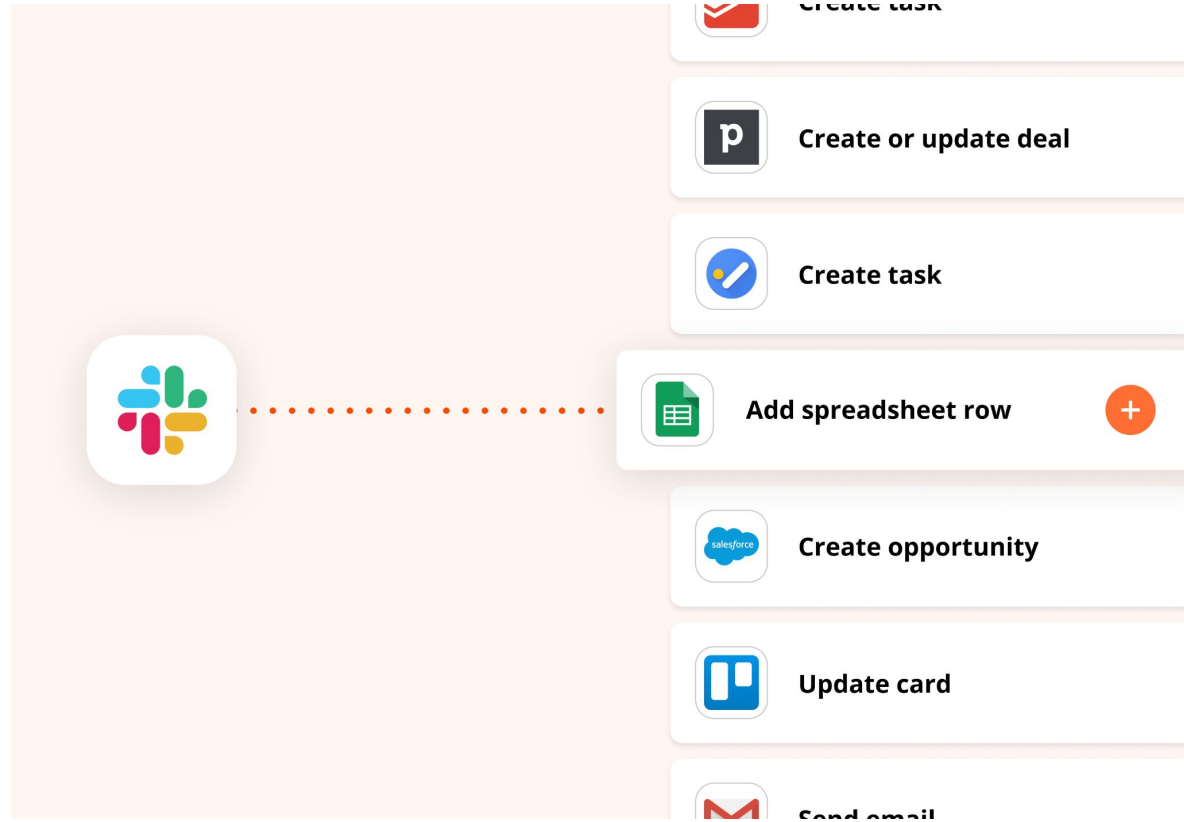

Image credit: Zapier

Marketing Automation Tools

Hubspot and Marketo

- Automate based on user behavior
- Reveal most engaged prospects
- Combine marketing tools with shared data

Video credit: RedPandas Digital

Other Workflow Automation

Case Management

- Guide through intake process
- Suggest enrollments and referrals
- Automatically notify appropriate staff of changes

Donor Management

- Automatically assign a donor for follow-up based on established criteria
- Send an email welcome series

Finance

- Route expense reports for approval
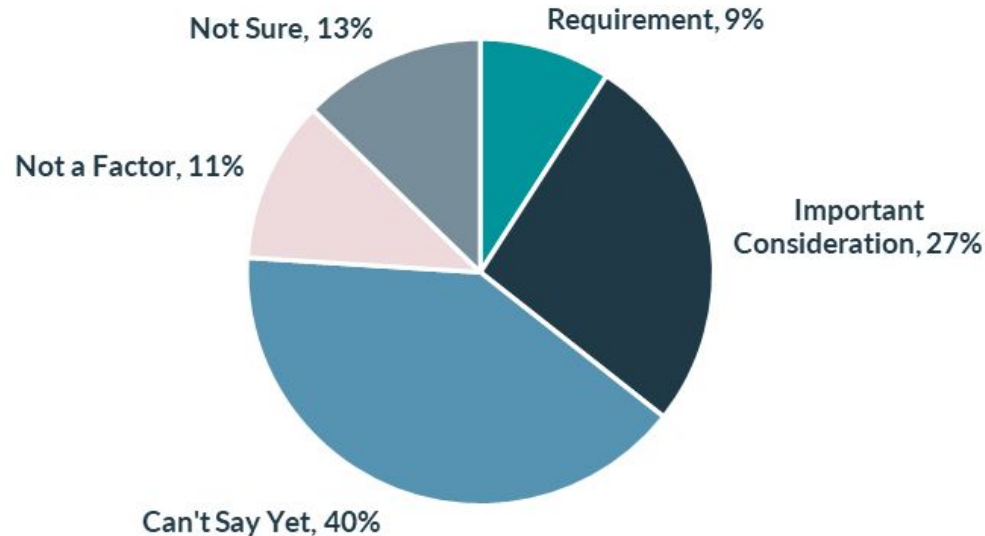- Capture invoice data via OCR

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POLL: Which statement best describes how AI considerations are likely to affect your next software purchase decision?

- ❏ Likely to be a requirement
- ❏ Important consideration, but not a requirement
- ❏ We're just beginning to think about AI and can't yet say if it will be a factor
- ❏ We don't believe AI is applicable to our situation and don't feel it will be a factor
- ❏ Don't know/not sure

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From the 2024 Donor Management Use and Satisfaction Study

Importance of AI Considerations on Next Purchase

Not Sure, 13%
Requirement, 9%
Not a Factor, 11%
Important Consideration, 27%
Can't Say Yet, 40%

Generative AI

Example: Using Chat GPT to write drafts, summarize, edit for grammar and voice.

Caution!

- Privacy
- Bias
- Making stuff up

Design a 10-minute learning activity for adults who have been presented with tips on managing their inbox

Title: Efficient Inbox Management Crash Course

Duration: 10 minutes

Objective: To help adults develop practical skills and strategies for managing their inbox more effectively.

Materials Needed:

- Presentation slides or a whiteboard
- Marker or pen
- Timer or stopwatch

Activity Steps:

1. Introduction (1 minute)
   - Greet the participants and briefly introduce yourself.
   - State the objective of the activity: to provide practical tips for managing their inbox efficiently.
2. Recap of Inbox Management Tips (2 minutes)
   - Provide a quick recap of the key tips for managing an inbox effectively.
   - Use presentation slides or write the tips on the whiteboard.
   - Emphasize the importance of staying organized, prioritizing emails, and minimizing distractions.
3. Pair Discussion (3 minutes)

Meeting Assistants

Reviews (covers Fireflies, Avoma, tl;dv, Equal Time, Rewatch, Otter, Nyota, Fellow, Fathom)

You'll need protocols for:

- Asking permission
- Sharing recordings and summaries
- How many AIs can attend
- Whether AIs can attend as substitutes for humans

P.S. Try CC and translation too!

Otters are cute, but they can be annoying ⌃

📎 🖼 image.png

Dear ⬤ colleagues,

More of us are starting to use Otter.ai and similar tools to transcribe and summarize meetings. This is great, if it makes us more productive and helps us catch details we might have otherwise missed! However, it has the unintended consequence of filling our inbox with unwanted notifications—unless everyone updates their settings.

If you are using these tools, please update your standard default settings to:

- Don't notify the host that your AI tool is joining the meeting (you can still do this if it's sensitive, on a case-by-case basis)
- Don't share notes
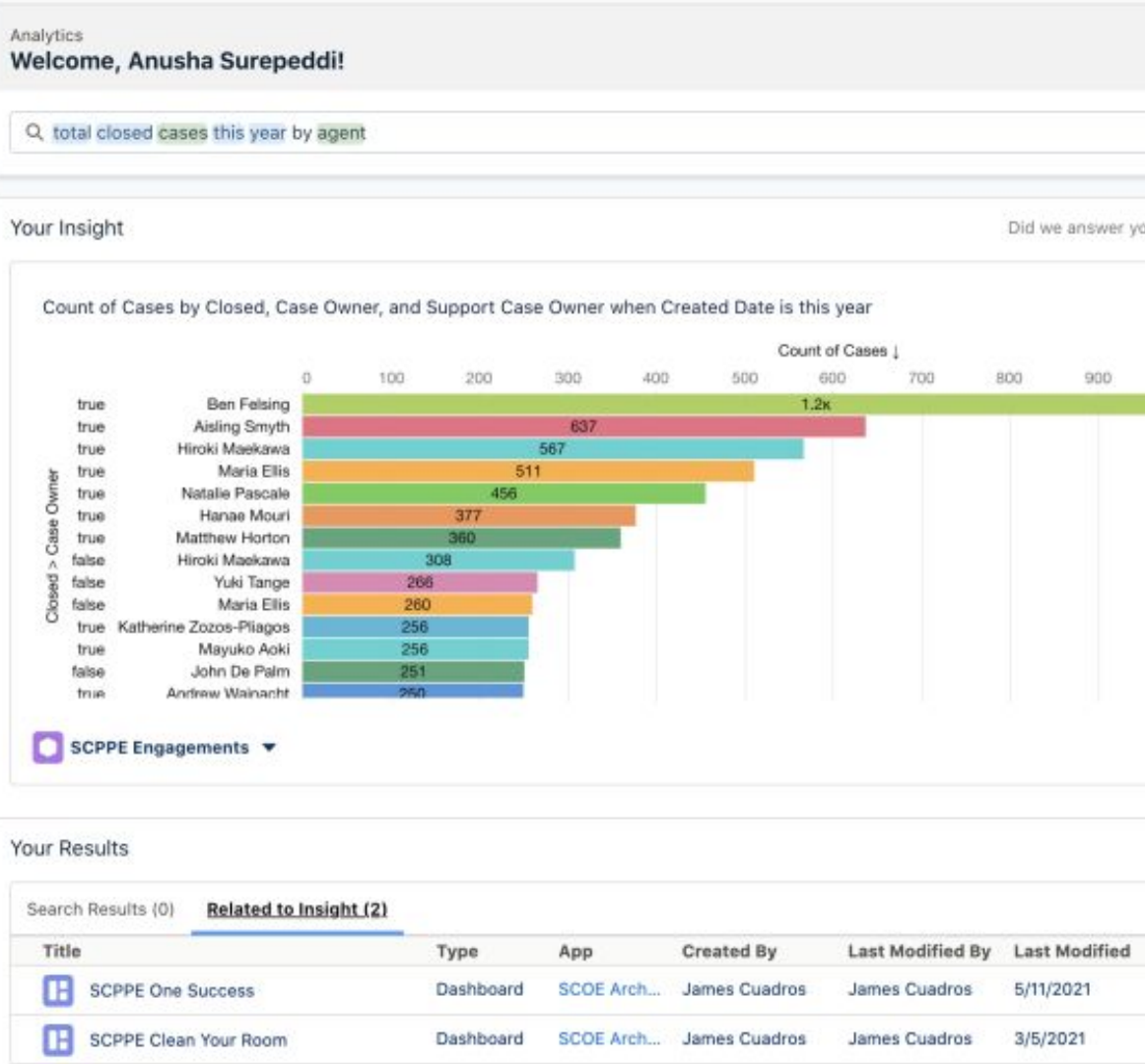- Send transcripts and chat summaries only to yourself

This 1 minute video (which I recorded especially for you) shows you how to update your settings in Otter.
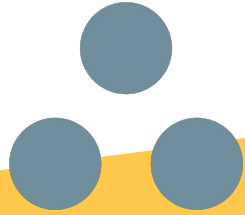
Natural Language CRM Interactions

Search and build reports, without manipulating a complicated interface or knowing how filters and crosstabs work.
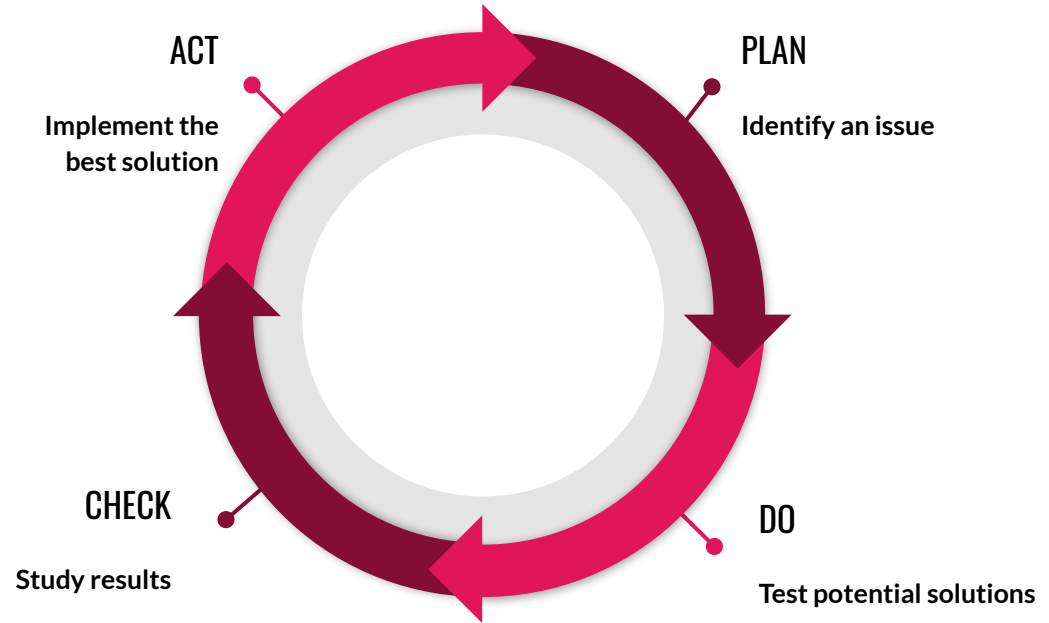
Image: salesforceblogger.com

A Few Approaches to Process Improvement

Plan-Do-Check-Act

Developed by Dr. William
Edwards Deming

Familiar to MBA students

ACT
Implement the
best solution

PLAN
Identify an issue

CHECK
Study results

DO
Test potential solutions

Understanding Processes

Use **immersion** and **simulation** to understand the end user's perspective, find bottlenecks and redundancies, and identify other pain points.

Use **time tracking** to find out how much time people are really spending on each step and where there are delays.

(I use Toggl Track for time tracking.)

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Documenting Processes

Experience Diagramming

Visually depict what happens, key decisions and tools, and who is involved. ([Free templates](#) from Luma Institute.)
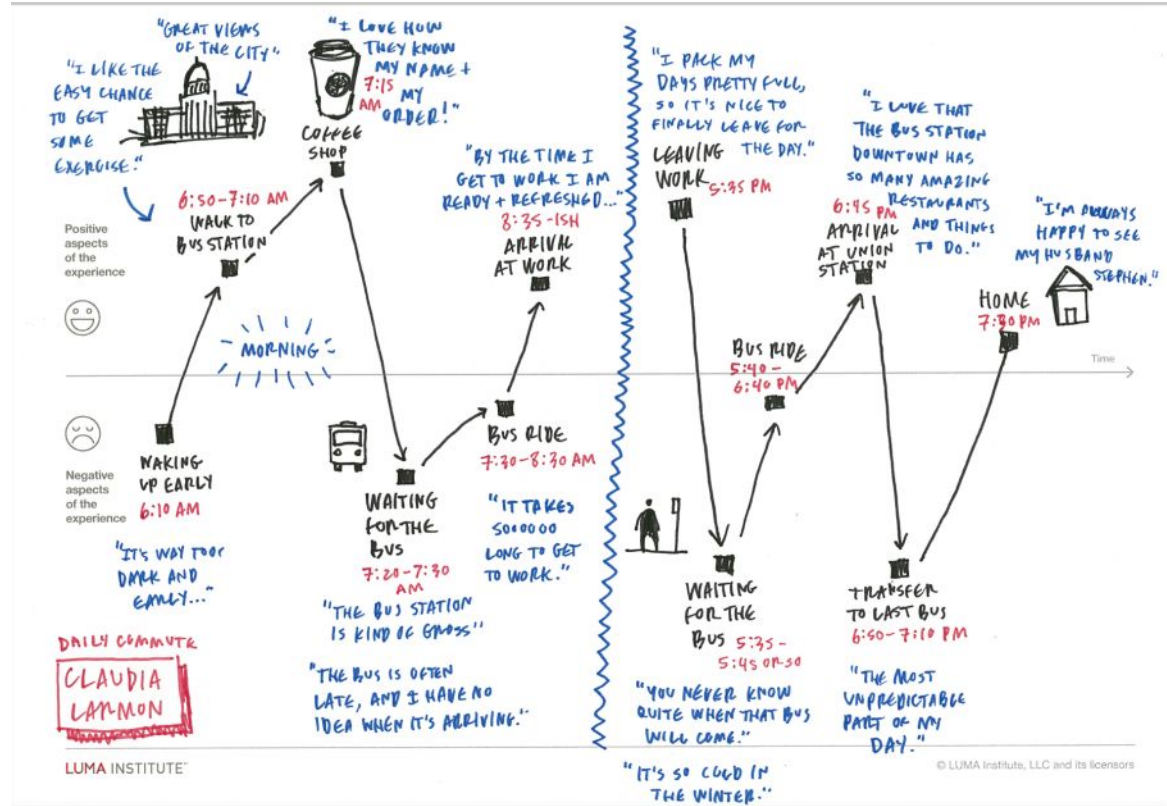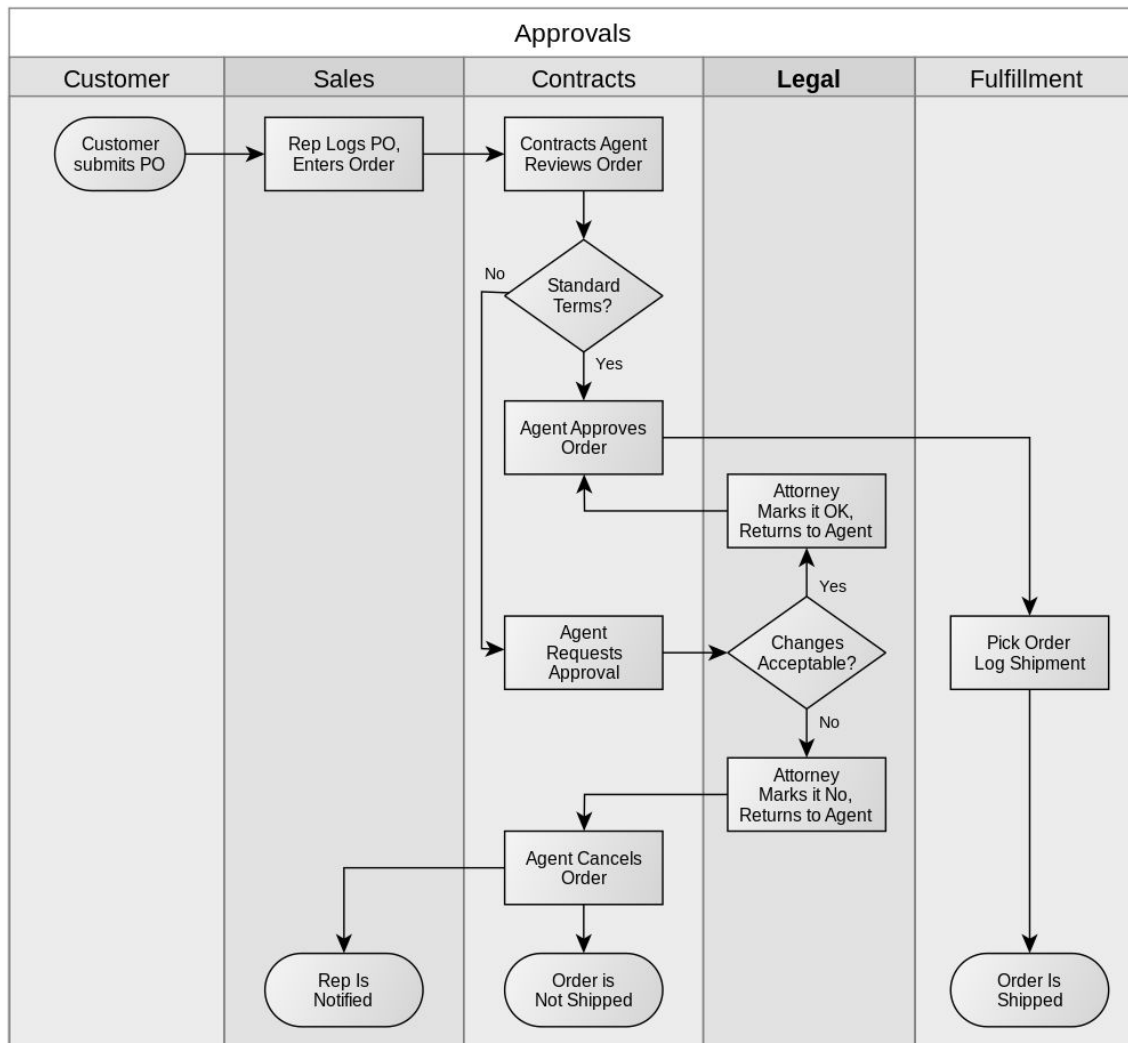

Image credit: Luma Institute

Documenting Processes

Swim Lanes

A type of flowchart that groups processes and decisions into rows or columns (lanes), often based on who is responsible.

Image credit: Paul Kerr

Documenting Processes

Storyboards

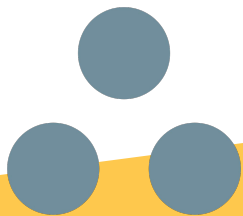Tells what happens, often from a specific perspective, as if you were summarizing scenes from a movie.

Image credit: Canva

Practice Activity

Work with a colleague to document a process, using an experience diagram, swim lanes, or storyboard.

More Productivity Techniques and Tips

Time Blocks

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Pomodoro: 25-minute focus time with five-minute breaks

Add project time to your calendar

Admin days / no meeting days

You can buy this on
Amazon for $6.99😊

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Eliminating Distractions

This might not be possible for you.

Photo credit: [Ketut Subiyanto](#)

~~Eliminating~~ Minimizing Distractions

Set expectations with family members.

Arrange your environment: tidy, white noise, temptations out of reach/out of sight.

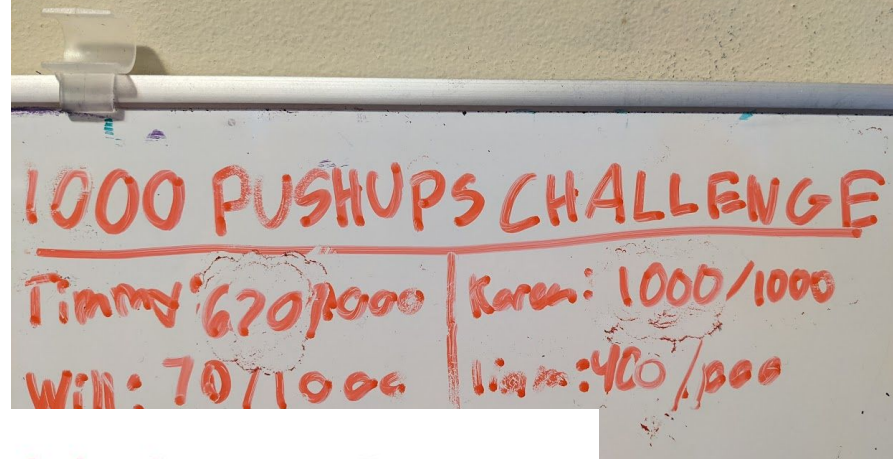Clear your mind.

Photo credit: [Ketut Subiyanto](#)

Deadlines and Rewards

Create artificial deadlines for "someday" tasks

Track progress and promise yourself a prize

Find a buddy

Make it into a game

Free printable charts at lilyvolt.com

Update Equipment

Slow computers (and slow internet connections) are a huge waste of staff time.

5 minutes/day

x 260 days/year

x 5 staff

x $40/hour average rate

= $4,333 per year

☐ Compare

New Latitude 3540 Laptop

Order Code s020l3540usvp

★★★★⯪ 4.4 (74)

Specs Customize →

Processor	13th Gen Intel® Core™ i7-1355U
OS	Windows 11 Pro
Graphics	Integrated Intel® Iris® Xe or UHD Graphics for i7-1355U Processor
Memory	16 GB DDR4
Storage	256 GB SSD
Display	15.6-in. display Full HD (1920X1080)

▰ Deal of the Week

Estimated Value $1,734.36

$1,129.00 You Save **$605.36 (35%)**

☑ Get it as soon as **Friday, Jun 2**

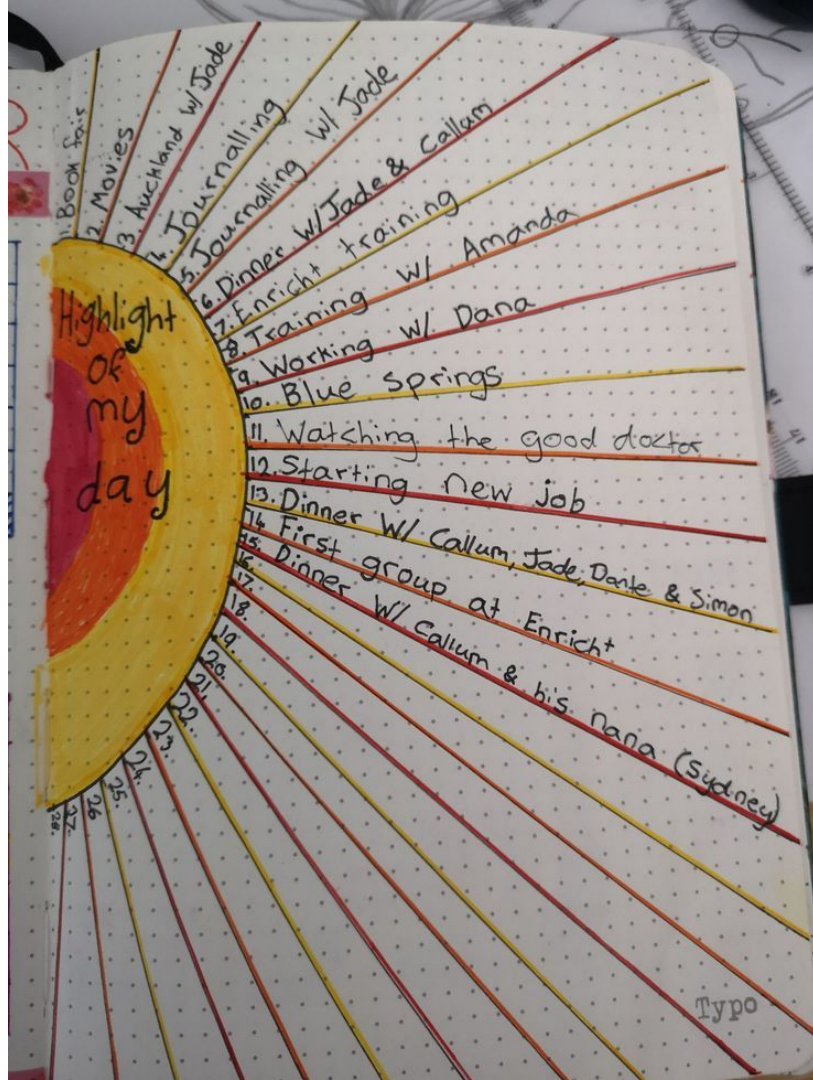View Delivery Dates for 55401

Special Offers View All (1)

Rewards Up to $34.00 back

Financing Offers

Learn More | Apply Now

Daily Highlights

Write down an accomplishment, large or small, each day.

Image credit: Jake Singleton

# Special Considerations for Small / New Organizations

Look for deals, but don't cheap out.

- TechSoup for nonprofit discounts on hardware, software, and services
- Seek pro bono help from partners like Taproot or VolunteerMatch
- Don't be afraid to invest in something that builds your capacity

Focus efforts where they will yield the most impact.

- Optimize your service processes so they are efficient for everyone
- Consider getting help from a fundraising professional

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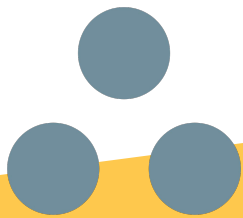
Wrapping up

Let's Recap and Reflect

Name some key points of this workshop.

Photo credit: [Felipe Cespedes](#)

Your next steps

What is one thing you will do today or as soon as you get home?

How might you keep yourself on track or hold onto this priority?

Who can give you a hand?

Photo by Oleksandr Pidvalnyi:
https://www.pexels.com/photo/blue-jeans-3036405/

Let's answer your questions!

More resources

How a Nonlinear Workday Might Help You Get More Done, by Stephanie Vozza for Fast Company

How to Overcome Your (Checks Email) Distraction Habit, by Maura Thomas for Harvard Business Review

Break Your Screen Addiction: Never Check Email in the Morning, article by Julie Morgenstern (author of *Time Management from the Inside Out*)

14 Time Management Strategies from Highly Productive People, article by Laura Vanderkam (author of *I Know How She Does It: How Successful Women Make The Most of Their Time*)

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Thank you

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For a free 25-minute advice session, contact me at karen@karengrahamconsulting.com.

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Bonus Material

Scheduling Aids

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Trying to find a time to meet with an individual or group can be time-consuming and frustrating. Here are some scheduling aids.

Doodle is for polling a group for availability. It's widely familiar, but the free version has so many ads! They offer a team version for $8.95 / user / month.

Calendly is what I use. People can book 1:1 meetings of various lengths, and I can also set up a poll similar to Doodle for easy group scheduling. As you can see in the picture, it syncs to my calendar, not offering times the week of March 10th when I'm out of office.

Outlook can embed the poll right into your email message. Instructions are here.

Google also does this. Instructions are here (scroll down to the section "Offer available times to meet"). I also sometimes use this, as you can see in the picture.

Using Templates to Save Time

Do you find yourself typing the same thing over and over?

Both Gmail and Outlook can store templates to insert into your email messages.

- [Gmail template instructions](#)
- [Outlook template instructions](#)

I use [Typedesk](#), which has a free version with up to 10 templates. Type a shortcut and it auto-fills the text. I reveal my templates in the picture here.
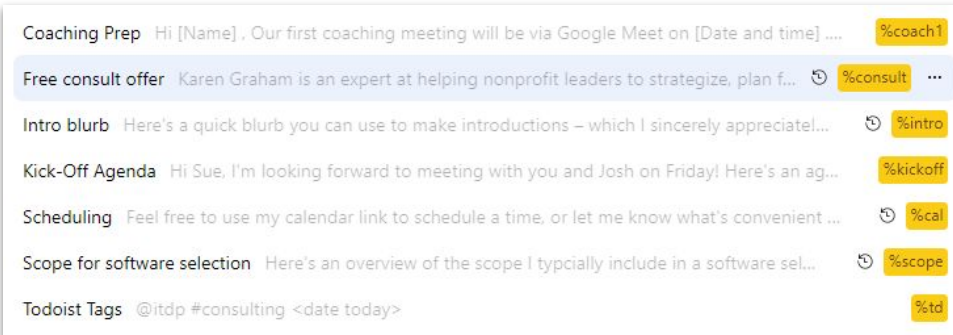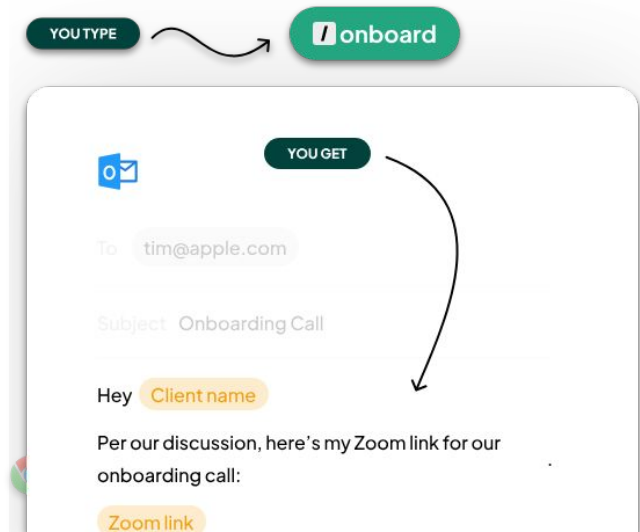
Free Advice for Uncertain Times

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Small nonprofits are facing a lot of uncertainty, concern about funding sources, and even worries about safety. Here's one source of help.

Karen Graham is an expert at helping nonprofit leaders to strategize, plan for, and select the right technology for their organizations. She can help you get technology working the way it should and feel confident in your decisions.

Karen offers a free 25-minute consultation to give you some direction and clarity, no strings attached. She recently helped people:
- Prioritize a list of possible technology investments.
- Invest in cybersecurity insurance.
- Identify software options in their budget range.
- Develop a list of trusted Salesforce implementation partners.
- Understand the pros and cons of fixing issues with current software vs switching to a new provider.

You can learn more about her at karengrahamconsulting.com, on LinkedIn, or email her at karen@karengrahamconsulting.com.

Feel free to use my calendar link to schedule a time, or let me know what's convenient for you.

Typedesk inserted this section automatically when I typed "/ consult"

Typedesk inserted this section automatically when I typed "/ cal"

This goes to my Calendly page where you can see when I'm free and book a meeting.