



## “Take it from me: Tools you can use,” as originally aired on June 11, 2020

**Ashley Neal:** Hey, everyone. My name is Ashley Neal, and I'm a content writer for Sidecar. As a thank you for being the best part of search connect, we've compiled a lightning round of association professionals, sharing the tech tools that make their lives easier.

To get us started, I want to talk about Align. Align is a priority and task management software. It allows for transparency, accountability, and helps to keep our team on track. Align has daily and weekly huddles, where team members share their top priorities and what they've accomplished. These huddles are especially helpful in times of high growth, massive change, or for interdepartmental teams and remote workers, which is especially prevalent now with the coronavirus. My personal favorite tool within Align is the ability to assign and be assigned stucks. Stucks are exactly what they sound like, letting your team know if you're stuck, waiting for another team member's collaboration, or if another member is waiting on you. Align has helped my team stay on track tremendously, and it can help yours, too.

**Craig Johns:** Do you find that you've got a whole lot of ideas and items on your to do list, but you just don't know where to start? How do you choose what to do next, when everything seems like a priority? Kia Ora, hi, I'm Craig Johns, CEO and founder of Energy to Perform, international speaker, high performance leadership expert, and host of the Active CEO podcast. Today, we're talking about the 2x2 priority matrix, because we're going to help you understand how to choose between different priorities when they all seem urgent, they all seem quite important, but you just don't know where to start. There's enough overwhelm as it is right now, so we don't want to add any more. So let's take a look at the 2x2 priority matrixes that we're going to look at today. There's two of them.

The first one is importance versus urgency. And the second one is impact versus effort. When there is a sense of urgency and overwhelm, I first start with the importance versus urgency. I take a 2x2 grid. So I create four boxes, two on the top, two on the bottom. And up the vertical axis, I put importance, starting from low importance to high importance. And across the bottom axis, I have urgency, and it starts with low urgency and finishes with high urgency. Then I start putting all my priorities into different boxes. So if they are really high importance and high urgency, they'll go in the top right box. If they're high importance, low urgency, they'll be in the top left box. Now if they're low importance, but high urgency, they

go on the bottom right box. And if they're low importance, low urgency, they go on the bottom left box. Now that bottom left box, you might as well disregard it and chuck it straight in the rubbish bin. Because you don't have time for them, and they've got no importance, and there's nothing urgent to do. So just discard them straight away.

However, the ones that end up in the high importance, high urgency top right box are really important. So we need to look at how we utilize those, to identify our top three tasks for today. Now, if it's not that clear, then we go to the second 2x2 matrix, and that is impact versus effort.

So once again, we create that 2x2 grid, which has been adapted by President Dwight Eisenhower, with impact on the Y axis, on the vertical, and along the X axis, we put effort. Now, then you place all your ideas and to do items in the grid, according to the impact and effort. So in the top right box, we're going to have high impact, high effort. In the top left hand box, we're going to have a high impact, low effort. And in the bottom right hand box, low impact, high effort. And in the bottom left hand box, we're going to have low impact, low effort.

Now we need to choose our top three priorities from there. Now do they match? So if we overlaid both grids, do your priorities start to match up? Now sometimes importance and urgency become really difficult to grasp. So that's when we go to impact versus effort. Because they're easy terms for us to understand. How much impact does it have, and how much of my time and effort is it going to take to do that? Sit down tomorrow, when you're looking at your priorities, or on Monday or Tuesday next week, sit down and look at everything that you're going to need to do list and start putting them in these priority 2x2 matrices and see which ones really are going to be impactful and are really that urgent and important that you need to do it now.

Only choose three things per day. Then you can achieve those three things, because if you take on any more than that, it's really easy to get overwhelmed once again and be frustrated because you're not finishing everything. Or you'll start multitasking, rather than focusing on one task at a time. So let's get three tasks every single day.

I am Craig Johns, the active CEO, with ordinary don't belong.

**Peggy McElgunn:** My name is Peggy McElgunn. I've served as a nonprofit executive for 30 years. As the owner of a nonprofit management firm, I have served in a variety of roles, including executive director, COO, CEO, legal counsel, and just about every department director position possible. I've worked with over 50 organizations, including trade associations, professional societies, accrediting bodies, and credentialing organizations. I am currently the CEO of a nonprofit management firm, Global Professional Services PC, [gpsforgrowth.com](http://gpsforgrowth.com).

As a person in this position, I have to manage a wealth of information, support a variety of organizational and individual needs and requests, and advance the work in an effort to reach goals and objectives for multiple organizations, as well as my

own. This requires a level of organization and planning that on most days is almost impossible, but on some days is manageable and even rewarding because of a tool I have found that enables me to sort through all of the strings that are wound up in their individual balls of yarn in my head. This tool is the bullet journal.

This approach, journaling in a very specific way, was developed by a gentleman named Ryder Carroll. His goal was to be able to track the past, order the present, and design the future. And isn't that a lovely concept, especially now, as we hunker down with most states, having issued stay in place orders, as we endure a global pandemic? There is no doubt that our approach and our efforts to work are certain to change, but we will always need to manage ongoing activities. And if we are creative, we can even imagine a future and work towards creating one that benefits all of those involved with us. In fact, this global experience provides everyone with the chance to step back and analyze that which is truly most important, both in terms of professional and personal effort. And to take a moment to figure out how we can better achieve our goals with this understanding being first and foremost, this is a rare and unusual gift.

And frankly, the bullet journal method allows me, with the tools to be able to do this more reflectively, with data in hand, and to more analytically and objectively outline a possible or several possible best way forward. For me, for my staff, for work in general, and for my clients specifically. What is the bullet journal method? It is a way to record activities, plan for the day, week, month, and future, and then journal about what happens in a defined period.

I think the thing that is most revolutionary about this approach, at least for me, is the fact that it is not electronic. By demanding you actually write down your activities, plans, and reflections in a notebook, it requires you to think about things in a way that is more separated from the constant din that comes from the computer. Not just the sound din, but the information overload that is so commonly associated with computer and electronic interactions.

There is a separateness that happens when you are writing in a notebook that is both isolating in a good way, not in a pandemic way, and mindful. There is joy in the solitude of thinking and reflecting, at least for me. While it is similar to journaling, there is a defined framework for recording information.

The first step is to outline your current work, what you should be doing, and what you want to do. These three columns are intended to drive your work towards a higher plane. There are specific actions to take at the start of each month, with daily guidance for outlining goals and activities and tasks. And there are specific ways for you to review the day and push your activities and goals that you did not accomplish, and then reflections to be recorded. It's sort of a combination of right brain creative side meet left brain analytical side, with whichever side of your brain that is strongest driving, but the other side gets a voice, too.

I have found a method to be both therapeutic, as well as practical. It not only allows me to see what is planned for it and what is accomplished, but it provides me with more insight and awareness regarding what gets pushed to the side and bubbles

up to the top. For example, the work that involves creation, for me, always gets completed. The work that demands great attention to minute detail sometimes gets pushed until it's demanded. This helps me better understand myself and better delegate and support my staff to accomplish the bigger goals for our company and our clients.

I think the element that I like most about the bullet journal is the analog approach. You can be anywhere, and even if you are not a list maker, you can lay things out so you can view them comfortably for yourself. You can look at the leaf, the tree, or the forest. It's really up to you. And since it's written down in a book, you can review it at any time. It's always there. And the level of insight I use is applicable when I choose to apply it. The flexibility, the mindful approach, the insight, and the opportunity it provides, the bullet journal has been a great source for goal setting and more importantly, goal achievement. I recommend it strongly.

**Chloe Blair:** Hello. My name is Chloe. My tech tool is ContentCal. I like ContentCal because it is a scheduling platform for social media, along with a content calendar, all in one. I appreciate this tool because many tools out there do not do the content calendar. It gives you a full calendar view. It's easy to collaborate with team members. I can write messages on content that is created, and we can collaborate and shift content very easily as needed. I also love ContentCal because of their customer service. Andy, one of the owners, is really easy to get in touch with, and he's always willing to jump on a Zoom call and help figure things out, whenever he's available.

Lastly, my favorite thing about ContentCal is the easy integration with Zapier. It's easy to find and kind of personalize the program by finding different integrations and using those integrations like a Slack and ContentCal integration to further collaborate with your team and just stay informed on what's being published and what's going on.

**Emily Nash:** I'm Emily. I work with Hybrid Solutions. I've been solely focused here on associations and their unique challenges for over three years, and I've got about 10 years in the space of digital marketing, and I rely on this app. All right. So the app I'm going to talk about is a little app called Insight Timer. And I've been using it from the beginning, it feels like, because it was not as sophisticated back in the day. It's something that I used to meditate. So it's not necessarily related directly to my work. It's not Zoom. It's not... I use all the tools that typical people in this tech space use: Slack, HubSpot, Zoom. I'm not going to talk about those. The ones that work for me at the end of the day, when I need to unwind, or a lot of times at the beginning of the day, where I just need to set the tone for the day, this really helps me.

What I like about the app is I can go in and give it any amount or increment of time. Sometimes, I usually do around 10 minutes to just, at the very minimum, do something. I shoot for 20 minutes when I really want to get into a head space that's really quiet and peaceful. And I do the guided ones. So there's ones that kind of

guide you through like a compassionate, give like a prayer to the world or something, especially right now, it's really good. And there's others that I've used in times of flux, where I want to manifest something in my life.

And I have to say that when I am good at it, and I've done it for several days in a row, because it does give you a track of your behavior, what you've done over a certain time, and it definitely has made a difference, a huge difference. So I try and be good with it. If I'm not using it every day, I tend to kind of sporadically use it to help me sleep sometimes, and get to in that peaceful place to kind of just really feel good, if you're still thinking about all those tasks and work and projects that you're involved in, in your workday.

So Insight Timer. There are others. Calm is one, but Insight Timer was free from the beginning. At the end of your meditation, it tells you all the thousands of people from around the world, including a map, of who you were joined with in that meditation time. I've had people... it's a community. So I've had people message me and say, "Hey, thanks for meditating with me." It feels really good.

So it's not directly related to getting a task done, but it's how I remain calm and resilient in times like now. And just in general, as business moves so fast, and we're constantly being tasked with more and more hats to wear, I just tend to be resilient and calm during that kind of shift and change in times. And it's directly related to getting into a head space. It's super customizable, so I can just pick a time. So I recommend this app to anybody who needs two minutes up to 10 minutes of time to just relax.

It's really simple. I'll show you. There's the world where all the people are right now. You can pick a time, you can just do a timer, and it'll do a bell, if you don't want someone guiding you. There's tons of guidelines. It's super outdated and nice now, but it was super kind of grassroots when I first downloaded it on my phone, and it looks like a little rain bell. Anyways, it's one of my favorite apps right now. And that's my tool. Yeah. So, all right, thanks.

**Michael Tatonetti:** Hey everybody. It is Dr. Michael Tatonetti, and I'm excited to be speaking at the upcoming Surge event. I wanted to give you one of my favorite tech tools and what I love about it. And for that, it is going to be Crowdcast. What I love about Crowdcast is it's a great solution for pretty much any association right now. Most of the time when I speak with an association, they're in one of two buckets. Either they have no LMS, they're not ready to go virtual, but we have two right now. Or they have an LMS, but they haven't really done much virtual event-wise. And they're trying to figure out how do we combine it with our LMS? What do we do? What I love about Crowdcast is that Crowdcast is good in either situation. So if you don't have an LMS set up, Crowdcast is a platform where you can set up registration pages. You can accept payments. You can have discount codes or coupon codes, if you want certain segments to attend for free or at a member rate versus a nonmember rate. And it will track all of your registrations. You can go live. It includes chat, asking questions, polling. You can have a call to action. All of that is

there. And it's not that expensive. Depending on the plan, it's less than 1000 dollars a year, typically. So that is a great option. And you can use it over and over.

On the flip side, if you do have an LMS, but you haven't yet gone virtual, and you're figuring out how do you use the tech that you have, you can actually take Crowdcast and embed it in the LMS that you have, as long as your LMS has that as an option. And then your current users can still register through your LMS. You can use that technology, but it gives you an amazing platform for going live, still housing chat and polling and questions and call to actions. This way, the live session is there with Crowdcast interface in your LMS. And then you can have the replay there as well for after the event, so that your attendees can binge watch.

So for me, if you are not a pro right now in doing virtual events, and you're getting thrown into it, like a lot of us are, I love Crowdcast. It's an all in one solution, whether you have no real tech ready to go, or you have some, and you're trying to find the final pieces. I hope that helps. I hope that it's something that is worthwhile for your association as you're looking to go digital. And best of luck during this time. Stay safe and healthy.

**Amy Thomasson:** Hi, my name is Amy Thomasson, and I am an association marketing membership and volunteer management professional. And one of my favorite tech tools to save me time and increase my productivity is called HootSuite. HootSuite is a social media and marketing management tool. And my favorite tech tools are those that anyone can use. They're plug and play. So I don't have to go down the rabbit hole of watching a bunch of YouTube videos about how to utilize the tool. I can create a free account and get started.

So what I enjoy using HootSuite for is primarily to help me schedule my social media posts to help build my personal brand. I primarily utilize LinkedIn. What's nice about HootSuite is that you can utilize multiple social networks and schedule posts across multiple channels. But even if you just hone in on one, HootSuite is really valuable for being able to schedule your content, especially because on platforms like LinkedIn, the optimum time to post is during the business day, when we have so much else going on.

So I really enjoy HootSuite for the scheduling option, but I also enjoy it because it has built in analytics that are easy to use and to run, to see how effective your posts are. And it also has tools for engagement. So you can engage across multiple social channels. For instance, if you have a link in a blog, directly through HootSuite rather than having to log on individually to link to each of those different platforms.

So in summary, HootSuite is a great tool to build your personal brand, to get your content out to the masses, and to engage with others. It's a simple plug and play tool that anyone can use, which is, again, my favorite type of tech tool.

**Chelsea Brasted:** Hey, everyone, I'm Chelsea Brasted, the content manager for Sidecar. And I'm very excited to share my own tool to use with this Surge session. So a little bit of background. So I, in college, my intention was to be a newspaper

designer. And so I ended up spending some time actually designing our college newspaper at LSU. And during that time, I used Adobe InDesign and Photoshop and all of these different programs to do some graphic design. And while I did not actually end up going that route, decided not to do newspaper design, I still remember a lot of those tips and tricks that I learned while on that new staff.

And so it's really been helpful to me, especially as social media has really transformed into a space where we're not just sharing like status updates, and we're sharing more images, and we expect more out of brands. We expect them to have these really engaging social media posts, and we expect brands to have different posts that sort of make us think about things in different ways and, honestly, entertain us.

So one of my favorite favorite things to do is to create some social media posts that I think are going to be really sort of jazzed up and fun for people to engage with, and are, frankly, a step more than just sharing a link. So if we're just constantly sharing links to content, as engaging as the content can be, it may not actually take the next step of really creating a conversation.

And one of the things that's really important to me is meeting people where they are. And so, I can try and get you to Sidecar, to see our blog posts all I want, but you may just hang out on Instagram a lot, and that's totally cool. So how can we really think about making our social media posts super engaging and interesting and entertaining and a space for conversation, where y'all are already having conversations?

So thinking about that, and then thinking about, too, the graphic design skills that I picked up in college and just really have a lot of fun, honestly, just kind of getting to play around. It's almost like, if you're the kind of person who can just get lost playing like a video game for hours, that's sort of me on graphic design. I look up, and all of a sudden it's three hours later. I just spent how much time putting together a couple of social media posts. So maybe it's not the best way to say, spend all this time doing this, but I'm getting lost.

But my point is I love Adobe Spark. It is a free program that you can use, even if you don't have an Adobe login, you don't need to have Photoshop, and you also don't need to pay for it. If you don't pay for it, you just have to manually remove log-ins every time... Or not logins. Logos, I'm sorry, whenever you create a post.

So what do I love about Adobe Spark? This is a program that's incredibly easy to use. It's super intuitive. In a matter of minutes, you can create social media posts or banners or posters or anything like that, really tailored for social media. It will be engaging. It will be pretty. And it also has free photos and things like that already embedded into the program. So you don't need to waste time going to Unsplash, if you are interested in using free photos, but you can also upload your own.

One of the features of it that I really, really love is that you can add your own branding information. So you can upload blogs... Or not blogs. I keep saying that. You can upload logos. You can identify all of your brand colors. So if you just need to whip together a post really quickly, all of your data is already there. You don't

have to spend time re-uploading your logo single time on the paid version. And you don't have to find all of your hex colors to go through and figure out like, "Oh gosh, how do I make sure that this is going to look like it's coming from my organization?" So I love, love, love Adobe Spark, and I'm probably singing its praises in the live chat right now. One of the things that I think is great about it is if you do end up deciding to pay for it, it's only 9.99 a month, which, as far as software programs go, is pretty inexpensive. But you don't have to pay for it. So that's great.

One of the other things that's great is you can get transparent background downloads, which, fun fact, is actually how all of our name titles on everything during Surge happened. I wanted custom name titles, and I wanted something that my team could build into every single program that they were using to edit all these videos. We had a team of people editing videos. And so how do we make sure that they all look like they came from the same group? We create some of these custom things. And so those titles came from Adobe Spark. Whenever you see any text moving or anything like that, that came out of Adobe Spark. And I just did it on my phone as I was editing and sent it to my computer using AirDrop.

And so there's a lot of different ways you can use it. And I'd love to hear some of the ways you guys are using Adobe Spark, too. So thanks so much. That's my very quick pitch on Adobe Spark. I hope you guys find it as useful as I do.

**Erica Salm Rench:** Hi everyone. My name is Erica Salm Rench. I'm the director of customer success at Rasa. And one of my favorite tools is Slack. Slack is awesome because it brings all of your communication into one place. So instead of having to bounce back and forth in your email and have a separate tool for chat, you can do direct messaging and channel communication within Slack.

And what's also really cool about it is that it allows new team members to get access to historic communications. So, whereas if you're onboarding someone brand new into your team, into your association, and you need them to have historic context on a project or some sort of process in the office, they can read all the way back in a Slack thread, if you give them access to a given channel. You can also mention people in a channel, so that they only get notified when there's something that directly pertains to them. And it really makes things so much more fast-paced and smoother, in terms of your communication, and gets rid of a lot of the clunkiness that can sometimes come across with email threading, both from a timing perspective and from a perspective of being in your email application.

What's also really awesome about Slack is all of the incredible native integrations that it comes along with. And even beyond native integrations, you can use Zapier to bring all kinds of information directly into a Slack channel. So for example, at Rasa, we have our NPS, our Net Promoter Score, come in from app queues and then it comes directly into a Slack channel into our NPS channel. So, then all of us folks who are on that channel can directly communicate about that score, how we can get better, how we can improve, and we can really act on that feedback in real time.



You can also have your project management software feed into a Slack channel. So for example, if you're managing a project in Asana, which I know a lot of association professionals use, you can have any project update feed into a Slack thread, so that you know when the next step needs to be completed or when it's your turn, and you're all queued up for your step in that project.

Something else that's really cool about Slack is that it helps you organize your communication. So there's a little something called the Slack Bot, and the Slack Bot pops up every once in a while, when it feels like, "Oh, you haven't been using this channel in a while. Do you want to exit this channel?" So as not to clutter up your workspace. So it's just a really smart communication tool in so many ways, and it allows you to do so much in one place.