

Online collaboration

A PRACTICAL GUIDE FOR MODERN TEAMS



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Introduction

So, coming into the office just means that people have to put on pants. There's no guarantee of productivity.

*Jason Fried, CEO of Basecamp;
Co-author of "Remote: Office Not Required"*

Why did we write this guide?

There is a shift going on in the business world and we want to help modern teams make the most out of it. Organizations start or move their operations online with increasing rates. Estimates suggest that most people on Earth will work entirely online within two decades. Why? Because it's beneficial for both employees and organizations. This guide is meant to help you make the transition to online collaboration or improve your existing operations. We want to make the process as easy and frictionless as possible.

Who is this guide for?

This guide is for entrepreneurs, project managers or anyone else interested in collaborating online. If you manage people, technology or processes, you should get value from this guide. If you work in a company that is either remote or looking to move its processes online, we hope that there will be valuable take-aways for you.

How to use this guide?

You can read individual chapters of this guide based on your interests. If you're interested in the specific software tools to use online, you can [skip to that part](#). Or if you're simply looking for best practices, you can start from [Chapter 4](#). Whatever works for you is best, but we recommend reading the whole ebook at least once first. You can then go back to it as a reference file.

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Part 1

Why would anyone collaborate online?

“ Teamwork is working together,
even when apart.

Anonymous



Everything that's wrong with working online

At first, we thought that in a completely distributed company, team members will not be able to bond as well as they could in an office. There is no opportunity to have an occasional chat over lunch or a few drinks after work.

When someone is hired at [Sendtask](#), they have an informal video conference with everyone on the team but apart from this, communication is mostly professional. Some companies, like Trello, organize conference calls where each Friday people have a casual (non-work related) call with a random set of 3 other co-workers.

While this approach seems efficient, we didn't want to limit people in terms of topics they can discuss and choose who they interact with. In addition, even though video conferencing has become much better in recent years, it's still not the same as interacting with a co-worker face-to-face. We thought hard about this question:

How do we create a distributed working environment where team members are friends and not just colleagues?

For us, the answer was quarterly team retreats. Once every three months, we fly everyone for a week to a location somewhere in the world where we spend almost all of our waking time together. We work on projects, discuss long-term topics, have fun, lunch, and dinner together. While this brings extra business costs, it's still a small investment compared to renting a full-time office and relying on traditional methods of collaboration.

As a result, team members spend more quality time together - where everyone learns much about the others in a more personal way. We've all been in situations where people work in an office for years but still feel like strangers to each other. Intensive team retreats which are spread between important milestones are what solved this problem for us.

The example above highlights that you will encounter problems on the way to bringing your company partially or entirely online.

Before examining why online work is beneficial, we'll look at the bad sides most people point out. Some of them have solid ground, while others don't have anything apart from "that's how we do it around here".

We've identified three main reasons why companies don't allow their employees to work from home. They relate to company culture, lower productivity, and reduced creativity.

Company culture

When employees don't take part in frequent social events, company culture might suffer. After all, people like spending time together, don't they? Frequent face-to-face interaction lets people create meaningful relationships.

Productivity

Several issues impact productivity in a negative way. Distractions at home caused by family, environment or waiting for the cable guy. The lack of routine



can cause people to neglect key professional areas or not give them the full attention they deserve. People are unavailable when needed because they work at odd hours. These issues cause concern among executives considering remote work as a viable option.

Creativity

The best ideas come from collaboration and bringing people from different backgrounds together. The lack of a physical location where people can bounce ideas off each other may harm creativity.

All three reasons above are very real and their consequences could be harmful for any organization. In the next chapter, we'll look into each of them in turn and see if they should really be a cause for concern in your situation.



The benefits of online collaboration

Core benefits of virtual and connected workplaces



In this chapter, we're going to look at the benefits of remote work. We're going to show how the disadvantages from the previous chapter could be turned into advantages. We'll examine hidden perks of remote work too. These are things like speed, efficiency, reduced costs, better customer service, and fun.

How can the company culture get stronger?

Culture comes from being different to other similar organizations. It's about "us", not about "me". Having the flexibility to work from home and choose your own working hours is not the norm (at least at the moment). This is why employees who work at companies that allow remote work often take pride in how and where they work. According to Forbes, remote workers are both happier and feel more valued because of the freedom and flexibility they can enjoy.

Why is productivity higher?

People don't work at the same frequencies. How can you ensure that everyone works to their full potential if you put them in the same "bucket"? In fact, a survey by TINYpulse, an employee engagement company, found that 91% of remote workers believe they achieve more compared to what they did in an office.

Here are the top reasons why productivity can increase when working remotely:

1) Environment - you can set up your environment at home in the most productive way for yourself. Your home office can make you laser focused if you examine and understand how you work best.

2) Routine - no one can create a better routine for you than yourself. This leads to better rest, exercise, control over your time, and a genuine love for your work because of this.

3) Flexibility - if people can work when and where they want, they feel in control. This is good because everyone works when they are most productive. Also, employee motivation is higher due to the feeling of control.

Why is creativity increased?

This is a legitimate concern which is easily remedied. Brainstorming sessions can now happen online. There are whiteboard tools, workflows charts, video conferencing software and everything in between. These allow people to collaborate together in real time. And with instant chat apps, it's easy to get into a random conversation with a colleague anytime.

Speed and Efficiency

Collaborating online can increase your organization's speed and efficiency. The real-time communication and ability to attach files cut out unnecessary waste. When you store all documents in a single place, it's faster and easier to find and share important data.

People often become more independent because they need to work on their own and get used to doing things by themselves. What might cause a bit of a steep learning curve at the beginning, pays off quickly.

Reduced costs

Working without an office comes with an attractive perk for any business - costs. A physical office is often a big expense for a company. Thus, allowing your team to work from anywhere can improve your income statement. You also remove related expenses like electricity, internet and amenity costs.

Better customer service

It's great if you have employees working at odd hours and different time zones. You could potentially have someone available at all times, thereby improving customer service.

Fun

When you're not with your colleagues every day, seeing them is much more rewarding. At Sendtask, we get together four times per year for a week of fun and work. Each of us has something new and interesting to share and we get to know each other in various settings. For example, this could be going to an escape room, surfing or skydiving together.



Who does business online?

Remote work is no longer adopted only by startups and freelancers. Organizations of any kind embrace online collaboration for some or all of their operations. Here are a few examples where remote work is normal:

SMEs to large corporations

Small and agile companies like [Buffer](#) embrace online collaboration. However, behemoths like Xerox and Dell also encourage remote work for some of their teams. If you run or work for a big corporation, you've likely worked with remote teams even if you don't look at it this way. For example, important areas such as accounting, legal and HR are often outsourced. Even traditional "brick and mortar" businesses are adopting remote work - from real estate to pharmaceuticals and education.

Non-profit organizations

Charities like the [American Heart Association](#) also embrace remote work. Higher efficiency and better alignment are just some of the benefits they cite.

Clients and other stakeholders

Many organizations deal with clients exclusively online. This realm is not reserved for internet businesses only. Right now, you can deliver complex services entirely online. And in some cases, the clients prefer this type of collaboration rather than face to face. This is true especially when there are significant travel implications involved. Glance over at the [UpWork](#) categories to see what is possible to do online. From accounting to voice overs, the ability to deliver great work online increases day by day.

Part 2

Best practices for effective online collaboration

“ Technology now allows people to connect anytime, anywhere, to anyone in the world, from almost any device. This is dramatically changing the way people work, facilitating 24/7 collaboration with colleagues who are dispersed across time zones, countries, and continents.

Michael Dell, Chairman and CEO of Dell Corporation

General rules for effective online collaboration

We've covered why online collaboration could be useful to an organization. Now, we'll look at how you can put it in practice to your existing processes or augment your current remote setup. In this part, we're going to provide both general and specific guidelines. This way you'll make the most out of a remote workforce in any organizational environment.

The general principles of remote work include simplicity, flexibility, clear expectations and milestones. We'll now look at each in turn.

Simplicity

Businesses are complex enough as it is. New technology can quickly become overwhelming, especially when the workforce is not tech-savvy. Fortunately, most of today's tools are friendlier than, say, Microsoft Word to use. Therefore, people often learn how to use new software faster than you expect. This is further enhanced by improvements in smartphone functionality and usability. That said, it makes sense to keep your setup as simple as possible for maximum efficiency. A useful question to ask yourself when choosing the specific tools you will use to work remotely is:

“What is the simplest possible combination that does the job right?”

Often a simple Google doc is enough to work on complex projects. These types of projects need more sophistication at first glance, but often that's not the case. Keep it simple whenever you can and add extra tools only when needed.

Flexibility

Every team is different and has its own workflow preferences. You should think about this when creating your online setup. The best strategy is to keep an open mind and experiment with different approaches. 37signals - the company behind [Basecamp](#) - experiments all the time with great success. For example, they introduced a 4-day work week so that people can enjoy more of the summer. According to their employees, this practice hones their prioritization skills, energizes and connects them to each other.



Flexibility is important so you don't feel confined to a single approach. This could make your organization slow and rigid. Treating different approaches as experiments will reduce the pressure of implementing a system. This will let you be more creative with the tools and methods you use.

Clear expectations

A winning combination of routines, practices and tools requires good communication. You need to provide every team member with clear expectations. What does working online mean for them and their role? Are you going to leave people to create their own responsibilities? Are you going to provide everyone with detailed guidelines? What you choose is up to you, but it's important to share with your team what you expect of them. This applies to the organization as a whole in order for remote collaboration to work for you.

For example, at Sendtask we have a detailed Bootcamp guide that's used to get new hires up-to-date. We also use it as a reference point when someone on the team isn't sure about what to do. The file details practices for efficient collaboration. Things like how to communicate internally, areas of responsibility and many others. Everyone participates in creating and updating this file. As a team, we want everyone to have a say in the way we collaborate together.

Milestones

If you're working in a physical location, making things remote is best done in stages or milestones. [The Association for Information and Image Management](#) (AIIM) implemented a gradual transition. By starting to work online for only one day a week, they removed the element of shock. This made it much easier to start working two, three and five days a week remotely.

Specific practices of application

There are specific guidelines you can use for each key area of online collaboration. We'll cover guidelines for Communication, Scheduling, Information Storage and Task Management (later we'll go into the specific tools you can use for each area).

Communication

This is any exchange of information - both internal and external. These are the key areas to think about when it comes to communication.

1) Internal communication

It's best to use a chat tool like [Slack](#) and some video conferencing software such as [Appear](#) for meetings. You can also use tools for brainstorming like [RealTime board](#) or good old Google docs. Email is generally slower than other options but you can always use it when needed. It still provides the most flexibility to all parties involved.

2) External communication

You need to consider what your clients, suppliers or other stakeholders' preferences are. Generally, email is a safe bet. Also, tools like [Sendtask](#) help combine internal and external collaboration in one place.

Scheduling

This is all time-centric information. Meetings, events or reminders all fall into this category. The calendar is the preeminent tool to use and there are plenty of options available online. You can share a calendar with your team as well as have individual ones. A few tools, like [Calendly](#), are available that let you share

your calendar with anyone. This way, people can schedule meeting or other time slots without having to go back and forth with email. All you need to do is specify when you are available and share the scheduling tool with whoever you want to meet.

Information storage

This all storage where you keep reference files for use in the future. Services like [Evernote](#), [Google Keep](#) and [OneNote](#) let you capture notes on the go. They also make information easy to share and search later. With [Google Drive](#) or [DropBox](#), you can store any kind of information. This could be things like documents, photos or videos. You may then access them anywhere so you're not tied to an office computer. These services provide bank-level security for your files. This means you don't have to worry about the safety of yours or your customer's data.

Task management

It's best to manage actionable information with specialized tools like [Sendtask](#) or [Trello](#). They give your whole team access to projects that are in progress, done or planned. Again, it's important to keep your workflow simple and choose the tool that suits your team. Try out what works for you and adopt the experimenter mindset.



The ultimate remote work checklist

40 steps to prepare your organization for success

Disclaimer: This checklist is meant to aid you when moving part or all of your business online. Every company is different and it is highly likely that some of the steps are not applicable to your situation. Please use this checklist as a rough guideline. You may find information which helps you determine your processes and get new ideas to do things better.

Part 1: Preparation:

- ✓ Outline the main goal of your transition
- ✓ Draft the key outcomes needed to achieve your goal
- ✓ Create a brief document with milestones for each outcome needed (e.g. get one person to work at home one day a week)

Scenario planning:

- ✓ Create a scenario where a small part of your team works online
- ✓ Create a scenario where about half of your team is online
- ✓ Create a scenario where all of your team is online
- ✓ Create a plan B in case things don't work for your team, be flexible

Master file:

- ✓ Create a file detailing what you'll do - this should be maximum 5 pages
- ✓ Distribute file among team
- ✓ Ask for team's input
- ✓ Change file based on your team's feedback
- ✓ Ensure everyone knows what's happening and that they're okay with it

Part 2: Implementation:

Communication rules:

- ✓ Decide how you will communicate internally with team members
- ✓ Decide how you will communicate one on one
- ✓ Decide how team members will provide feedback to each other
- ✓ Decide how you will provide customer support if applicable
- ✓ Decide how you will receive user feedback if applicable
- ✓ Choose one chat service
- ✓ Choose one email service
- ✓ Choose one video conferencing service.

Scheduling rules:

- ✓ Choose an online Calendar service
- ✓ Set up team calendar
- ✓ Set up individual calendar accounts
- ✓ Share calendars where needed

- ✓ Outline time off planning for team members
- ✓ Outline Work hours for team members

Information storage rules:

- ✓ Choose a system for storing documents and other files
- ✓ Decide how you will share files
- ✓ Organize your file storage system

Task management rules:

- ✓ Choose a task management system
- ✓ Set up several workflow options to test (e.g. kanban, GTD, agile)
- ✓ Decide how you will prioritize tasks and projects
- ✓ Decide how team members will share what they are working on
- ✓ Choose a time tracking system
- ✓ Decide how product ownership will be determined
- ✓ Decide how to deal with emergencies and reach team members in critical situations
- ✓ Determine a system to track passwords to ensure security
- ✓ Choose an operations analysis tool
- ✓ Set up analytics best practices
- ✓ Monitor analytics to track team efficiency and results

Part 3

Online collaboration in action - the Sendtask team

That's the first time we met in person.... after working together for more than a year



The Sendtask Bootcamp Guide

In this part, we'll present a case study of online collaboration using our team's Bootcamp guide. It details the specific processes and approaches we take for each key area of online collaboration - Communication, Scheduling, Information storage, and Task management. In addition, we're going to look at several processes we use for general and admin activities. A file like this is useful in any situation, not just when working remotely.

Note: *Some parts have been slightly changed or omitted for security purposes. However, it's still easy to spot the main patterns that drive our work online.*

From Siberian ice to Miami Beach

We're a team with passion for productivity and lean collaboration distributed all over the world. There are no two members of our team who work from the same location.

One call

We have only one weekly video call and we end each meeting with a riddle. We have few meetings so everyone can enjoy as much distraction-free time as they need.

Results are what matters

Collaborating online lets us work during our most productive time leading to high efficiency. Some of us are night owls, others are early risers. Why would we make everyone come into an office at 8 am and kick 'em out at 5 pm?

Communication

We communicate internally in a variety of ways. This chapter will examine our communication processes in-depth and provide a rough guideline for you to follow.

General Communication, 1-on-1 communication

We use Slack as our pre-dominant communication channel.

| The rule is: *If it doesn't go somewhere else, it goes in Slack.*

If talk or video is better, we use appear.in or Skype, depending on the service availability/ quality. Everyone checks Slack every 2-4 hours. If urgent, we find ways to communicate (via Skype, Phone, WhatsApp etc.).

We only talk at the same time with everyone once a week. We do asynchronous communication whenever possible to avoid disrupting people's flow.

Customer Support & User Feedback

We reach out to our users via Intercom and we also get feedback from them via Intercom whenever we can. If someone approaches us on a different channel (facebook, real life, etc.) we help them there.

As a team, we want to learn from our users - both in quantitative and qualitative ways. We reach out to users and ask them about their experience with Sendtask to learn from them in a qualitative way. We share the feedback with the team. Everyone in our team talks to a user at least once per week and shares any learnings with the rest of the team.

We send out periodic emails asking for feedback via Typeform (or similar tool). We post all feedback into the #customersuccess channel in Slack. Everyone can catch up whenever they want.

Personal Feedback

We all strive to get better and we value honest and direct feedback. We all give feedback to each other and we formulate it in a constructive way so that the other person can learn from it and get better.

We use online forms where each team member can provide feedback about themselves and about others using a qualitative and a quantitative system. This feedback is summarized and presented in special feedback calls once every 6 weeks.



One-to-many communication

Fun or interesting information to be posted in the #general channel on Slack. Quick calls are done on appear.in or Skype. Feature, design, marketing and other specific communication is carried out in the relevant Slack channels. Add talking points the day before our weekly call in the #updates channel on Slack. Talk about solutions, not problems, and end each call with a next action list.

Design review

New layouts/design features are released in InVision. An update is posted on Slack and a task is sent to everyone who should review. Reviewers leave comments in InVision and re-assign task to designer once done. Discussions can happen in Slack or appear.in when needed. Once consensus is reached, assets are uploaded to Zeplin and shared with developers.

Internal feature feedback

When a new features needs to be tested, the lead developer on the project requests feedback in Slack and describes the features to be tested. A task is assigned to all reviewers. Assignees give feedback and re-assign the task to the developer who requested feedback.

Content review

Copywriter prepares content file on Google Drive and sends review task to relevant team members. Team members provide feedback via 'suggesting' or additional comments. Necessary discussions to be held via Slack or appear.in.

Scheduling

Scheduling is another important area of online collaboration. We need to be extra punctual with time because there are no specific working hours. As most live communication happens via video conferencing software, it's important to have a process in place for setting and making the most out of meetings.

Work hours

Everyone manages their own hours in a way where they can be most productive. If we have a usual rhythm, we make the team aware if that changes - so that people can have a good idea of when they will be able to get feedback. On any day (including weekends), we check slack at least once a day, so that people can reach each other within a maximum of 24 hours on any given day.

Everyone shares their exact usual working hours in a 'from-to' format so that we know how to plan our own workflow. We need to have at least 2-3 hrs of overlapping work time on work days.

Meeting scheduling

We use Google Calendar, shared Calendars and Calendar Invites for meetings and other scheduling. We ensure that we are on time for all meetings as we don't want to waste other people's time by showing up late.

Time off planning

Mention every occasion which significantly differs from your usual work hours. Let the team know early enough if you want to take time off. For example, if you want to take a day off, let the team know 3 days in advance or earlier. If you want to take the week off, let the team know at least 2 weeks upfront and so on. Use #general channel on Slack to notify about time off.

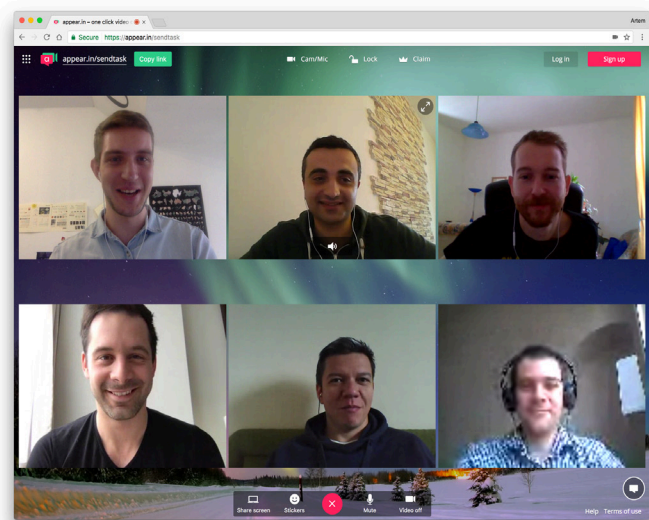
Task management

Task management is an important aspect in any business. When working online, people can easily get complacent. Therefore, it's of utmost importance that rigorous measures are taken in advance to ensure everyone completes what they need to do. Below are some of the Sendtask task management outlines, excluding software-specific practices for simplicity.

Team Visibility

We update each other once per week on what we've worked on and what we're going to work on during the next week. We leave a status update in the #updates channel on the evening before the weekly call, so that everyone else can have a look. The update is split up in three parts: Last Week, Next week and Talking Points. Talking points are things we'd like to discuss during the weekly call. This structure allows everyone to go through the update before the call, s.t. we can be very efficient with everyone's time during the call.

The weekly call takes a maximum of one hour and the agenda for the call is documented in the '#weekly call' project on Sendtask. We have the call on appear.in unless there is an outage and we fall back to Skype or another solution.



Sprint Planning

We work in both long, topic-based 6-week sprints as well as weekly release sprints.

All our sprint planning is motivated by a measurable goal/ milestone that's communicated within the #updates channel on Slack.

1'000'000

*A goal might be to «Reach
1'000'000 DAUs».*

A goal might be to «Reach 1'000'000 DAUs». The topic sprints (6 weeks) are there to get us closer to that goal. One topic could be to «Make Sendtask attractive for agencies and freelancers» because we think that's what's gonna help us reach our goal. Once we agree on a topic, we use the #sendtask Project on Sendtask to map out who'll be working on what.

Sprints start on Wednesdays (when our weekly call happens) and end the following Tuesday. The last week of the previous sprint, we decide on a goal for the next 6 weeks. Once we agree on a goal, we each lay out 1-2 tasks per weekly sprint that we plan to work on. After we agree on this, we fill out the project with more detailed tasks. Every week before the weekly call we bring our task list in order and adjust due dates where necessary.

Product Ownership

Everyone is encouraged to take on projects. Almost all of the features we implement will be multidisciplinary and thus anyone can lead any project. If one is responsible for a project, she/he takes full responsibility from ideation/incubation to a successful release.

Whoever is in charge of a project makes sure to communicate with the other members via the appropriate channels to make sure they get their part done on time and the project can finish as planned.

Everyone has a responsibility to constantly improve Sendtask in his/her own area of expertise and - if needed - create new projects.

Splitting tasks (development)

Feature/ module ownership determines task assignee. Ownership can be asked about on Slack from any developer. Task briefing between developers happens on Slack (for smaller tasks) or with appear.in for bigger ones. Feature requests shall be directed at the lead developer who will then delegate when appropriate.

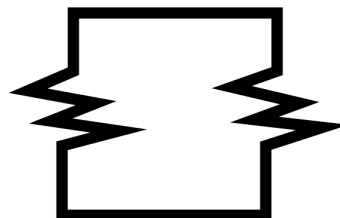
Bug reports

We use Sendtask tasks for bugs. By default, bug report tasks should be created and filled out by the person who created the bug report (to avoid further need to communicate). Bugs should go under the BUGS section on Sendtask, under the #sendtask project.

Discussion of bugs/unexpected behaviour can happen on Slack, but if the consensus is that it's a bug, a task must be created by the one who creates the bug report.

Bug report policy:

- Reproduction steps
- Environment info: what OS, browser, environment (testing / production)
- Description of bug
- (optional but very much welcome) Screenshots (Monosnap), GIF (use <http://www.cockos.com/licecap/>), videos (Loom)



Bug reports from users:

- Collect the info as above from users
- Submit a bug report as described above

Feature requests

We track every feature/ change request in a Sendtask task. If the request has specification outside the limits of comments, we will link to a document in our repository. If the spec changes over time, the person who suggested the change must leave a new comment on the task describing it. This is so that we can see

a timeline of what changed over time and we can track produced documents along the way. After releasing the feature on testing, ask the person who requested to validate on Slack/ weekly call.

Release

Share release report on the #deployments channel in Slack for the team to see. Release notes for users are written and published on Intercom and Facebook.

Monitoring

Use Slack integration to get notified of:

- Crashes
- Server events that we want to track (thresholds reached, etc)
- Average API request time, etc.
- Server availability (Up/Down)

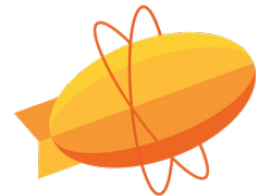
Use digitalocean services to monitor server load/ health. We alarm to developers in case one of our servers is down or there's down time due to another reason.

Information Storage

One of the best things about working online is the unlimited file storage. With cloud technology, it's easy and cheap to store everything online. Powerful search algorithms help with finding whatever is needed in seconds. Outlined below are our current practices for storing and sharing files.

Asset sharing

All Files and Documents are stored on Google Drive in shared folders depending on area. All Design items to be stored and shared in Zeplin.



File sharing

Files are shared in the relevant Slack channel. If necessary to upload, use the relevant Drive folder. All files with long-term value shall be stored in Google Drive. One-time usage files (e.g. a screenshot or similar) can be shared in Slack or other channels without being uploaded.



Documentation storage

All documentation to be stored in Google Drive for easy search, edit, and feedback.

General and Admin

While above are the key areas in online collaboration, there are additional aspects which we can't neglect. These relate to company strategy, payments and other general and admin areas.

Long Term Strategy

We make sure that everyone in our team knows about our next milestone. This milestone is always measurable. This way, we ensure that everyone in our team knows what we are working towards and can make the right decisions when they are working on their own.

We always have our vision and mission in mind. We get together 3-4 times a year for a week long retreat that we use to discuss ways of how to reach this goal and stay on the same page. Based on our agreement, we define the roadmap for the period until the next retreat. If we need to adjust the roadmap in between retreats, we make the team aware of any changes and we get their feedback.

Payments:

The payment cycle is always two weeks. Weeks start on Monday and end on Sunday. We send a freshbooks invoice to the main administrator every 2nd Monday for the previous two week period, ending on Sunday. Payment cycles always include an uneven and an even calendar week

Main administrator reviews and emails all invoices for finalizing the payment. Payments are executed via Bank transfer or Payoneer.

Time tracking:

Work time is tracked in TimeDoctor automatically. At the end of the day, we review the time worked and delete any time we were not productive/ worked on

something else. Manual time is added only when needed and a note explaining why is left on the time entry.

Emergencies:

Everyone provides the means of communication on which they can be reached in emergencies (Phone, WhatsApp). This is only to be used in high priority situations. If team member can't pick up, they should call back at earliest convenience

Passwords & Security:

- Do NOT store passwords in your browser
- Choose long & safe passwords (8-14 characters)
- Enable 2-factor authentication wherever possible (including your Google account)
- Store your passwords in a password manager
- Be aware of phishing/ impersonation attacks
- Do not share internal discussions (including teambuilding sessions and similar)
- Only share the roadmap on a if-needed basis
- Do not post about 'sendtask' publicly without prior approval
- Immediately report any stolen devices/ reset your accounts. Let the team know if this happens.

User acquisition

Marketer to propose target, channels and campaigns. Team members suggest improvements and other channels as they see fit. Execution begins once the approach is agreed upon and finalized.

Analysis

Marketer is responsible for monitoring KPIs and sharing a periodic report. Key metrics revolve around traffic, conversion, and user retention. We use a mixture of internal and external tools to analyze our performance and improve.

Part 4

Tools and Resources for online collaboration

“ A man is only as good as his tools.

Emmert Wolf

The four dimensions of tools you need for effective online collaboration

This chapter will examine a few of the most useful software applications for online collaboration. Again, we'll use the four pillars of effective online collaboration as our guide - Communication, Scheduling, Information Storage, and Task management

COMMUNICATION

Slack

[Slack](#) is the main communication hub we use. It allows for instant communication in a simple way, all in the same place. It's better than other services for a number of reasons - it has a free plan, gives you the ability to share files and has its own app store for a number of additional applications.



SCHEDULING

Google Calendar

There are many great calendar options out there. The reason we recommend the Google Calendar is because it's very simple and integrates with email and docs. It can also integrate with many other options out there using Zapier or IFTTT.



INFORMATION STORAGE

Google Drive

Ok, this is a bit of cheating. Google Drive actually includes the ability to store files, create spreadsheets and detailed documents. It's kind of a 3 in 1 but we probably use all features equally. It's our tool of choice versus competitors like DropBox as it gives us more free storage initially, works extremely well, and integrates with the entire Google suite.



TASK MANAGEMENT

Sendtask

We're obviously a little biased on this one. Of course, there are multiple options for effective task management out there. We worked with many over the years and loved tools like Trello and Asana. However, when we collaborate with other stakeholders like suppliers or clients, these tools don't allow much flexibility. In these cases, we normally used email and spreadsheets.

Sendtask gives you all the functionality you need to manage projects effectively, but it also allows you to work with outside partners even if they don't have an account. It's also free to use. It integrates with Slack which is another win for us (as you can see above, we use Slack A LOT). For these reasons, we recommend using Sendtask as your main task management tool.

Bonus: The 28 best apps for online collaboration

This is a list of our choice of applications for driving great remote work. While you can always go another way, the recommendations below are tried and tested so we can vouch for them.

Payments and Invoicing

[Freshbooks](#) - Invoice and Accounting Software for Small Businesses

[Payoneer](#) - International Money Transfers: Quick, Secure & Low Cost

Design

[Invision](#) - Digital Product Design, Workflow & Collaboration

[Zeplin](#) - Collaboration app for UI designers and frontend developers.

Communication

[Slack](#) - A cloud-based team chat and collaboration service

[Appear.in](#) - One click video conversations

[WhatsApp](#) - Free calls and messaging app available on multiple platforms

Files, Sharing and Storage

[Google Drive](#) - Cloud Storage & File Backup for Photos, Docs & More

[Dropbox](#) - File hosting service that offers cloud storage and file synchronization.

Customer support

[Intercom](#) - Customer Messaging Platform

[Facebook](#) - Connect with users through your Facebook page

Time tracking

[Time Doctor](#) - Smart Employee Time Tracking Software with Screenshots

[Toggl](#) - Time Tracker & Employee Timesheet Software

Analytics

[Google Analytics](#) - Freemium web analytics service offered by Google

[Mixpanel](#) - Product analytics for mobile, web, and beyond

[Hotjar](#) - Heatmaps, Visitor Recordings, Conversion Funnels, Form Analytics, Feedback Polls and Surveys in One Platform.

[FullStory](#) - Pixel-Perfect Session Replay

Scheduling

[Google Calendar](#) - Google's free online calendar

[Fantastical](#) - Beautiful calendar app for Mac

Passwords and Security

[1Password](#) - Save your passwords and log in to sites with a single click.

[LastPass](#) - Password Manager, Auto Form Filler, Random Password Generator & Secure Digital Wallet App.

Task Management

[Sendtask](#) - Free, simple & powerful to-do app for teams & partners

[Trello](#) - Flexible project management tool based on the Kanban system

[Asana](#) - Work tracking and project management software

Notes

[Evernote](#) - A cross-platform app designed for note taking, organizing, and archiving.

[OneNote](#) - The digital note-taking app for your devices

[Google Keep](#) - A note-taking service developed by Google.

Conclusion

If you've made it this far, you're probably very interested in online collaboration and its best practices. We hope this guide will make your efforts towards efficient work much easier. While the information presented is important, there's nothing more valuable than practical experience. As parting advice, we recommend you to keep an open mind about online collaboration. You should experiment until you find the correct setup for you and your team.

Now that you have this knowledge, it's time to use it and outsmart your competitors. Use the information in this guide to get the most of today's modern business world. Otherwise, you may find yourself lagging behind where a golden opportunity lies.



If you want to get started in the most lean and fast way possible, you can set up a free account with Sendtask on sendtask.io to manage, track, and organize all your tasks online.