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On the Ground: Real-World Solutions: Taking the Best from a Bad Situation

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ON THE GROUND: REAL-WORLD SOLUTIONS **TAKING THE BEST** FROM A BAD SITUATION

A review of collaboration apps that made 2020 more bearable.

BY RACHEL EVANS & JASON TUBINIS

On the heels of 2020, and with a bit of uncertainty still in the air surrounding the lingering pandemic, knowledge workers around the world are evaluating the tools that proved especially useful over the past 20 (and counting) months. There's no shortage of news articles or opinion pieces discussing the fate of remote work, and popular books like Cal Newport's *A World Without Email* are on the rise, challenging the status quo of our arcane work conventions. Although the dream of ditching our inboxes is still light years away for most of us, the benefits of many tools highly utilized during the height of work-from-home have clear advantages. In this article we will review our favorites, rate their connectivity types by synchronous versus asynchronous, and offer a few deployment best practices for effective team communication and collaboration. Whether you have returned to the office or are still teleworking, these apps offer something for everyone.



Synchronous Virtual Meetings

Synchronous tools, including the most popular virtual meeting apps reviewed here, facilitate real-time communication. There are some obvious advantages to engaging people instantly and at the same moment in time, but there are disadvantages too, including the mental and emotional drain that comes with this territory. This is particularly true with too many video calls, which popularized the term “Zoom fatigue” over the last year

and a half. Zoom is such a household name that it’s used as a blanket term for all video conferencing, so we won’t cover that particular app here. Still, there are some benefits in using synchronous meeting tools, including the ability to screen share when you are troubleshooting or demoing software, or explaining multi-step processes to more than one person.

SKYPE, CLASSIC FUNCTIONALITY

You might think Skype is old news by now, but the classic functionality of this Microsoft-owned tool will never go out of style. Skype is one of the few applications reviewed here that allows users to connect to calls completely from within the browser; no installation of a desktop or smartphone application is necessary to use Skype. Skype also offers the ability to create a second phone number, which could be useful depending on your internet, data and device limitations. Of course, Skype still offers apps as well, including those that enable HD video, call recording, and live subtitles. bit.ly/ND21skype

WONDER.ME, HOTTEST NEW TREND

If you like the functionality of Zoom but want a little more control over the experience you are creating, check out Wonder.me. With this new app event organizers can set up areas, define content or topics, and determine how guests interact. Wonder.me is very visually oriented, and within each event space guests can see a variety of topics by using their mice to click and drag their avatars to a certain area. This creates a “circle” of people who can then interact through chat, video, or audio. When you are ready to present something, such as leading a meeting or delivering a training, you can choose to “broadcast.” This ceases video and audio communication among other attendees and puts the focus on only those who are broadcasting. bit.ly/ND21wonder

JABBER, ONE-STOP SHOP

Cisco-owned Jabber is a unified communications application providing a single interface for instant messaging, voice and video calls, voice messaging, screen sharing, and conferencing. Jabber allows you to select from their new or classic application view, and it provides for light, dark, and high-contrast modes. If you use other Cisco products such as WebEx, there may be less of a learning curve. Designating your Phone Control settings in Jabber allows users to establish their computer as their telephone device, so that all calls when they are present online will ring through the Jabber application. bit.ly/ND21jabber

Asynchronous Shared Task Management

Asynchronous tools aim for sustained communication over a longer period of time and allow people to connect at their convenience or on their own schedule. These tools are also useful for providing resources and information and, as such, they might be more helpful in capturing the history of a team’s interactions or creating a collective knowledge base. The biggest drawback to asynchronous tools is that they require more discipline to use successfully than synchronous tools. They also might come across as less personal for employees that prefer higher-touch technologies. There are a wide variety of individual tools that fit into the asynchronous category, but our reviews will focus on our favorite web-based platforms. The tools selected below provide most of the functionality of standalone tools, but all inside one online environment; synthesizing apps in one place creates a coherent portal that is greater than the sum of its parts.

TRELLO, CLASSIC FUNCTIONALITY

Trello expands on the classic “kanban” productivity method with the concept of “Boards” at its core.

With a good communication plan, and perhaps RACI charts when needed, you can be certain that no matter what combination of tools you select, your colleagues will interact and collaborate more effectively whether they are all in the office, working from home, or some hybrid of the two.

A basic Trello board will contain three columns: To Do, Doing, and Done. Each column can have one or more “Cards.” The cards are the building blocks of organizing work on your board and can contain as little (e.g., Task title only) or as much detail (description, checklists, attachments, deadlines, reminders) as you need. As cards move across the board from doing to done, you can assign them to members and track productivity metrics. Sharing a board ensures all team members can access relevant documentation, contribute to project updates, and monitor overall progress. One added benefit to Trello is that it allows you to save and print your cards, which can aid in accessibility as well as help generate policies or archive workflow procedures.

bit.ly/ND21trello

AIRTABLE, HOTTEST NEW TREND

Airtable allows for collaborative editing of database information; think of it like Excel but designed to be collaborative and user friendly. The databases you create and edit with Airtable can be much more robust than your typical spreadsheet, providing more latitude about the kinds of projects you can manage. For example, when creating a database, Airtable provides a collection of templates, from scheduling social media updates to pet medical history. Getting started with Airtable involves creating a “Space” for your databases, and then populating those spaces with the aforementioned templates, creating a database from scratch, or

importing data. A notable feature in Airtable is the “Automations”; simple “if X occurs, do Y” statements that let you automate tasks.

bit.ly/ND21airtable

ASANA, ONE-STOP SHOP

Asana organizes document sharing, calendars, and project management into one tidy package for your team. Establish goals for your project, create a list of tasks, and assign a priority level in “List” view. Based on the members associated with certain tasks, you can also visually map out and track progress using the “Timeline” view so you can see how one task impacted the next and ultimately the end goal. “Automation” and “Workload” are additional aspects of Asana Business. Automation uses rules to automate routine tasks much like Airtable, while Workload uses graphical data analysis to compare team member progress, time spent on tasks, and number of tasks. Asana projects serve as a single location for all information related to a particular project (analogous to Trello’s Boards). Templates can be created and customized to replicate projects, especially for workflows or sets of tasks that may repeat in the future. bit.ly/ND21asana

Synchronous & Asynchronous Chats

The following tools can be used synchronously or asynchronously, and establishing the norm at your organization for speed and types of messaging with these platforms could make or break successful adoption.

Using these tools synchronously, the major drawback would be same-time participation. Conflicting schedules between employees, even those within the same time zone, can create major communication challenges. An expectation of always being plugged in can distract employees rather than connect them, accelerating burnout, exacerbating existing issues, and keeping them from the valuable deep work that legal information professionals are best at. However, there are upsides to these tools as well. These applications are popular because of the spontaneous collaboration that can take place, as if everyone were gathered around the virtual water cooler. They can provide a space for employees to give or receive feedback in real time, and in some cases, emergencies can be addressed more immediately and comprehensively. Expressing both stress and excitement involved in projects is not only possible but was a lifesaver to many over the course of 2020. As long as you set reasonable expectations with these tools, including using them synchronously only when necessary and asynchronously the rest of the time, your team can experience the advantages and avoid constant interruptions or context switching.

SLACK, CLASSIC FUNCTIONALITY

Slack is a cloud-based IRC (instant relay chat) tool intended to simplify team communications by putting instant messages at the center of your work, theoretically eliminating unnecessary usage of other tools such as email or document sharing services. You set up a “Workspace,” create private or public “Channels,” and users share messages, files, reactions, and more. Private channels can be used to restrict conversations to pre-approved members, or users can initiate direct messages. One of Slack’s most notable features is the robust library of plugins, but with the free tier, you are

limited to a max of 10 third-party or custom apps. bit.ly/ND21slack

DISCORD, HOTTEST NEW TREND

Originally developed (and still primarily used) for providing voice communications in online video games, the ease of installation, use, and customization has made Discord very popular even outside the gamer demographic. Functionally speaking, it operates very similarly to Slack: you create a free server (analogous to Slack's workspaces), add individually themed/task-oriented channels, and swap between these servers and channels depending on the topic. These channels serve as text chat rooms, but true to its roots, Discord makes Voice over Internet Protocol (VoIP) communications available by default across the platform. bit.ly/ND21discord

TEAMS, ONE-STOP SHOP

If your organization is using more than one Microsoft cloud-based product, chances are you have access to the entire Microsoft Office 365 suite of tools. Teams is one of those tools that integrates instant chats between individuals and groups and virtual meetings (including voice and video calls) into one app. As with Slack and Discord, users can instantly send GIFs, stickers, and emojis in addition to file sharing documents or photos. For most effective collaboration with Teams, you really need Office 365's full suite for the advantages of ease in finding, sharing, and editing files in real-time with ubiquitous apps such as Word, PowerPoint, and Excel. bit.ly/ND21teams

Best Practice Communication Plans

Deploying a cool new tool in the office will never solve an organization's communication problems on its own. Having a clear communication plan for the library, specific departments, and working teams is

more important than the application itself. A good communication plan will:

- **Define** what channels exist, and what each is for
- **Align** on when to communicate in person, synchronously, or asynchronously
- **Notify** who is responsible for the management of each channel
- **Establish** channel conventions and frequencies (no-message hours, using "in meeting" or "do not disturb" statuses, etc.)

By setting these guidelines at the point of adoption you will effectively remove the biggest barrier to team communication and collaboration. If your colleagues know where to communicate (and perhaps just as critical, where not to communicate), you can be confident team members are sending the right message at the right time. For an example of defining the channels, throughout the pandemic the University of Georgia (UGA) Law Library used:

- **Trello** to communicate asynchronously about on-going work (with document attachments, checklists, and deadlines)
- **Slack** for live synchronous chats and quick questions
- **Email** for official communication involving anyone outside the library
- **Zoom** for virtual team meetings

To help align team members and set reasonable norms that everyone is comfortable with, come together as a group to decide and establish the conventions for each channel you define. This is where you note for each channel the time to answer expectations: 2 hours, 1 day, 1 week, etc. For bigger projects that involve team members over a longer period of time, or for work that crosses departmental structures, consider

taking your plans a step further and creating a RACI chart for that project:

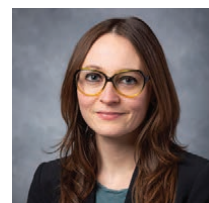
- **Responsible:** one person directly responsible for the work, they will be the go-to for task-level questions
- **Accountable:** one person overseeing the work, they make sure deadlines are met
- **Consulted:** person or people who must sign off on work before it is completed
- **Informed:** people connected to the work, but not necessarily included on task-level progress reports

With a good communication plan, and perhaps RACI charts when needed, you can be certain that no matter what combination of tools you select, your colleagues will interact and collaborate more effectively whether they are all in the office, working from home, or some hybrid of the two. ■

IM Information Management

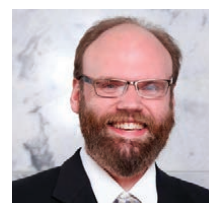
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