Pivot Online:
A Toolkit for Individuals and Organizations

Saskatchewan

Contents

Introduction

Amidst the tremendous challenges caused by the COVID-19 pandemic, many innovations and new opportunities have appeared to help individuals and organizations adapt to our 'new-normal', including a pivot to presenting their work and delivering services online. Many individuals and organizations have already integrated changes to how they work, connect with an audience, or set up a storefront. Technical and digital engagement will continue to be complementary to in-person experiences and many individuals and organizations will continue to deliver services online and in new and different ways.

This toolkit captures and shares the insights learned from individuals and organizations that have pivoted their work and operations online. It also provides information and resources to help individuals and organizations pivot some, or all, of their operations online.

Intended Audience

The majority of the information in this toolkit is relevant for all audiences seeking basic information on how to work online.

Legal Considerations

This toolkit references several companies (e.g., social media platforms, learning management systems, online collaboration tools) commonly used by individuals and organizations to conduct activities online. The Government of Saskatchewan does not endorse or recommend any of these companies and takes no responsibility or liability for the actions of third-parties. Individuals and organizations that choose to engage with the companies listed in this document do so at their own risk. To reduce your risks, make informed decisions, ensure your rights are protected, it is important to review the company's terms of service, privacy policies, and security policies. Consider the company's policies around intellectual property and ownership, copyright, dispute resolution, consumer protection, and more.

Life in a Digital World

This toolkit provides information and resources to help you consider your options for pivoting your work online. Before moving some or all or your operations online, there are a few important things to consider.

Top Considerations for Pivoting Online

Pivoting to an online platform requires special considerations. Here are the top five things you may wish to consider:

1. **It is ok to feel like you do not know what to do at the start.**
   - This may be a significant change for you or your organization and the way you typically work and engage with your audience.
   - As with any emergent practice, it is important to recognize that you will be learning as you go and that your online presence will evolve as you learn what works (and what doesn't) for you or your organization.
   - Finding similar communities of practice may be helpful for sharing resources and gathering advice – we are all in this together.

2. **Start with a plan and consider how moving online fits into your long-term strategy.**
   - The way you do operate online is not the same as how you operate in-person. How you interact with your audience, how you market yourself, and how you collaborate on projects will be different.
   - There are also costs (time, money, infrastructure) required to moving online. Sometimes these costs can add up fast once you start investing in infrastructure and software to deliver programs online. It is important to consider how long you want to be online in order to determine what costs are worthwhile. For example, if you plan to be online only for a few months until you have a physical location, it might be best to stick with simple approaches (e.g. webinars, live streams, Facebook marketplace). If moving online will be a long-term or permanent business strategy, then it might be more strategic to make the appropriate investments upfront.
   - Building your online presence now may help you or your organization increase and diversify revenue sources after social distancing protocols begin to be lifted.

3. **When starting off, keep it simple and accessible.**
   - Start with what you are already doing online (e.g. social media, email).
   - Consider how your audience can engage with you. Be mindful that some audience members may not have high-speed internet for certain digital tools. Your audiences' ability to learn the digital tools will also affect their experience with your online activities.

- Ensure all materials are original, and not protected by copyright. Always credit your sources. Providing hyperlinks to other creators' articles, images and other content is acceptable.
- Captions, transcripts, and descriptive text should accompany media materials as much as possible.

4. **Online does not have to mean impersonal.**
   - Online and social media tools offer different opportunities to demonstrate what makes you or your organization unique. For example, individuals and organizations are sharing "behind-the-scenes" videos, Q&A sessions, and coffee chat videos to give their audiences a unique view into their lives. You can also show your personality through creative backgrounds, memes, questions, and jokes. The more you engage your audience, the more personal online activities will feel.
   - Several collaboration tools are available that enable you to actively engage with your audience real-time. They can also be personalized to show your unique style and brand. Online activities are also an opportunity to learn more about your audience.

5. **Learn about your audience and your operations using analytic tools.**
   - Online activities can provide opportunities to expand your audience reach, to learn new insights about your audience (like what kind of content they respond to), and to stay connected in simple-but-meaningful ways.
   - Analytic tools can help you quickly and easily see who is engaging with your content, from where, how often, how long, and more. Analytical tools can also help you evaluate whether your online activities are meaningful. This analysis will help you improve your online activities and marketing.
   - There is a wide variety of tools available, each with different features. It is important to explore the various options (and review their privacy policies) to determine which tool(s) best meets your needs and comply with Saskatchewan's privacy legislation. Examples of available tools include:
     - Some online platforms, such as Facebook, Twitter, Instagram, and YouTube, have analytical tools built into their platform. For example, YouTube has an analytics tool that provides information about your video's watch time, audience retention, demographics, traffic source, and devices used by your audience to view your videos.
     - Other analytic tools are separate platforms that are integrated into your online activities through coding. For example, after Google Analytics is integrated into your website HTML, it can track certain data such as what directed visitors to your website, what pages they pages clicked on, how

long they stayed, and more. Other examples include Matomo, Open Web Analytics, and SEMrush.

- When choosing your tools, ensure the collection, use and disclosure of personal information collected for commercial purposes complies with the federal *Personal Information Protection and Electronic Documents Act* (PIPEDA).
- The better you understand your audience, and why they are attracted to you or your organization, the easier it will be to generate the type of content that will continue to attract them to your online presence.

Options for Pivoting Online

With these considerations in mind, the information below highlights the approaches that many individuals and organizations are taking to pivot online. These options include:

- Ramping up your social media to engage with your audience, continue performances, or sell products and services;
- Setting up live streams to continue performances, courses, Q&As, etc. with your audience online;
- Selling your products or services online through a variety of platforms;
- Building your brand, marketing or retail space through your personal website;
- Using your skills to obtain temporary or online employment; and
- Operating your organization online by managing your team and/or moving your programs and services online.

Using one or more of these options can help you successfully incorporate online tools into your practice or operations. While there are also many other options not included here, it is important for you to consider what is viable and accessible for your organization and your audience.

Ramping up Social Media

There are over 25.3 million Canadians on social media, yet social media networks may be an underutilized online business asset. Social media platforms, such as Facebook, Twitter, YouTube, and Instagram, can be highly effective tools to help you stay connected to your audience.

Individuals and organizations can use social media in a variety of ways to pivot online, such as:

- advertising links to your website or online store;
- photographing and advertising your products on social media for shipping or curb side pickup;
- posting advertisements to commission custom orders;
- live streaming events such as music, theater, dance lessons, and art classes;
- notifying customers or clients of upcoming events;
- answering customer service inquiries and maintaining customer relationships;
- hosting fundraisers, and more.

It is likely that you or your organization are already on one or more social media platforms. Like any new project, it is important to set goals for what you want to achieve. To help determine these goals, ask yourself:

- Do you want social media to help you sell products or services?
- Do you want to increase or diversify your audience?
- Do you want to learn more about what your audience wants, likes or doesn't like?
- Do you want to use social media to help innovate your current practice?
- Do you want to use social media to help fulfill a component of your mandate?
- Do you want to use this opportunity to try something fresh and new?

It may be that, as an individual, you do not have a professional social media account. While you may be tempted to use an existing personal social media account to help you pivot online, you may wish to assess the risks of doing so.

- A sizeable following on a personal account may not be the desired audience as for your practice or for your organization.
- If your current platforms provide a strong audience, there is nothing stopping you from asking these people to follow or otherwise "like" a professional account.
- Expanding an account from a personal to a public realm may carry privacy risks to your personal information. For example, your personal account may have information about your home location, personal contact information, friends, family, personal activities, and more that would be risky to associate with business activities.
- There may be also existing content in your personal account that is embarrassing or otherwise undesirable to associate with your professional practice or organization's brand.

Ramping up social media does not necessarily mean making more content, it may also mean making different and more directed content. Some social media platforms (e.g. Facebook) have algorithms designed to suppress content from accounts that publish frequently, but fail to generate much engagement in their content. Both your audience and your social media platform want the same thing: content that is more interesting, not simply more content.

This is where your goals come in to play. Developing content that's "interesting" may seem complicated, but it is less so when you know what you want to achieve (your goal) and you know who you are talking to (your audience). Consider:

- Many people fall into a trap of "billboard" content when trying to professionalize an account. This is publishing content that is akin to ads (e.g. check out my new < < product > >), and is generally only useful if you are paying the social media platform to boost your content.
  - While you may wish to advertise your products or services through social media, the content that generally engages audiences is the story behind the product.
- When in doubt, ask yourself honestly about the kind of content that you tend to gravitate towards when browsing social media. In all likelihood, there may be similarities in the types of content you and your audience tend to click on.
- Sustainability is fundamental: As with content development, it is more important to select your social media platforms according to your needs and objectives, rather than trying to ensure that you or your organization has an identity on every platform available.
  - Developing social media content is work, as is monitoring and interacting with other accounts (e.g. answering questions, responding to comments, etc.). Be realistic about you or your organization's capacity to maintain your accounts so that they are a benefit, rather than a drain, on your resources.
  - The answer to the question, "How often should I post?" is "As often as your capacity allows you to create content that is both highly engaging and fulfills the objectives of your plan."
- Social media in itself is typically not a money-maker. While there are examples of YouTube stars that have created channels that generate millions in annual revenue, these represent a very small proportion of the content creators on the platform. Social media can be a very useful tool to:
  - Complement initiatives;
  - Promote and market events, products or programming;
  - To develop an identity;
  - To expand and/or interact with an audience;
  - To keep abreast of industry news and other opportunities; and,
  - To share information.
- If you are able to monetize your social media efforts as well, consider this a bonus.

For more information on how to attract more fans to your social media, check out this article.

Live Streaming

People are becoming more interested in live stream videos as way to engage with the world. Live streams are becoming a popular social media tool to continue to connect with audiences, promote content and products, deliver classes, and more.

Live streaming content is easier than ever before. You can pull out your phone, open Facebook, and start streaming to Facebook Live on the spot. With a little more investment, you can make higher-quality videos with a few additional production elements to improve the viewers' experience. This resource provides a basic guide on how to get started with live streaming.

Getting Started

You can get started with live streaming in four simple steps:
1. Choose your platform for live streaming
2. Set up the necessary (and optional) equipment
3. Prepare for the live stream
4. What to do after the live stream

Step 1: Choosing a Platform[1]
- **YouTube** is the most popular video platform in the world with two billion users. It is ideal for posting finished videos and creating a video library of past performances. YouTube also offers a live option for streaming.
  - Individuals and organizations from many different disciplines and sectors have used YouTube to offer virtual tours, showcase works and products, provide educational content, etc.
  - YouTube can also generate income through advertisements and user subscriptions.
  - Click here for a guide on how to set up a YouTube Live event.
- **Facebook Live** can be useful for recreating a virtual 'live' environment for a one-time only show. It can be recorded though Facebook and shared on the platform after the event ends.
  - Facebook Live is a good platform to promote and stream events, performances, Q&A's, behind-the-scenes tours, classes, and more.
  - Facebook has announced plans to enable content creators to charge for access to live streams.[2]

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1 Information about the following collaborative tools is taken from company websites. Refer to the company's website for the most accurate information about their features and policies.
2 https://www.musicweek.com/digital/read/facebook-to-allow-artists-to-charge-forlivestreams/079632

- ▪ Click here for a guide and tips on how to set up a Facebook Live event.
- **Instagram Live** can be useful to gain new followers and increase engagement by posting promotional content and selling products.
  - ▪ Instagram Live allows for videos between three seconds to 60 minutes.
  - ▪ Many individuals and organizations are using Instagram Live to highlight their products, conduct behind the scenes tours, show off skills, advertise events and sales, and to simply connect with customers.
  - ▪ Click here for a guide on how to set up an Instagram Live.
- **Periscope** (Twitter) is essentially "Twitter Live," even though it still maintains its own separate platform. You can Tweet a link to your live broadcast with just one tap from within the Periscope app, or you can start a broadcast on Periscope with one tap from Twitter.
  - ▪ Periscope offers many of the same benefits as Instagram Live. Many individuals and organizations with active Twitter accounts can benefit from streaming live video to that destination.
  - ▪ Twitter makes it easy to disperse your promotional content through re-tweets.
  - ▪ Click here for a guide on how to set up a live stream event on Periscope.
- **Tik Tok** is one of the most popular and trendy video platforms at the moment. Tik Tok videos tend to be short and light-hearted, ideal for keeping your audience engaged. Tik Tok videos can be shared to Twitter and Facebook.
  - ▪ Click here for a guide on how to use Tik Tok.
- **Zoom:** With low-cost solutions for small organizations, in-person service providers can offer classes, webinars and group sessions/meetings to get the services and information their clients need most delivered with speed and a personal, almost-in-person touch. Be sure to review safe "zooming" guidelines to help keep your meetings secure.
  - ▪ Click here for a guide on how to use Zoom.
- **Google Meet**: Real-time meetings by Google. Using your browser, share your video, desktop, and presentations with teammates and customers.
  - ▪ Click here for a guide on how to use Google Meet.
- **Twitch**: Twitch is an online site that allows users to watch or broadcast live streaming or pre-recorded video of broadcaster's event. A Twitch broadcast often includes audio commentary, and video. The user can appear on the edge of the screen via their webcam. For example, an artist could host a painting show with one camera on the canvas and the other on the host. Twitch can also generate income through advertisements and user subscriptions. Twitch Subscriptions provide a recurring income to streamers.

You can encourage your followers to subscribe to your channel for a recurring monthly fee. The money collected is split 50/50 between Twitch and the streamer.
  - ▪ Click here for a guide on how to use Twitch.

Step 2: Setting up the Equipment

In this section, we are going to talk about the types of tools you will need to live stream.

1. **Internet-Ready Camera or Capture Card**

   The first tool you will need is a camera or capture card capable of broadcasting over the internet. The most common cameras include a smartphone, a webcam that is built into a computer, or an external camera that can be hooked up to a computer. There are several options for internet-ready cameras on the market.

   A capture card allows users with existing cameras with HDMI out to turn it into a casting device.

2. **Tripod or Stabilizer/Gimbals**

   Having a livestream that remains still improves the viewing experience. A tripod can be used to mount your camera to adjust height and hold the camera steady. A stabilizer/gimbal can be a phone handle that lets you move around while keeping the video steady.

3. **Lighting**

   Lighting is one of the key components to creating a good looking video. Sometimes, in-room lighting is not adequate, and having additional lights can help brighten your video.

   Common options are lights that connect onto your camera, ring lights, and studio lights. Read this article for additional lighting tips and options to enhance your video.

4. **Stable Internet**

   One of the top priorities to ensuring an effective livestream is ensuring you maintain a strong, stable internet connection – whether it is through a cable connection, Wi-Fi, or mobile data. Live streaming consumes significant bandwidth. It is safest to stream from a cable connected device rather than Wi-Fi. You should also check your internet provider's bandwidth restrictions to ensure it will not hinder your connection.

- Go to your internet search engine (e.g. google.ca, bing.com)
- Search for internet speed test.
- Tap or click Run Speed Test.

Most popular streaming services offer 1080p streams, but you should aim for at least 720p. To stream consistently at a 1280 x 720 resolution at 30 fps — all other things being equal you will need an upload speed of about 3 Mbps of upload speed.

5. **Simulcasting/Advanced Streaming**

Some individuals have expanded the reach of their live streams by simulcasting to several places at once. This is possible through open broadcast software that will connect your stream to Instagram and YouTube at the same time, for example. Open Broadcasting Software (OBS) is a free and open-source streaming and recording program. It can also be used for setting up advanced streams, with multiple scenes, transitions, and graphics. StreamYard is a popular option and can help you send live streams to Facebook, YouTube, Twitch and Periscope. Other ones that will connect you to similar platforms are OBS Studio, Hovercast and Switcher Studio. For more advanced interfaces, there is also Streamlabs and Switchboard Live.

Step 3: Preparing your Livestream

One of the benefits of a live stream is that it can range from impromptu/informal events to formal, higher end productions). No matter how much, or how little, planning goes into your live stream, it is important to ensure your audience is able to have a positive experience with you. Here are a few tips to help prepare for your live stream.

- **Plan your Live Stream**
  - It is important to plan a live stream as you would an in-person event. Choose the topic and content you want to talk about, and be clear on why it is relevant to your customers or clients.
  - One great thing about live streaming is your audience's ability to join the conversation and comment in real time. Having a moderator can be beneficial if you plan to incorporate viewer's comments or questions in the live stream. The moderator can keep track of questions and feed them to you.
  - Consider whether you want to have guest speakers in your live stream and how you can connect them in.
- **Create a Script**
  - Live streams are great for those improvised in-the-moment ideas, but it is important to be cautious about long-winded, rambling streams. Creating a rough script of what you want to talk about can help keep you on track. A script is like scaffolding. It lets the conversation build, while maintaining a firm structure underneath your feet.
  - In planning the script, be sure to emphasis the important points or statistics you want to highlight.
  - Software is available that works like a teleprompter to feed your script to you as you live stream. One example is CuePrompter.

- **Promote Your Live Stream**
  - It is important to let your audience know you will be holding a live stream. Begin promoting your next live stream a couple of days in advance across your social media platforms and website.
  - Be sure to mention the:
    - ‣ platform you're using (provide a link if you can)
    - ‣ time and date it's happening
    - ‣ topic you'll be discussing
  - If you are using a framework that requires audience interaction, you can also ask them to submit ideas and questions ahead of time. This way, you have some content to start the stream.
- **Do a Dry Run**
  - It is a good idea to test all the equipment and technology in advance of the livestream. This can include your internet speed, sound quality of your microphone, simulcast software, lighting, and more. If you have to spend the first 5 minutes getting your microphone to work, you put yourself at risk of immediately losing viewers.
  - You may also want to do a dry run with your guest speakers and moderator, if you have them.
- **Go live!**
  - Have fun with your live stream!

Step 4: After your Live Stream

- In the hours after you finish your stream, you should:
  - Respond to any unanswered comments that were posted by viewers.
  - Save the video to your video library (e.g., computer, YouTube, website).
  - Repost the video on your social media platforms.
  - Look for valuable feedback that can make your next live stream even better.
  - Use analytics tools, such as YouTube, provides.

Additional Resources

Are you ready to level up your production game? Check out these resources to improve your livestreams:

How To Improve the Live Streaming Quality of Professional Videos

40 Live Streaming Tips To Make Your Broadcast Better

Building or Updating your Website

With the popularity and diverse uses of social media platforms, you may wonder what the value is in having your own website. A website can:
- Make you look professional and credible.
- Attract new customers through internet searches– a well-optimized website with key search terms will enable you to rise to the surface in internet searches, which can draw in customers/clients beyond social media platforms.
- Highlight and sell products and services – a website provides you with the flexibility and freedom to display

your products and services in an appropriate format which may not be possible on social media platforms. Sales platforms can also be integrated directly into your website.

- Put you on the map – Having a website can connect you into google/apple maps, making you appear in searches when individuals are looking for local organizations to support.

Creating or upgrading your website is easier than ever before, thanks to readily available templates and platforms. Below are a few options that are popular among individuals and organizations[3]:

- Shopify: A robust solution for e-commerce-fueled businesses, Shopify can help small businesses with everything from securing a domain name to getting an online store up and running. The company even offers fulfillment services, payment processing and easy integration with social media sites to expand your online sales.
- Squarespace: With a collection of sleek website templates and add-ons, like blogs and online stores, Squarespace makes it simple to build a clean and engaging website. Its robust toolset includes analytics, Search Engine Optimization (SEO) strategies to help you get noticed online, integration with a wide variety of social media sites, fulfillment services, and email marketing tools to help you reach your customers where they are: whether at home or on mobile devices.
- Wix: Like both Shopify and Squarespace, Wix offers small organizations the ability to launch a web-based business in minutes. You can reserve a domain name or use your existing one, create an online store, capture email addresses for your marketing efforts and even create a logo using its online logo maker. Wix even has a tool called WIX ADI that will build a website for you after you answer a few questions.

Selling Online

The frequency of selling online was becoming increasingly popular even prior to the pandemic. Setting up an online store can be free (or almost free, paying only when you sell products), has few risks, and can be done in minutes. Many successful entrepreneurs use a combination of the following strategies for selling online[4]:

1. **Existing Sales Gateways** - individuals and organizations can step up online shops to sell their work through already established platforms. Platforms typically have resources to help new sellers get set up and tips on how best to showcase works and sell items. These platforms also have a large, established community of returning customers. The most popular ones are:
- Etsy – Etsy is famous for being the go-to-sales platform for custom, hand-made, and unique art and products.

Etsy enables entrepreneurs to easy access the global marketplace where consumers spend billions of dollars.
- Amazon Handmade – Handmade is an artisan-only community on Amazon, enabling artisans to sell their handmade goods online. Amazon has its broader Marketplace for selling other products.
- eBay – eBay is one of the largest global marketplaces, enabling entrepreneurs to sell a wide diversity of products.

2. **Social Media Platforms** - Along with marketplaces, social media channels allow you to get your products in front of prospective customers. The most popular ones are:
- Facebook Shop - A Facebook Shop is a tab, which you can configure on your Facebook page to promote and sell your products directly to Facebook users on the platform itself. Once you have a Facebook shop set up, you will be able to start tagging any of your products featured in your images. This ensures that everyone who views your posts will become aware of the products you have available.
- Facebook Marketplace - Rather than having a separate store, Facebook Marketplace lets you create a listing for single items.

3. **Integrate a store on your Website** – Adding a store to your website is easy with well-established platforms such as:
- Squareup - Widely known for its payment processing services, Squareup lets entrepreneurs add a free online store to their existing website with ease. For entrepreneurs looking to add curbside delivery or pickup services, Squareup integrates with Instagram and Facebook ads, accepts gift cards, coupons, and donations, and more.
- Shopify – Shopify enables entrepreneurs to sell products to anyone, anywhere— online with an ecommerce store, online marketplaces, social media, and in-person with point of sale.
- Sellfy – Ideal for less-tangible products, this tool can be used to sell digital products like video or photo pre-sets, e-books or copywriting templates, animations, jingles, beats, or even knitting patterns.

Online Job Opportunities

There are several opportunities available to work remotely. The following are some resources to for finding remote (online) job opportunities.
- Become a tutor in popular online course platforms like Skillshare and Udemy. Classes are for creators, and fall into a variety of topics, including illustration, design, photography, video, freelancing, and more.
- Similarly, Cambly is a tutoring platform to teach

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English.
- 25 + Sites for Finding Remote Work is a helpful resource for finding remote work online during the pandemic and beyond.
- A Google document has been set up to post Job Listings for Remote Work
- Hire Artists is online marketplace to connect artists offering online lessons, performances, and more with paying customers.
- Fiverr is a freelance community that enables individuals to set up and sell their service to a global audience. There are over 200 categories of services.

The Virtual Organization: How to Operate Remotely

Operating an organization remotely involves several considerations including, but not limited to, how to manage a workforce, run team meetings, connect with your audience and clients, deliver programs and services, generate revenue, limit overhead expenses, and manage work-life separation.

This section of the toolkit provides resources to:
a) Continue to engage with your internal team or external audience, and
b) Begin to shift programs or services online.

Working from Home and Managing Remote Workers

Several resources are available that provide strategies for working remotely and how to manage remote workers and volunteers. A selection of resources includes:
- Pro tips on working from home (Charity Village)
- Guidelines for Working Remotely (Tamarack)
- GitLab's Guide to All-Remote Working (GitLab)
- What's Your Company's Emergency Remote-Work Plan? (Harvard Business Review)
- Introduction to remote work and collaboration (Miro)
- How to Set Up Your Startup for Remote Work (Betakit)
- The ultimate guide for remote work by Zapier team (Zapier)
- How to work from home if you've never done it before (New York Times)
- 8 strategies to set up remote work during the coronavirus outbreak (Fast Company)
- Prepare your team to work from home (LinkedIn)
- Remote Working Learning Path (LinkedIn Learning)

Online collaboration tools

Online collaboration tools allow individuals to interact with each other (via web-based systems) to share information and work on a common project. As individuals can work with others from any location, internal or external to the organization, online collaboration tools have become increasingly popular over the last several years.

Several online collaboration tools are designed for project management, information sharing, communicating, brainstorming, and more. While some are free, most tools have a cost. When choosing a collaboration tool, ensure you review their terms of service, privacy, and security policies to understand how your information is stored, accessed, and protected.

Far from exhaustive, the following list contains some of the more cost-effective and user-friendly collaboration tools[5]:
- Google / G Suite – Google offers a variety of free online collaboration tools through docs, sheets, slides, and forms. This platform lets individuals work together in real-time, which makes it simple to provide immediate access to drafts and updated information. Google's collaboration tools are similar to traditional formats (e.g., Microsoft Word, Excel, PowerPoint), so they are more are intuitive and user friendly for a wide variety of audiences. G Suite is a paid version with enhanced features.
- MURAL - MURAL is one of the most popular collaboration tools that enables teams to think and collaborate visually. People benefit from MURAL's speed and ease of use in creating diagrams, which are popular in design thinking and agile methodologies, as well as tools to facilitate more impactful meetings and workshops. MURAL can be used internally and with external audiences. MURAL requires a subscription.
- Zoom - This Skype alternative gives you the chance to have video calls, online demos or webinars with your virtual teams. Advanced features include selective screen sharing where only some participants can see the presenter's screen. It also has breakout rooms, where virtual teams can gather inside video calls without being disconnected from the main feed. This is very helpful to discuss a separate topic, or multiple topics simultaneously, when running a large webinar or training session.
- Slack – Another popular team chat tool is Slack. It allows teams to send direct messages to each other as individuals as well as groups. Its strong points are that it can integrate with a wide array of services that organizations are probably already using -- from Dropbox and Google Drive to Salesforce and Zoom. Slack offers a free version for small teams and paid versions. There is also Slack for nonprofit organizations.
- GoToMeeting is an online meeting and video conferencing tool designed to enable organizations to collaborate with their teams, clients, customers, and other businesses in real time via the Internet. The other features of the platform include messaging, group chat, recording, integration with other tools, and a one-click meeting feature that instantly schedules meetings in Google Calendar or Outlook.
- Trello - Trello uses boards, lists, and cards to allow you

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to organize and prioritize your projects in a flexible and easy-to-use way. A limited free plan is available, and paid plans, which include larger file attachments, unlimited team boards, and app integrations.

- Basecamp aims to be an all-in-one collaboration and communications platform, to bring features of multiple software offerings into a single place so that it is easier to sort through information. Features include chat, message boards, to-do lists and scheduling as well as automated check-in. It is also a single place to store all documents, files, and folders. Unlike other collaborative software that charges per user, Basecamp charges a single fee for unlimited users.
- Monday.com is a platform that allows you to plan, track, and collaborate on projects in a visually simple manner. Drag-and-drop functionality makes this a particularly good platform for project management and general workflow management among teams. It also integrates with Slack, Trello, Google Drive, Dropbox, and others, so you can use it a central focal point for teams to work together.

There are many other collaboration tools worth your attention, if nothing else because of the way they apply features differently, or even add other useful features. This website, for example, provides an overview of over 60 collaboration tools.

Running Virtual Meetings and Webinars

Many organizations are continuing to operate remotely by connecting with their team and with their audience. Several free and low-cost platforms, such as Zoom, Skype, GoToMeeting, Google Hangouts, and more make it possible to connect visually to share webcams, screens, and even contribute content through chat boxes, whiteboards, and polls. Running a meeting virtually has different considerations than in-person. Below are some resources to consider for running virtual meetings.

- Facilitating a Virtual AGM, including possible platforms, roles, and tips and tricks from those who've done it before (Edmonton Chamber of Voluntary Organizations and Ontario Nonprofit Network)
- How to move board meetings to the virtual world (BoardSource)
- How to run a great virtual meeting (Harvard Business Review)
- The ultimate guide to remote meetings in 2020 (Slack)
- COVID-19: How Nonprofits Can Facilitate Inclusive Online Gatherings (TechSoup Canada)

Once you have chosen the platform that you want to use to run your virtual meeting, look for guides provided by that company, or others that provide tips and tricks specific to that platform.

Online Course Marketplaces

For individuals and organizations that are looking at providing training or services online, online courses may be an option. Online course options can be a significant revenue generator, a simple way to get content out to a wide audience, and a way to help individuals who are expanding their skills through remote learning. The next sections provide an overview of considerations and options for online courses and program delivery.

- Online course platforms provide individuals with access to digital classes on almost any teachable topic. These virtual courses are similar to offline classes in several ways: an instructor provides an engaging educational experience through video, image, text, audio, and PDF files.
- When it comes to selling online courses, there are essentially two options: self-host your course or sell it to an online course marketplace.
- This section covers online course marketplaces. In marketplaces, your course is a part of a catalog, and you have the option to customize your course and your course landing page, but not much else. Most marketplaces let you post for free, but then take a percentage of the sales made from your courses.
- Marketplaces provide several benefits including: providing the marketing for courses, attracting a large student base, access to supportive communities, and established credibility. Drawbacks of marketplaces can include little control over how courses are advertised, little direct access to your students, and sometimes no control over the costs to access your course.
- When choosing a marketplace, be sure to review their terms of service, privacy, and security policies. Not all marketplaces have the same policies, and there could be implications for your rights as an artists and organization.
- Some of the most popular online course marketplaces are[6]:
  - Skillshare – Focused on teaching creative skills, topics on Skillshare range from graphic design and music production to fine art and cooking. Each Skillshare class is 20-60 minutes broken down into shorter lessons, plus projects and a community discussion forum to connect with other students. Through open discussion, students can share their progress and get feedback from others. Teachers are paid monthly for each student that watches their videos.
  - Udemy - Udemy is one of the most popular platforms for creating and selling online courses, with over 12 million students and 20,000 Subject Matter Experts. This eLearning platform has many content creation tools such as PDF documents, PowerPoint, etc. Text and video content can be collated to create and publish courses. Creating courses on the platform is free, however, Udemy takes 50 per cent per sale of each course. There is also little autonomy for

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6 *Information about the following collaborative tools is taken from company websites. Refer to the company's website for the most accurate information about their features and policies*

instructors. For instance, Udemy controls branding and pricing of courses, and instructors do not learn much about their students.

- **Teachable** – Teachable addresses many of the limitations of Udemy. It has more than three million students, 7,500 instructors, and 20,000 courses, and these numbers are growing. Instructors pay a monthly fee to access this platform. Teachable offers quick-start resources such as webinars and ebooks to get started on creating courses on its platform and is considered one of the best platforms for beginners.

Course Creation Software

- Instead of uploading courses to a marketplace, you can use a platform to self-host your content. Self-hosting enables you to control your branding, marketing, course fees, audience engagement, and more.
- Self-hosting can be more labor and cost intensive, as you have to do your own marketing and website maintenance. Platforms may charge a variety of fees.
- Despite some drawbacks, self-hosting can be ideal for organizations that want to integrate the content more with their programs or have several courses they want to host online.
- Several platforms offer a user-friendly experience for instructors and students. These platforms can include a dedicated fully responsive website experience, easy content uploads, the ability to edit the look and feel of the class, marketing features, course completion certificates, a sales funnel, and more.
- Some of the most popular platforms include[7]:
  - **Podia** - lets you build an online store for your digital content. Create online courses, digital downloads, and even membership sites, all as part of one digital storefront. All Podia storefronts have a similar template, which is helpful if you find too many options overwhelming.
  - **Thinkific** – is another platform with a robust set of user-friendly features, email marketing tools, membership site integration for lessons, and 24/7 customer support. It can be more customizable than other platforms because you build the course from scratch. Thinkific's website builder is one of the easiest to use. Choose the pages you want to include, add your copy, pick a theme, and you are done.
  - **WizIQ** is another established brand in the eLearning industry and has been the go-to tool for instructors to deliver live and on-demand webinars. It is equipped with enough provisions such as slides, desktop sharing tools, audio, video etc. WizIQ is very common among academic course content creators. It is effortlessly easy to create courses and publish them on WizIQ online marketplace. It also provides a host of plug-ins for popular learning management software such as Moodle, Sakai, etc.

- While the previously mentioned platforms are amongst the most popular, there are several other software options for creating and hosting online courses and content, including Adobe Captivate, Kajabi, Linkedin Learning, Treehouse and more. With so many options, it is worth spending some time determining what platform is best suited for your content, brand, and audience.

Other Learning Management Systems

- For more robust online learning, organizations can use a Learning Management System (LMS) such as Moodle, Blackboard Learn, and Canvas, which allows you to create, deliver and report on training courses and programs. In this category, course content is created separately and then uploaded into the LMS. In a LMS, students can access assignments, take exams, collaborate with peers, communicate with professors, and more.
- In the context of this toolkit, a LMS is best suited for organizations that are looking to develop sustained online programs or courses. A LMS would provide the most varied and customized options that enable you to tailor the delivery methods to the needs of your organization and audiences.
- However, a LMS can be expensive to purchase and operate. A LMS requires administration by the organization. Many LMS systems also require organizations to estimate the number of people that would use it, as fees are based on the number of seats available in the system, billed annually.
- Developing a LMS system is more advanced and beyond the parameters of this toolkit. If you are interested in learning more about what to consider when choosing a LMS, check out this article.

Other Resources

The following list highlights other helpful resources for operating your organization online:

- Love in the Time of Smartphones: How to Digitally Engage Donors (Keela)
- The Complete Guide to Online Fundraising Ideas (Keela)
- 30 + Free Tools for Nonprofits (Keela)
- Get Donated and Discounted Tech (TechSoup Canada)
- COVID 19: How Nonprofits Can Foster Digital Resilience (TechSoup Canada)

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