

Getting Organized



Presented by Sheryle Gillihan, Director of Partner Solutions **CauseLabs**

**Good Intentions
Are Not Enough**

**Don't Get Addicted
to Being Busy**

We crave tools.

What's best tool for the job at hand?

Do you need to manage tasks, designs,
software development, programs or customers?

What works for your daily flow?

Do you work better with desktop, mobile or both?

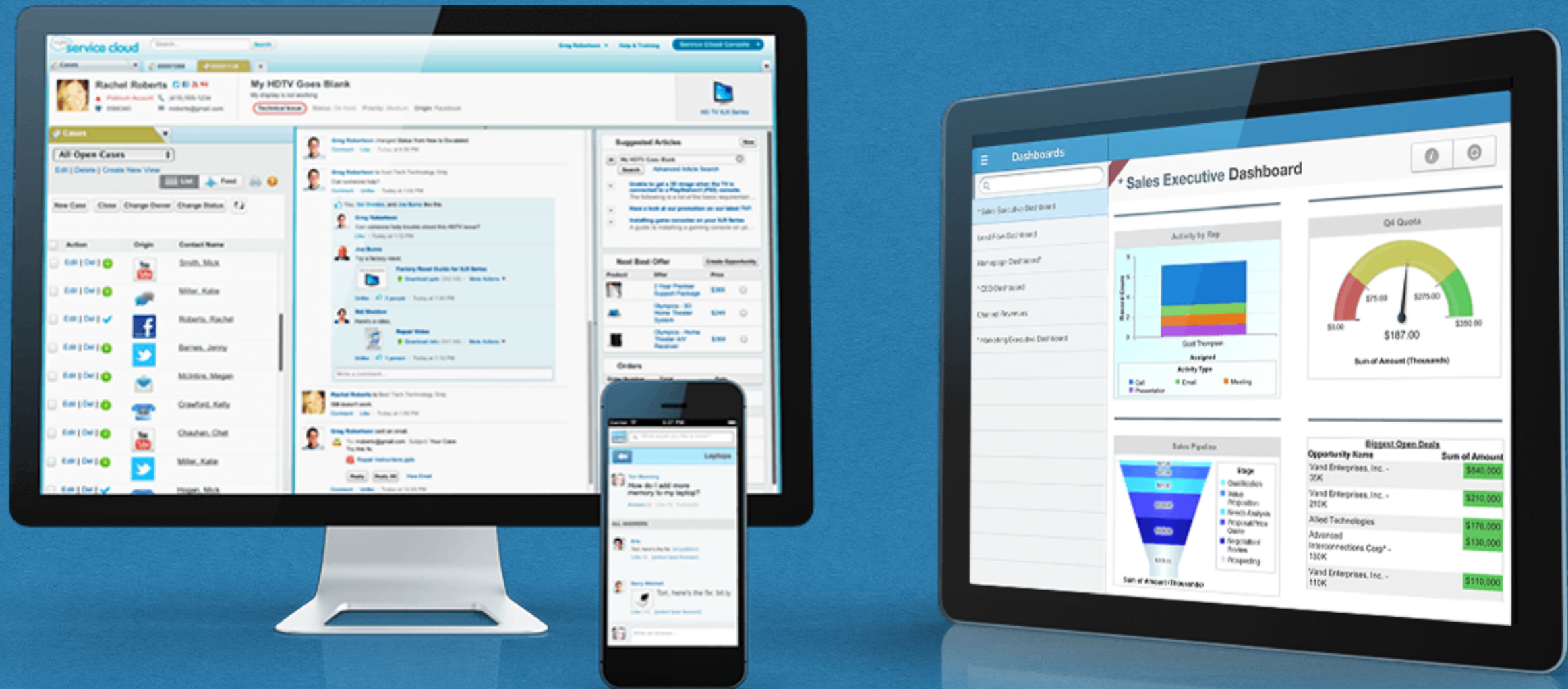
Simplify.

Busy \neq Productivity



www.salesforce.com/solutions/nonprofits

Salesforce CRM



Customize for almost anything. Sync anywhere.

Salesforce for Nonprofits

Also see: www.salesforcefoundation.org/products

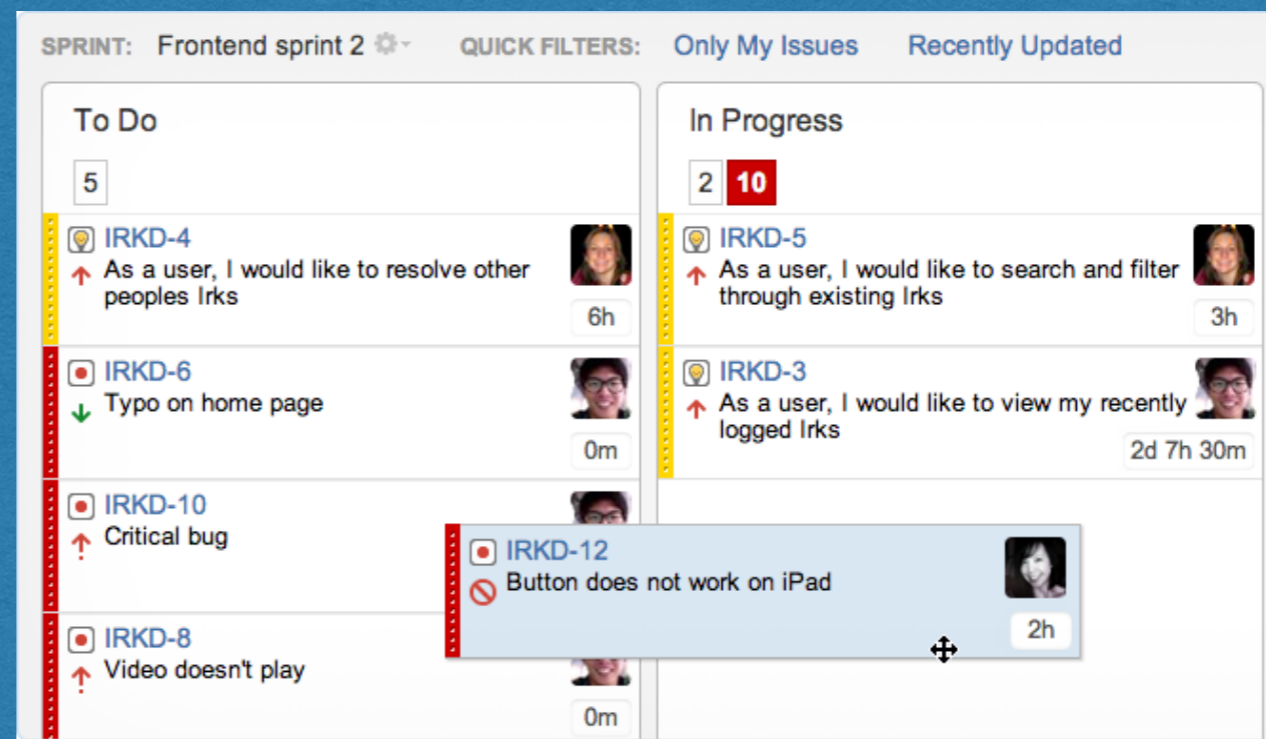
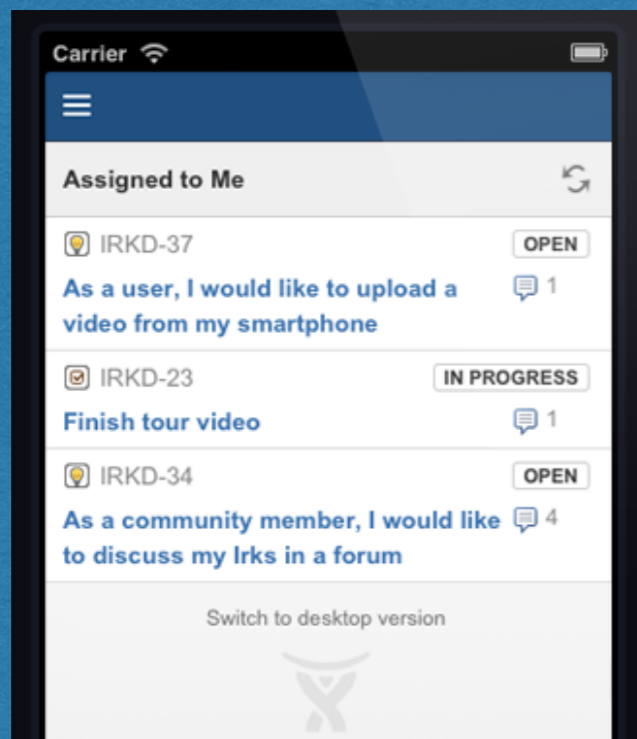
- Customer Relationship Manger
Manage leads, volunteers or donors.
- Has a large marketplace of add-ons.
- Nonprofit price: \$30/mo per person
10 seats included.



www.atlassian.com/software/jira

JIRA Project Management

Software development tools for web or mobile.



FREE

JIRA Project Management

- Robust development workflow and collaboration
- Free licenses are available for qualified open source projects, nonprofits and classrooms.
- Alternately, prices start at \$10/mo for up to 10 users



www.basecamp.com

Basecamp

Latest activity across your projects

CasJam Media — web show

- Writeboard [Wirecast setup](#) Updated by Brian C. Yesterday
- Writeboard [Re: Name ideas](#) Comment by Brian C. Yesterday
- Comment [Re: Call Thursday?](#) Posted by Brian C. Yesterday
- Comment [Re: Call Thursday?](#) Posted by Dave Y. Yesterday
- Message [Call Thursday?](#) Posted by Brian C. Jan 5

CasJam Media — Rockwell Group

- Comment [Re: css/rq-print.css](#) Posted by Timo K. Jan 5
- Comment [Re: css/rq-print.css](#) Posted by Brian C. Jan 5
- Message [css/rq-print.css](#) Posted by Timo K. Jan 5
- Comment [Re: We're Live.](#) Posted by Timo K. Dec 21
- Comment [Re: We're Live.](#) Posted by Brian C. Dec 21

(Note: The bottom of the screenshot shows a blurred continuation of the activity list.)

Next 6 weeks

Hide calendar list

Sun	Mon	Tue	Wed	Thu	Fri	Sat
5	6	7	8	Today 9	10	11
				Fresh Brands: Design phase Fresh Brands brainstorm	Mark Stocks interview 2pm	
12	13	14	15	16	17	18
				Fresh Brands: Design phase		
19	20	21	22	23	24	25
	Vacation: Jennifer P. Meet with Jennifer 12pm	Cindy's birthday	Fresh Brands lunch 11:30am	Jennifer Jones interview 4pm		
26	27	28	29	March 1	2	3
				Fresh Brands: Programming phase Review applicants App Store Kickoff 10am	App Store: Programming phase Acme Products meeting: Room 1403	Scott G. out of office
4	5	6	7	8	9	10
		Jason's birthday	App Store: Review	Camping trip: Jamie	Fresh Brands Launch!	2 To-dos Programmer tests Call printer
11	12	13	14	15	16	17
				Job Fair	App Store launch!	

Tools for task management and basic project management. Packages start at \$20/mo

Basecamp

The screenshot displays the Basecamp web interface. At the top left is the Basecamp logo, followed by navigation links: **Projects**, Calendar, Daily Progress, Everyone, and Me. A search bar on the top right contains the text "Jump to a project, person, or search..." and a "Sign out" link. Below the navigation is a "New Project" button with a green plus icon and a list of icons. The main content area features three project cards, each with a star icon in the top right corner. The first card is titled "37signals Newsroom" and contains the text "Company-wide discussions. Goodbye Backpack Newsroom. 27 discussions, 11 files, 2 documents" and a grid of ten user avatars. The second card is titled "Marketing Sites" and contains the text "37signals, basecamphq, highrisehq, backpackit, cam... 14 discussions, 3 to-dos, 16 files" and the same grid of ten user avatars. The third card is titled "SvN" and contains the text "Post ideas and feedback 7 discussions, 1 to-do, 37 files, 1 document" and the same grid of ten user avatars. At the bottom of the interface, there is a section titled "ALL PROJECTS A-Z" with a "Trash can" icon on the right. Under the "0-9" filter, a list of projects is shown: "37 ALMS Car", "★ 37signals Newsroom", "37signals: Print Media", and "37signals: Privacy Policy".

Access your projects on web or mobile devices.

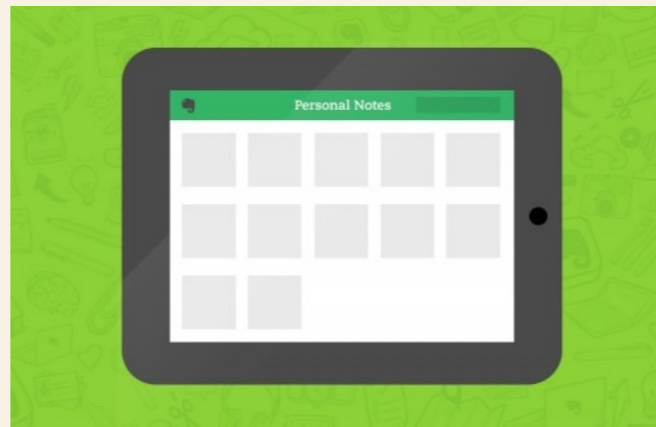
EVERNOTE®



www.evernote.com



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access on
any device



New custom
interface
for tablets



Work with
friends and
colleagues

FREE



A tool for knowledge sharing.

Business Accounts
\$10/mo per person

<https://evernote.com/business>



www.trello.com/tour

Trello

The screenshot displays the Trello web interface for a board named "To Do List". The board is organized into three columns: "To Do", "In Progress", and "Done".

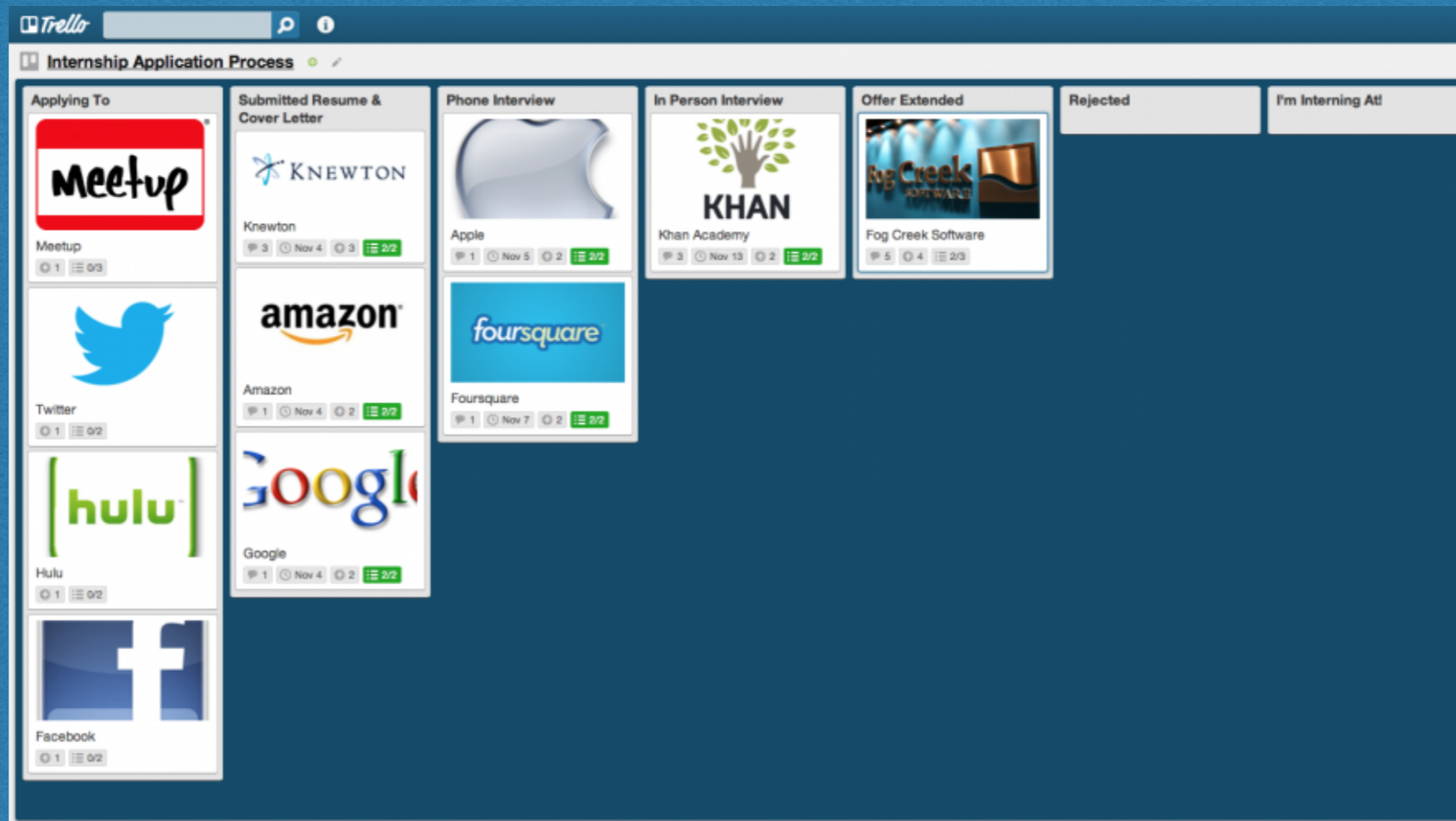
- To Do Column:** Contains cards for "Read Work the System", "Call Patricia" (with a comment icon and "Nov 1" due date), "Optimize Processes" (with a checklist icon and "0/2" progress), "Trello Calendar" (with a calendar icon), and "Visit Seattle this Q4" (with a clock icon and "Apr 1" due date).
- In Progress Column:** Contains cards for "Test and Release 2.2.1", "Money think scheduling", "Prep for Tech4Good", and "Finish FCBH Roadmap".
- Done Column:** Contains cards for "Review Quote Roller", "Finish Choba scoping and resourcing", "Finish BPN backlog", "Android hub tests" (with a clock icon and "Oct 21" due date), "CHOBA tickets and project setup", "SVP Contract" (with a comment icon), "BPN team meeting", "Asim translations", "ECP doc for SVP", "Iridescent Workshop kickoff letter", "GS check for \$15/6 girls" (with a clock icon and "Oct 21" due date), and "Return movie" (with a clock icon and "Oct 21" due date).

A "List Actions" menu is open over the "Done" column, showing options: "Add Card...", "Copy List...", "Move List...", "Subscribe", "Move All Cards in This List...", "Archive All Cards in This List..." (highlighted), and "Archive This List".

Define your columns. Drag and Drop. Collaborate.

Trello

FREE



Free mobile and web apps to manage your lists.

Eliminate the Toolbox Clutter

“Productivity is never an accident.
It is always the result of a commitment
to excellence, intelligent planning,
and focused effort.”

Paul J. Meyer

Key Take Aways

Choose the best tool for the job.

Pick a tool to match your use case.

Keep it simple.

Focus on results, not activity.

Many Thanks!



@sgillihan



sheryle@causelabs.co



<http://sheryl.es/>