

## **NTAP Communication Protocols (from NTAP's wiki)**

When working virtually, communication is paramount...and how you communicate is even more important. Here are some quick protocols.

### **Email**

Email is our crutch for communication, but there are appropriate and inappropriate ways to use email. See our Guide to Writing Effective Email attached.

Email is typically used for:

- updates and general communication
- requesting or sending larger amounts of information, particularly a list of tasks or questions where the written record is helpful;
- communicating when others are not available online;
- letting staff know if you're going to be out.

### ***Protocols for Responding to Email:***

NTAP staff pride themselves on returning emails quickly and efficiently. You should check your email multiple times a day and respond within 24 hours. If the email is something that requires research/time, respond to say you have received the email and give a timeline for your work on a response. It is polite to respond to every email (except the responses to responses, :) ). It helps the person on the other end know that it was received and develops a rapport among us.

### ***Avoid Email:***

- Avoid using email for project management. Sending an email saying, "Copy of the attached, please review." or "Here is a Word document with my workplan." is not an effective use of email. It changes its role from communication to project management. Use Basecamp to post a message and the file. We'll get the email, but won't have to rely on our inbox for tracking the files you've sent/posted.
- Avoid email for quick questions. Sending an email saying: "Are you available at 2 today?" or "Where can I find X on the wiki?" is not appropriate because it clogs in the inbox. Use email for this only if the person is offline. For these quickie questions, use jabber.
- Avoid email if you are upset or are unclear about the meaning of someone else's email. The worst thing is to receive an email that upsets you. Even worse, is responding to that kind of email. Please pick up the phone.

### **Jabber, Basecamp, Wiki**

***Jabber:*** Best used for quick questions and pre-scheduling of meetings. See Meeting Scheduling for more information. You can also create a three-way IM with jabber. Or, if you don't know how, go to Campfire

**Basecamp:** This really relieves our email inbox. Post your workplans, written material, drafts, create to-dos, note your deadlines, post messages. Makes life easy. Get familiar with it.

**Wiki:** We're using this as our Intranet to hold general staff info, but we also have some project workspace, which acts as draft space prior to basecamp.  
Scheduling Meetings

### **Tips To Setting Up a Meeting Online.**

Something mundane like meeting scheduling is actually an art form. Because we rely on people's volunteer efforts, every intersection we have with folks should be easy, enjoyable and inspiring. We want to avoid frustration. Meeting scheduling is usually a cause for frustration if you don't work with some experience. Here are some tips.

1. **Identify your VIP.** At some meetings, you need everyone you've invited. At others, you can't have it without X, but it can still happen without Y. Identify who is essential. Jabber, call or email them FIRST and see what dates of the ones you are thinking are they available. (It will bum you out if you send it out to all folks and everyone can come but the VIP. Assess this first.) If you are doing a small meeting where everyone is needed, skip this step.
2. **Select dates far enough in advance.** Smaller meetings or meetings with just NTAP staff are easier to accommodate. But, if you are scheduling multiple people for a committee or larger meeting, make sure you select dates that are at least 10 days away. Select at least 6 dates and times. (Some staff only work on certain days of the week, so if you only give an option for Tuesdays, you may be disappointed and have to resend the notice.)
3. **Select your online meeting scheduler.** We've given you two options, you may find others. There are differences between them. Use the one that meets your needs.
  - MeetOMatic: This allows you to select a window of time on multiple days. You can, for example, select 12 possible days and ask people to assess their availability based on AM or PM. You cannot select specific times, however, for folks to confirm. It does not generate an email to folks, but gives you a link to send in your email. This option works well if you are using a specific time or window of time (say 11 Pacific / 2 Eastern) and want to check for folks' availability across many days. It also works well if you have other info you want to send in that email and just include a link to the scheduler.
  - MeetingWizard: This allows you to be precise. You can select 12 dates and times (ie, Monday, May 1, 9 am). You can select the timezone. It will send out an automatic email for you. You will need to enter in everyone's email address (or copy and paste them). You have an opportunity to personalize the outgoing email, but not by much. This option works well if you do not have a specific time window, but instead want to nail down the exact date and time for a meeting, and you don't have many options. You will need to send a separate email to your attendees in this option.

4. ***Communication about the meeting.*** This is essential if you want people to respond. You can use online meeting schedulers, but it won't replace an email that you write in addition.
- Meet-O-Matic: If you use Meet-o-Matic, you are given a link. It does not generate an automatic email. Therefore, you will include the link it gives you in your email to participants.
  - MeetingWizard: An automatic email will be generated. Make sure you send an additional email at the same time from your own email address using the guidelines below, otherwise people may ignore an automatically generated email because they do not understand what it is for.
  - Your Outgoing Email: You need to include the following:
    - What meeting you are trying to schedule and its purpose. (Again, you are trying to inspire attendance and ensure every intersection with NTAP communication is easy and clear.)
    - Proposed times with reference to either a subsequent MeetingWizard email you are sending out or the link below to click on. Oftentimes, people will get this auto-generated email and not know what it is referring to. If you use MeetingWizard, send an additional email from your own email address telling folks (a) you would like to set up a meeting about X and you are using MeetingWizard to do so, (b) they should be getting a separate email to indicate their availability. If they do not receive, notify you. Give them the dates and times in case the links do not work, so they can respond via email in a worst case scenario.
    - Note the timezone that your meeting time is in, and if possible, restate the time in Pacific and Eastern at least. For MeetOMatic, they are selecting AM or PM or an entire day. Make sure you tell them what time they are indicating as available (i.e., "Select the days you are available for a meeting in the window of 11 - 2 pacific / 2 - 5 Eastern. If you have only portions of this window available, indicate your exact availability in the comments section.")
    - Deadline to respond. If you wait until everyone has responded and you don't give them a deadline, then sometimes, by the time you are able to schedule, the VIP is no longer available or others who indicated promptly. ("Let us know your availability by Friday (two days away), so we can confirm the meeting based on everyone's availability.")
    - Confirm the Meeting. Send or have sent an automatic email with the meeting time confirmed. Best to include an agenda and the call in or log in information as well.

## **Calendar**

### ***Placing Personal Milestones on your Google Calendar***

1. Inside your basecamp account on the right side of the milestones section where the link says "Subscribe to iCalendar", COPY THAT LINK. (If you're using a PC, right click and copy link location).
2. Go to your Google Calendar page.
3. Click on the "Add" drop down next to "My Calendars" and select ADD BY URL.
4. PASTE THE COPIED LINK into the Public Calendar Address space. Then click ADD.

This will create a calendar with your milestones. Have fun.

### ***Placing All Milestones on your Google Calendar***

The steps are almost the same as those used for placing personal milestones on your Google Calendar, but use the "Global iCalendar" link on the Dashboard page near the very bottom.

### **Phone Conference System**

We use Free Conference.Com. Schedule it prior to sending out your confirming email on meetings. If you absolutely need to use a toll free service, you can use the InterCall phone service at 4.9 cents a minute. See InterCall numbers for log in. (No reservation needed.)

### **Communicating to the List or Large Groups**

If you are emailing folks wanting them to do something, practice by sending a draft to Gabe, Becky, David, or Gene to review first. There are nuances that we've developed over time. I can't remember them now, but just send over a draft and that will be the fastest way to learn.

### **YouSendit**

If you need to send a file which is bigger than your e-mail client allows you can use a internet service called YouSendit. The URL is [www.yousendit.com](http://www.yousendit.com). This mostly free service allows you to upload a file to their website. You will enter your intended recipients and they get an e-mail from yousendit that your file is available for download. Those people can then download that file from YouSendIt for a period of time.