

HOW TO WORK FROM HOME **EFFECTIVELY**

Our favourite time saving,
productivity boosting tools



A SPECIAL **FREE** REPORT FROM CANONBURY PUBLISHING

How to work from home effectively: Our favourite time saving and productivity boosting tools

Stay safe, keep in touch with your clients and team and boost your productivity during the covid-19 lockdown

Here's some good news in the midst of all this chaos.

If you're self-isolating and working from home on projects right now, we've compiled a list of tools to help you get things done. These will save you a huge amount of time, money and stress.

Over the years we have tested hundreds of online tools to streamline how we work. We live and work in a global economy and more often than not people (whether it's staff, clients, freelancers or customers) are in different locations using different equipment.

What follows isn't just a mish-mash of random online productivity tools. This is our "swear by it" list of essentials that we use day in and day out.

8 of the 10 tools you'll see below are completely free to use. Each one listed is simple and intuitive to use and connects seamlessly with little or no overheads.

(Please note: we have no affiliation with any of these companies and receive no kickback).

Video Conferencing

Zoom

Why we like it:

- The next best thing to holding a meeting in person
- Zero costs or logistics, it's free for 100 users or less
- Great way to hold weekly or daily meetings with your team

Zoom is a fast and effective way to video conference call. It just pips Skype for us because we find it slightly easier to connect multiple parties at once. The latter is slightly less intuitive on this front.

There's not really much else to say about it. The layout is great and as long as you have a decent Internet connection lags are rare.



Zoom is free to use for up to 100 participants which is more than enough for most people and meetings are limited to 40 minutes. If you're holding larger or longer meetups then there are pro and business packages available for £11.99 a month upwards.

Alternative platforms:

Skype

As already discussed, I'm sure you're familiar with Skype. It's a really solid allrounder and can be used for group video conferencing sessions of up to 50 people. Handy if you want to streamline the number of platforms you're using.

GotoMeeting/webinar

Gotomeeting is a good paid for solution for teams and may appeal to larger organisations. It's incredibly easy to use and is very fast. Starter plans are £69 a month for 100 participants or less and then there are Pro and Plus packages if you're looking to host huge events for 500 participants + and want features like transcripts, certificates, custom urls and so on.

Here are the links:

Go To Webinar: <https://www.gotomeet.me/>

Zoom: <https://zoom.us/>

Skype: <https://www.skype.com/en/>

Communication / Messaging Tools

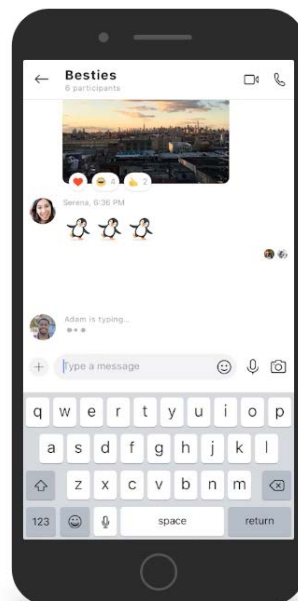
Skype

Why we like it:

- It's a simple lightweight platform that most freelancers use and are familiar with
- Better than email in the sense that it's easy to see who's online and available
- You can live chat which saves time spent waiting on responses
- Easy to see when your messages have been viewed

It's very likely you will have used Skype before. What some people don't realise is that as well as offering free video conferencing it also has an excellent in house chat system where you can send messages, share links and so on.

You can always see if the other person is online and whether they have read your message, so unlike email there's a sense of immediacy when you're on there. This is helpful if you're trying to get something done quickly and you need someone's full attention.



Skype also has a “Share Screen” facility where you have the option to show the other user or users exactly what you're doing on screen. I've mainly used this to

show my mum how to fix strange settings she's accidentally enabled in Microsoft Word ;-)

It also works well if you need to share things with team members or freelancers.

Skype is one of my go to tools when chatting to freelancers, especially tech folks, as most of them use it. It has an app for your desktop, laptop or phone and it's lightweight and easy to use. Well worth having in your toolkit.

Alternative messaging platforms:

WhatsApp

Text messages can be a bit clunky and expensive (especially if you're contacting someone in another country). Apple tried to disrupt the market with their iMessage system. It's great if everyone you know has an iPhone, not so great for the rest of the world...

WhatsApp on the other hand is free and works on any smartphone.

90% of you will be familiar with WhatsApp already. Over the past year or so the majority of people in my social and professional circle have moved over from text messages to WhatsApp.

If you want to get hold of someone right away we've found it a better option. Not as invasive as calling someone but is just as instant. You can also see if someone's read your message because it will have two blue ticks next to it.

The other great thing about WhatsApp is the 'Groups' function. While you're at home during the Corona outbreak, why not set up a WhatsApp group for team members so you can share quick updates or for loved ones who may be feeling isolated or alone.

Slack

A lot of business's swear by Slack and see it as "the new email". It's a place where you can talk to your team about specific projects in one place. It's not free but if you do have the budget, and you are working across a lot of different projects with a lot of different team members, it's definitely worth looking at.

So how does it work?

Slack's a bit like having your own team Twitter for individual projects. It sits somewhere between the group chat function on WhatsApp and a private chat. So you can have team members assigned to certain projects and you can also have conversations with individuals directly.

I've found it a fantastic tool if you want some work / life separation because it moves you away from checking your email or your phone all the time.

It also seems to integrate with a HUGE number of third party tools, including Ora. You can link to shared files in Google Drive and hook events up to your calendar and so on.

When you first log in to Slack you might not be bowled over. It's not beautiful and it's not instantly intuitive. However, spend a few minutes setting up different Channels (these are workspaces / group chats) and it'll soon make sense.

The downside is that while there is a free starter option which may suit you it . In fact it's £5.25 per person per month, so this is really one to go for once business has ramped up, income is coming in and you have a few people in your team you need to engage with on projects at once.

You can find each of these tools here:

Slack: <https://canonburypubl-rgx1139.slack.com>

Skype: <https://www.skype.com/en/>

WhatsApp for web: <https://web.whatsapp.com/>

Project Management Tools

Think of the best project management tools as post it notes on a whiteboard. That invited members of the team can access and work on. Simple, intuitive and effective.

There are so many great project management tools; Trello, Asana, Monday.com all of which we recommend and have used at one time.

They each have their pluses and minuses and this is the one case we don't have a 'strong' favourite but the one we've stuck with is...

Ora

Why we like it:

- Intuitive tool for managing ongoing projects and tasks
- Very easy to separate out projects and avoid that feeling of overwhelm
- Visual format makes it easy to see at a glance exactly which tasks have been done already and which are outstanding
- Accessible from any platform using virtually any setup

We'll start with our number one planning and project management tool, Ora.

Ora makes laying out and monitoring projects easier than anything else we've used to date... and we've tried the lot.

With project management you need something everyone can get to grips with and use. If just one person doesn't use it, the whole thing falls apart. We've tried dozens over the years and most have been ditched unceremoniously.

The problem in our case is that we're visual, not techie, people. We've found most of the all singing and dancing tools we've tried in the past to be way too complicated.

Most of us just want a simple way to see what we're doing and when we need to do it. Who has the time to learn a whole new ecosystem? In my experience, if you can't make sense of what's going on in 60 seconds or less it's not going to be a tool you're going to want to keep coming back to (and it'll certainly be an uphill struggle to get team members to use).

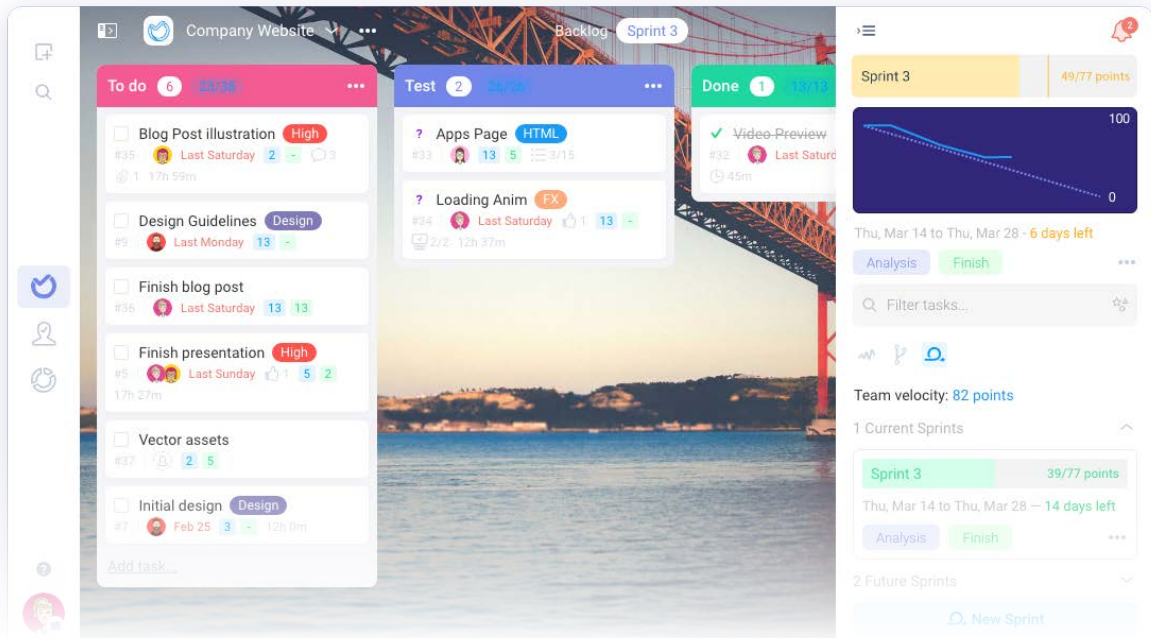
So how does Ora work?

It uses what's known as a Kanban approach, a visual system for managing work. It lays your workload out for you in a step-by-step format and displays what tasks you need to do to achieve each goal within each project.

This setup means you can always see, at a glance, which tasks are outstanding, which need reviewing, which are completed.

It's a bit like having a giant whiteboard covered in 'to do' post-it notes (think CSI Miami) but then beautifully rearranged in a way that makes sense to you. Unlike a physical system it keeps things nicely segmented for you so you don't feel overwhelmed and you can move stuff around, edit it and add to it whenever you want.

If you've completed a task you can simply click it, ready for review and then once that's done you can mark it as complete and it'll cross it off your list. Adding deadline reminders is a doddle and there are a whole host of customisations you can make if you so wish.



How do you run it?

It can be accessed from any browser, via their webpage, which means it's backwardly compatible with pretty much any setup. You just need a computer, an Internet connection and access to Chrome or Firefox.

You also have the option to download their desktop apps (Mac, Window, Linux) if you want to work offline. Smartphone apps are also available in beta mode on request (this is where they lag behind Trello)

Ora is completely free for up to 3 users if you're using the 'basic plan' (which should be more than adequate for most). If you're running a larger operation prices start at \$4.33 a month per user for teams of 8+.

You can find Ora here: <https://ora.pm/>

Our other recommendations are:

Trello - <https://trello.com/>

Asana - <https://asana.com/>

Monday - <https://monday.com/>

Copy Review and Collaboration

Google Docs

Why we like it:

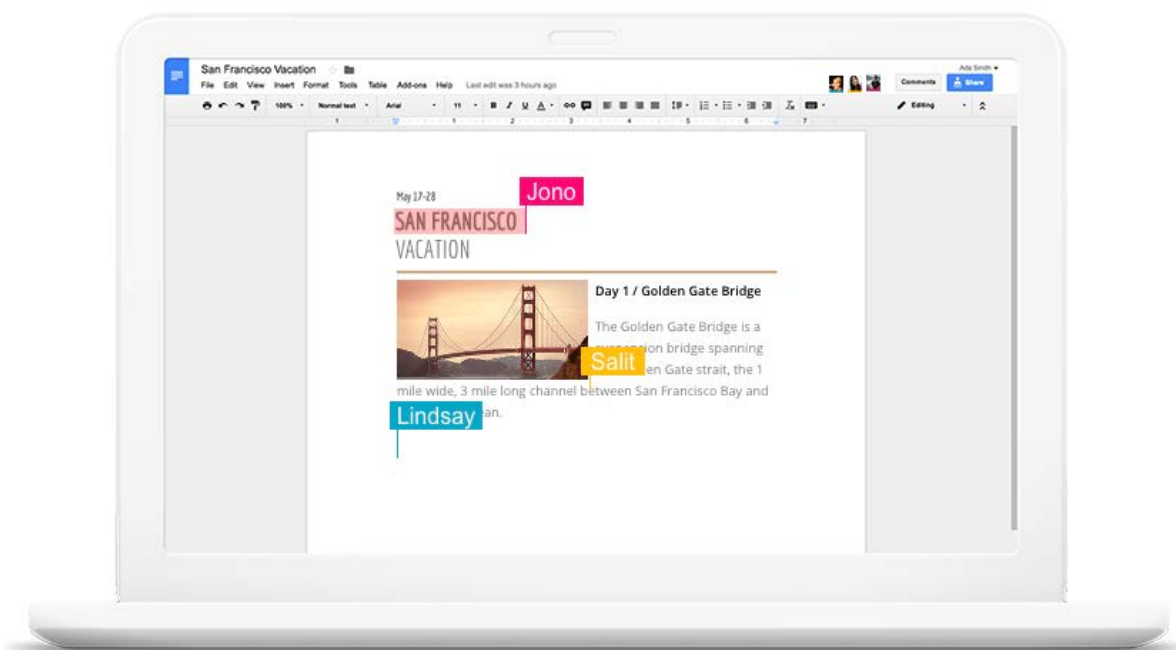
- It's free and backwardly compatible with any setup
- Fantastic for any collaboration tasks that involve the written word
- It's a great place to store and share templates (for yourself and/or your team)
- Useful for storing and locating written 'how to' instructions

As a word processor Google Docs is a fantastic alternative to Microsoft Word and Apple Pages and it's completely free.

In fact if my brain wasn't so conditioned to use Word docs (and hoard offline versions of everything) I'd have switched over everything I write to Google Docs already.

One of the most useful features is the ability to make documents 'shared' so that anyone you invite to share that document can edit, add to and leave comments.

In fact this is THE best mark-up feature on any word processing I've ever used. Changes are made in real time so if you have more than one person working on or viewing a document at the same time, you won't suffer lags or conflicts.



All you need is a browser (Firefox, Chrome, Safari, whatever you fancy) to use Google Docs. Because it works on any setup, from anywhere, you'll have no trouble getting members of your team to use it either. Giving people shared access to a document is as easy as adding their email address and sharing a link.

Typically we get the most use out of Google Docs for copy review tasks, templates and how to guides.

So for example, last week we reviewed a set of proposed Facebook Ads with a Social Media agency we hired for a project. They sent over a shared Google Docs containing their draft ideas and we were able to make minor edits and add feedback to the document which they could then see. It's super clear who has made each comment or edit because each is colour coded and has the person's name by it.

It's also great for templates. It doesn't matter how much blurb you put on the website or sales copy, there will always be some people who'll write in with a question regarding something you've already covered.

We create shared Google Docs containing standard responses to some typical questions from customers. Now when a customer writes in with one of these questions whoever's answering can just click on the doc and copy and paste the relevant response into an email. After a bit of tweaking it's then good to go. This saves hours every week.

Finally, we've found it really useful for 'how to' guides. Perfect for any written procedures that are fiddley and you need regular access to (for example it could be a food recipe, if you work in catering, or a set of html codes if you work in web design). If there's a problem that you or anyone else in your team comes across that you need help with, you can simply bring it up and follow the steps. No need to relearn how to do it each time.

You can find Google Docs here: <https://docs.google.com/>

Personal Organiser

Evernote

Why we like it:

- It's like a digital extension of your brain, a kind of second memory
- Store notes, ideas, webpages within digital 'notes' which can be kept in notebooks
- Notes can also be tagged using keywords so you can locate them via search
- 'Shared notebooks' allow you to collaborate with other users

If someone put a gun to my head and said there is only one tool from this entire list that I can keep, I would say Evernote every time.

But it's a strange one...

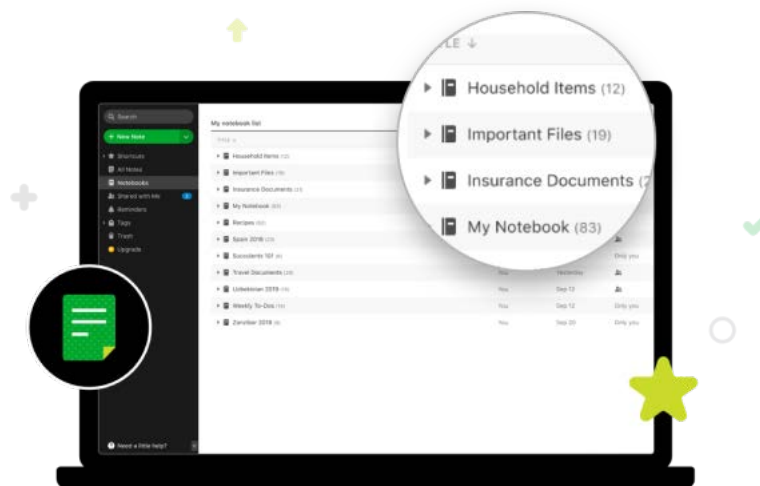
I've recommended Evernote to a few people in the past and most of them signup, play around with it for a minute or two, then never use it again.

They don't get it. What's the point? Yet another place you can write notes, wow, greeeeat, very original. I felt the same when I first used it. At the time I was quite

happy using the 'notes' app on my phone to scribble down random musings and Microsoft Word or Google Docs for everything else.

But as a tool this is completely different. Stick with it and it'll transform your life. I now think of Evernote as a kind of extension of my brain. I'm useless at retaining information in real life, probably because I cram my few remaining brain cells with so much junk each day, and seem to lose valuable information. Life in the age of the media and Internet is awash with information and it's hard to keep track.

Evernote is a way to create and then categorise information in a way which specifically makes sense to you. It means that next time you want to recall or work on something you can do so in a few seconds.



Here's how it works...

The thing to bear in mind is that Evernote is made up of notes.

A note can be ANYTHING.

If you have a random thought in the middle of the day you can open the app on your phone and quickly type that out as a 'note'. If you're feeling swish you could also dictate it using the transcribe feature. Or you could take a photo and post an image, save a recording, whatever you fancy. Lots of options are at your fingertips.

Each note is an individual thought, document or entry, whatever you want to call it. It can be as long as you want and you can go in and edit it whenever you want. It can be text or it can be a mixture of text and pictures and files and whatever else.

Here comes the clever bit.

You can assign a note to a notebook of your choice (you can create as many notebooks as you want). So for example, let's say one of your hobbies is gardening, you might have a notebook called "Gardening". When you're out in the park and see a beautiful flower you could take a photo, save it in a note along with the name of the

flower and then assign that note to your “Gardening” notebook. Or you might be chatting to a friend sometime and they mention a local nursery that sells high quality bulbs. Great recommendation! Type it out in a note and then assign it to your “Gardening” notebook.

So you now have a notebook containing lots of useful individual notes relating to gardening that you can add to or follow up on. You could also have a notebook for book recommendations, cooking, article ideas, you name it...

The next feature is even more useful.

Leaving notebooks to one side for a moment you can also tag each individual note with keywords (as many as you want). You can do this as you’re creating the note or afterwards, it doesn’t matter. What you’re doing here is creating an easy way to find notes/thoughts/documents in the future. I like to think of it as my own personal Google.

When you’re starting out and only have 5 or 10 notes this will seem pointless. Why would you need to search them when you can see them right in front of you?

But here’s the thing. Once you get used to Evernote you will use it for EVERYTHING. Every shower thought, every work meeting writeup, every recipe, every friend’s suggestion, every draft email. Very soon you’ll have hundreds, if not thousands of notes and sometimes you won’t know what to put in which notebook. Right now I have 4,362 notes in mine. This is when tags become important.

While Evernote is good at searching using your note titles the tagging system puts you in total control. For example I went to South Korea last year. As part of planning for the trip I made dozens of notes in Evernote. The one note I kept coming back to was my South Korea Itinerary note. Because I tagged this note with “South Korea” and “Itinerary” whenever I wanted to access it, I could just type either or both of those words and it would come up instantly. No wading through notes or notebooks.

I’ve found this especially useful for any ‘how to’ notes. Sometimes I have to figure out a fix for a website problem or a software issue. I’m not super techie and the first time round it can take hours of research online or talking to a customer service person to figure out a solution.

Once I’ve found a fix I don’t want to lose this knowledge in case the same problem crops up again in a few months time. So once I’ve figured it out and got it to work I right down a quick step-by-step guide as a note in Evernote. After labelling it appropriately: “How to fix XXXX” I’ll also tag it with the kinds of words I’d use if I was going to search for the same issue on Google. This saves HOURS in the long run. Often I’ll stumble on a problem that I’ve fixed before but completely forgotten about. A quick search in Evernote brings up the answer!

Last but not least (and this is many people’s favourite feature) is the web clipping tool.

When you install Evernote's free clipping extension on Chrome, or whichever web browser you use, it lets you save pages off the internet into your Evernote as a note instantly. Seen an interesting article online? Press one button and it will save it as a note and store it in your Evernote. You have the option for it to save as it looks on the page with the all the formatting OR you can save it as a 'simple article'. The latter is my favourite option as it strips out all the formatting and just pastes in the text and the images for you, a bit like a newspaper article would look.

This is SUCH a useful tool and means you can save your favourite articles in Evernote and access them whenever you want.

<https://evernote.com/>

Sending Large Files

WeTransfer

Why we like it:

- Great for files over 10mb which you can't send over by email
- You can send large files, images, zips to anyone with an email address
- It's fast, free and sends a download link to their email (i.e. doesn't clog inboxes)
- You can continue to use Dropbox for any smaller day-to-day shared files

Cloud storage tools like DropBox and Google Drive are amazing.

But we've often found ourselves spending way too long trying to figure out how to share files by DropBox or Google Drive to recipients who aren't on that platform.

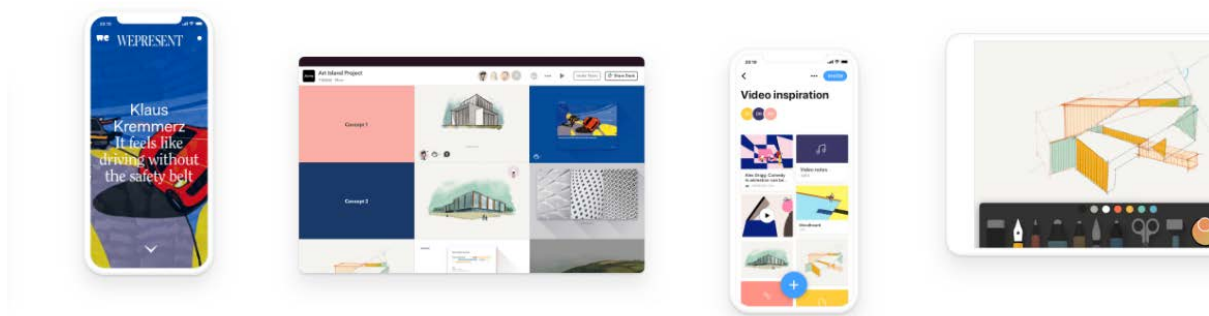
They're great if you're accessing files across your own devices, or sharing with someone who also has an account with them, but frustrating if not...

On top of that there are also limits on what can be stored on them, which is another hurdle.

So if you're not sending military grade secrets, but need to send files too big to send over email I highly recommend WeTransfer, it's free and easy to use.

Welcome to WeTransfer

WeTransfer was founded in 2009 as the simplest way to send big files around the world. Today we're a set of beautifully obvious tools to keep your ideas moving.



You just drag the file onto the screen and pop the email address of the person you want to send it to. Once it's ready it will then send them a download link.

It's super super easy and unfussy. What I love is that no one needs to be signed up to any sort of account or pay anything. Once the person has downloaded it, the link and file will be discarded after 7 days. None of it costs you a penny.

<https://wetransfer.com/>

Document Scanner (PDFs Using Your Phone)

Adobe Scan

Why we like it:

- Works like a scanner but uses your phone instead. Just download the app and use the camera on your phone to photograph pages. The app then compiles the images into a PDF which you can share
- Perfect for sending over proofing changes
- Great for 'scanning' official documents and converting them into a PDF

If you've ever had to proof paper copies of a document and pass on those changes to someone remotely (i.e. online) to make edits, you'll know it's a big faff. Often it's a long phone call where you have to go over each individual tweak.

A MUCH faster way of doing this is to make written edits to the documents and then use a phone scanning app to compile these into a PDF. You can then send this PDF on and they'll have their own marked up copy to work off.



This sounds time consuming but it actually takes just seconds. In fact, use this tool once and you'll find yourself using it for all sorts of other things. For example I used it recently to scan a pay slip that a mortgage lender needed as a PDF.

The beauty of this is that you don't need a scanner, you just need a smartphone which has a camera on the back.

Here's how you do it:

1. Download Adobe Scan to your phone.
2. Lay the document or documents you need scanning flat on the table.
3. Press the scan button on the app and you'll be instructed to hold your phone above the document, as if you were taking a picture from a bird's eye view.
4. You'll see the app tries to locate the corners of the document, so assist it by moving your phone slightly until it lines up.
5. It'll let you know when it's grabbed that page and then you can flip the document over, or get the next page ready, and do the same again.
6. Once you've finished you simply click the button again and it'll start compiling it into a single PDF document. You can then download this or share it with others with the click of a button.

This whole process takes less than a minute and saves a huge amount of time and money messing about with physical scanners.

You can access them here:

Adobe Scan for iPhone: <https://apps.apple.com/us/app/adobe-scan-digital-pdf-scanner/id1199564834>

Adobe Scan for Android: https://play.google.com/store/apps/details?id=com.adobe.scan.android&hl=en_GB

Create How To / Explainer Videos in Seconds

Vidyard / Loom

Why we like it:

- Create explainer videos in seconds for customer support reps or tech freelancers
- Create and archive help videos for your own use (for example step-by-step guides) that you don't want to forget and may need access to in the future
- Explain a concept, procedure or idea quickly to members of your team, freelancers or even customers

Have you ever been stuck in a live chat with a customer support rep that goes on FOREVER?

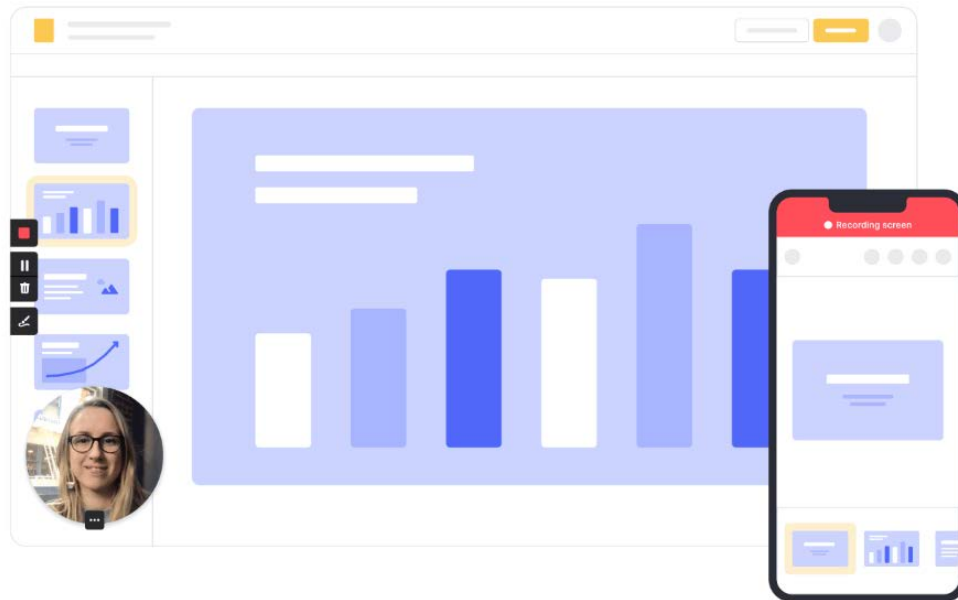
Where you know they're working off a script and you get the sense they're dealing with 20 or 30 other live chats at the same time...

You find yourself saying the same thing to them over and over again and keep getting passed from person to person. It's an easy way to lose an hour of your life and sanity.

Screen recorders are a fast, free solution. They're a way to show someone exactly what you mean on screen so that language is no barrier and there is zero ambiguity.

There are two brilliant, lightweight (and free) screen recording tools that let you do that, Vidyard and Loom. They both do pretty much exactly the same thing so take your pick.

Once you've set up your free account make sure you install the relevant Chrome browser extension. I should note that you do need Google Chrome (also free) for this. Don't worry if that's not your normal browser you can simply use it to create these explainer videos and you can use your existing browser for everything else.



Here's how it works:

1) Once the browser extension is installed you'll see a new button next to the address bar in Google Chrome (normally to the right). When you're ready to record simply press the button and it will bring up some options.

2) You can now choose whether it records just the website displaying on your screen and nothing else, OR your whole screen (i.e. your desktop and whatever software you're using).

You can also choose whether it records audio so that you can narrate what's happening and/or give instructions. And if you'll feeling really bold you can have it record a little video of you at the same time. This would appear in a little box next to the recording of the screen if you choose that option.

Tip: If you do want to record audio (recommended) or video make sure these features are enabled and working. In most cases it will use your computer or laptop's internal microphone and above screen camera but it never hurts to do a quick dry run first.

3) Once you've pressed the button it'll give you a 3 second countdown and then start recording. Do your recording and then when you're finished click the button/icon on your browser again to edit the recording.

4) It'll then quickly process the video and take you to a page where you can access a share link. If you give this link to anyone they'll be able to view the video cast you've made of your screen, a bit like a YouTube video. The beauty is it takes just seconds to make. There's no downloading files, no processing and uploading, it does the whole thing for you.

Editing these videos is extremely limited (at best you can trim a bit off the end) but that's not really what these videos are for.

This tool will save you so much time and once you've started using it you'll lament the hours you wasted trying to explain simple issues to people in the past. It's fantastic if you're trying to show someone something quickly. It's much easier than trying to explain over email.

Here are those links:

Vidyard (you need to make an account and then install Chrome plugin):

<https://www.vidyard.com/free-screen-record/>

Loom (you need to make an account and then install Chrome plugin):

<https://www.loom.com/>

Video Transcriptions

Rev

Why we like it:

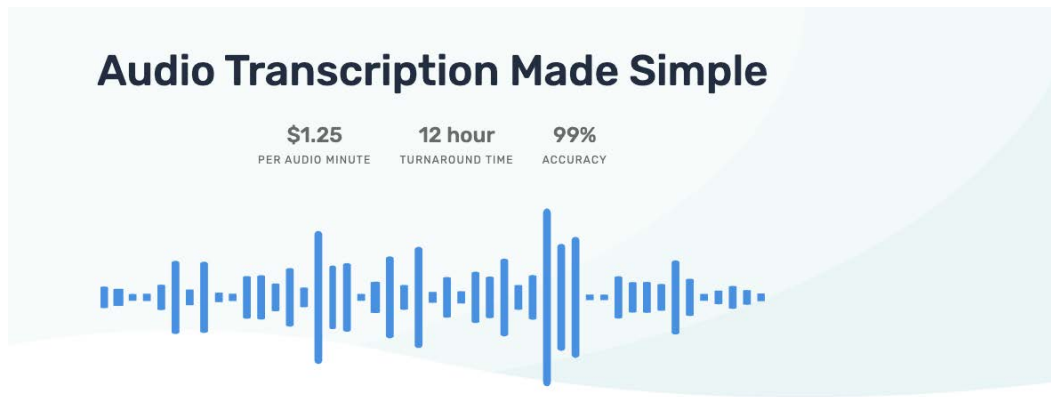
- Transcribe media content quickly and easily
- Allows you to repurpose, as reports or eBooks, content you've already made

If you create video content for your customers a fantastic way to add real value to your offering is to add a transcript of this material.

Some people actually prefer reading content and video or audio transcripts are a great way to offer that for very little additional cost.

It's also a brilliant, cheap way to repurpose media content into free reports and eBooks.

There are lots of online tools that let you do this but our favourite is Rev.com. They charge \$1.25 per minute of transcription (not free but incredibly reasonable given they are transcribed by humans) and the quality is excellent. They also have a much cheaper machine transcription service called 'rough draft' which is just 25c per minute. We've also found this extremely good!



To get material transcribed you can either send them a link to the content (if you've hosted it online) or you'll have the option to upload it. They'll send you a notification as soon as it has been transcribed, typically less than 24 hours. The 'rough draft' service is much quicker.

They transcribe both audio and video so it has a huge range of applications.

Maybe you've recorded a brainstorm session and you want it transcribed. This is a great way to do that.

Or if you've conducted an interview with someone and recorded it, using a service like this is a much better use of your time than spending hours and hours trying to write it all out into Word.

You can find this tool here:

<https://www.rev.com/>

Video Uploads

Vimeo

Why we like it:

- Upload unbranded videos that display on virtually any browser
- Easy to use platform

Video content is increasingly a must for most businesses.

Whether you're posting video blogs (vlogs)... or 'how to' videos for customers... or motivational videos, they're a great way to keep people engaged.

But where do you upload and play these videos?

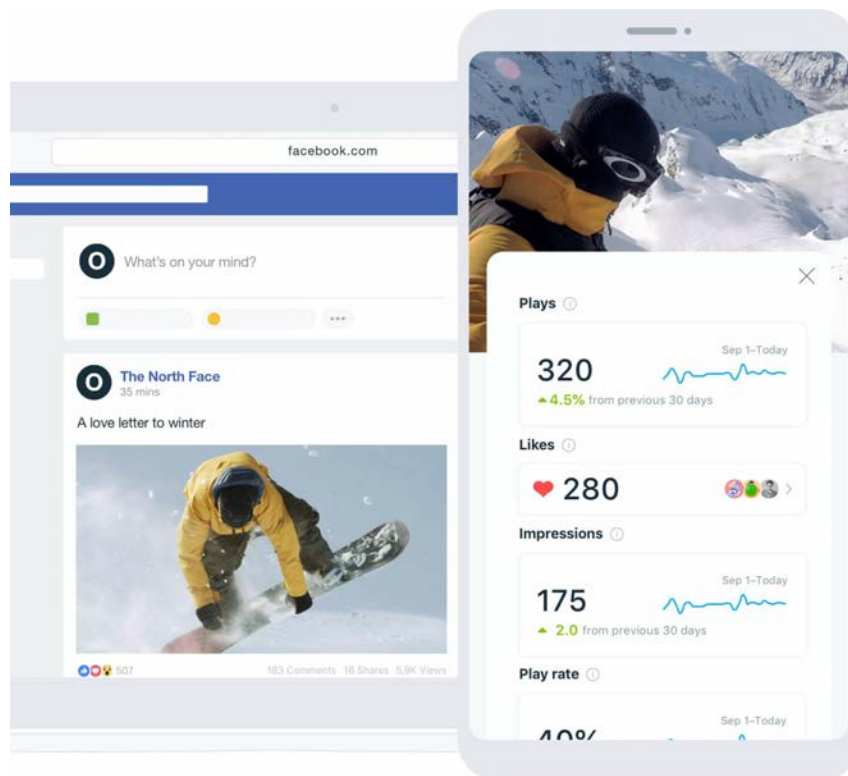
You don't want to host these videos yourself on your website package. I've tried that and your bandwidth (or usage) will burn out ridiculously fast. Video content takes up a HUGE amount of space.

That's why it makes sense to upload any video content to a third party (YouTube are the most famous) and then embed the video on your website. That way the video is still on your website... but the big, heavy files are being resourced elsewhere.

Hopefully that makes sense.

YouTube is the obvious solution for most but if you're running your own business you might not want to get stuck with all their branding. If you're looking for your very own, fast, effective YouTube-like video upload platform, I highly recommend Vimeo.

If you're in the creative industries your account here will be free. But if you're uploading content that is clearly 'for business' then they do charge a monthly fee of £6 - £16 a month, depending on your package.



Of all the systems we've used they have the most backwardly compatible player of almost any we've used, including YouTube. That's a major issue as you don't want people using old browsers saying they can't view your content.

It's also well laid out and easy to setup. You can simply drag and drop files into their upload box. Best of all there's no branding so you keep your own look and style.

Well worth a look.

Right, that's it! I hope you found this useful.

It used to be that you had to rent or buy incredibly expensive software that was complicated or wasn't compatible with other people's machines.

The tools in this list are almost all free (or have a free element) and they're a great way to store ideas, get things done and collaborate with one another, even when you're on lockdown!

They have been a huge time saver and efficiency booster for us and I hope they are for you too.