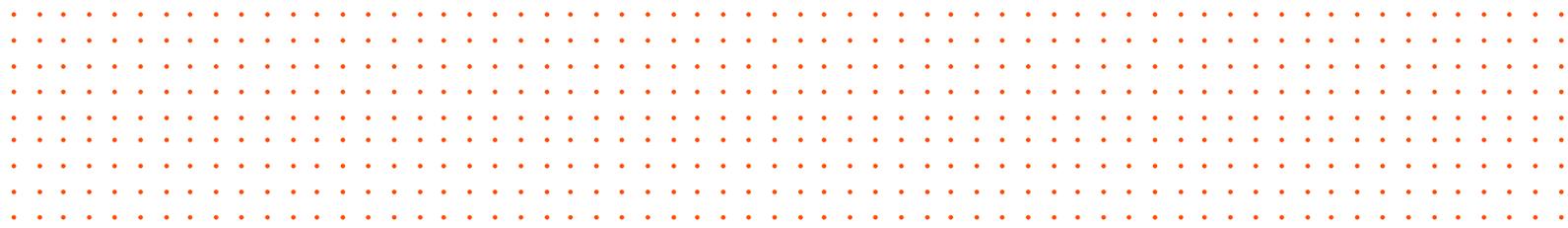


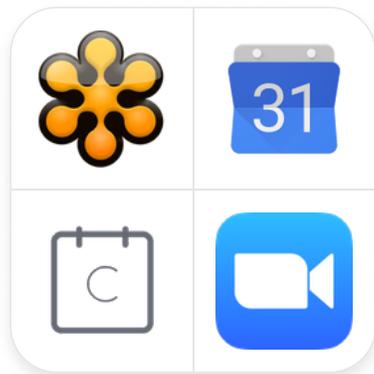
zapier\*

# Suddenly Remote Starter Kit



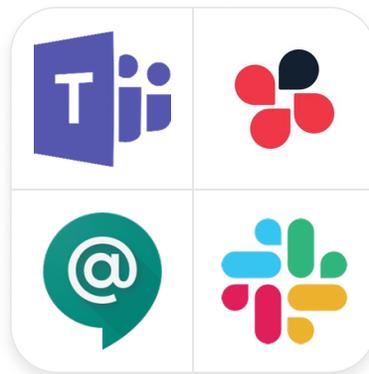
# Getting started

Transitioning to remote work means reevaluating how to function as a business. But it doesn't have to be as difficult as you think. It really comes down to nailing three key remote work practices:



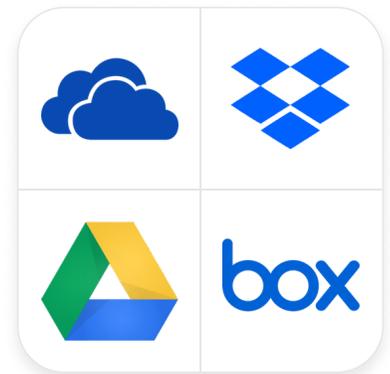
## Section 1

### Meetings



## Section 2

### Chat communication



## Section 3

### Documentation



# How to be a pro at remote meetings

Since meetings are a core part of team collaboration, one of the first things you'll want to do when moving to remote work is pick a video conferencing app. Once you've settled on a tool, the next step is to learn how to run and participate in effective remote meetings.

## Tips for remote video calls

Be intentional about your communication

- Don't rely on nonverbal cues—ask for feedback in chat
- Call on participants by name
- Leave a few seconds for people to respond
- Ensure everyone has a chance to participate

Agree on tech protocols ahead of time

- Know who's hosting the meeting and screen sharing
- Decide where written chat will happen during the call
- Determine if you need to record the meeting

Brush up on your video call etiquette

- Mute by default if it's a large meeting
- Default to keeping video on
- Avoid distractions (close other programs, mute notifications)



### Keep reading

- [7 strategies for running effective remote meetings](#)
- [When should you mute yourself during a video call?](#)

## Level up your remote meetings

Don't see your app here? Zapier connects to thousands of apps—[search for your favorites](#).

### Get reminders for upcoming meetings

Automate the last-minute scramble by sending reminders to a public channel (and even @ tagging invitees for standing meetings). In addition to serving as a reminder, it can also provide everyone with the link to the video call and include any other details that are stored in your calendar event.

 ▶ 	Post approaching Google Calendar events to a Slack channel	<a href="#">Use this Zap</a>
 ▶ 	Post to a Microsoft Teams channel when Google Calendar events start	<a href="#">Use this Zap</a>
 ▶ 	Post approaching Google Calendar events to Hangouts Chat	<a href="#">Use this Zap</a>
 ▶ 	Create ChatWork message from Google Calendar events	<a href="#">Use this Zap</a>

### Create meeting agendas automatically for every meeting

Instead of manually creating a new note or document at the beginning of every meeting, you can use automation to create new communal folders, docs, or spreadsheets every time you have a meeting on your calendar. That way, when the meeting starts, you already have the doc ready.

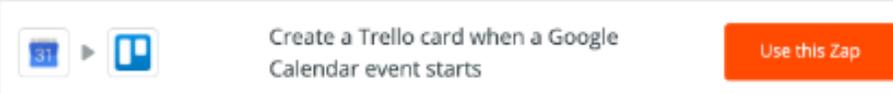
 ▶ 	Add notes to Evernote for new Google Calendar events	<a href="#">Use this Zap</a>
 ▶ 	Append Google Calendar meeting info to a Google Doc	<a href="#">Use this Zap</a>
 ▶ 	Create note on OneNote from new Google Calendar events	<a href="#">Use this Zap</a>
 ▶ 	Create rows in a Coda doc from new Zoom meetings	<a href="#">Use this Zap</a>

## Remember to follow up on action items

Create workflows that help you track and complete action items after meetings. You can get notifications in your chat app or automatically add items to your task management program.



Get weekly reminders in Slack [Use this Zap](#)



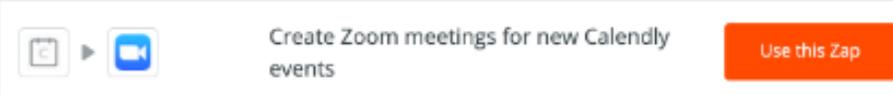
Create a Trello card when a Google Calendar event starts [Use this Zap](#)



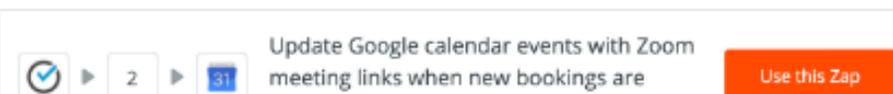
Create new Todoist tasks when your Google Calendar event starts [Use this Zap](#)

## Connect your calendar and video app automatically

Forgetting to add the video call link to your calendar invite—or forgetting to create one at all—can lead to a last-minute scramble and late meetings. Use automation to sync your calendar and video call app.



Create Zoom meetings for new Calendly events [Use this Zap](#)



Update Google calendar events with Zoom meeting links when new bookings are made via ScheduleOnce [Use this Zap](#)



Add new detailed events to Google Calendar for new GoToMeeting meetings [Use this Zap](#)



Create meetings on GoToMeeting for new events on Google Calendar [Use this Zap](#)



### Keep reading

- [Never lose a meeting action item: automate the process](#)
- [Streamline your meetings with these workflows](#)

# How to be a pro at remote chat communication

First, pick one main chat tool where all important conversations happen across your company. Then use communication best practices, so the signal-to-noise ratio remains high and all the most important conversations filter to the top.

## Tips for remote chat

Be specific and concise in chat

- Ask direct questions and tag a particular teammate or group
- Provide context and include links to any relevant documentation
- Start with the core information and add detail in threads

Organize your conversations

- Create channels or rooms for different teams and projects
- Use threads for specific conversation topics
- Communicate in public channels and include keywords for easy searching

Make space for fun

- Mimic your favorite in-office activities in your team chat app
- Build trust with your team by dedicating time to socialize
- Create special interest channels or rooms



### Keep reading

- [5 tips for communicating on a remote team](#)
- [How to make small talk when working remotely \(without being weird\)](#)
- [Why remote work makes disagreement hard—and how to do it anyway](#)

## Level up your remote meetings

Don't see your app here? Zapier connects to thousands of apps—[search for your favorites](#).

### Automatically keep your team in the loop

When working remotely, you can't always tell if someone's on a call, has their head down, or has stepped away from their desk. To avoid interrupting someone else's focus time, use automation to make sure the information people need is automatically surfaced in the relevant channels. This keeps information public, where everyone who needs it can see it, and keeps a task off your to-do list.

 	Post Microsoft Teams messages from emails from Gmail [Business Gmail Accounts Only]	<a href="#">Use this Zap</a>
 	Create messages in Google Hangouts Chat for new cards in Trello	<a href="#">Use this Zap</a>
 	Send Slack messages from new Microsoft Outlook emails	<a href="#">Use this Zap</a>
 	Send new Jira Software issues in Slack channel messages	<a href="#">Use this Zap</a>

### Filter out noise and take action from your chat app

If you're funneling all your important notifications and communication into your team chat tool, there's bound to be a lot of noise. Send important tasks to your to-do list or project management app with these automations.

 	Generate Microsoft To-Do tasks from new saved messages in Slack	<a href="#">Use this Zap</a>
 	Create Trello cards for new Microsoft Teams channel messages	<a href="#">Use this Zap</a>
 	Create Jira Software issues from new messages posted to a Slack channel	<a href="#">Use this Zap</a>

## Automatically celebrate wins and build culture remotely

When you're working remotely, there's no "water cooler" talk, and you can't high five over a team win. These automated workflows can help you keep your office culture alive and allow the remote socializing and celebrations to come more naturally.

 ▶  ▶ 	Post a random Good Morning GIF from GIPHY every day on Slack	<a href="#">Use this Zap</a>
 ▶ 	Get a Slack DM when Mercury enters retrograde	<a href="#">Use this Zap</a>
 ▶ 	Post Today's Weather Forecast to Hangouts Chat	<a href="#">Use this Zap</a>
 ▶ 	Get daily reminders in Slack	<a href="#">Use this Zap</a>



### Keep reading

- [The best automations for Slack users](#)
- [Build culture in your remote team with automation](#)

# How to be a pro at remote documentation

Remote work can require more discipline. You have to make sure you're documenting your work and commit to writing things down. We've learned that a lot of humans are just a little lazy about that stuff. We'd rather casually tap someone on the shoulder than spend the time to document a new process. But in a remote workplace, everyone has to make this part of their process—even if it's not your preferred way of working. Here we'll show you how to make it work.

## Tips for remote chat

Document more than you normally would

- Take notes at every meeting to accommodate scheduling conflicts
- Document all important decisions for transparency
- If you do something more than once, document how you did it

Be intentional about file management

- Decide which types of documentation live where
- Don't rely on conversations in chat for important documentation
- Update documentation quarterly and archive files that are no longer relevant

Think about your audience

- Write clearly and concisely
- Don't use jargon or acronyms
- Provide context and include screenshots and video walkthroughs



### Keep reading

- [A guide to onboarding remote employees](#)
- [How to simplify content for a better reader experience](#)

## Level up your remote meetings

Don't see your app here? Zapier connects to thousands of apps—[search for your favorites](#).

### Set yourself up for success

Zapier can automatically create files and folders for you, making the documentation process frictionless. Turn every meeting or task into a document or folder, or create files on a schedule so you don't have to do it manually every time.

 ▶ 	Create Google Drive folders for new Trello cards	<a href="#">Use this Zap</a>
 ▶ 	Append Google Calendar meeting info to a Google Doc	<a href="#">Use this Zap</a>
 ▶ 	Create Quip documents every week	<a href="#">Use this Zap</a>

### Get all new documentation to the right place

Having all your documentation in one place will make it so everyone can find what they need. Automatically copy new files and folders to different file management systems so your team never has to waste time searching.

 ▶ 	Copy new Dropbox files to Box	<a href="#">Use this Zap</a>
 ▶ 	Copy new OneDrive files to Google Drive	<a href="#">Use this Zap</a>
 ▶ 	Backup your Evernote notes to Dropbox	<a href="#">Use this Zap</a>

## Move all email attachments to a shared location

If team members send and receive files that everyone needs access to, make sure those documents get moved to your designated shared drive or storage system.

 	Save new Gmail attachments to Google Drive	<a href="#">Use this Zap</a>
 	Save new Gmail attachment as a file in Box [Business Gmail Accounts Only]	<a href="#">Use this Zap</a>
 	Save Gmail attachments to Dropbox as original file format	<a href="#">Use this Zap</a>



### Keep reading

- [How to create and autopopulate a Google Docs template](#)
- [How to use Evernote Templates to quickly make new notes](#)
- [Create an agenda in Google Docs when you schedule a meeting in Google Calendar](#)

# Next steps: Personalize your remote work experience

Now that you've established your shared tools and processes, don't forget to personalize the remote work experience. Maintaining a strong team culture and continuing to foster connections will keep morale high and increase productivity.

## Make time for socializing

The time you spend socializing at a remote job shouldn't be seen as slacking off—it's a way to get to know the people you work with so you can trust them more when it comes time to get stuff done.

- [Build culture in your remote team with automation](#)
- [Remote team activities: How to have fun when you work from home](#)
- [How to make small talk while working remotely \(without being weird\)](#)

## Accommodate for different schedules

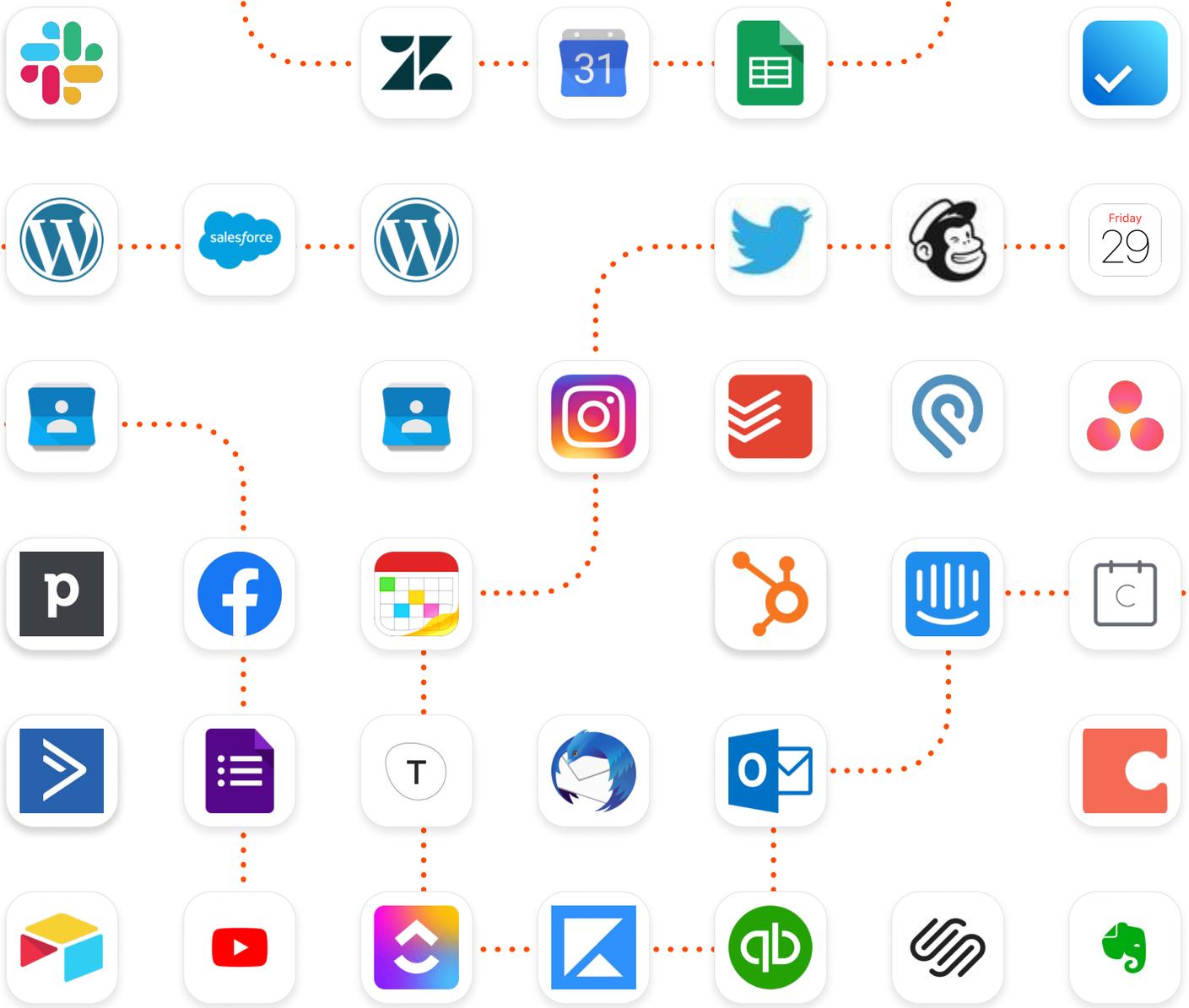
It's likely that everyone on your team will have a slightly different schedule. That's okay! Build room for flexibility so everyone can work when they're most productive.

- [3 ways to automate parenting duties without screen time](#)
- [Find your chronotype and schedule your productivity](#)
- [How to collaborate across time zones](#)

## Personalize your workspace

One of the perks of working from home is that you can make your space your own. By personalizing your workspace, you'll feel more energized and get more done.

- [How to bring joy to your work day](#)
- [This is what a remote office looks like](#)



zapier\*

# Thank you!

