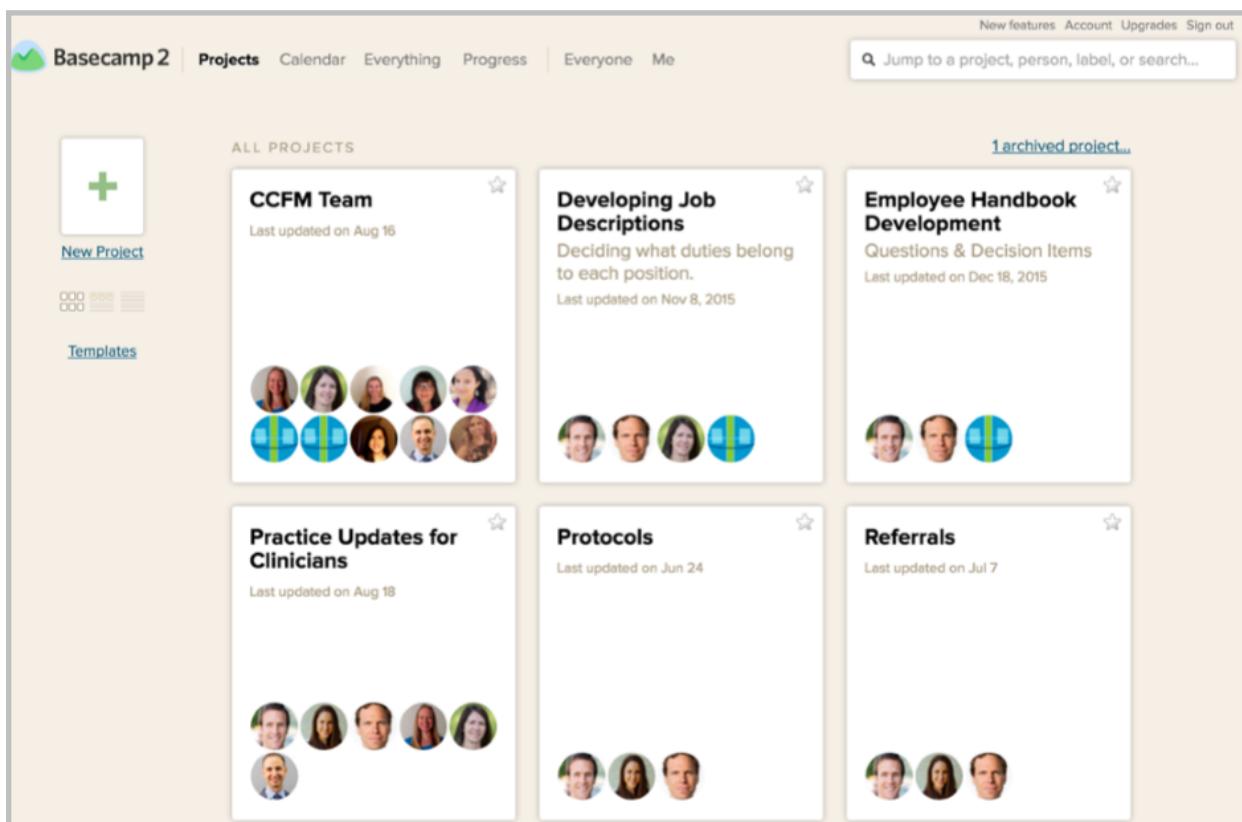


Collaboration and Video Conferencing - Part One

Hey, everybody. In this presentation I'm going to discuss tools for collaboration and video conferencing. Just as a general reminder, I don't receive any compensation for recommending products or companies in the ADAPT program. I just recommend the ones that we use and have found to be most helpful.

First, let's talk about collaboration. If you're employing the hybrid practice model that I'm teaching, you'll likely have staff members distributed across different locations. This makes collaboration more challenging, and effective tools more important. That said, even if you're in one location, effective collaboration is still vital to the success of your practice. We use a variety of tools to facilitate this at the California Center for Functional Medicine.



The screenshot shows the Basecamp 2 web interface. At the top, there is a navigation bar with links for 'Projects', 'Calendar', 'Everything', 'Progress', 'Everyone', 'Me', and a search bar. Below the navigation, there is a section titled 'ALL PROJECTS' with a 'New Project' button and a 'Templates' link. The main area displays six project cards:

- CCFM Team**: Last updated on Aug 16. Contains 10 team member profiles.
- Developing Job Descriptions**: Deciding what duties belong to each position. Last updated on Nov 8, 2015. Contains 5 team member profiles.
- Employee Handbook Development**: Questions & Decision Items. Last updated on Dec 18, 2015. Contains 4 team member profiles.
- Practice Updates for Clinicians**: Last updated on Aug 18. Contains 6 team member profiles.
- Protocols**: Last updated on Jun 24. Contains 3 team member profiles.
- Referrals**: Last updated on Jul 7. Contains 3 team member profiles.

A sidebar on the right indicates '1 archived project...'.

The first is Basecamp, which is a web-based software designed specifically for collaboration among teams. You can have different projects to organize your discussions on various topics. As you can see, we have projects for protocols, referrals, and practice updates for clinicians from staff members. This includes things such as changes to lab test pricing, availability of tests and supplements, general discussion area, job descriptions, an employee handbook, and resources and tools.

You can control access to projects, so that only clinicians have access to some projects, for example, whereas only the business owners would have access to other projects. When you create a new discussion within a project you can choose who is notified and who participates on that thread, and then they receive an email notification. They can respond by email or go to Basecamp on the web or in a mobile app. This means that discussions are in one central hub, rather than buried in email threads that are impossible to find. You can also attach files such as Google Docs or Dropbox videos and links, and it's easily searchable in the future if you want to refer back to a discussion that you had in the past. It's highly recommended. There are other tools that are similar, but Basecamp is the one that we use most. Basecamp 3 is now out, this is Basecamp 2 that you're looking at. We recently upgraded to Basecamp 3 and definitely recommend starting with Basecamp 3. I don't even think you can start with Basecamp 2 anymore. Basecamp 3 has some additional great features that Basecamp 2 didn't have.

Slack is another crucial collaboration tool that we use on a daily basis. It's an internal chat app that makes communication amongst distributed staff really easy and efficient. There are many times throughout the day, if you just have a quick question or immediate need, and this is equivalent to what you might call "the shoulder tap" in a brick-and-mortar office where you would walk over to a colleague, tap them on the shoulder, and ask them a quick question. Email is not good for this. Most people's inboxes are already really cluttered and, hopefully, they are not checking their email every second. Phone isn't great either. It's really hard to reach people on the phone these days, as I'm sure you know, and this is the gap that a tool such as Slack fills. It's the shoulder tap, and it's an internal chat tool.



It's also secure, which means you can mention patient names within Slack without violating HIPAA. It's useful if you're discussing a case amongst clinicians or with admin staff. You can send direct messages to individual staff members. You can create group conversations. You can see I have a few conversations—group conversations—going on the sidebar, one with Sunjya, my co-director, and Kristi, the practice manager; and one with Sunjya, Amy, and Ramzi, which are the clinicians. You can create channels, which are up above there. You can see general, CCFM clinicians, and then random. We don't use channels as much, but you can create channels, which are kind of like rooms where you can post something in that room, and everyone who is a part of that channel or room will see it. You can see that the channels can be open or they can be locked. We have a locked practitioner channel and a locked CCFM clinician channel.

You can also, now in Slack, initiate an audio call immediately from within Slack using VoIP to any other team member, and this is faster and easier than picking up the phone, since most of the team members are in front of a computer during the day and they have Slack open. The audio quality is quite good and, very soon, Slack will enable instant video calls as well, so you could have a quick video conference with someone. This just adds with a virtual team, it makes people feel more connected, and that's really important when you have a virtual or a hybrid setup.

Slack also integrates very well with Google Docs, Dropbox, Basecamp, Asana (which is a project management tool), and other web apps. For example, if you attach a Google Doc, it will automatically link to that Google Doc within Google. You can attach PDFs, or any other files, and make comments on them. If you attach a link, it will show a preview of that link. If you attach a picture from something such as Dropbox or a web-sharing service, it will show up within Slack, so it's a great tool. We really love it.

Just before the time of this recording, the week before, Facebook released a tool that is very similar to Slack called Facebook for Work [now Facebook Workplace]. It has a lot of the same features that I described here, and the same basic purpose and intention. Some people are even more excited about it because a lot of people are on Facebook already, so they don't need to learn a new tool such as Slack, and download a new application. Personally, I don't spend a lot of time on Facebook myself, and we're already pretty committed and invested in Slack. Everybody loves it, so we haven't seen a reason to switch but, just for your information, you might want to check out Facebook for Work as an alternative for Slack. Compare them and see which might work the best for you.

The screenshot shows the Google Apps for Work homepage. At the top, there's a navigation bar with links for Home, Products, Pricing, Learning, Contact us, and Get started. The main headline is "Get email for your business" with a subtext: "Professional email, online storage, shared calendars, video meetings and more. Built for business, designed for teams." Below this is a large image of a man and a woman smiling while looking at a smartphone. A green "Get started" button is visible on the left. In the center, there's a section for users who already have a productivity software enterprise agreement, with a link to check if they qualify for free service. To the right, there's a link for users who have an enterprise agreement. Below these sections, there are three main features: "Professional email and more" (with an '@' icon), "Freedom to work from anywhere" (with a phone icon), and "Business-grade security and controls" (with a lock icon). Each feature has a brief description and a link to learn more. At the bottom, there's a section titled "Tools to get more done" with a "Take Gmail to work" heading and a "Gmail's spam protection, powerful search and integrated" note. To the right, there's a screenshot of a smartphone displaying a Gmail inbox.

Google Apps for Work [now G Suite] is another essential collaboration tool that we use. It's the best option, in my opinion, for shared email, calendar, and document creation for a small business, and even a large business perhaps. It allows you to use Gmail with your own domain. For example, with our domain, which is CCFmed.com, we send and receive email from that domain within Gmail on the web or within your email client that uses Gmail. We can also have shared calendars within our domain, so employees can see the clinician's schedule and can manage. Clinicians can see their schedule on their calendar app. The MD HQ calendar syncs with Google Calendar, so clinicians and staff can use their favorite calendar apps to view their schedule with patients, rather than logging into MD HQ directly. We also use Google Apps to create all clinic documents from working procedures to patient handouts before they are formatted to FAQs, and it's possible to use Google Drive to store all of your clinic documents.

The screenshot shows the top navigation bar of the Dropbox website, featuring links for Pricing, Compare plans, Features, Learn more, Contact sales, and a "Try free for 30 days" button. Below the navigation is a large image of a person's hands typing on a laptop keyboard. To the left of the image, the text reads: "You use Dropbox. Why doesn't your company?" followed by a promotional message about boosting business productivity. At the bottom of the main content area, there is a link to a Gartner Magic Quadrant report.

You use Dropbox.
Why doesn't your
company?

Boost business productivity with the ultimate
file saving and sharing tool for as little as
\$12.50/user/month.

Try free for 30 days

or [purchase now](#)

Dropbox named a Leader in the 2016 Gartner Magic Quadrant for Enterprise File Synchronization and Sharing. [Get the report](#)

Dropbox is another helpful tool for collaboration, although Google Apps for Work arguably has everything you need. We prefer to use Dropbox for file storage and sharing and Google Apps for everything else: email, calendar, and document creation. Dropbox just seems to be more intuitive and a better setup for file storage and sharing. We have a Dropbox Business account that includes unlimited storage space and unlimited file versions. Nothing is ever deleted. You can also restore previous versions of files and granular permissions. You can assign access on individual or group basis to particular files and folders. For example, only business owners can have access to financials.

Dropbox has recently launched a document creation app called Dropbox Paper, which is a competitor to Google Docs. It's included if you're a Dropbox Business user. I haven't used it much and can't comment on it. Most people are familiar with Google Docs and, for me at least, the Paper interface is not as intuitive, and I don't really see a compelling reason to use it.