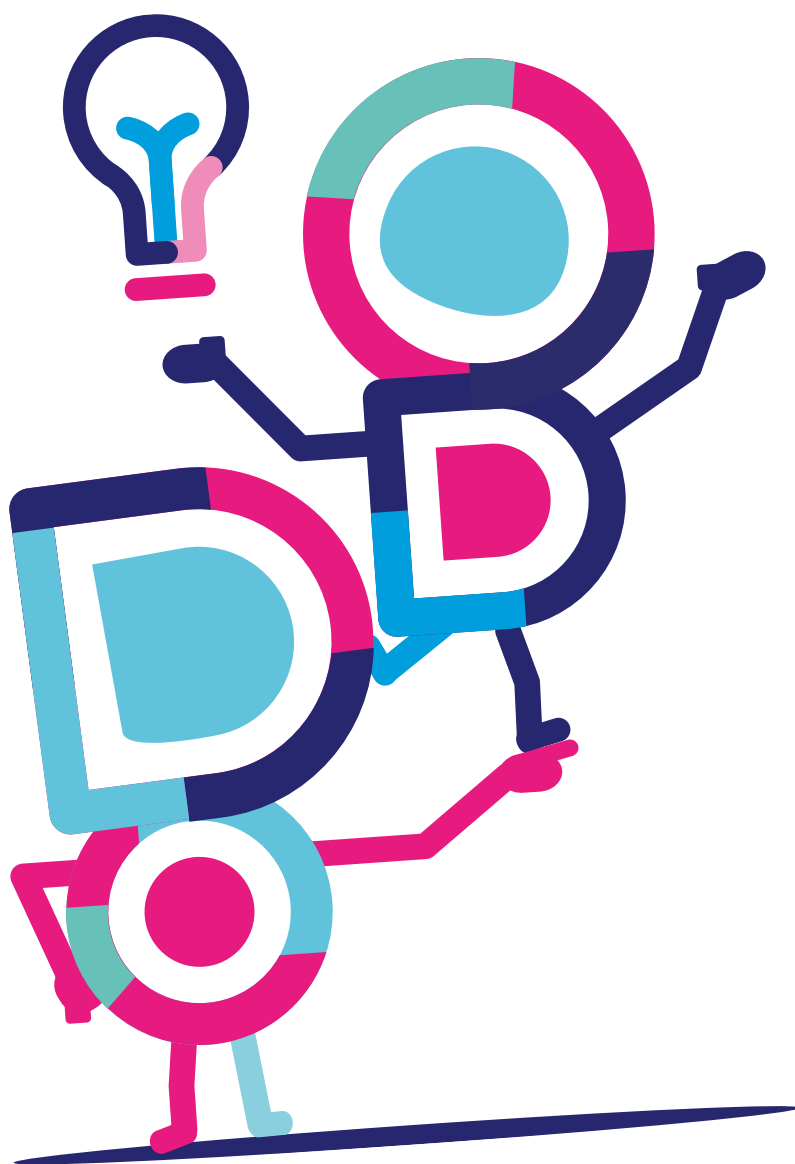




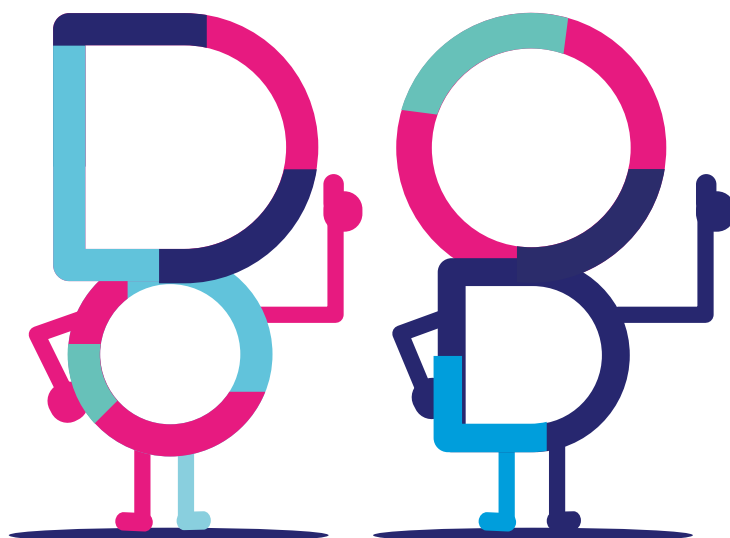
**ORGANISATION
DEVELOPMENT**

Digital tools for doing OD



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Introduction

Welcome to our short guide to working with a range of tools that can help us do organisational development (OD) online. We have created this in response to the fast-changing environment our NHS OD community have been living through in recent months, and likely will be for some time to come.

Before COVID-19, the majority of work required of an OD professional could be achieved with some tried and tested tools: a room, a flip chart, some pens, and the ever important post-it note. Now, as many of us are working remotely from our organisational buildings and teams, we've shifted not just our working patterns but also fundamentally how we do OD. This shift requires us to discover, learn and use new tools that help create positive spaces to learn, connect and grow.

This collection of tools and guidelines have been compiled to support this change of work. As with everything online, it changes quickly. Please don't think you need to know how to use every single tool. Also, hold them lightly in case one day they change. There are no 'right' tools for certain interventions. The resources listed here are part of a toolbox of options.

We would encourage you to share your experiences of the tools with the OD community. We can then curate your comments and build some wider wisdom on how the tools work in practice, what works, and what to avoid. You can email your comments to us at do.od@nhsemployers.org or via our [Do OD Slack Group](#).

We hope you enjoy this guide, and it opens new possibilities for how we do OD in health and care.

Karen Dumain & Paul Taylor-Pitt
Do OD



Paul Taylor-Pitt,
Assistant Director of OD,
NHS Employers

Karen Dumain,
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Lead, NHS England
and NHS Improvement

General guidelines

Less is more: When working with a new team or group, try not to ask too much of them too soon. The digitally savvy may take to a complex new whiteboard system with ease, but others might be using a tablet, or just be more uncomfortable. Try to use the simplest tools necessary for an intervention. For example, Zoom provides very basic whiteboard functions and allows people to stay on the same screen to work, rather than having to navigate away, sign into a different platform, and deal with multiple features to achieve the same thing.

Use mobile: You might find you need to collect content, views, or opinions during a meeting and your conference tool of choice will not work. In these circumstances, look for the light touch systems that people can use on their own mobile phones. It allows people to engage via a familiar digital tool, while keeping their meeting screen in front of them.

Drive digital learning: Trying new technologies is important but be prepared to take key stakeholders on a journey before using it in a live intervention. Participants will want to focus on the subject, not the tool: they will not want to spend time learning the technology, they will want it to 'just work'. If you are developing a team for repeated working online, invest in the time to upskill everyone.

Test and iterate: Try things out and be curious to see what is out there. It is an ever-changing landscape where new features emerge continuously in even well-established tools. Try out new combinations of technology, or new functions, to make sure they work for what you need them to do. They don't always work for multiple users, tablet users, large numbers of participants and so on. Be prepared to think on your feet.

Support: Where possible, work together. Have people in the background ready to do the 'heavy lifting' of the technology where required. Having an extra pair of hands in the form of tech facilitators or producers can be a lifesaver for complex engagements.

Function over style: We recommend you choose what works for you and your co-workers. Try not to get fixated on a new flashy tool if it complicates and confuses the intervention. Working online can be just as slick as face-to-face – and in some circumstances gives you even more control of the process - but keep the focus on what you need to achieve.

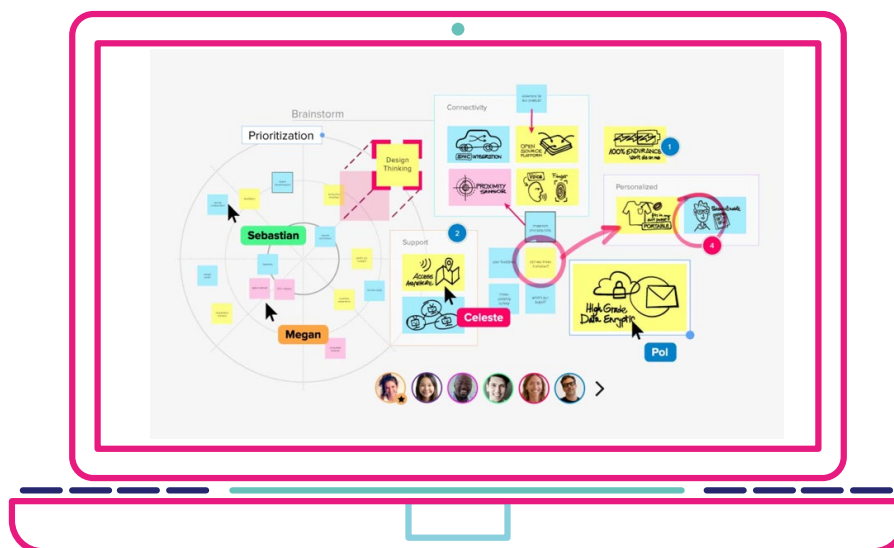
Whiteboards



What are whiteboards?

Whiteboards are digital flipcharts and post-it notes - but in the digital world you never run out of space or steal someone's favourite sharpie. Use these tools to gather people around a topic, brainstorm an idea, or work asynchronously (not at the same time) to develop a project. Some of these tools are simple, others are full of features and require some investment of your time and energy.

Whiteboards



Mural

Description

Mural is one of two top-of-the-range digital whiteboard systems currently available - the other is Miro. They are both fantastic tools with lots of functionality and the choice between them may come down to a particular function you're looking for or determined by what other people are using.

With all such whiteboard systems, you have a range of tools, templates, and features, which allow you to run a huge variety of interventions. Anything you might have done with a flipchart and post-it notes, can be done here.

Accessibility for OD practitioners

Mural is a great tool - but it is not the easiest to use or understand quickly. If you are happy picking up new digital tools, then you shouldn't find this too hard. If you are new to the world of inline working, you might find Mural at the high-end of features and options, which can make the learning curve rather steep.

Other options for more simple whiteboards are Jamboard (through Google) or use the white board integrated into Zoom.

Accessibility for participants

Participants who are new to such systems will struggle at first.

If you are planning a one-off event, then consider something more basic/ simple to ensure the technology does not get in the way of the intervention. See below for some other options.

If you are building team capacity, responding to new ways of working or managing and working across multiple remote teams - Mural is a great tool for brainstorming, collecting, synthesising, and analysing data. Mural even has templates to support this such as the 'digital assault course' designed to help new users get used to the tool.

Whiteboards

Mural continued

Cost

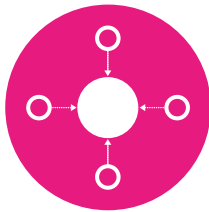
Paid options are available.

Which category

(Talk, Move, Write, Capture, Present, Poll, Change group size, Cluster & sort, Admin)



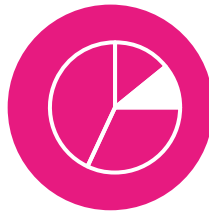
Write



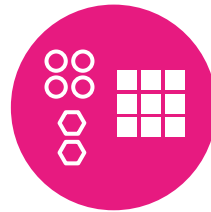
Capture



Present



Poll



Cluster & Sort

How might it be used?

You are likely to use this in conjunction with Zoom/ MS Teams for synchronous collaboration, planning, and capture. But importantly, also for asynchronous working that requires teams to access the same sheet.

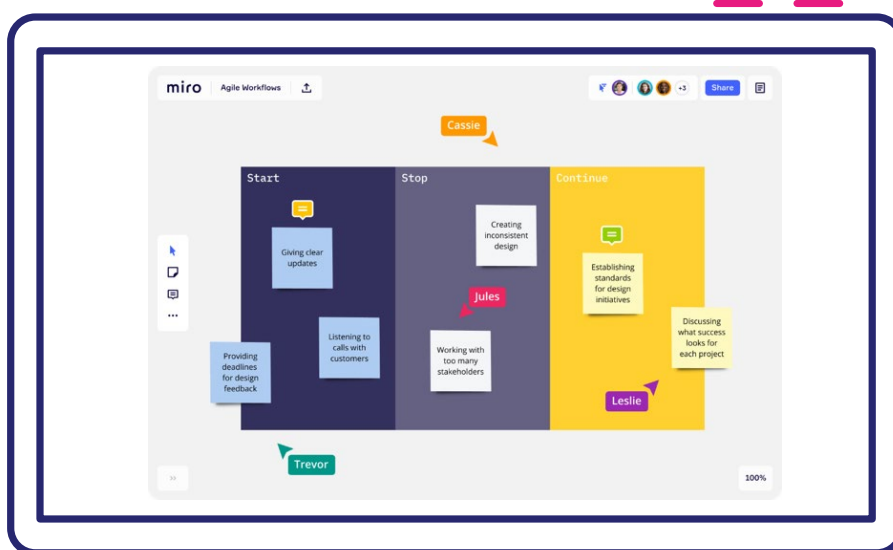
Suitable for ad hoc use?

No.

Group size (limitations and flexibility of splitting and combining)

Limited to 50 per board. A starter package is aimed at single team working.

Whiteboards



Miro

Description

On Miro, multiple participants can write, draw, and post images. Miro offers templates for things you might do with a whiteboard - from laying out the board itself for a particular process (for example, a Kanban board) to adding sticky notes to the board for when you need them. You can also attach various kinds of media to the board - documents, videos, web pages and links. Anything you can do on a whiteboard you can do in Miro, plus all the digital additions. It also integrates with a variety of other services. Video chat can be embedded into any board on paid plans.

Accessibility for OD practitioners

You can create a free account (maximum three live boards).

Accessibility for participants

Free account: an email invite adds people to your 'team', and they have access to edit all your boards. Keep in mind that this includes boards you may not want them to access.

Cost

Free for a basic account and paid options for upgrades such as unlimited editable boards and private board sharing.

Which category?

(Talk, Move, Write, Capture, Present, Poll, Change group size, Cluster & sort, Admin)

Whiteboards

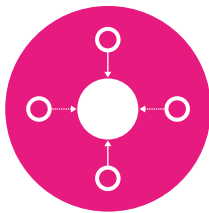
Miro continued

Which category?

(Talk, Move, Write, Capture, Present, Poll, Change group size, Cluster & sort, Admin)



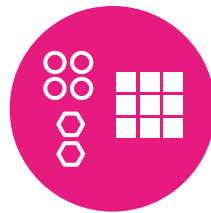
Write



Capture



Present



Cluster & Sort

How might it be used?

Like Mural you can use it in conjunction with Zoom/ MS Teams for synchronous (at the same time) collaboration, planning, and capture. But importantly, also for asynchronous working that requires teams to access the same sheet.

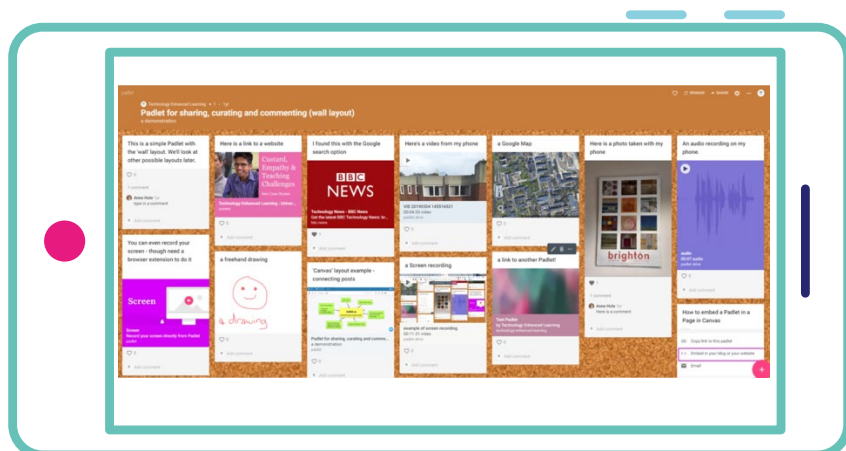
Suitable for ad hoc use?

Yes.

Group size (limitations and flexibility of splitting and combining)

No limit.

Whiteboards



Padlet

Description

Padlet is a collaborative whiteboard that's easy to use. It's template-based and each template offers a different way of organising your posts: in columns, in a wall, in a free-flowing space, on a map, as chat, and so on. You can embed various kinds of media in the templates. The ability to link boards together means you can combine several templates to achieve what you want. You can make the boards public or private, and you can easily invite people to collaborate without them needing to create an account.

Accessibility for OD practitioners

It's straight forward to create a free account.

Accessibility for participants

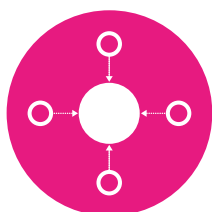
You can share the board's URL. Collaborators don't need an account.

Cost

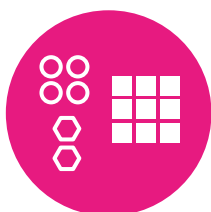
Free, or paid options for a Pro account and more storage.

Which category?

(Talk, Move, Write, Capture, Present, Poll, Change group size, Cluster & sort, Admin)



Capture



Cluster & Sort



Write

Whiteboards

Padlet continued

How might it be used?

For data capture before and during a conference, and for supporting team meetings, Since you can add your own background image to the board, it could be used as a very basic way of running an exercise where you want to simulate standing in different places in a room.

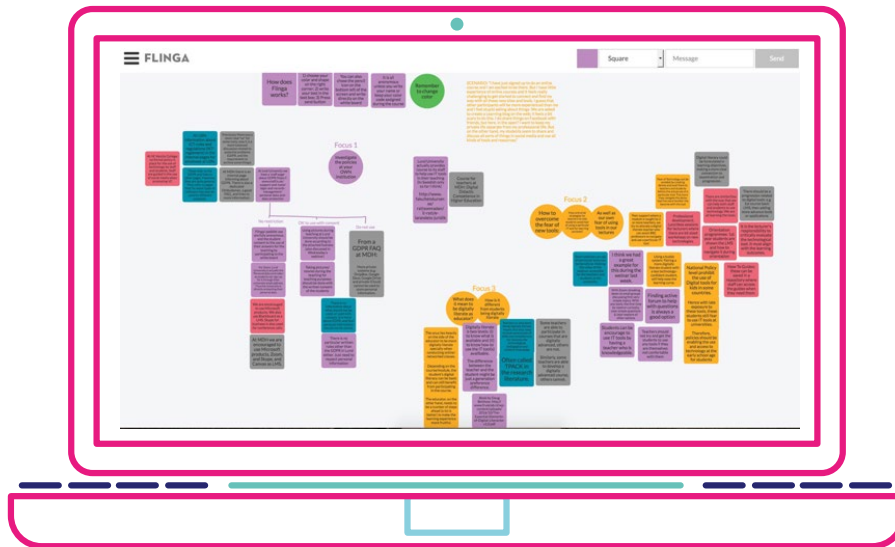
Suitable for ad hoc use?

Yes.

Group size (limitations and flexibility of splitting and combining)

N/A.

Whiteboards



Flinga

Description

Flinga is a collaborative whiteboard with a beautifully simple interface: almost everything is under easy-to-find buttons around the edge of the board, and the Help system consists of just seven videos, which you can watch without leaving the board.

It has two modes:

- **Whiteboard:** you 'send' sticky notes (of different shapes and colours), images or text onto the board, move them around and draw with the pen tool.
- **Wall:** a group can 'send' messages to the board which appear on large coloured sticky notes. You can view the notes in the order they arrived, in reverse order, in the order of 'likes', as a list or grid. Four buttons let you control what collaborators can change.

There are three sample activities to try, and if all that isn't enough then, uniquely, you can even export the board to an Excel file.

Accessibility for OD practitioners

It's easy to create a free account.

Accessibility for participants

You can invite collaborators with a URL, a QR code or by sending them an access code which they can paste into the login page. They don't need an account.

Cost

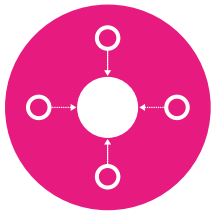
Free. You can have up to five active sessions and delete old ones to make space for new ones.

Whiteboards

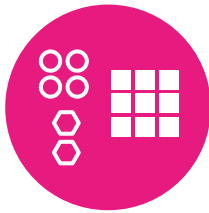
Flinga continued

Which category?

(Talk, Move, Write, Capture, Present, Poll, Change group size, Cluster & sort, Admin)



Capture



Cluster & Sort



Write

How might it be used?

As an online whiteboard.

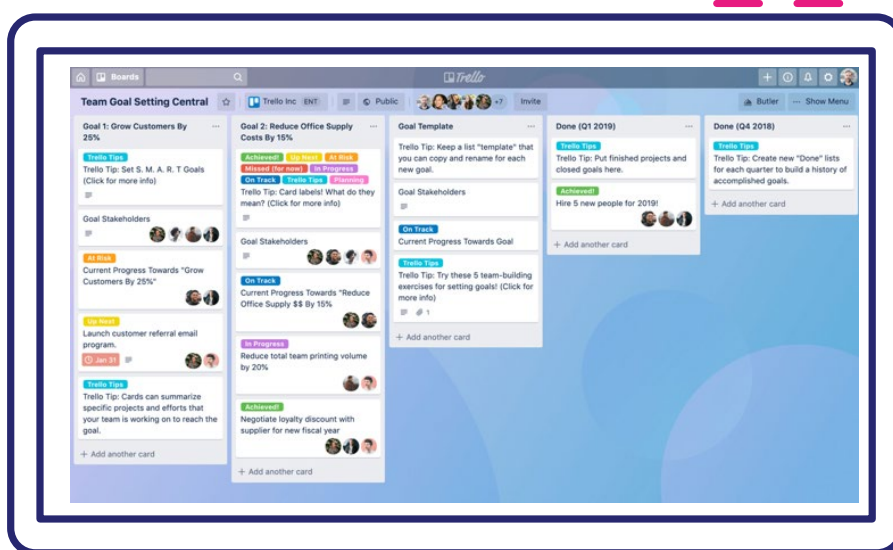
Suitable for ad hoc use?

Yes.

Group size (limitations and flexibility of splitting and combining)

N/A.

Whiteboards



Trello

Description

Trello is a narrowly focused whiteboard: it holds lists of cards, and that's it. While you could easily do that in a more powerful whiteboard app, Trello's focus makes it quick to get started and very simple to use.

In Trello, a card is a task and contains all the features needed for collaborative task management: owner(s), due date, attachments, checklists, comments and change history. An example application would be a Kanban board with three lists: To do / Doing / Done. The cards move between the lists as the tasks progress.

For OD practitioners, Trello can be thought of as a general sorting and clustering tool. Instead of sticky notes on a whiteboard, you move cards between lists (clustering) and move them up and down the lists to prioritise them (sorting). Sometimes less is more, and Trello's obvious interface and mobile app make it a pleasure to use.

Accessibility for OD practitioners

Open an account, create a board, invite collaborators.

Accessibility for participants

Open an account and accept an invitation to a board.

Cost

The free version is very usable.

The paid version lets you integrate with MS Teams, Google, and many other apps.

Whiteboards

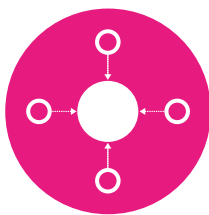
Trello continued

Which category?

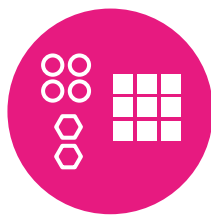
(Talk, Move, Write, Capture, Present, Poll, Change group size, Cluster & sort, Admin)



Write



Capture



Cluster & Sort



Admin

How might it be used?

For clustering and sorting ideas.

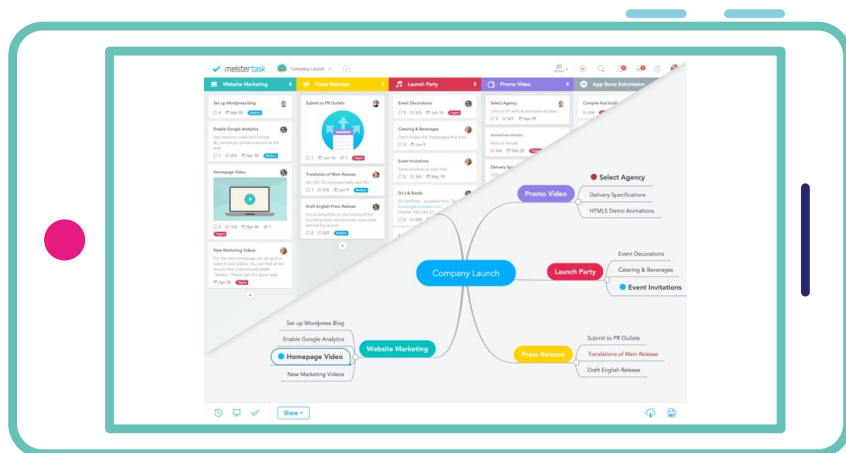
Suitable for ad hoc use?

Yes (but everyone needs an account).

Group size (limitations and flexibility of splitting and combining)

N/A.

Whiteboards



Mindmeister

Description

This is a shared mind mapping on a fixed format whiteboard product. It's simple to use and is as useful for individual mind mapping as when used collaboratively. You can configure the tool in many ways, and a history view lets you see changes made over time. You can embed documents, images, links and videos, and can present the board to others.

Accessibility for OD practitioners

You need to create an account.

Accessibility for participants

Invite others by email or by sending the URL. They will need to create a free account to see the map.

Mobile app available.

Cost

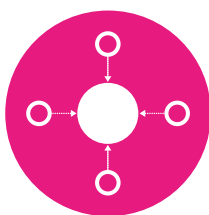
Free (three shareable mind maps, export only to text, no attachments). Paid options available (unlimited maps, better export, chat inside maps).

Which category?

(Talk, Move, Write, Capture, Present, Poll, Change group size, Cluster & sort, Admin)



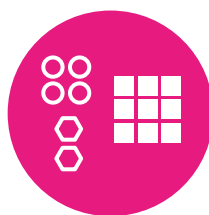
Write



Capture



Present



Cluster & Sort

Mindmeister continued

How might it be used?

If you already use a personal mind mapping tool to sketch out OD designs, this may be a tool for you, as it allows you to share and collaborate with others. If you're new to mind mapping, it's useful in visually organising the structure of something when you don't know in advance how best to do it.

Suitable for ad hoc use?

Yes.

Group size (limitations and flexibility of splitting and combining)

N/A.

Whiteboards



Google Workspace

Description

Google Workspace (previously Google Suite) is one of the only free alternatives to MS Office. It covers all the basic such as documents, spreadsheets, slides, notes, and multiple options for conference calling and chats. Unlike MS Office it runs everything from your browser, so internet access is a must - even to retrieve files. But unlike the MS365, real time collaboration is fluid and simple. Rather than working from multiple access points for documents (teams, web browser or desktop app) Google works only through the browser making it a cleaner and more intuitive interface.

What Google makes up for in collaboration and ease of use, it loses in functionality. For the hard-core Excel and PowerPoint users, the Google versions are not going to cut it. You will often need to revert the file, download it, and open in the MS version (all completely compatible) to finalise a project. Google also contains an online whiteboard called Jamboard. This lacks the functionality of Mural or Miro, but does simple whiteboard tasks well, and can be set up in advance of any session.

Accessibility for OD practitioners

It's easy to use and free, but you will need a Google account.

Accessibility for participants

It's very easy to collaborate and engage with if you have a Google account. If you're running an event with people who don't have a Google account, their interactions will be limited.

Cost

In the main, all Google services are free - if you accept a certain level of data capture and target advertising to tailor your experience. Cloud storage is still cheap.

Whiteboards

Google Workspace continued

Which category?

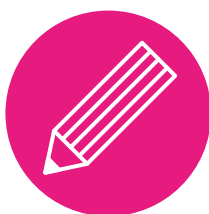
(Talk, Move, Write, Capture, Present, Poll, Change group size, Cluster & sort, Admin)



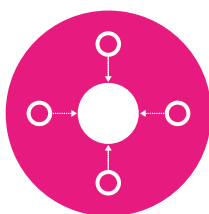
Talk



Move



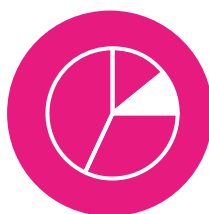
Write



Capture



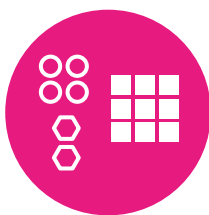
Present



Poll



Change Group
Size



Cluster & Sort



Admin

How might it be used?

The platforms and tools work well when you need to collaborate with individuals across multiple organisations in a light touch way. You could use a Google Doc, for example, as a capture tool for the outputs from group brainstorming or open space type sessions.

The whole group can work independently on the same document and move across sections easily. Google Slides could be used as a virtual constellation board where people move their own symbol on the slide to represent where they stand on a model, or in relation to each other. The final outputs are then immediately available to people in their raw form (so you don't need to package and send them on) or can be easily downloaded and converted into more powerful programmes such as Word or PowerPoint.

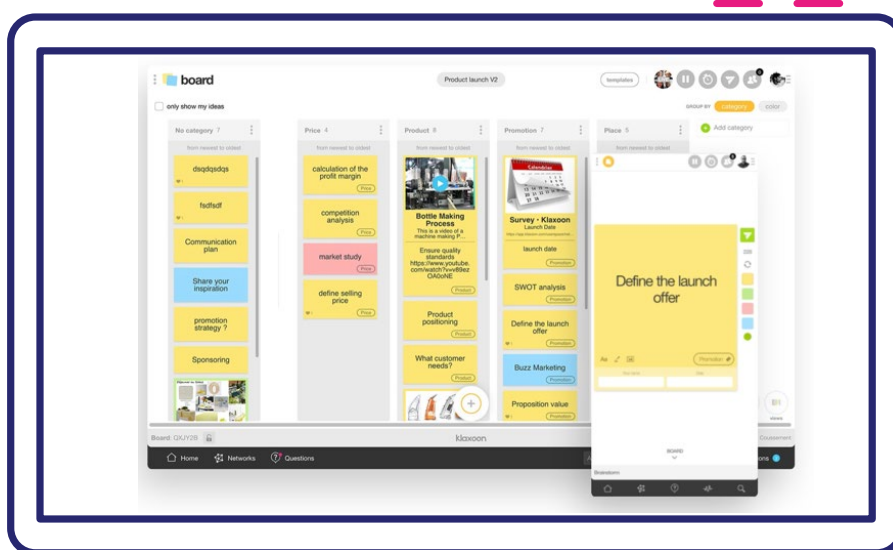
Suitable for ad hoc use?

Yes.

Group size (limitations and flexibility of splitting and combining)

Lots of flexibility.

Whiteboards



Klaxoon

Description

Klaxoon is intended for team collaboration (where all team members have an account) but it is built around the core idea of a whiteboard, and you can use the board feature as a solo facilitator quite easily.

The board feature of Klaxoon works by letting you place sticky notes ('ideas') in different colours onto a board. You can choose and change backgrounds on which to stick your ideas, and depending on how you set the board up, you can define categories for the ideas. It has a useful feature of being able to switch from the whiteboard view with notes stuck on whichever template you might be using (such as a grid or some concentric circles) and then see the ideas listed according to category or colour. Further sorting is also possible using by adding 'dimensions' to your ideas.

When working collaboratively on a board, you can start what they call a 'live' - a video call within the board, limited to five, 15 or 30 minutes in length. Or you can start an MS Teams, Zoom, Google Meet, WebEx or Skype call from the board allowing everyone to jump into that environment.

Klaxoon say they are Mural-plus. In addition to the whiteboard, you can run meetings, do surveys, create learning/testing modules, and create private groups in which you host and share Klaxoon activities.

Accessibility for OD practitioners

It's completely browser based. All you need to do is set up an account.

Accessibility for participants

Invite people by email (or by name if they are already a user).

Whiteboards

Klaxoon continued

Cost

Paid per month for one login using whiteboard and collaborative messaging only (15 people max on integrated video conferencing, up to 100 participants on the board).
Extra cost per month for one login with all features available.

Which category?

(Talk, Move, Write, Capture, Present, Poll, Change group size, Cluster & sort, Admin)



Talk



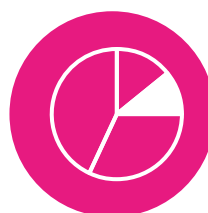
Move



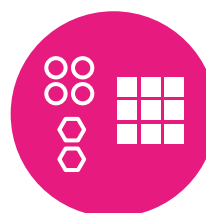
Write



Present



Poll



Cluster & Sort

How might it be used?

As a whiteboard product, but the integral video calling options are useful when working separately on a group project – so not part of a scheduled session – but you want to have a quick chat with someone else also working on the board. This is the beginnings of video being integrated into other products and platforms, rather than standing on its own.

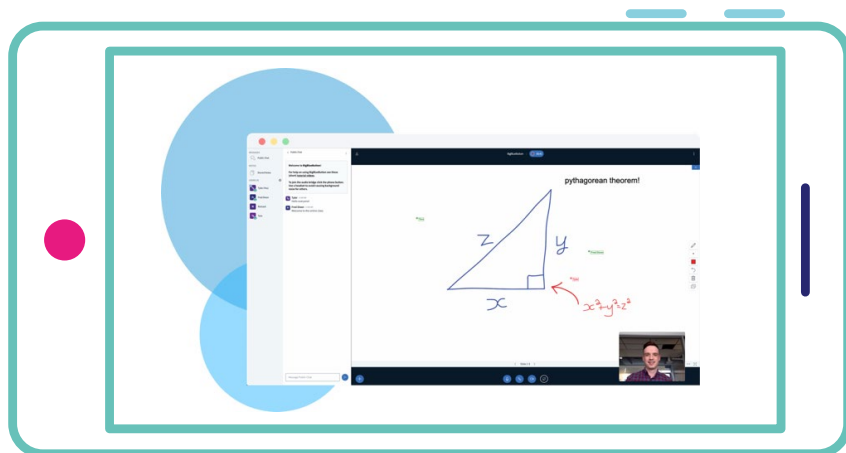
Suitable for ad hoc use?

Yes (where one facilitator buys a login and runs the intervention).

Group size (limitations and flexibility of splitting and combining)

None.

Whiteboards



BigBlueButton

Description

A web conferencing system designed for online learning. It's an open-source platform which features a whiteboard, multiuser annotations, webcams, breakout rooms (auto, manual, participant choice, timed), screen sharing, polling and slide sharing. It's aimed at the education sector, and so the 'teacher' (moderator) can control settings for participants.

Accessibility for OD practitioners

Any browser can be used but note that BigBlueButton is not a service: you need to install the software on your own server. You can create an account on the demo platform to evaluate the software but that is not intended for live use.

Accessibility for participants

Any browser (including mobile).

Cost

The software is free to download and use.

You need a Unix/Linux server and someone to install, configure and support the software.

Which category?

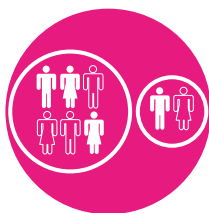
(Talk, Move, Write, Capture, Present, Poll, Change group size, Cluster & sort, Admin)



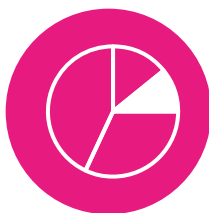
Talk



Present



Change Group
Size



Poll

BigBlueButton continued

How might it be used?

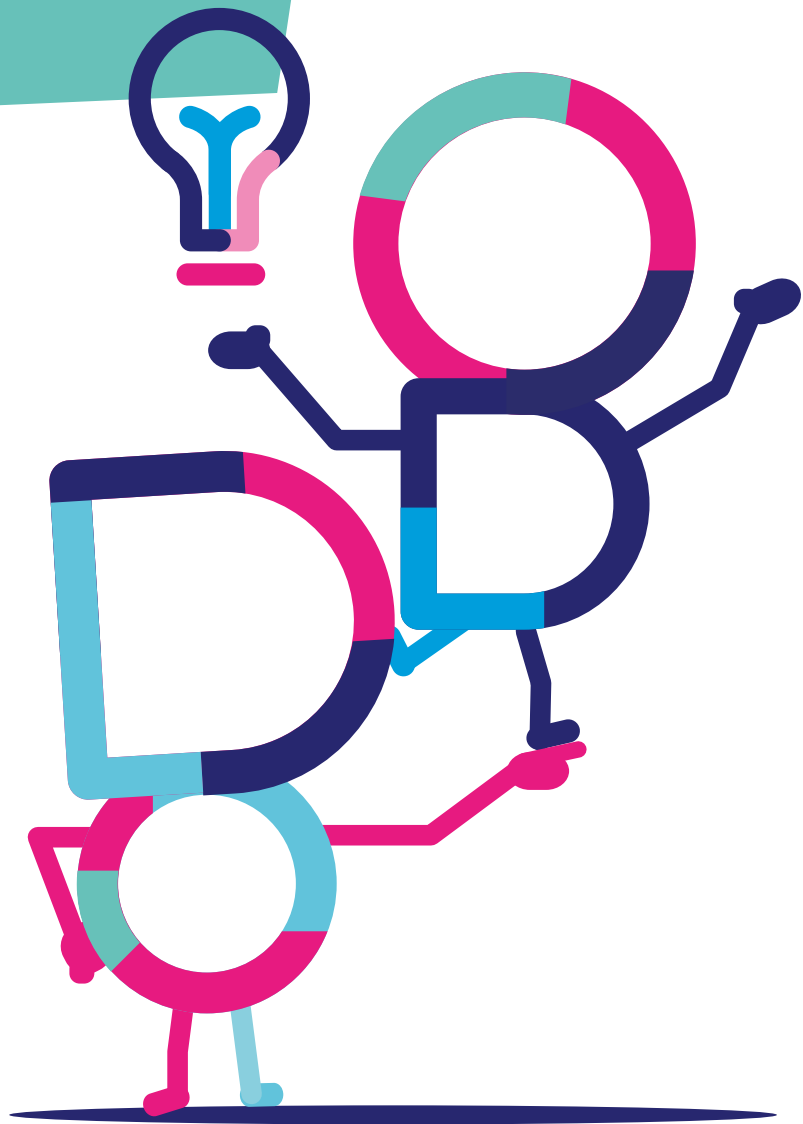
This looks great for running online courses. It is explicitly aimed at teachers and has back-end integration to learning management systems (LMS) if required.

Suitable for ad hoc use?

No.

Group size (limitations and flexibility of splitting and combining)

No limit.

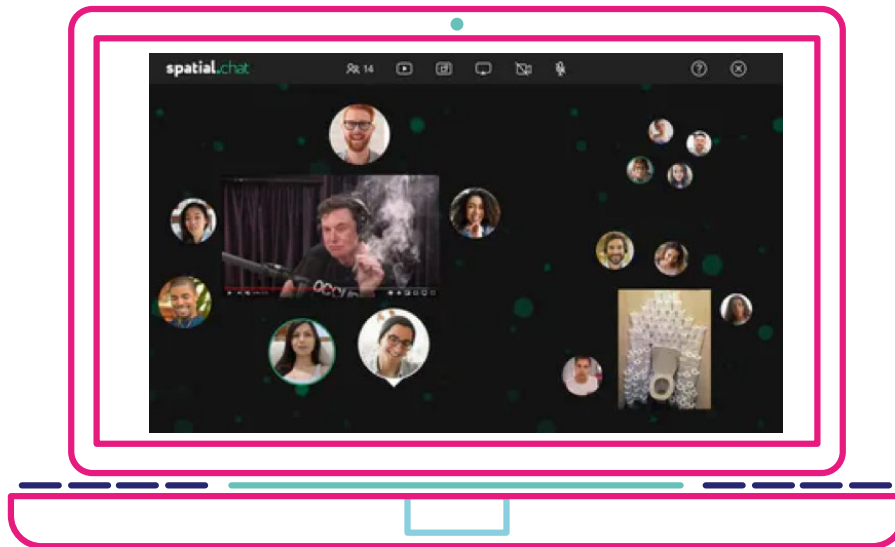


What are video spaces?

Video spaces are a step away from the standard video conferencing experiences, which offer only rectangular videos with no movement allowed unless gifted by the organiser.

With features such as spatial sound, such tools allow you to move between groups in a digital space easily shifting your audio and experience from one to the other. These are great for open spaces and social experiences.

Video spaces



Spatial.chat

Description

This is an online video conferencing platform. It features a two-dimensional screen space where you are represented by an avatar that moves around the screen using a mouse or cursor keys. The closer you move towards people, the louder their conversation gets, and moving next to them pushes you into a video call meeting. You can configure different rooms and integrate video and sound. There are limits on the participant size which means this is mainly a tool for small group work.

Accessibility for OD practitioners

Getting signed up is straight-forward and registration is via the website.

Accessibility for participants

A shareable link allows people access into the site.

Cost

There is a free version, which is limited to 25 participants in any one room, and three rooms in total. There is also a cap on participant minutes (3000 per month). So, if you had 10 people in a room for an hour that would use 600 participant minutes. Note that only meetings with more than five people count towards the participant minutes cap, but you can see how quickly they might get used up with bigger groups and/or longer events. The paid standard plan increases the number of rooms, participants, and minutes. There are also custom plans for specific events although these are pricey unless you can pass on the charge to participants.

Video spaces

Spatial.chat continued

Which category

(Talk, Move, Write, Capture, Present, Poll, Change group size, Cluster & sort, Admin)



Talk



Move

How might it be used?

This is a good platform for open space events or anything where you want people to move freely around and interact with others online. The strength of Spatial.chat over other similar platforms is that the sound is dynamic - the closer you are, the more you can hear. This allows for eavesdropping which can be very useful if you're wanting to monitor groups without popping up on screen. You can also allow people to broadcast to everyone, which makes presenting possible, and opens up the potential for online fishbowl and panel conversation activities.

Suitable for ad hoc use?

Yes.

Group size (limitations and flexibility of splitting and combining)

25 people per room with the free plan. Groups can form into any sized group.

Video spaces



Cozyroom

Description

This is a peer-to-peer audience conferencing tool. Each participant has a two-dimensional avatar which can move around the screen - the nearer to another participant you get, the more loudly you can hear them. What's unique about Cozyroom is that it's peer-to-peer, so audio is transferred directly between devices rather than through a host server, making it more secure. It also offers a number of items which can be placed on the screen to create bespoke scenes to meet in, or for use in a session. It is very simple and was designed for developers and friends to hang-out, rather than as a corporate tool.

Accessibility for OD practitioners

It's a web-based platform, no login or account required.

Accessibility for participants

You can join the room via a unique link. It helps if everyone is using headphones. People need to use Chrome or Safari.

Cost

Free.

Which category?

(Talk, Move, Write, Capture, Present, Poll, Change group size, Cluster & sort, Admin)



Talk



Move

Cozyroom continued

How might it be used?

As this is audio only, it creates a different, often more intimate, climate. This can be useful for informal getting-to-know-people sessions, or just as a variation on video screen calls. The placeable items also mean that groups can create their own spaces. This allows the platform to work well as a constellations tool, where people can place objects on the screen as a representation of group or organisation dynamics, and then discuss with others on the call.

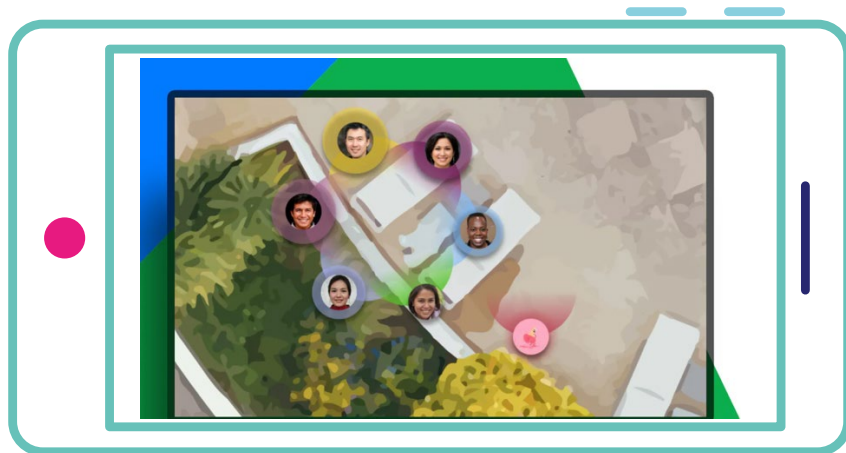
Suitable for ad hoc use?

Yes.

Group size (limitations and flexibility of splitting and combining)

This works well with smaller groups - up to 10 to 12 people.

Video spaces



High Fidelity

Description

This is a spatial audio experience in a 2D environment designed for flat screen devices like computers and mobile devices. It's a beta product, so early adopters are doing user testing to some extent. The platform comes with a standard background although it is possible to customise this to something else. The unique feature of High Fidelity is the directional sound - each avatar has a cone indicating which direction you're facing and therefore what you can listen to.

Accessibility for OD practitioners

You need an account to use the platform, which requires you to provide your email address and full name. Login access is then emailed to you.

Accessibility for participants

You can invite others to your High Fidelity space by giving them an invite link or QR code. Like other audio platforms, it requires that everyone wears headphones. Participants need to use Chrome or Safari, although iPhone devices are Safari only.

Cost

Free for up to 20 people at once in the room. Paid options for events up to 120 people.

Which category?

(Talk, Move, Write, Capture, Present, Poll, Change group size, Cluster & sort, Admin)



Talk



Move

High Fidelity continued

How might it be used?

As an audio-only platform this works well as something different from video, and to create a different climate. It might be useful for when you want different groups to meet without any status issues getting in the way. It's less interactive than CozyRoom, which has placeable objects.

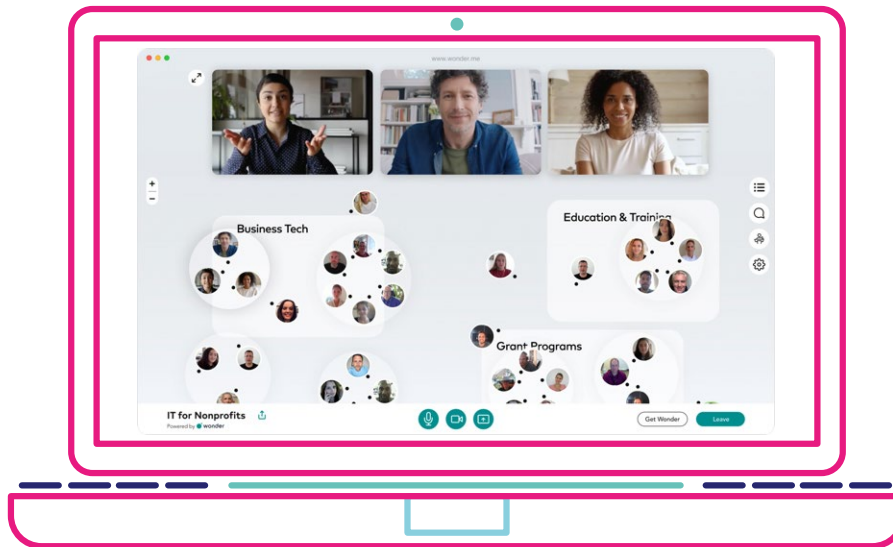
Suitable for ad hoc use?

Yes.

Group size (limitations and flexibility of splitting and combining)

A free account is currently limited to 20 people. This is a beta version so it's unclear how it may develop in the future.

Video spaces



Wander.me

Description

Wonder is a video conferencing platform which allows participants to move freely around the screen via a two-dimensional avatar. When your avatar bumps into someone else, a circle is formed, and a video call is started. Other people can then join these circles, up to a maximum of 15 in each circle conversation. The circles can be locked to make them confidential, and people can move away and leave at any point.

Any number of different circles can happen at the same time, and the platform claims to be able to handle 1500 people in a room simultaneously. It is possible to change the background of the room, and you can set up marked areas on screen to help people navigate around. The host can broadcast to the whole group, but participants can't speak to the whole room. There is a chat function for participants to chat with any individual, the circle they are currently in, or the whole room.

Accessibility for OD practitioners

An account is required. Sign up on the website and receive a link.

Accessibility for participants

You can invite others through a unique URL. They need to enter their name and then access the room. Participants need to use Chrome or Firefox browsers, and there is a limited mobile functionality.

Cost

It's currently free to get an account and free to use the room. There is talk of introducing pricing towards the end of 2021.

Video spaces

Wander.me continued

Which category

(Talk, Move, Write, Capture, Present, Poll, Change group size, Cluster & sort, Admin)



Talk



Move

How might it be used?

This is an ideal platform for open space type events, where you need the functionality of a Zoom-like video conferencing tool, with the freedom to move around and join different groups. Unlike the audio-only platforms (see CozyRoom and High Fidelity) or rival video platform Spatial.chat, it's not possible to 'overhear' conversations in other groups. This may be advantageous if you want to enable fluid groups which can also quickly become closed groups.

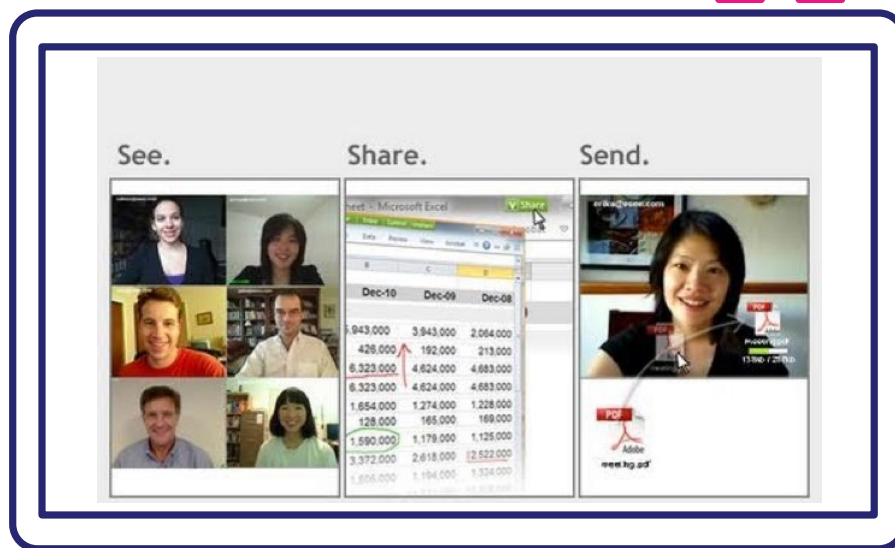
Suitable for ad hoc use?

Yes.

Group size (limitations and flexibility of splitting and combining)

1500 in a room at the same time (although this may create issues for those on slower processing or broadband speeds). Small conversation groups within each room are limited to 15 people but the number of these is unlimited, which makes it suitable for pair work through to group work of 15 people.

Video spaces



Vsee

Description

This is a video conferencing platform, which serves the healthcare market by providing secure video calls - doctor/patient calls and therapy. The waiting room really is a waiting room. The 1:1 version is free and may be worth considering in some contexts. The full service is probably outside the scope of OD (online appointments, credit card payments).

Accessibility for OD practitioners

It requires a download.

Accessibility for participants

It requires a download.

Cost

VSee Clinic is free for 1:1 calls.

Which category?

(Talk, Move, Write, Capture, Present, Poll, Change group size, Cluster & sort, Admin)



Talk

Video spaces

VSee continued

How might it be used?

Coaching, where users require a secure connection, or HIPAA compliance is required. Zoom and MS Teams may have caught up with the compliance aspect by now.

Suitable for ad hoc use?

Yes.

Group size (limitations and flexibility of splitting and combining)

One to one.

Video spaces



Clickmeeting

Description

A webinar system. Looks like a well-established product. Lots of features oriented to webinars including simultaneous (Google) translation, payment, and registration. Some of the downsides - breakout rooms are new, and the max number of cameras on at any one time is 25. It's a presenter model.

Accessibility for OD Practitioner

No installation - web-based.

Accessibility for Participants

No installation - web-based. Mobile app available.

Cost

Complex pricing model depending on the max number of attendees you want.

Which category?

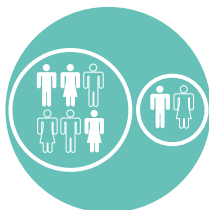
(Talk, Move, Write, Capture, Present, Poll, Change group size, Cluster & sort, Admin)



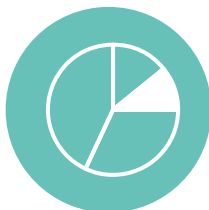
Talk



Present



Change Group Size



Poll

Clickmeeting continued

How might it be used?

It's focused on large scale webinars. You might choose to pay for a month or two to run a large event if you wanted specific features. It's geared towards content sharing with larger groups, rather than anything more interactive over video.

Suitable for ad hoc use?

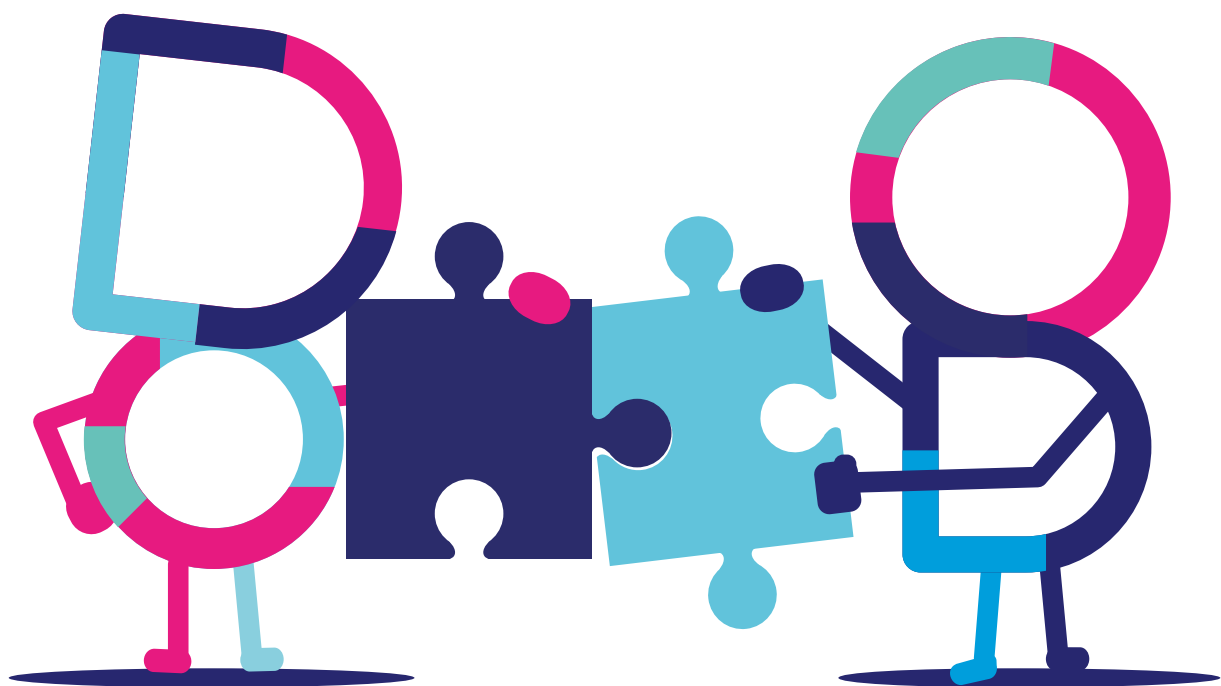
No.

Group size (limitations and flexibility of splitting and combining)

Video meetings are limited to 25, no matter what the max attendee limit is (the product focus is webinars).

Breakout rooms are new - they are obviously changing with the times. Breakout rooms are limited to 25.

Maximum cameras on at the same time is also 25 (even if you have hundreds of people in your webinar).



What are 3D spaces?

Various 3D spaces are becoming available for use with and without virtual reality (VR) headsets. They tend to be demanding on your computer and can be confusing to move around in at first. Here are four spaces to consider.

3D spaces

Moot

This is an experimental offering in virtual online events and conferences. It's a 3D meeting space where you control an avatar and interact with others. It's designed for use with VR headsets but works on a desktop - although it does take up a good deal of processing power. Arguably the future of online meetings will be along these lines. Moot isn't fully there yet but can be used for a different online meeting experience, although only for small groups using the free account.

TriCAT Spaces

This is a 3D environment which looks like a corporate office park. The avatars wear suits. You can rent a variety of environments for up to 36 participants. The 'scenario packages' page provides details.

SystemicVR

This is a 3D environment designed to support facilitators who use systemic constellations. Avatars and objects can be arranged in a virtual room. It is currently limited by being a single user: either the facilitator moves avatars and objects on behalf of participants or allows remote control of their computer so that participants can do so themselves. You need to run a Zoom call at the same time and share your screen so that participants can see and hear what's going on.

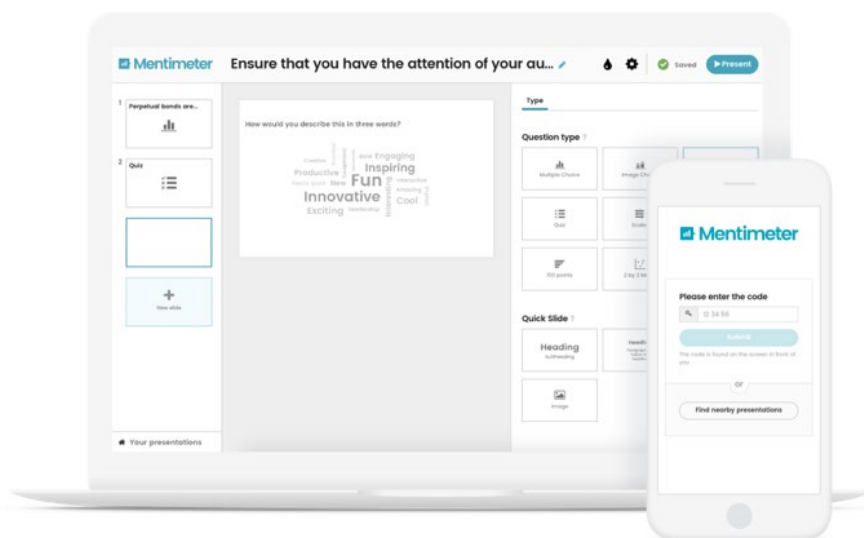
ProReal

This is a 3D environment which feels more like a computer game. The avatars represent generic human shapes rather than actual people and the environment is more of an imaginary world.

Miscellaneous tools



Miscellaneous tools



Mentimeter

Description

Mentimeter is an interactive presentation platform. You can build entire presentations through it (like PowerPoint or Keynote), but its main power is in interactive polling and participant data gathering. It features 13 different question types. Participants use a code to access a website where they answer questions and see the aggregated answers in real time (although it's also possible to not show the answers and to allow participants to answer over a longer period). Data collected through Mentimeter can be downloaded as images, PDF and Excel files.

Accessibility for OD practitioners

Sign up is easy and there is a free account, which is limited to two questions and five quiz questions in any one presentation.

Accessibility for participants

This is a core strength of Mentimeter. A short URL: www.menti.com takes you through to a page where you enter a code, or a unique URL avoids the need for a code at all. The site works on almost all browsers and is well configured for both desktop and mobile devices.

Cost

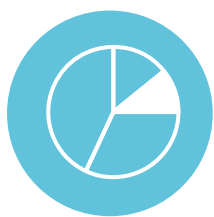
A free account will provide you with two questions, but to unlock more presentation and question options a 'basic' account has an annual fee. There is a 'pro' account which gives you form filling capability and the option to remove the Mentimeter branding, but if you're happy to have it look like a Menti site then the basic account is fine. There are ways of using Mentimeter in every intervention, so the basic cost is still good value for money.

Miscellaneous tools

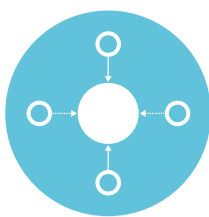
Mentimeter continued

Which category

(Talk, Move, Write, Capture, Present, Poll, Change group size, Cluster & sort, Admin)



Poll



Capture

How might it be used?

The most obvious use for Mentimeter is in evaluation activities. It's a very good replacement for 'happy sheets' at the end of any event, and the mobile capability is so good this is one of the few tools that you will still use during in-person place-based events.

There's a lot more that you can use it for, and any activity where you capture data from participants can be done effectively over this platform. Examples include collating topics for open space sessions, voting on which actions need most attention, placing participants on a 2x2 grid (such as support and challenge, or energy/attitude).

The answers are all anonymous which has an advantage in data protection, minimises login requirements and potentially creates more honest responses. It does mean some functions that OD practitioners might want to use it for are limited. For example, it's possible to place yourself on a grid, but not easy for anyone to know who's placed where. There is a segmentation tool whereby you can see the results of one question segmented by the answers to another question.

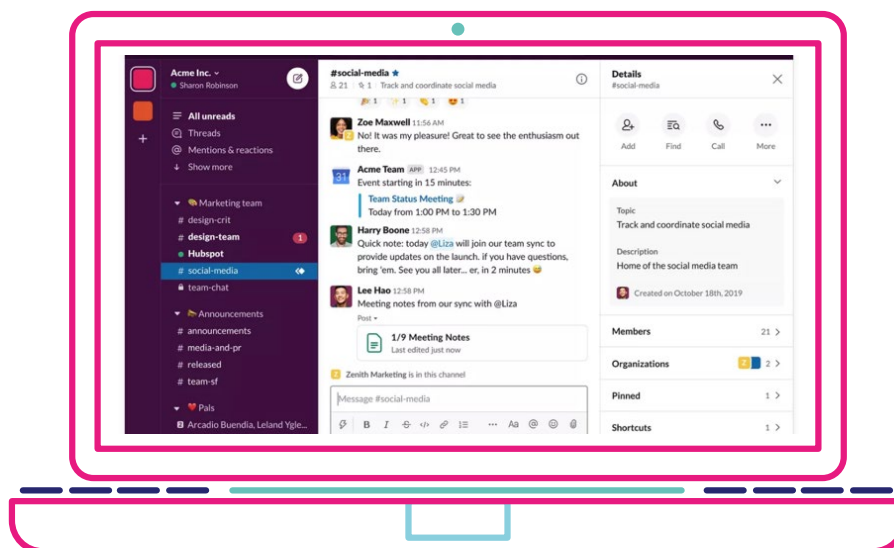
Suitable for ad hoc use?

Yes.

Group size (limitations and flexibility of splitting and combining)

There is no limit to how many people you can use this with.

Miscellaneous tools



Slack

Description

Slack is billed as an 'email killing' platform and is mainly marketed as enterprise (whole organisation) productivity and communication software. However, more usefully to an OD practitioner, it is still offering a very functional free platform which can be used for specific OD activity. All those registered on the site can chat, upload and download content, create and join channels, and integrate with a large number of other tools. In this way Slack is a very useful way of creating learning communities for programmes running over time, or discrete events where the ability to collate and share documents comes in handy.

Accessibility for OD practitioners

You can register for a Slack site by providing an email address and a unique name for the Slack group you are wanting to set up.

Accessibility for participants

Invitations can be made via email or a shareable link.

Cost

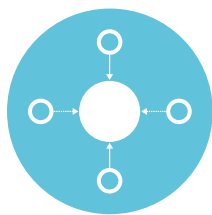
Free. Since the acquisition of Slack by Salesforce there has been a change in approach and more efforts have been made to get people to switch to paid accounts. However, for smaller groups, or one-off events, a free account is all you need.

Miscellaneous tools

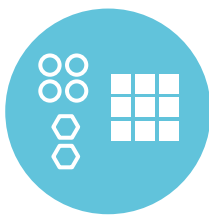
Slack continued

Which category

(Talk, Move, Write, Capture, Present, Poll, Change group size, Cluster & sort, Admin)



Capture



Cluster & Sort

How might it be used?

Slack can be used to support leadership and change programme with participants from across different organisations. Organisations generally have systems in place for this - SharePoint or MS Teams, but these are less effective when dealing with people with different email addresses and access rights. Slack works as a communications tool and document storage facility. The free account will provide 10k searchable messages, 10 apps and integrations, 1-to-1 video calls, and two-factor authentication, so it's unlikely you'll need to upgrade.

Another use for Slack is one-off events such as online open space events. Combined with Zoom, Spatial, or an audio-only platform, Slack can be used to capture the outputs and thoughts of participants in a way that everyone can access. For an open space event, you can create a Slack space with placeholder channels and give all participants access. When the open space groups form questions, these replace the placeholder names, and each channel is dedicated to one of the open sessions. Participants can upload documents, chat, link to other platforms such as Google Docs, and all the content can be exported for wider sharing.

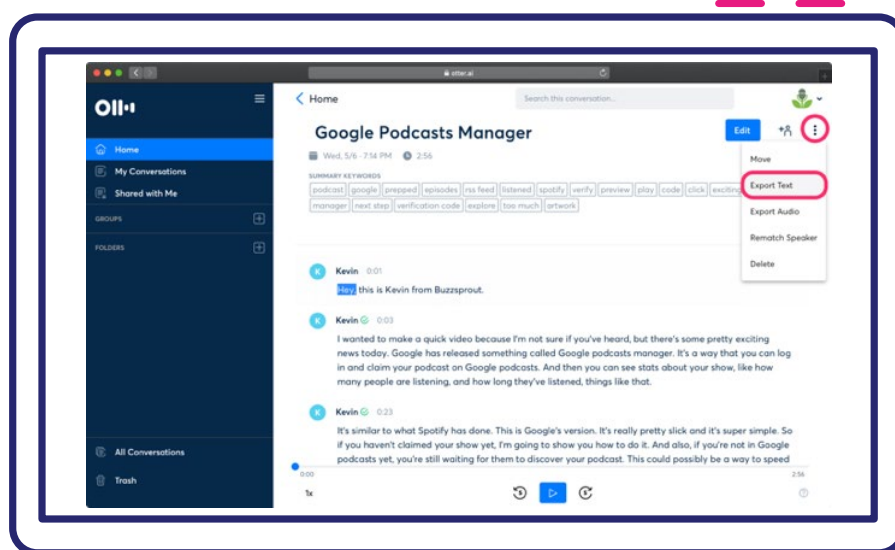
Suitable for ad hoc use?

Yes.

Group size (limitations and flexibility of splitting and combining)

An unlimited number of users are allowed into the site - the only constraint is in the number of searchable messages. Channels can be freely accessible or made private to smaller groups.

Miscellaneous tools



Otter

Description

Automated transcription service.

Record a Zoom or MS Teams meeting, upload it to Otter, wait a few minutes for the transcription, then correct it using the synchronised editor. You can then share recordings and transcripts with others who have an Otter account.

It's much cheaper and quicker than transcription, but corrections can take longer than you expect. Otter doesn't get everything right and often it's the smallest, quickest, mumbled sentences that make a big difference to the sense of what it being said - and can sometimes be missed. Obviously, it struggles when someone is speaking on a poor connection.

Live transcription of a meeting is also possible: it listens to you and whatever comes out of your laptop speaker (we've seen issues when doing this with MS Teams). A full integration of live transcription (not via your mic) is available with Zoom if you have an Otter Business subscription.

An alternative is [Sonix.ai](https://sonix.ai) which seems to be about as accurate as Otter.

Accessibility for OD practitioners

Web-based and mobile app.

Accessibility for participants

Web-based and mobile app.

Miscellaneous tools

Otter continued

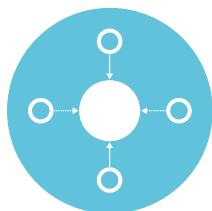
Cost

Free: 600 mins per month, max 40 mins per recording.

Paid options include 6000 mins per month, max four hours per recording, and integrated Zoom live transcription.

Which category?

(Talk, Move, Write, Capture, Present, Poll, Change group size, Cluster & sort, Admin)



Capture

How might it be used?

You can use this for transcribing interviews with individuals and groups, and for capturing key insights in discussions. You could also use it for note taking for any group work you're facilitating, which frees people up to be part of the conversation.

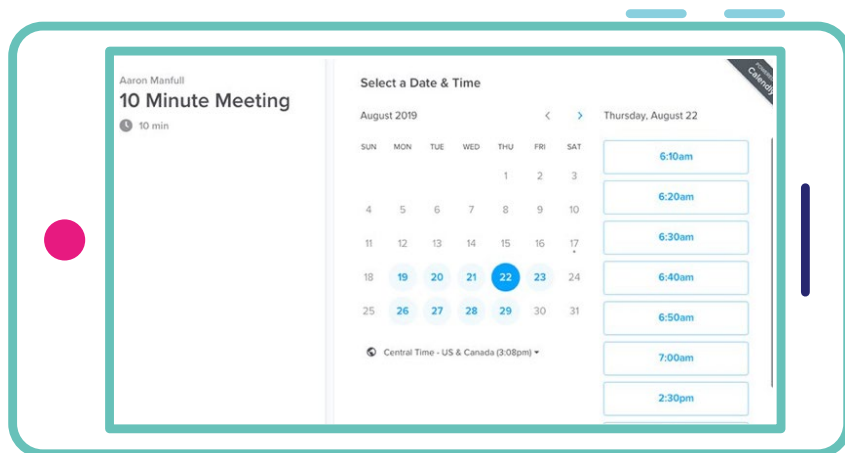
Suitable for ad hoc use?

Yes.

Group size (limitations and flexibility of splitting and combining)

N/A.

Miscellaneous tools



Calendly

Description

This daily admin tool is great if you need to manage multiple calendars, are having to juggle incoming requests for meetings, or scheduling multiple people across a network where people can't see your diary.

Accessibility for OD practitioners

It's easy to use and set up for the basic functions. You only need to upgrade to a paid account if you have multiple calendars and could see yourself using this every couple of days.

Accessibility for participants

This is designed for scheduling with external participants. It's easy to set up calls and the interface is intuitive.

Cost

Free for a single user and one calendar interface and this is fine for basic/ personal work. You might have to accept the branding on your schedule invites, but paid options are available too.

Which category?

Talk, Move, Write, Capture, Present, Poll, Change group size, Cluster & sort, Admin)



Admin

Calendly continued

How might it be used?

This is useful if you needed to set up multiple stakeholder interviews or touch points. It's easy to allocate sections of your schedule open to meetings and send out a group email that invites people to select a date and time that works for them.

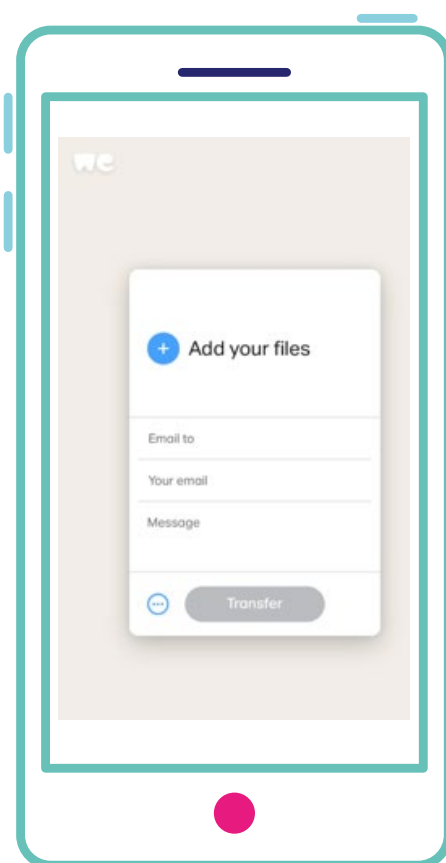
Suitable for ad hoc use?

Yes.

Group size (limitations and flexibility of splitting and combining)

The free version is good for one person and one calendar. Any more than that and you need to pay.

Miscellaneous tools



WeTransfer

Description

This is a file transfer platform. Its basic function (transferring files up to 2GB) is free and easy to use.

Accessibility for OD practitioners

Just upload your file, provide an email destination, and you are good to go.

Accessibility for participants

Incoming emails have a link for you to download the large file.

Cost

The basic system is free which allows files of up to 2GB. For larger file sizes there is a pro version, which includes cloud storage of 1TB and can transfer files of up to 20GB.

Which category?

(Talk, Move, Write, Capture, Present, Poll, Change group size, Cluster & sort, Admin)



Admin

Miscellaneous tools

WeTransfer continued

How might it be used?

This is an effective tool if you need to send or receive large files which are beyond the capacity of Outlook, Google, and the usual email systems - assuming that your security settings on a work machine allow you to upload or download files from the internet.

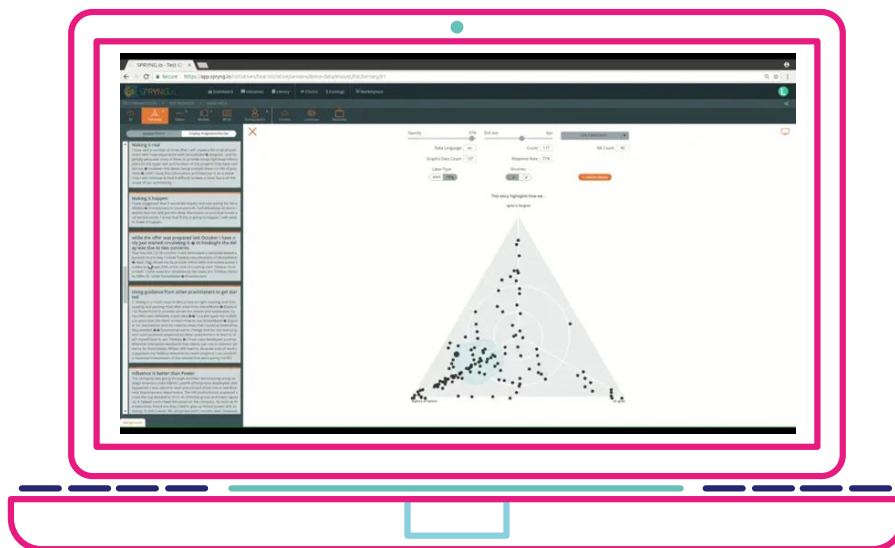
Suitable for ad hoc use?

Yes.

Group size (limitations and flexibility of splitting and combining)

N/A.

Miscellaneous tools



Spryng

Description

Micro-narratives – the fragments of stories that employees tell each other daily in the lift, over coffee, around the water cooler, reveal what people know and believe about the organisation. If we can collect such stories and understand what they mean in terms of our organisational objectives, the patterns that show up can help us see what's working and what needs to change. Spryng is a platform to do that. It is a less-expensive competitor to the perhaps better known SenseMaker from Cognitive Edge.

Accessibility for OD practitioners

This is a specialist tool, and the product will require more time to learn than other tools in this guide.

Accessibility for participants

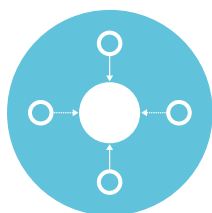
Story-input is form-based on web and mobile.

Cost

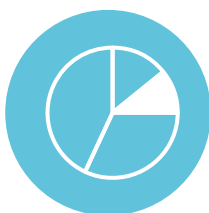
There is a 45-day free trial, then paid options.

Which category?

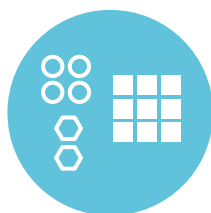
(Talk, Move, Write, Capture, Present, Poll, Change group size, Cluster & sort, Admin)



Capture



Poll



Cluster & Sort

Spryng continued

How might it be used?

This may be something that you've done using paper-based analysis or interviews. It's used for more holistic OD work where you really want to understand what's happening within an organisation in a systemic way. You can take a deeper dive into the culture of your organisation on a large scale by looking at patterns of stories and asking: How do we get more stories like these, and less like those?

Suitable for ad hoc use?

No.

Group Size (limitations and flexibility of splitting and combining)

N/A.

Comparison

	Talk	Move	Write	Capture	Present	Poll	Change Group Size	Cluster & Sort	Admin
Whiteboards									
Mural			•	•	•	•		•	
Miro			•	•	•			•	
Padlet			•	•				•	
Flinga			•	•				•	
Trello			•	•				•	•
Mindmeister			•	•	•			•	
Google Workspace	•	•	•	•	•	•	•	•	•
Klaxoon	•	•	•	•	•	•		•	
BigBlueButton	•				•	•	•		
Video Spaces									
Spatial	•	•							
Cozyroom	•	•							
High Fidelity	•	•							
Wonder	•	•							
Vsee	•								
Clickmeeting	•				•	•	•		
3D Spaces									
Moot	•	•							
TriCAT Spaces	•	•							
SystemicVR	•	•							
ProReal		•							
Miscellaneous									
Mentimeter				•		•			
Slack				•				•	
Otter				•					
Calendly									•
WeTransfer									•
Spryng				•		•		•	



ORGANISATION DEVELOPMENT

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