
CTPS ASANA GUIDELINES

Pilot Period

CTPS will pilot the Asana guidelines over a three-month period. This period will allow teams and individuals to begin implementation of these guidelines and work out the logistics of integrating Asana into current workflows. CTPS will begin to phase in the Asana guidelines starting in September 2023 with the goal that all staff will be consistently using Asana to manage projects, programs, and workflows by December 2023.

Purpose

Asana is a centralized work management tool designed to organize tasks and projects and improve collaboration within and across teams and groups. We use Asana to help promote efficient teamwork and to create a centralized knowledge hub to support cross-team collaboration. By centralizing our work management within Asana, we create a more transparent way to understand where our work currently stands. The centralization also creates a collaborative space that enhances productivity and promotes effective resource planning to set priorities and identify risks. Asana helps individuals manage their own tasks, collaborate with others, and understand how their work fits in with the larger agency goals.

Asana Communication Norms

The following conventions provide an overview of the most common ways Asana is used for communication and outline communication conventions to support consistent use. *There may be use cases that fall outside of these conventions.*

Consistent use: To maximize Asana's effectiveness as a communication and collaboration tool across the agency, it is important that staff use Asana tools and communication features consistently. When creating a project or task, follow the Asana guidelines and encourage your colleagues to follow the guidelines when they assign you a task. If a colleague is using another tool to communicate about a task, you can ask them to move the conversation to Asana.

Cross-team collaboration: Projects and tasks in Asana can support organized collaboration between different teams. When you are resource planning or first setting

up a project or program in Asana, before assigning specific tasks and setting due dates is a good time to communicate with colleagues. If you know you will need support from staff on other teams to complete elements of your project, but you aren't sure about specific personnel capabilities or resource availability, communicate with the manager of that team about your needs and their preferences for task assignments. (This communication may happen inside or outside of Asana).

Assigning tasks to colleagues: Tasks are the building blocks of Asana, outlining specific actions to support program and project development. Anyone can and should assign tasks to anyone else using Asana. When assigning a task, ensure clear and early communication to discuss your expectations and the colleague's availability. If you are assigning a task to a colleague with a near-term deadline (a week or less), ensure that expectations have been communicated in advance.

Responding to a task: When someone assigns a task to you or adds a comment to an existing task, respond to the task assignment or comment within 24 hours. The task due date can be negotiated. If you need more time to complete a task, or have concerns about the timing, use the task's comment box to communicate with the assigner.

Maintaining up-to-date information: Program, project, and group managers are ultimately responsible for maintaining accurate information. Asana allows you to set milestones for key deliverables. Build tasks around these milestones and ensure supporting activities are accurate, clear, and on schedule. If a task has not been addressed for six months, reevaluate whether the task is needed.

Guidelines

Creating a Task

When creating a task, providing clear task names, descriptions, details, and attachments to the task is important.

- **Task name:** Add the title of your task in the "Task name" section. Use specific, action-based task names to avoid confusion.
- **Assignment:** Assign the person responsible for completing the task.
- **Project:** Ensure each task is associated with at least one project. You can tag the task in additional projects as needed.
- **Due date:** Assign the desired due date.

- **Description:** Add a detailed description to your task in the “Description” box. Include relevant notes for yourself or others, provide context about the task or project, and add links, attach files, or tag colleagues or projects as needed.
- **Attachments:** If your task references a specific document or material, attach that material to the task.
- **Collaborator(s):** Regardless of who a task is assigned to, you can add additional collaborators to the task. Add any colleagues who are involved in or should be aware of the task/project.
- **Dependencies:** If the task is dependent on the completion of another task or needs to be completed before beginning another task, organize the flow of tasks within a project using dependencies.
- **Subtasks:** Add subtasks as needed to help organize smaller elements of the task. Just like tasks, subtasks have fields for names, assignees, due dates, descriptions, dependencies, and collaborators, and should be filled in consistently.
- **Milestones:** Indicate major deliverables and deadlines using milestones.

Creating a Project

Setting up a project or a program in Asana follows the same general flow as setting up a task, and details should be filled in following the same conventions outlined above. Similar to creating tasks, you should use a specific name for your project, and add collaborators.

- **What is a project?** A project is a large effort of 10+ tasks.
- **When to add a project:** Add a project and high-level tasks to Asana prior to hosting a kick-off meeting. Ensure that all staff responsible for a project task are added to the project.
- **Project team:** Projects belong to a team, but you can add or remove collaborators as needed.
- **Project permissions:** Projects should be public unless they contain sensitive information.
- **Project overview:** Complete the project overview to provide context and add key resources.
- **Milestones:** Indicate major deliverables and deadlines using milestones.

Receiving a Task Assignment

When assigned a task in Asana, it is important to review the task, let the assigner know that you received it, and let them know if you need further information.

- **Task Assignment:** When someone assigns a task to you, you will receive a notification in Asana. The task will be available in the “My Tasks” or “Inbox” section of Asana.
- **Response:** Review and respond to the task within 24 hours of receiving it. If you do not have any questions about the task, like it by clicking on the thumbs up icon in the task’s taskbar. Use the comment box to ask questions, make clarifications, request additional information, or communicate about the due date.
- **Due Dates:** The task due date can be negotiated. If the proposed due date is not feasible for you, use the task’s comment box to communicate with the assigner.
- **Comments:** Post updates about your progress on the task, including any proposed changes to the task or due date and any supporting material related to the task. For example, if you were assigned a task to create a document, you should attach the document in a comment. Tag others or add collaborators to keep teammates and supervisors informed or request assistance.
- **Completing a task:** Tasks should be marked as complete by the person who the task is assigned to at the time the work is complete.