Free Roadmap

ORGANIZE YOUR BUSINESS WITH ASANA

Louise Henry

Hey you!

READY TO STREAMLINE YOUR BUSINESS + HIT YOUR BIGGEST GOALS?

It's time to put a system in place to make it happen.

By following the roadmap below, you'll:

- Get all your to-dos organized in one place
- Know exactly what you need to do each day
- Manage your team more effectively
- Save up to 10 hours per week
- + Be more productive than you have even been before.

Using Asana has completely changed how I run my business - and I'm excited for it to do the same for you!

Enjoy!

Louise

1 SET UP YOUR ACCOUNT

Use your custom email address to set up your Asana account (e.g. yourname@yourbusiness.com). This means you will be classed as an "Organization" and will get more functionality (such as the ability to use "teams" as shown below).

If you do not have one yet, you can set it up with G Suite (here's the link). Otherwise, you can simply use your personal email address but you will not have access to step 2 and will be classed as a "Workspace."

CLICK HERE TO SET UP YOUR ACCOUNT

2 SET UP TEAMS

Think of these as "branches" within your business and set them up (even if it's just you right now!)

Part of my Asana system is preparing you for business growth – so we want to set up systems now for outsourcing in the future!

SAMPLE TEAMS:

- Executive
- Sales & Marketing
- Products & Services
- Operations
- Personal

3 CREATE PROJECTS

These are larger groupings of work – whether ongoing or fixed. Keep the number of projects you have as low as you can (otherwise, it'll be more of an organizational hassle, rather than an asset).

SAMPLE PROJECTS:

- Content Calendar
- Product Creation
- Product Launch
- Service Process

When you create a project in Asana, you will have the option of the following views:

1. List view
2. Board view
3. Calendar view

With any project, you can easily switch between the 3 options so don't worry about which one you start with! You'll quickly discover which is your favourite view to work in.

Note: You will see an option to start with a "Blank Project" or use the built-in Asana templates. I find it easiest to start with a Blank Project and build your project out that way.

4   SET UP TASKS & SECTIONS

Now it's time to start adding tasks & sections to organize your project.

Whenever you add a task, you **must**:

- Assign it to someone (even if it is just you right now, assign it to yourself!). Click "Unassigned" to do this.
- Set the date you're going to complete it. Click "No due date" to add the date.
- Add a description with any important details/files
- Add any relevant subtasks (this will create a checklist of smaller action items under the task)

Optional: add tags for each task

Colour-coding is one of the main reasons you can create a successful organizational system in Asana. Tags allow you to colour code tasks within individual projects! *(more on colour coding below)*

Click the 3 small dots top right of your task and then "Add tags."

5   CREATE MILESTONES

Define milestones of your project so you know whether you're on track!

This is a feature on the Premium plan. However, here's a free hack for you: create a tag and title it "Milestone" (this is what I do!).

6 ADD IMPORTANT LINKS & TEMPLATES

Create a section at the top of your project and title this "Important Links." Here is where you can add links to important documents or files team members might need as well as create templates for recurring tasks.

Adding files will seriously cut down on the amount of time spent searching for files.

Whenever it's a file, start the filename with [FILE].

I recommend using templates for recurring tasks and adding the steps of the task as subtasks. This will create a checklist of all the steps you need to complete that task.

Whenever it's a template, start the filename with [TEMPLATE].

To use this template, click on the template > click on the 3 small dots in the top right corner > click "Duplicate Task" > rename the task with the current task's title.

For example, if you create YouTube videos on a regular basis (like me!), you would have a template for creating & publishing YouTube videos.

You would first create the master template and title it [TEMPLATE] YouTube Video.

You would then add all steps of creating a YouTube video as "subtasks."

For example:

1. Write script
2. Film video
3. Edit video

7   SET UP YOUR MY TASKS HUB

"My Tasks" is where you will check in and get your daily action plan to conquer your goals.

This section will draw in any tasks across all projects that have been assigned to you.

In List View, you can organize it by clicking 1 of the following:

- Mark for Today
- Marked for Upcoming
- Mark for Later

This will give you a fantastic, typical to-do list to work from.

my fave:

Or, you use my favourite feature of Asana and that is the **My Tasks Calendar View.**

The My Tasks Calendar view will give you a colour-coded calendar with your to-dos.

You can check tasks off as you complete them and they will "fade" into the background. This way you can get a fab sense of accomplishment as you go about your day and will always be able to see what you have already completed.
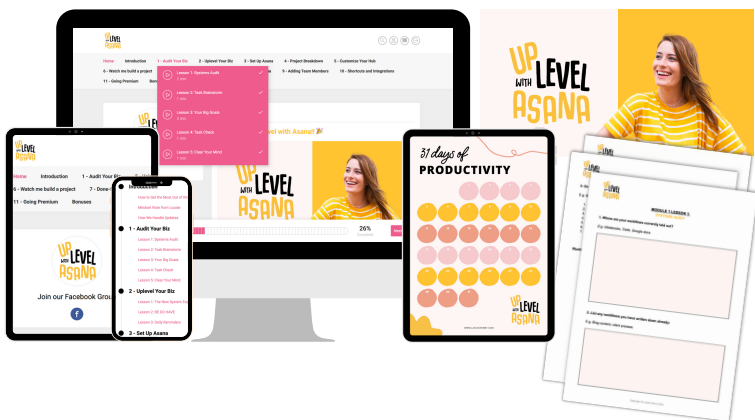
8 · TRACK YOUR PROGRESS

It's super important to track your progress and see what is and isn't working.

Click on the "Progress" tab to add in regular updates and let your team know how the project is going!

Click on the switch that says "*Remind me to update the status every Friday*" to get a reminder each Friday!

Next step!

9 · JOIN MY ONLINE COURSE
UPLEVEL WITH ASANA

There is so much more to teach you about Asana!

My online course, *Uplevel with Asana*, not only helps you master Asana but also teaches you how to use it to hit your biggest goals.

You'll get step-by-step, easy-to-follow video tutorials, done-for-you Asana templates and so much more.

CHECK IT OUT HERE!