1Bold Step

Asana SOP

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What is Asana?

Asana is a project management software that makes it really easy for teams to track their marketing efforts and accomplish their business goals. **Asana lets you know who is doing what, and by when.** In other words, you'll always know the status of work happening across your team.

When to use Asana?

The problem with using emails and chats to collaborate in marketing is that it can be confusing to keep track of tasks. We use Asana to keep any relevant conversations and documents in one central location instead of switching back and forth. So anytime you want a quick snapshot of the marketing plan, which tactics are currently being worked on, or you are wondering what your personal to-dos are, head over to Asana.

Glossary (A list of helpful Asana terms)

1. **Project** - Projects allow you to organize all of the tasks related to a specific initiative, goal, or big piece of work into a list or board. The 3 main projects you will use include the roadmap, sprint, and editorial calendar.
2. **Roadmap** - A 12-month marketing plan that has been divided into 4-5 marketing focus areas.
3. **Sprint** - A sprint is a quarter's worth of tasks from the roadmap. These tasks are divided into 2-week increments (aka "Sprints").
4. **Editorial Calendar** - A project that includes the planning of blogs, case studies, press releases, social media, and webinars.
5. **My Tasks** - A list of tasks and subtasks assigned to you.
6. **Inbox** - Notifications directly from Asana tasks (Comments, assigned to you, updates).
7. **Likes** - A like is the thumbs-up icon next to an update, task, subtask, or comment. It should be used to communicate that you have "seen" an update that requires your attention.

Understanding the Sprint process

Sprints help your teams prioritize work and decide who has the capacity to take on certain projects. But without a clear way to track your capacity, it's hard to know if you're scheduling the right work at the right time. To plan your most productive sprints, we use these 6 sprint sections:

1. **Backlog** - All the tasks and subtasks to be accomplished during a quarter.
2. **Up Next** - Tasks should be accomplished within a month.
3. **In Progress** - Tasks that should be accomplished within the next 2 weeks.
4. **Blocked** - Tasks that are being held up by another person, event, or are late.
5. **Done** - Tasks that are done within the current quarter.

Tips for using Asana

1. Stay up-to-date with Inbox

How is Asana's Inbox different than email?

Asana's Inbox will give you a list of updates on any tasks you are a collaborator on. That means any time someone leaves you a comment, assigns you a task or to-do, or progress is made on a task, you will get a notification.

Tips for Using Inbox

When you have new notifications, you'll see an orange dot next to Inbox in your [sidebar](#).

1. **How to customize your notifications.**
   Notifications can be helpful, but you can easily turn them off. You can unfollow tasks and conversations to stop receiving Inbox notifications in your Email Client like Gmail.
   a. Simply choose the project, click Share in the upper right-hand corner, then click Manage notifications. From there you can select when you want to be updated; whether it's when tasks are added, [status updates](#) are shared, or perhaps not at all.
2. **Archive notifications you've read and don't need to act on.**
   Unlike email, you don't need to "save" notifications, as all your work is organized and searchable in Asana. You can also find them in the Archive tab again.
3. **Use the thumbs-up button to show the rest of the team that you saw their comment or task update.**

2. Collaborating on Tasks in the Sprint

- If someone assigns you a task or a subtask, you can acknowledge it with a like to show that you've seen it and can work on it.
- As you work on the task, provide updates with task comments so task collaborators can respond and follow along in their inbox.
- The latest version of every file should ideally be labeled and linked within the description.
- When you're providing a comment or update in a task OR subtask, please tag the people who need to review your comments using @mentioning. This will automatically add them as a collaborator and send them an inbox notification.
- You can also @mention project, task, and conversation names to connect your work and make it easy to reference.
- If you're lost in Asana, you can always use the search bar to find the task or project you are looking for.
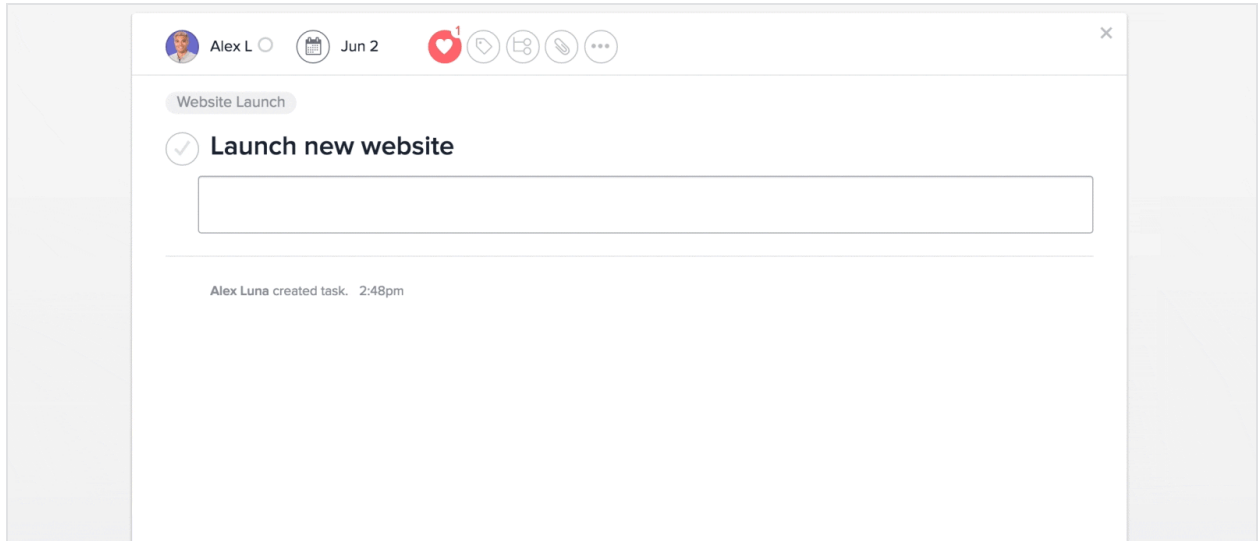
3. Managing Your Day-To-Day with My Tasks

The My Tasks section is a great way to keep track of all the tasks assigned to you. You can apply filters to sort out tasks by priority – including Do Today, Coming up Next, or Do Later – or view tasks according to their completion status.