# Contents

# Creating Tasks
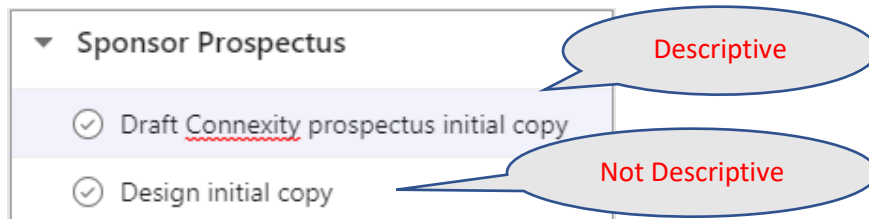
Standard Operating Procedures

1. **Every deliverable should be its own section**. Don't use "graphic design" or "copywriting" as a section – those need to be tasks (not subtasks) within a section. Examples…

| |
|---|
| ▼ Ads |
| ▶ Sponsor Prospectus |
| ▼ Pocket Guide |
| ▼ Connexity Signage |
| ▶ Website |
| ▶ AAHA Moment Ne... |
| ▶ Social Ads & Posts |
| ▶ Email 1: Registratio... |
| ▶ Email 2: Connexity ... |
| ▶ Email 3: Connexity ... |

| |
|---|
| ▼ CR Contacts |
| ▼ Social Media Camp... |
| ▼ Social Media Camp... |
| ▶ Go-To-Practice Sol... |
| ▶ Sell Sheet: Guidelin... |
| ▼ 2023 Media Kit |
| ▼ 2023 Strategic Allia... |
| ▶ Sell Sheet: Central ... |
| ▶ Sell Sheet: Quarterl... |
| ▼ Sell Sheet: Social M... |
| ▼ CR Newsletter Desi... |
| ▶ CR May 22 Newslet... |

> By making deliverables (instead of tasks like copywriting) into sections, it's easy to see progress on specific deliverables at-a-glance in the timeline view and board view.

2. Be **descriptive but succinct** when adding a task and fill in the details, including a description, before assigning it to anyone. This helps you use "My Tasks" and other Asana view to more quickly see relevant details without extra clicking. For larger asks talk with the potential assignee before adding a due date.

| |
|---|
| ▼ Sponsor Prospectus |
| ⊘ Draft Connexity prospectus initial copy |
| ⊘ Design initial copy |

**Descriptive**

**Not Descriptive**

> This ensures that the email Asana generates to the assignee has enough detail about the project request.
>
> If you're putting in a task that doesn't have copy or a lot of details, make a note in the description: "details coming soon" and when you have those details put those into the description and note, tagging the assignee.

3. Be sure to put a hyperlink (to the item in Sharepoint) to anything you reference in EVERY task in the description of the task:
    a. Copy to review
    b. Designs to review
    c. Source documents (ex. copy, messaging architecture, campaign plans, mailing lists, etc.)
    d. Mailing lists

> This ensures all relevant documents are always the most-current and are all in one place to execute upon.

4. Where possible, **list tasks and not subtasks** in any given section. Subtasks do not display in the Marketing Portfolio, which we are using – and directing other teams to use – to see where the team is on any given task.
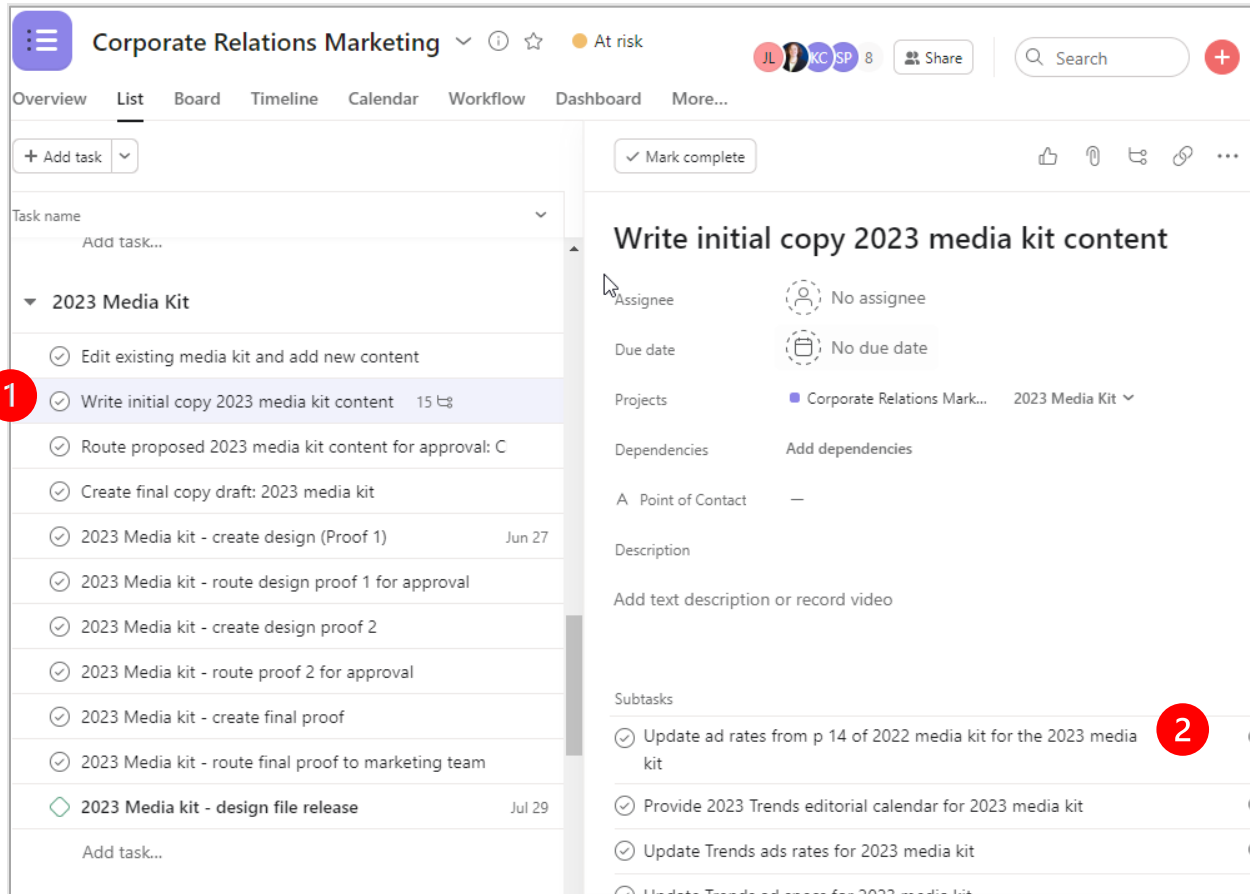
## Exception – when to create subtasks

If you have more than 5 or so tasks **(1)** that involve anyone outside of the marketing team, you can create

subtasks **(2)** for the major task-level deliverables.



## Task dependencies

5. Be sure to use task dependencies (you can mark a task as waiting on another task). When the first task is completed, it will notify the assignee of the next task that they can start on their task; they are also notified if the precedent task has its due date changed or removed.

   Click the + sign in dependencies; you can enter search text from any part of the task you want to link to (again highlighting the importance of using descriptive tasks and subtasks). (further help) You can have multiple dependencies.
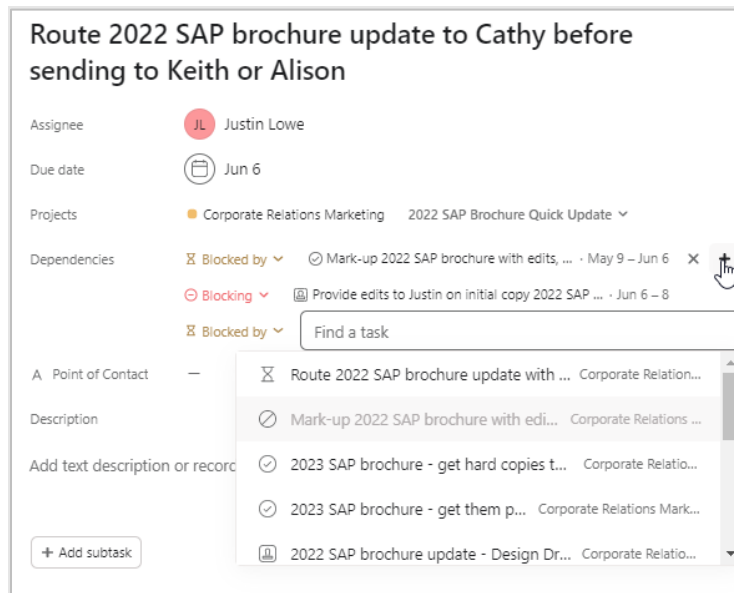
Or, click the colored dot and drag to create a dependency in **timeline** view:
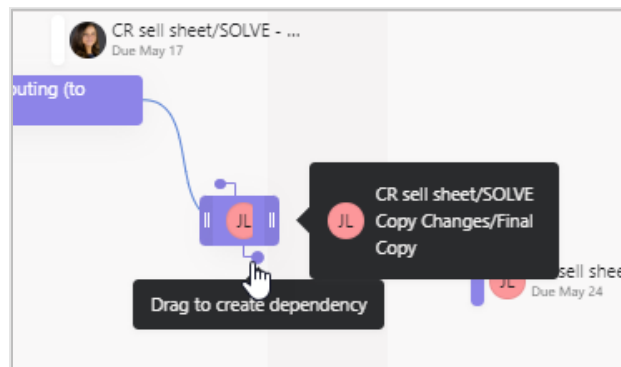


## Auto-shifting dates for dependent tasks

- The **date change MUST be made on Timeline.** If the update on a task is made from My Tasks, Inbox, or any other project view that is not Timeline (like List, Board or Calendar), the affected tasks won't be automatically updated. (view Asana how-to)

## From email

You need to download and install the Outlook plugin first. Then the Asana button will appear below. Fill in the form fields to assign it to a specific person (including yourself), fill in additional details, attach the email to the task, and select which project it foes into, add due date if applicable.
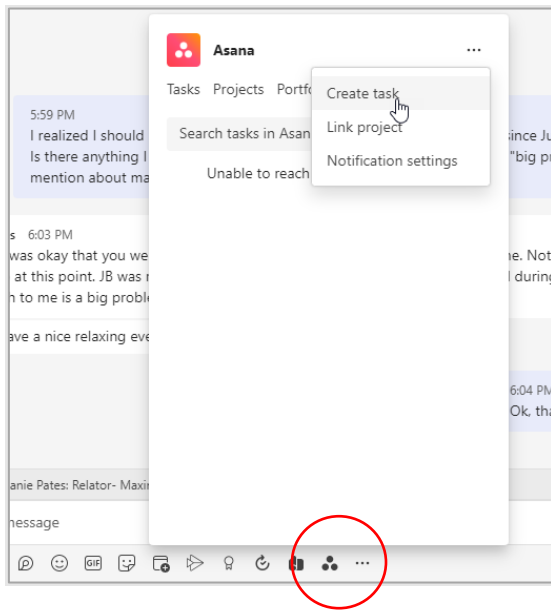
Note: you cannot tag individuals if you do this; you also can't tag individuals if you reply via email to comment on a task.
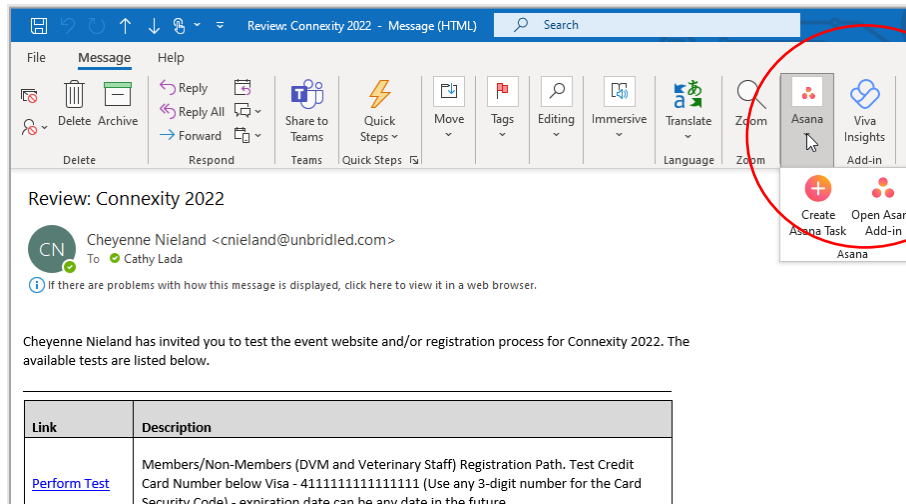
## From Teams

You must first [install the Teams plugin](#). Click the 3-dot Asana pyramid under the new message bar, then create task. Please see the plugin link above for further details on how to use Teams and Asana together!

## Duplicate the same task for up to 6 people

Enter the task one time – fill in all the details. Open the task to assign someone and select "assign duplicate tasks" (at the bottom of the list of assignees). Search for names of people to add, keep adding (up to 6) and hit "assign duplicates."
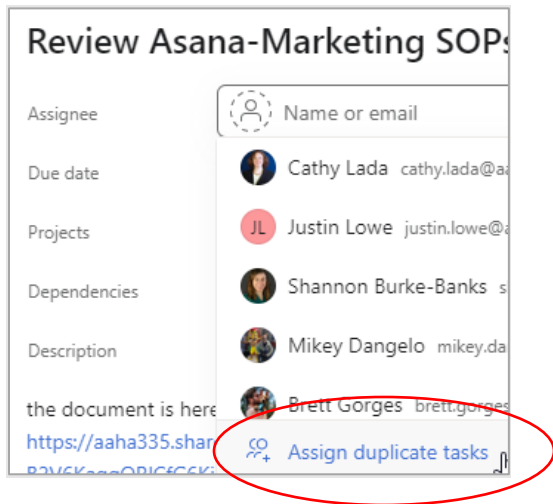


## Entering graphic design requests

Enter these as separate tasks within the deliverable's section (ex. In "sponsor prospectus" or "Central Line sell sheet"). The assigned router is typically either Justin, Shannon, or Cathy – not the designer, in any case. Replace "project name, task name" with the appropriate information. Be succinct but descriptive.

- Project name, task name, design (Proof 1)
- Project name, task name, design (Proof 2,3,4, etc. if needed)
- Project name, task name, design (Final proof)
- Project name, task name, design (File release)

Example:



The purpose of multiple design tasks is to take each deliverable from start to finish with room for rounds of feedback and revisions. If it's easier, you don't have to assign all tasks at once. For example, you can assign "Design (Proof 1)" and once you get feedback, create a "Design (Proof 2)" task  (or "Design (Final proof)) and assign it.

As long as you follow through to the file release, it doesn't matter if you set them up at once or as you progress through the approval process.

Here's an explanation of what happens in each round:

**Proof 1**

Once assigned, the "Design (Proof 1)" task should contain all the information I need to start designing the deliverable, including copy. Proof 1 is the first draft and therefore takes the longest to complete, so please allow enough time (10 working days).

Very rarely do I create work that is perfect, so once proof 1 of the deliverable is uploaded, the "Design (Proof 1)" task is closed, and it moves to the project manager where it is routed for feedback.

**Proof 2**

If there's a ton of feedback or major changes that could alter the design, a "Design (Proof 2)" task is created, the list of changes are added, and it's assigned to the designer. After the design/copy changes are made, the designer uploads proof 2 to the "Design (Proof 2)" task and notifies the project manager. The "Design (Proof 2)" task is closed.

**Final proof**

Once the deliverable reaches a place where minimal, minor changes are required, the changes are added to the "Design (Final proof)" task and the designer is notified. *Putting a list of changes into the "Design (Final proof)" task means there will be no more feedback once the final proof is uploaded.* Once changes are made, the designer uploads the final proof to the "Design (Final proof)"task and notifies the project manager.  The "Design (Final proof)" task is closed. The work is reviewed one last time (but not routed) to ensure everything looks good. If it does, written approval to release the final files is added to the "Design (File release)" task.

If something was overlooked and a small change(s) needs to be made, the "Design (Final proof)" task is reopened, the requested change(s) is added, the due date is updated, and reassigned to the designer. The same processes occur until the designer receives written approval to release the files.

**File release**

Once all revisions have been made and the deliverable is good to go, written approval to release the files is added to the "Design (File release)" task. The designer finalizes the deliverable so it's ready for release and uploads the final file(s) to the "Design (File release)" task and notifies the project manager. The "Design (File release)" task is closed.

In the rare chance that the deliverable is approved for release after proof 1, any subsequent proofs (proof 2, 3, etc.), including the "Design (Final proof)" task, is automatically closed. Written approval for release is added to the "Design (File release)" task and the designer is notified.

For a file release, I finalize and release the fully-approved work. When I upload proofs, I often upload a lower-res version in order to keep the file size small for routing (especially for print and video projects). This is why you never want to take the work from the final proof task and run. The file release is where I make the final touches so it's ready to be released into the world 😐

**For simple requests:**

For very simple deliverables that are made with pre-approved templates, (e.g. SAP (Strategic Alliance Program) or PBP (Preferred business provider) cards for our website) only a "Design (File release)" task is needed. If you prefer to see a proof, you can always add a "Design (Proof 1)" task.

If you want to change a pre-existing deliverable, the "Design" tasks assigned will depend on how much change is involved. If we are changing an image, adding/changing copy, or adding more/less copy than we originally had, it can alter the original deliverable enough that it becomes something else. In this case, it's best to assign all "Design" tasks. If we're changing a few words, adding a small amount of copy, changing a color, etc., a "Design (Proof 1)" task and "Design (File release)" task should suffice. Use your best judgement when considering how much a deliverable will change based on the amount of changes requested. When in doubt, just assign "Design (Proof 1, Final proof, and File release) tasks.

## Entering web requests
Please add them within a project under a section called "Web requests".

Entering social media requests

1. Find the appropriate deliverable/section – "Social Ads & Posts" or "Social Media"
2. Create new task with the task title beginning with "Social Post" , "Social Ad", "Video Upload", followed by the networks/channels content needs to be posted to, and an identifying word or two about the content. **Example - Ad: Post FB ad  (reg. opens).** If there needs to be a series of posts or ad flights, in each task, begin the task title with "Week1" or "Post1". Example - **Week 4 Social Post VV 1 of 2.** There should be a separate task for every post and/or ad.
3. Assign the task to "Samantha Motyl"
4. Add the due date (the day the post or ad needs to go live)
5. Select the appropriate project the social post or ad belongs to, and then add the appropriate section. **Example -**

   Projects        ● Marketing Requests    Social media ⌄

6. Add any dependencies – for example if a landing page needs to be created BEFORE the social content goes live, this is where that input is needed
7. For ads, include the TOTAL budget
8. Under the task description include
   a. Graphics, logos, videos, files (sized and formatted appropriately – with graphic design approval)
   b. Copy for social posts, including hashtags, links, titles, sponsor info, and any other social handles that need to be tagged (character length tailored to social channel)
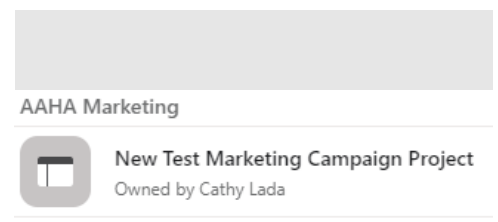9. Add collaborators as needed to task

# Project Setup

All **strategic plan projects** should live in the **"Strategic Plan Projects"** Team, not the Marketing Team. Coordinate with Caroline Parsons on how to add.

For marketing team projects (all of our projects intersect with other teams; the marketing team portion of work resides here; if desired the product owner can create a portfolio and display the marketing asana board related to the project as well as the project planning board).

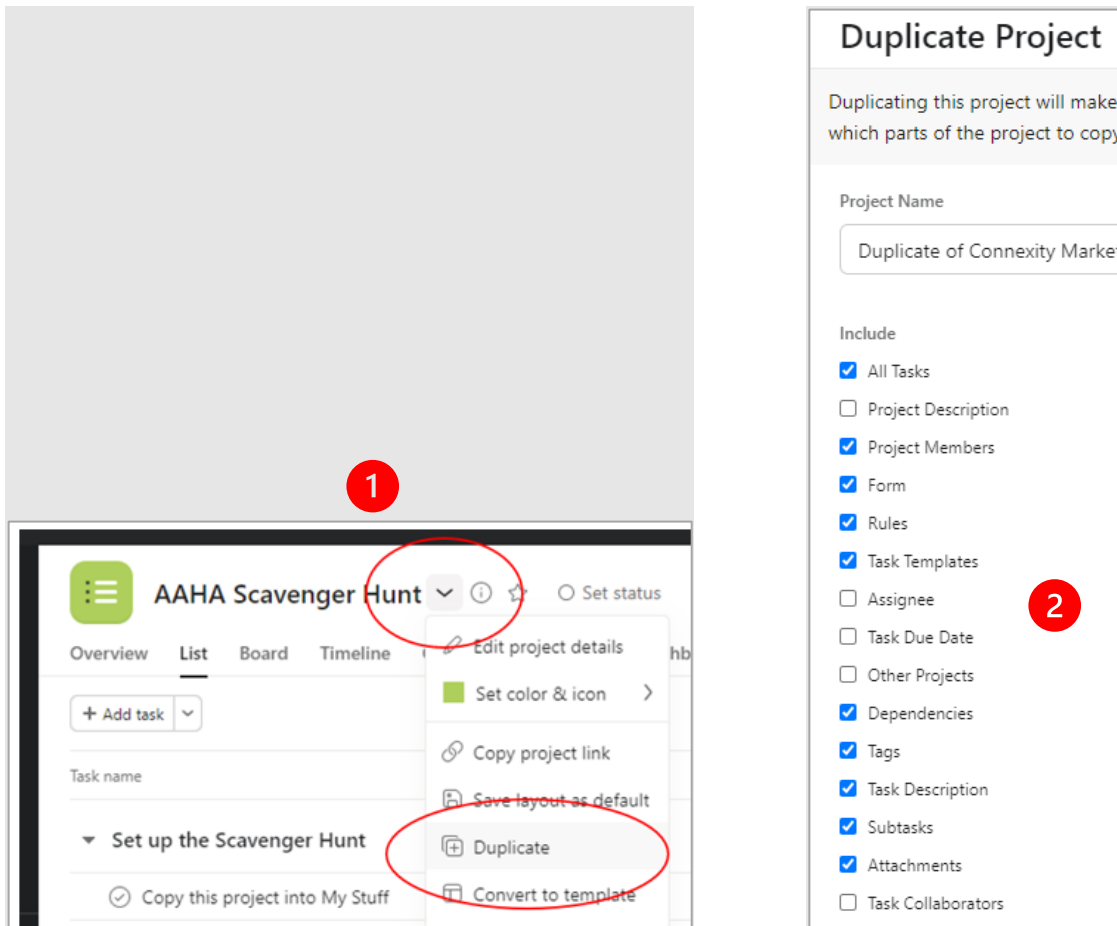**Use the Marketing template for NEW projects (not ever done before in Asana)**
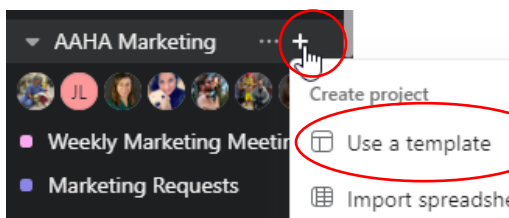
and then scroll down to select:

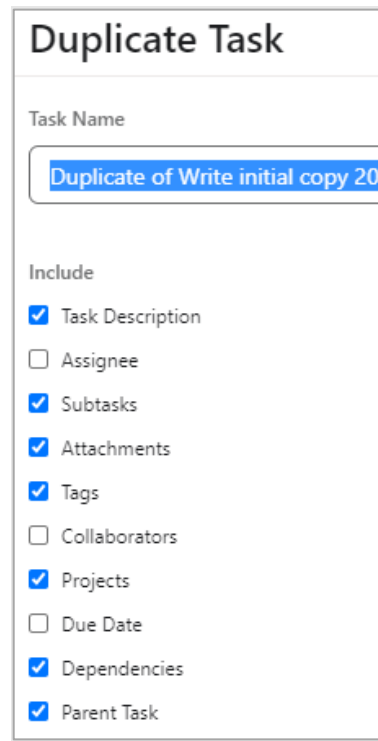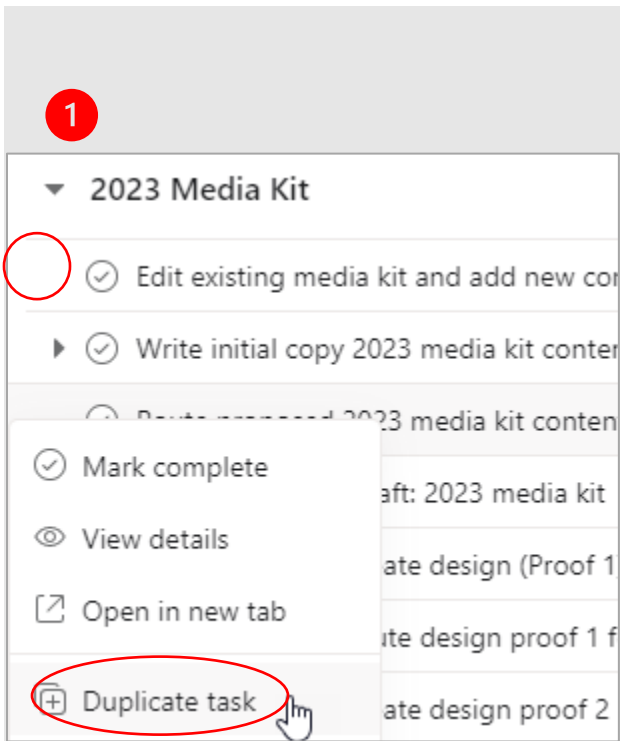**Or, for projects we use more than once, such as annual projects, duplicate the project:**



**Copy a set of tasks or subtasks (with deadlines, assignees, descriptions, etc.) to a new section**

1. Right-click in the space to the left of the task you want to duplicate and select duplicate task. Select what you want to duplicate and click create new task.
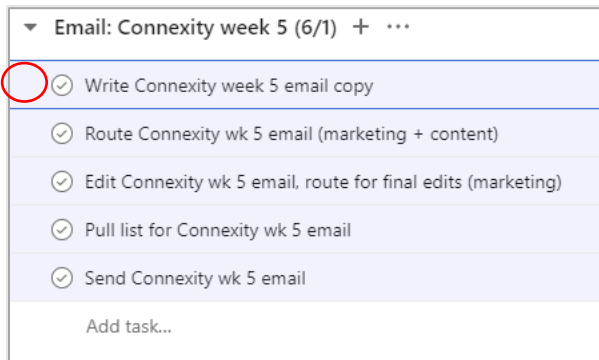
## Quick shortcut: Copy a set of tasks or subtasks (only the task/subtask portion) to a new section

1.  Create new blank section
2.  Right-click in the area to the left of the check mark icon, drag down to select all the tasks to copy
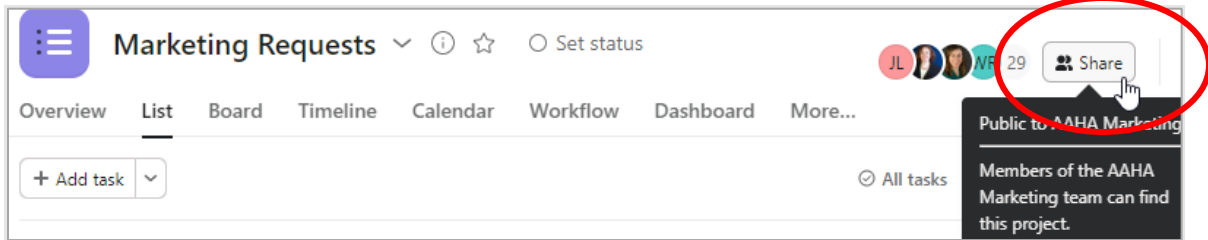


3.  Hit control + C
4.  Click to add a new blank task in the new section and hit control + P
5.  Will only copy tasks – not assignees, due dates, sub tasks, or notes

Inviting AAHA team members outside of the department to comment on tasks

This must be done project-by-project.

1. Go to the project board you want to share in Asana and click the Share button at the top.



2. Copy and paste email list (separate emails with commas) or add individually (just start typing a name in the invitation box).
3. Select the "Can comment" option in the dropdown
4. Un-check the "notify them when new tasks are added to this project"
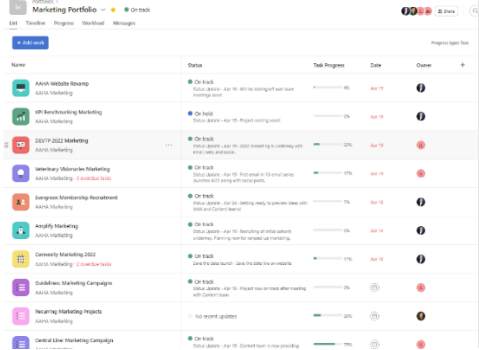5. Click send.
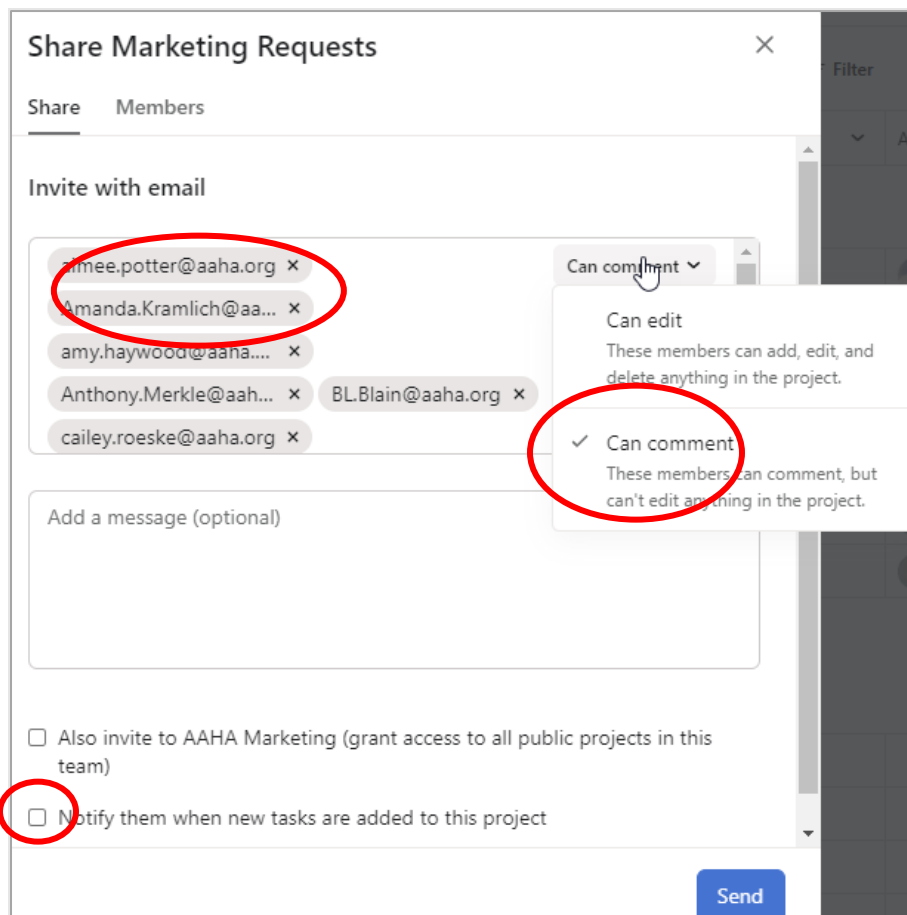
[Other teams working with the Marketing Team – Asana SOPs](#)

==The next pages are in a document (below version focuses on Membership only)
we are sharing with all of AAHA about how to access marketing projects.==

# Quick Links

| | |
|---|---|
| [Collateral Folder & Links](#)<br>• This folder contains PDFs you can use to communicate with members and prospects | • [Marketing Requests form](#)<br>• [Digital member brochure](#) |
| [Marketing Portfolio](#)<br><br>See all marketing projects, campaigns, and tasks<br><br>• Lists **project boards** for each campaign and overall status report<br>• Click **Timeline** to see status of major tasks for all marketing projects<br>• Click **Workload** and a specific person to see major tasks that person is working on (note: "workload" = number of tasks – not their difficulty or time it takes to complete.) |  |
| **Membership-Related Project Boards**<br><br>Use the links to the right or click on the board from the portfolio view | • [Affiliate Member Recruitment: Marketing Campaign](#)<br>• [Amplify Marketing](#)<br>• [APOY: Marketing Campaign](#)<br>• [Evergreen Membership Recruitment](#)<br>• [Marketing Requests](#) (if your task doesn't fit a project it is likely here) |

## I want to:    Do this:

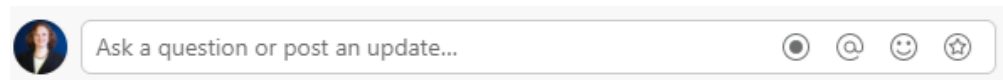| I want to: | Do this: |
|---|---|
| Submit a marketing request related to an existing campaign | Complete the [Marketing Requests form](#) |
| See progress on marketing requests | Go to the project board in Asana and click on Timeline view |
| Answer a question or give feedback on an existing task or campaign | The Marketing Team will ask you questions via Asana – you'll get an email <u>from</u> Asana. **Reply to the email to answer.** Note: please strip out signature block information before hitting send. |
| Ask a question related to an existing task or campaign | Go to the project board in Asana and click on the task to open it. Towards the bottom right, type in your question or feedback or give an update. **Tag a marketing team member** using the @ symbol to ask a question of or give feedback to a specific person. Then click the blue "Comment" button.<br><br> |
| Submit a marketing idea | Go to the [Marketing Requests form](#) and include "Idea:" at the top of the input box for "Summary of request." New ideas will be prioritized within the Marketing team's broader workload. |

Summary of request: *
Include "need to know" information, and if relevant, your goals and how your deliverable will be used

Enter your answer

**Helpful Views: Deliverables Progress + Workload by Individual (regardless of deliverable)**

**Timelines on individual project boards**. Ex. Evergreen Membership Recruitment. See **major deliverables** in progress, who is working on them.
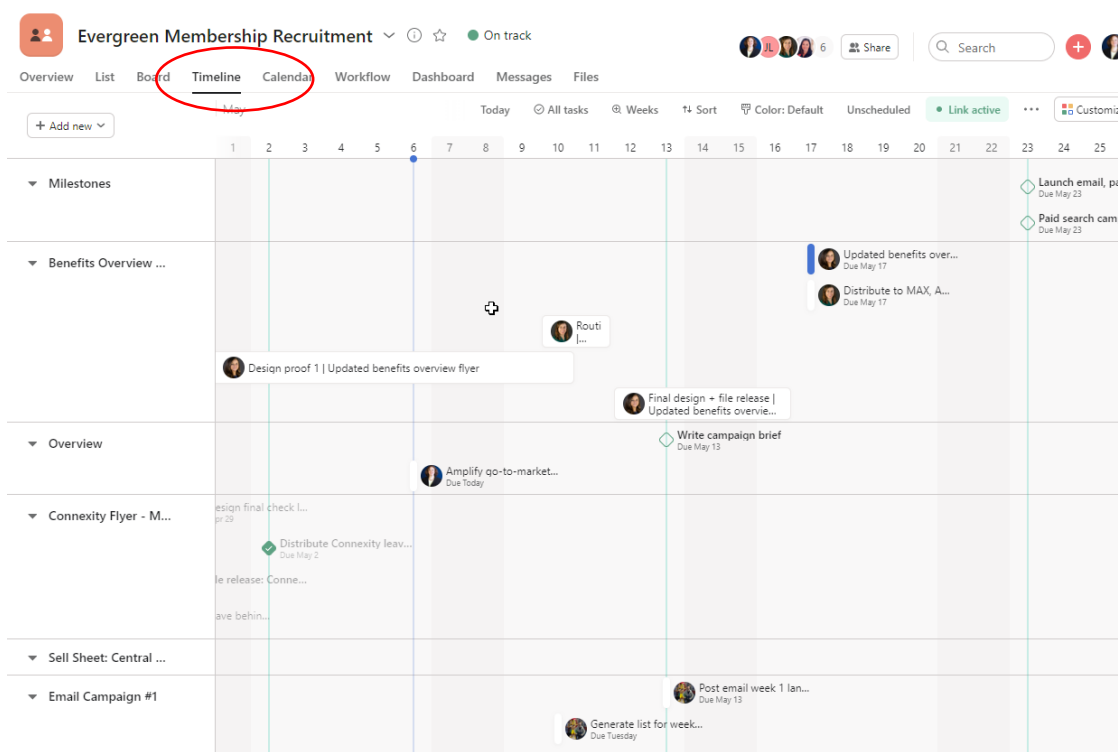
**Workload on Marketing Portfolio**

At this point in time, these don't accurately reflect effort – just number of tasks – but does give you a general sense for volume of work being tracked in Asana. Click on an **individual team member to see which tasks they are working on**.