

Introduction to Asana and Evernote

Rich Ingle

14th December 2020





Who am I?

- ▶ Property Investor
- ▶ Software Engineering Manager

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Organising Yourself - Quick Reminder

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Organising Yourself

Quick Reminder

- ▶ Skills & Tools - Foundations to Be More Effective
- ▶ Task Management & Workflow - Getting Things Done
- ▶ Habit Formation - Behaviour & Identity Change
- ▶ Knowledge Management - Building a Second Brain

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Task Management - Asana

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Task Management

Quick Reminder

- ▶ Capture - Write **everything** down.
- ▶ Clarify - Make it **outcome oriented** and **actionable**.
- ▶ Organise - Put it in the **right place** so it can be quickly identified and acted upon when required.
- ▶ Reflect - **Review frequently**, at different levels, to retain control and focus.
- ▶ Engage - **Take action**.

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Task Management

Asana

- ▶ Capture - Add Task, Notifications, Email Forwarding.
- ▶ Clarify - Assignee, Description, Subtasks, Collaborators/Mentions.
- ▶ Organise - Sections, Projects, Tags, Start/Due Dates, Dependencies, My Tasks.
- ▶ Reflect - Recurring Tasks.
- ▶ Engage - Unicorn!

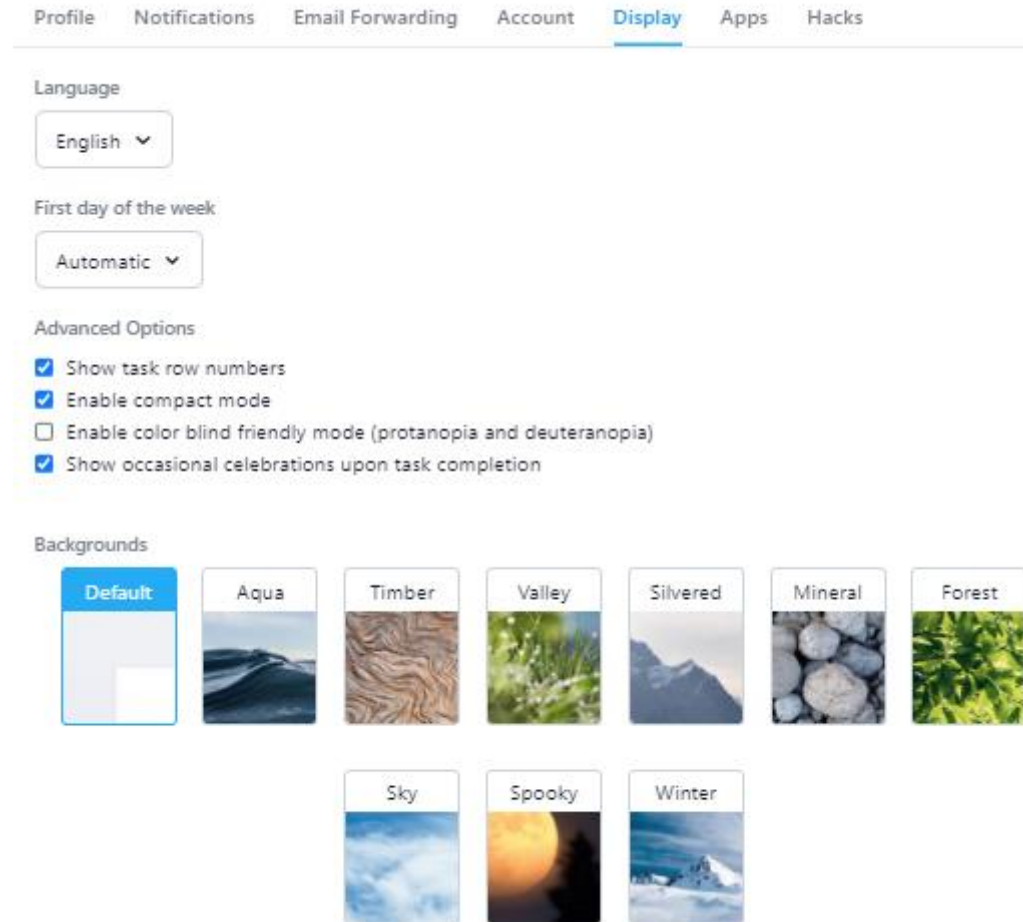
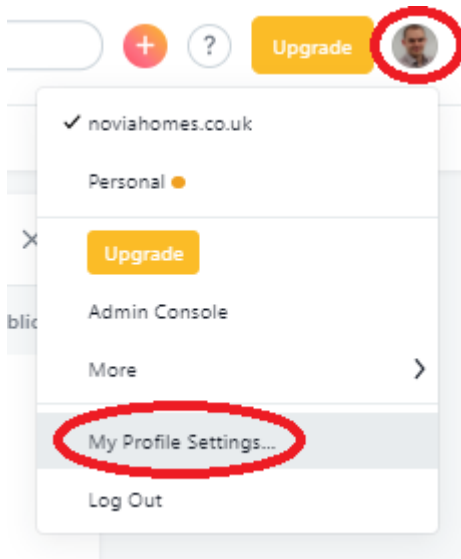
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Setup - Basics

Asana



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Setup - Notifications (1)

Asana

My Profile Settings

Profile **Notifications** Email Forwarding Account Display Apps Hacks

Do not disturb

Notifications paused until 05:00

 Resume notifications

Schedule

☒ Do not notify me from: 21:00 To: 05:00

Do not disturb me on my days off

Mon Tue Wed Thu Fri **Sat** Sun

Email notifications

Preferred email

[About notifications](#)

rich@noviahomes.co.uk ▼

Send me email notifications for:

- ☒ Activity updates
New tasks assigned to you, @mentions, and completion notifications for tasks you're a collaborator on
- ☐ Daily summaries
New tasks assigned to you and upcoming due dates
- ☒ Weekly reports
Status updates on projects in your portfolios

+ Add New Email

Remove Email

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Setup - Notifications (2)

Asana

Browser notifications

Send me browser notifications for...

[Send feedback](#)

☐ Task updates

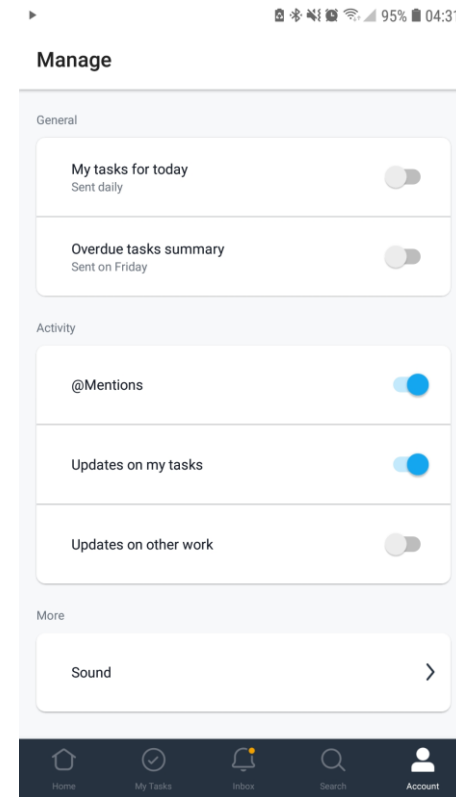
You'll be notified when there's a comment on a task you're following, you're assigned a task, or you're added as a collaborator to a task

☐ @Mentions only

You'll be notified when someone mentions you

☒ Nothing

You won't receive browser notifications from Asana



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Capture - Email Forwarding

Asana

Profile Notifications **Email Forwarding** Account Display Apps Hacks

You can create tasks & conversations from email addresses associated with Asana.

Create Tasks by emailing x@mail.asana.com. Tasks emailed will appear in your My Tasks list.

- The subject line will be the task name
- The body will be the task description
- All email attachments will be attached to the task
- You can cc teammates to add them as task collaborators

Create conversations by emailing [team-name]@mail.asana.com. For example, marketing@mail.asana.com goes to the Marketing team, and customer-success@mail.asana.com goes to the Customer Success team.

EMAILS SENT FROM	CREATE TASKS & CONVERSATIONS IN
rich@noviahomes.co.uk	<div>noviahomes.co.uk ▼</div>
richingle2016@gmail.com	<div>Personal ▼</div>
info@noviahomes.co.uk	<div>noviahomes.co.uk ▼</div>
admin@noviahomes.co.uk	<div>noviahomes.co.uk ▼</div>

[+ Add New Email](#) [Remove Email](#)

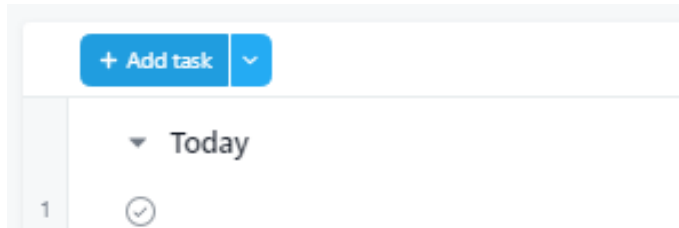
► <https://asana.com/guide/help/email/email-to-asana>

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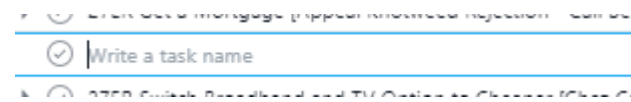
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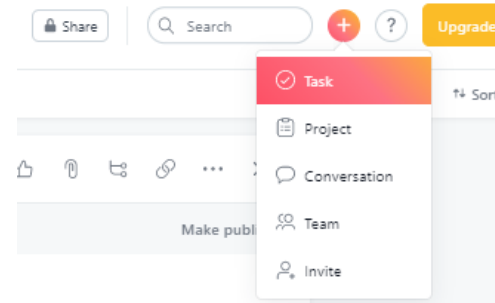
Capture - Tasks (1)



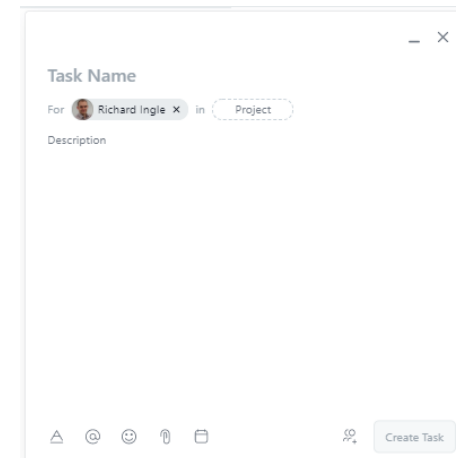
This is a local add putting the task in the line below your current focus.



Asana



This is a global add. You still need to set the project/context.



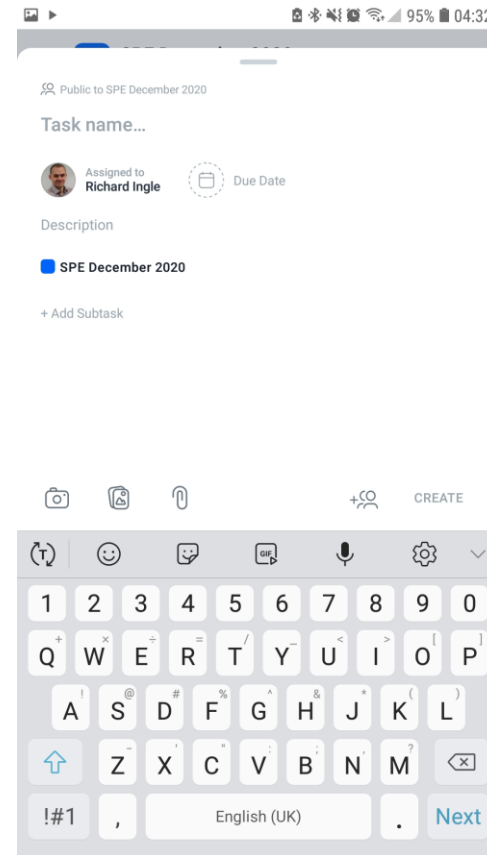
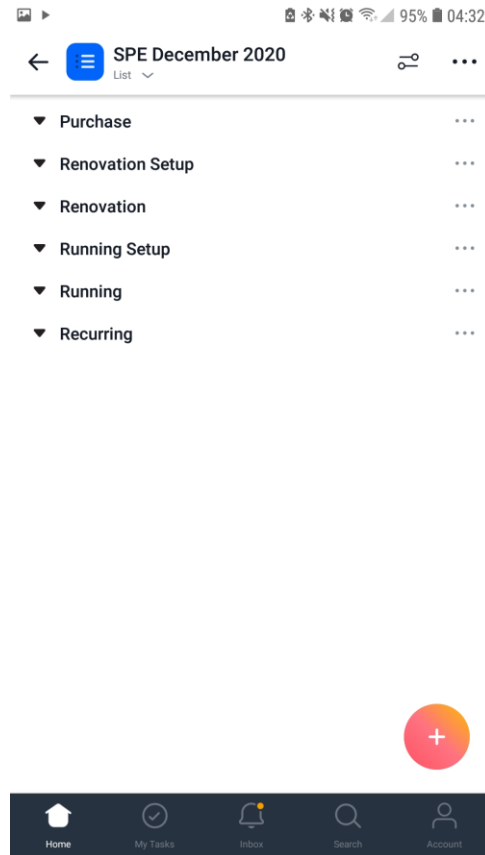
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Capture - Tasks (2)

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Clarify - Task Definition



Asana


- ▶ Task Name - Short, Descriptive
- ▶ Assignee - Who owns it now (in their my tasks)
- ▶ Project - The context.
- ▶ Description
 - ▶ Background Details
 - ▶ Clear Acceptance Criteria
 - ▶ Mention with @ (they get notified)
- ▶ Collaborators - Tag for notifications
- ▶ Subtasks
- ▶ Due Dates

Write Asana Presentation

Assignee  Richard Ingle 

Due date  14 Dec

Projects  SPE December 2020 

Tags  Laptop X

Description
Richard has asked me to put together a presentation that covers the tool Asana. Audience is the SPE crowd some of whom may be familiar with the tool others it may be new to. I have 15 minutes so should cover the basics of being organised and feed that through into showing how Asana functionality links up to it.

Done when:

- Presentation has been created in google drive.
- Chez or Kelly have proof read it.
- I've done a test run in under 15 mins

Subtasks

- ☒ Draft Presentation Flow
- ☒ Flesh Out Sections
- ☒ Add In Mobile Screenshots
- ☒ Prep Live Demo Project
- ☒ Get it Proof Read
- ☒ Trial Run

+ Add subtask

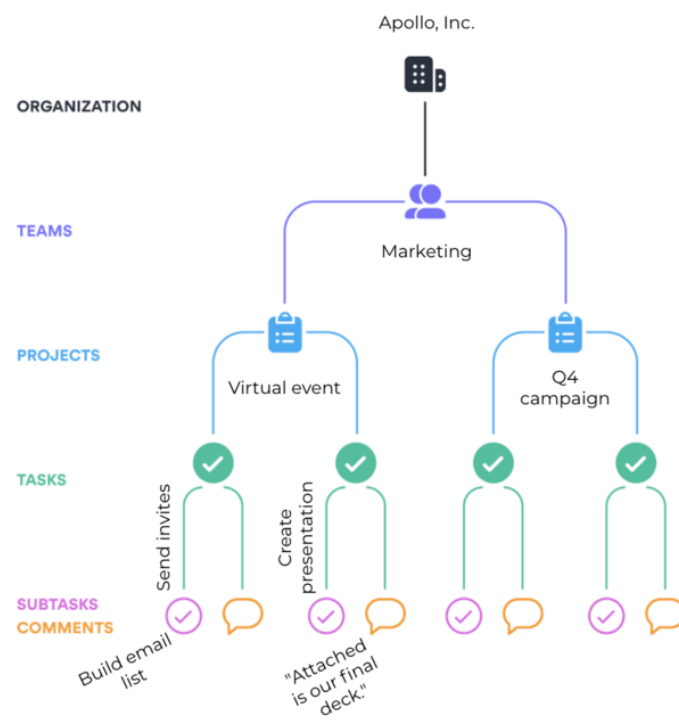
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Organise - Structure

Asana



Organization: Everyone in your Asana domain.

Team: Evergreen groups of people collaborating across multiple large efforts.

Project: Large effort (~10+ tasks) that a group of stakeholders or entire team works on over a period of time.

Task: Any effort that can be accomplished in a few minutes or work days. Tasks are generally part of one or more projects.

Subtask: Breaks down a task into smaller steps. (You don't need to see it in other views.)

Once

Frequency of creation

Daily

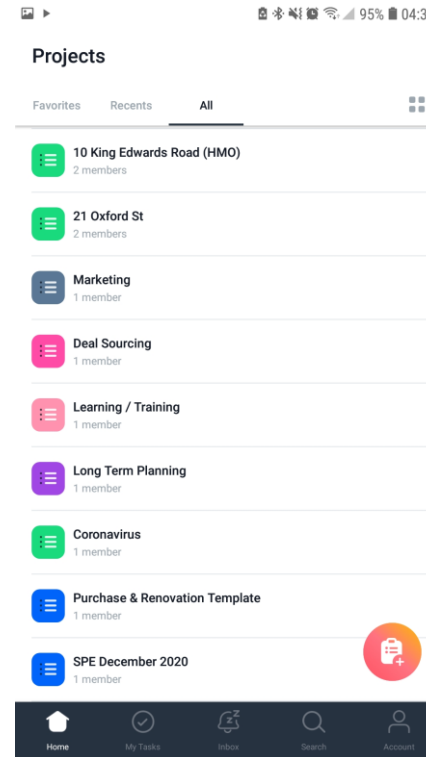
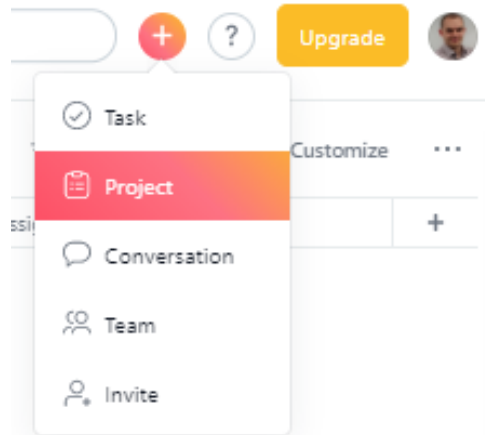
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Organise - Projects (1)

Asana



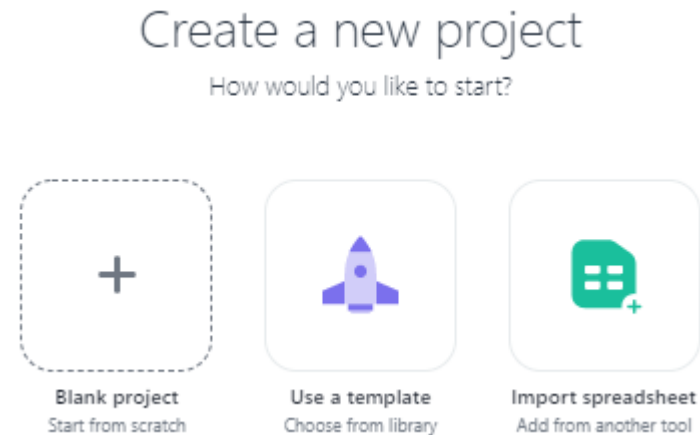
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Organise - Projects (2)

- ▶ Blank Project
- ▶ Templates - Paid plan only



New project

Project name
SPE December 2020

Team
Novia Homes

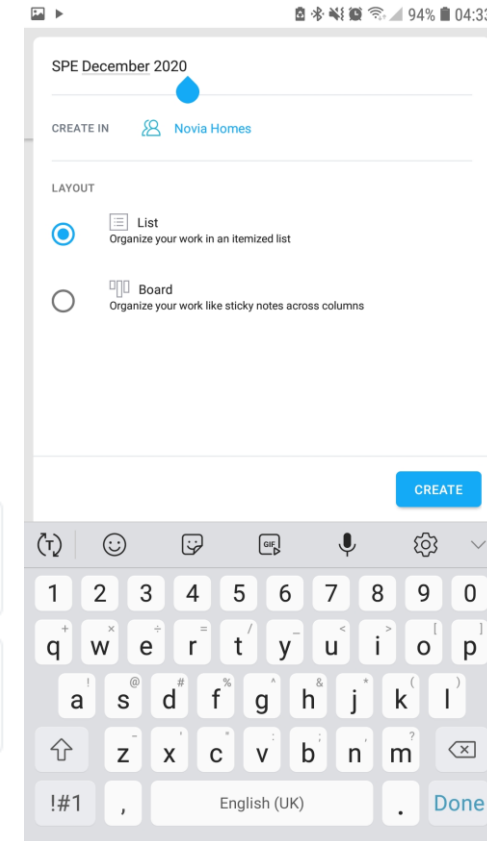
Privacy
Public to team

Default view

List
Board
Timeline
Calendar

Create project

Asana



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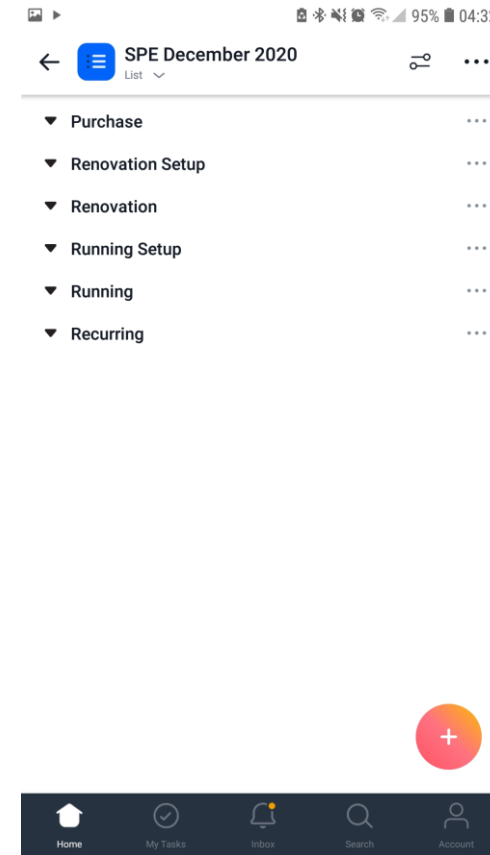
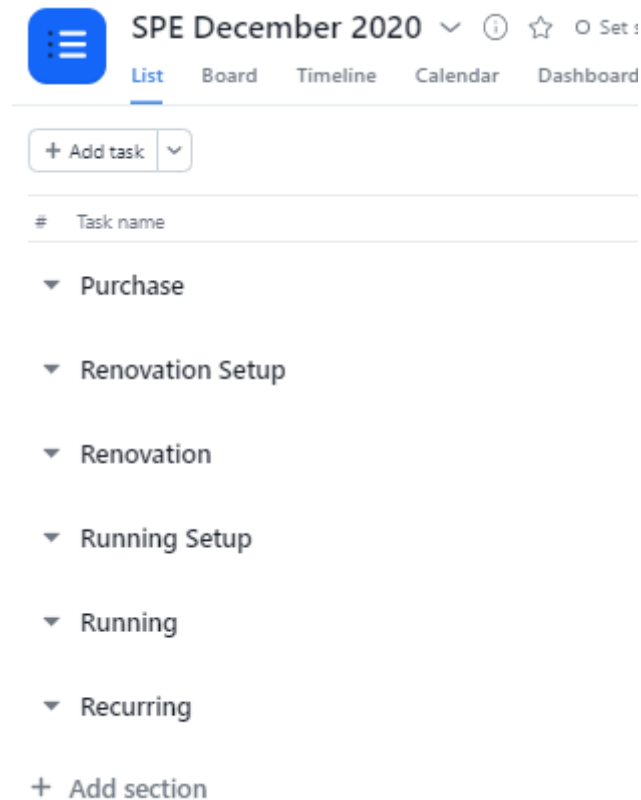
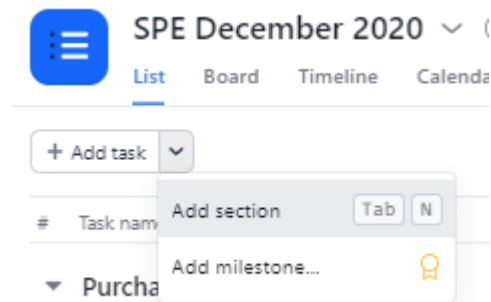
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Organise - Sections

- Groups tasks in projects

Asana



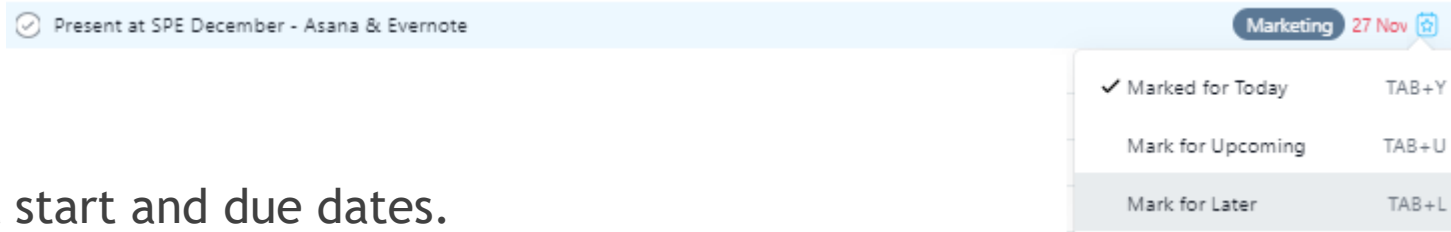
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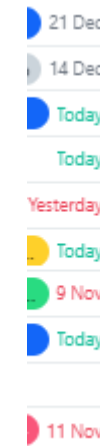


Organise - Dates (1)

Asana



- ▶ You can set start and due dates.
- ▶ Start dates are only available in the paid version. They can be used to hide a task from your list and have it appear on the start date.
 - ▶ In the free version you can simulate this using due dates and Upcoming or Later in My Tasks.
- ▶ Due dates will appear as
 - ▶ A date in normal text when due well in the future.
 - ▶ The day in text when due within the next week.
 - ▶ Green when the task is due today or tomorrow.
 - ▶ Red when the task is overdue.



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Organise - Dates (2)


Asana

- ▶ Recurring tasks.
- ▶ Very useful for review reminders, reflection and habit formation.

Buy SPE ticket for next month

Assignee  Richard Ingle

Due date  21 Dec



Projects  [Add date range](#)


Description [Buy-a-ticket at](#)

[+ Add subtask](#)

DECEMBER 2020

M	T	W	T	F	S	S
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

 Repeats Monthly 

On day 

Daily

Weekly

✓ Monthly

Yearly

Periodically

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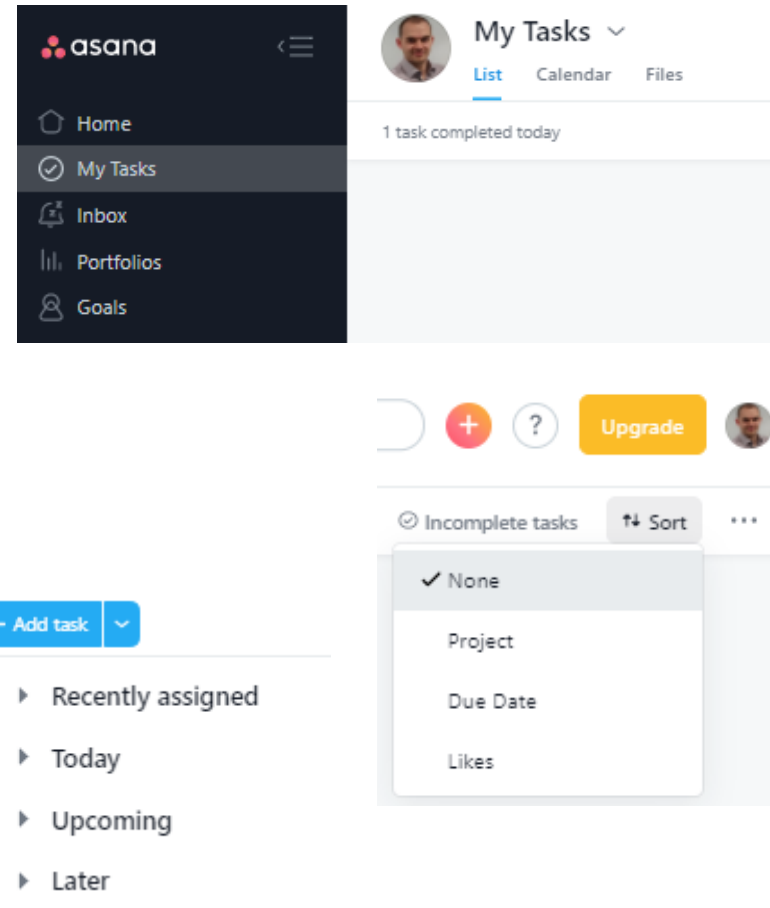
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Organise - My Tasks (1)

Asana

- ▶ Where I spend most of my time.
- ▶ Sort order.
- ▶ 4 core sections.
 - ▶ Recently assigned - By you or others.
 - ▶ Today - The important do now list.
 - ▶ Upcoming - Tasks due soon come in here
 - ▶ Later - Out of sight, out of mind.



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Organise - My Tasks (2)

Asana

▼ Recently assigned

- ✓ Buy SPE ticket for next month SPE Dece... 21 Dec >
- ✓ Write Asana Presentation SPE Dece... Laptop 14 Dec >

▼ Today

- ✓ Present at SPE December - Asana & Evernote [Flesh Out] Marketing >
- ✓ Process Payroll General ... Today >
- ✓ Habit: Write Next Day Plan. 1 Important Not Urgent. Today
- ✓ 27ER Get a Mortgage [Appeal Knotweed Rejection - Call Ben] 27 Eaton ... Yesterday >

▼ Upcoming

- ✓ Monthly General Investment Email Update Marketing 3 Dec
- ✓ Monthly Mileage and Expenses [~30 Mins] General ... Xero Tuesday >
- ✓ 90 Day Goals Update [Fortnightly] Long Ter... Monday
- ✓ Hire a Virtual Assistant General ... >

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Organise - Tags

Asana

- ▶ Can be used for context e.g. Phone Call, Laptop, Out and About.
- ▶ Gives another possible view over your tasks.

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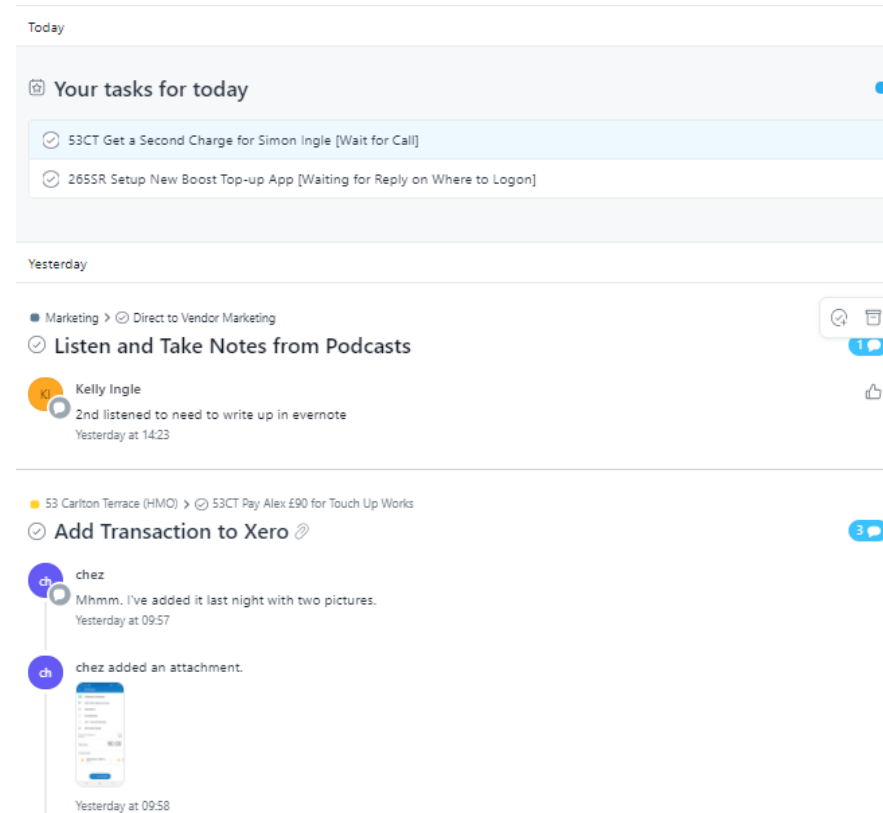
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Organise - Inbox

- ▶ Your tasks.
- ▶ Tasks where you are a collaborator.
- ▶ Check regularly (or use different settings e.g. email notifications).
- ▶ Essentially don't miss a thing.
- ▶ Acknowledge them!

Asana



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Reflect

Asana

- ▶ Aim to review **weekly**.
 - ▶ Remove unimportant items.
 - ▶ Clarify again where needed.
 - ▶ Consider what has changed given newer information.
 - ▶ Re-prioritise as necessary.
 - ▶ Have trust in its state.

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Engage

Asana

- ▶ Now you are organised you can just get on and get things done.
- ▶ Look out for the Unicorn!



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Knowledge Management - Evernote

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Knowledge Management

Quick Reminder

- ▶ Building a **second brain**.
- ▶ Quick to find information you need.
- ▶ Consider compression vs context. Use **progressive summarisation**.
 - ▶ Raw notes > bold/highlighted passages > summary.

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Knowledge Management

Evernote

- ▶ Capture - Unsorted Notes Inbox.
- ▶ Clarify - Sort.
- ▶ Organise - Notebooks, Notebook Groups, Tags, Favourites, Sharing.
- ▶ Reflect - Progressive Summarisation
- ▶ Engage - Just do it!

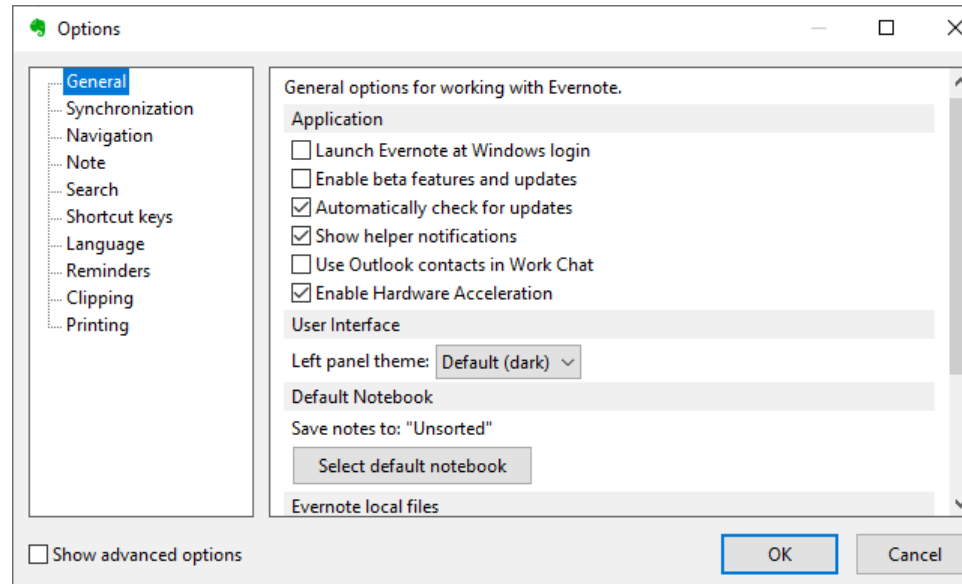
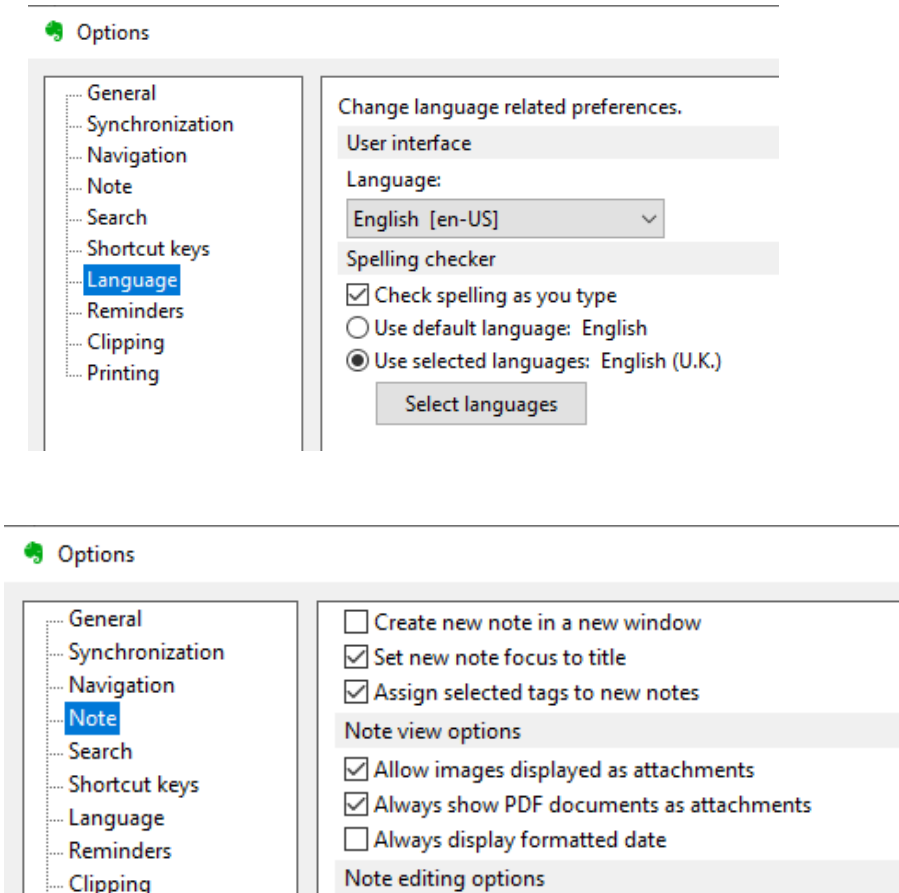
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Setup - Basics

Evernote

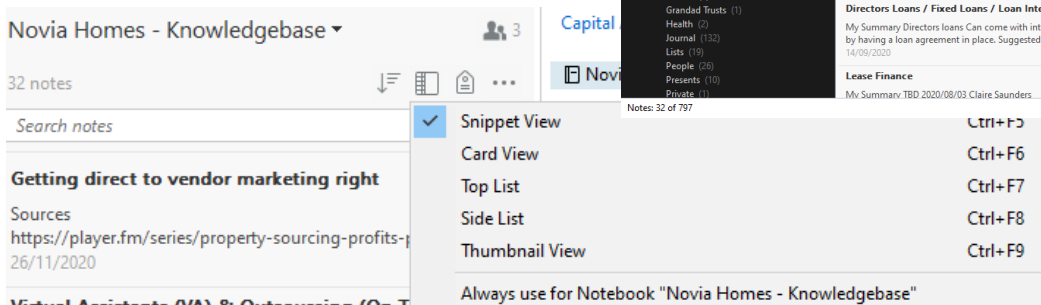
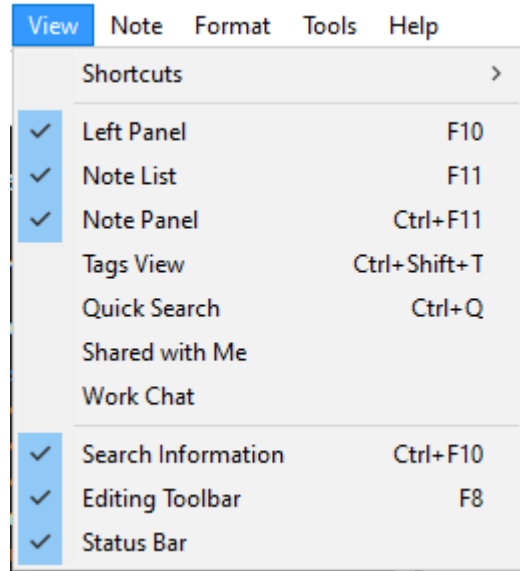


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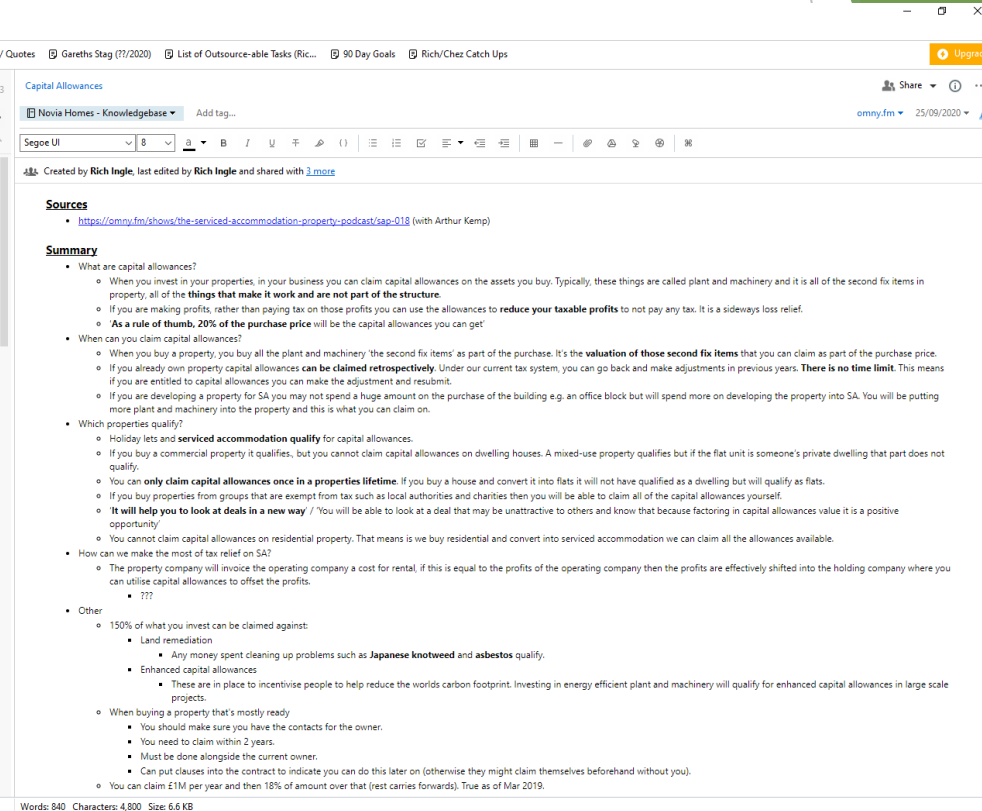
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Setup - View



Evernote



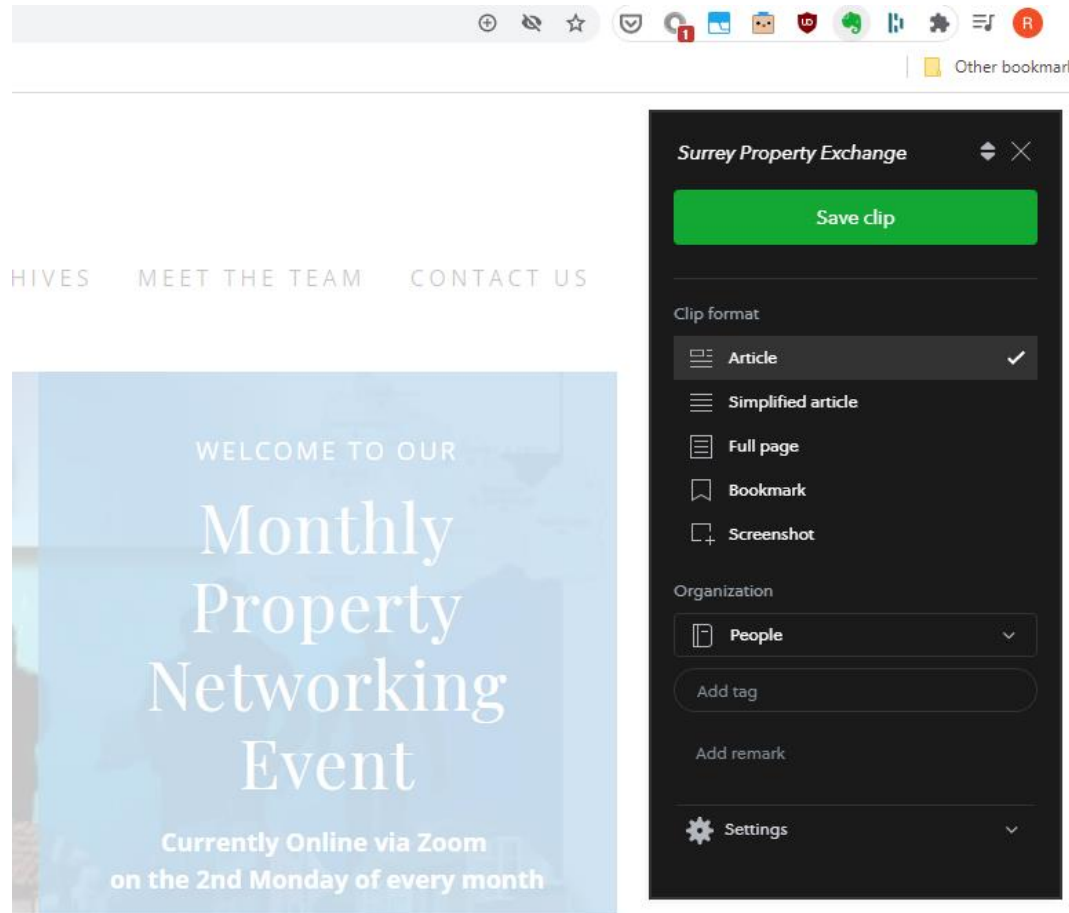
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Capture - Clipper & Email

Evernote



Email Notes to @m.evernote.com ?

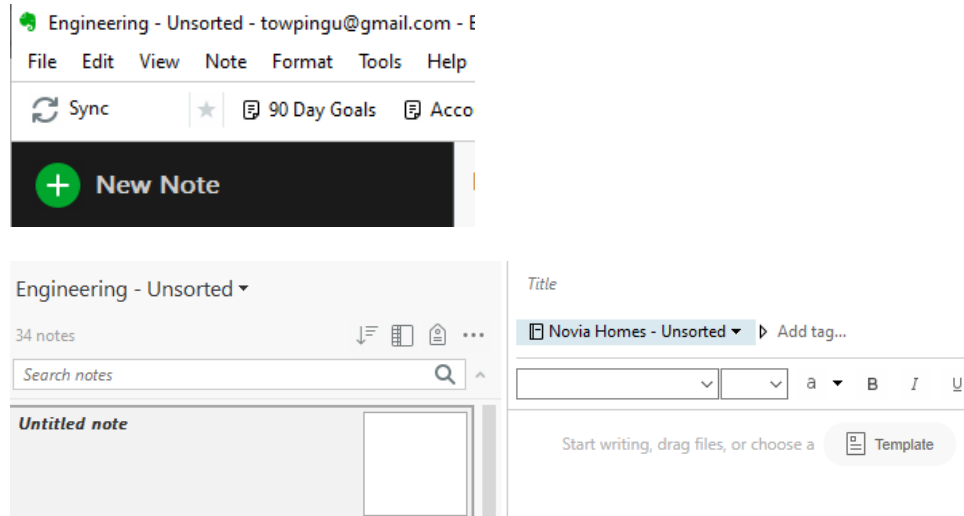
Email your notes, snapshots, and audio clips directly into your account.
Emailed notes will go directly into your default notebook.

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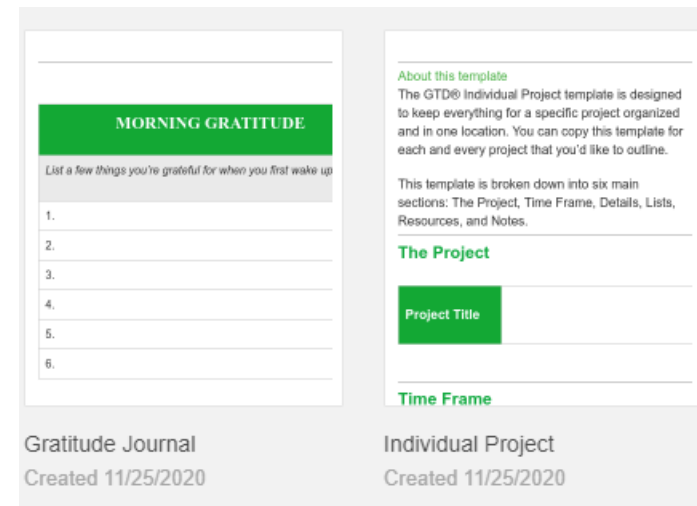
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Capture - Notes



Evernote

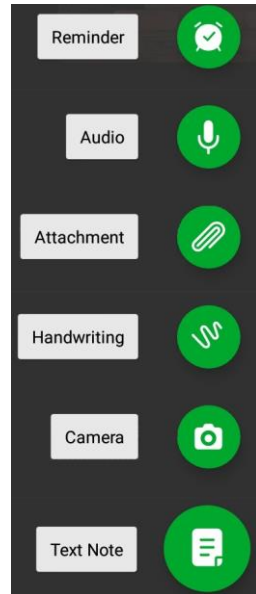
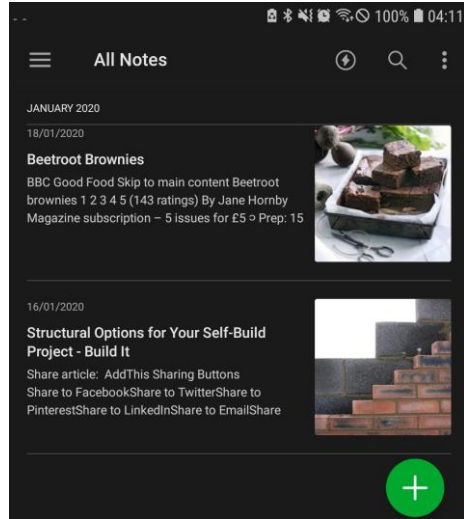


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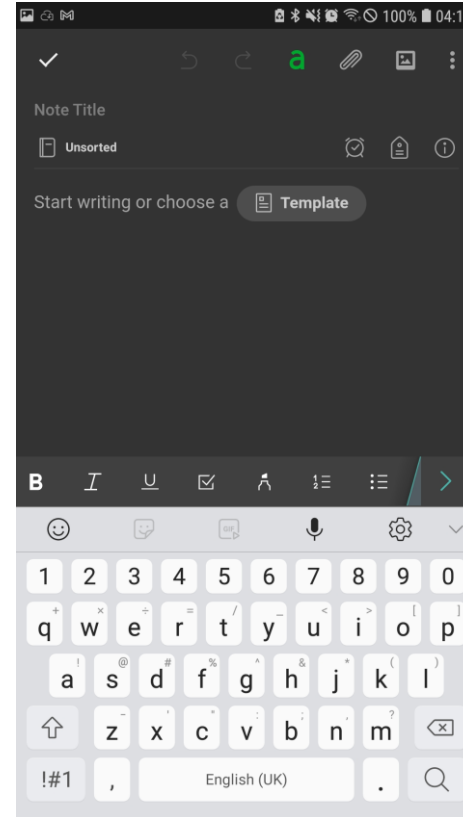
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Capture - Notes Mobile



Evernote



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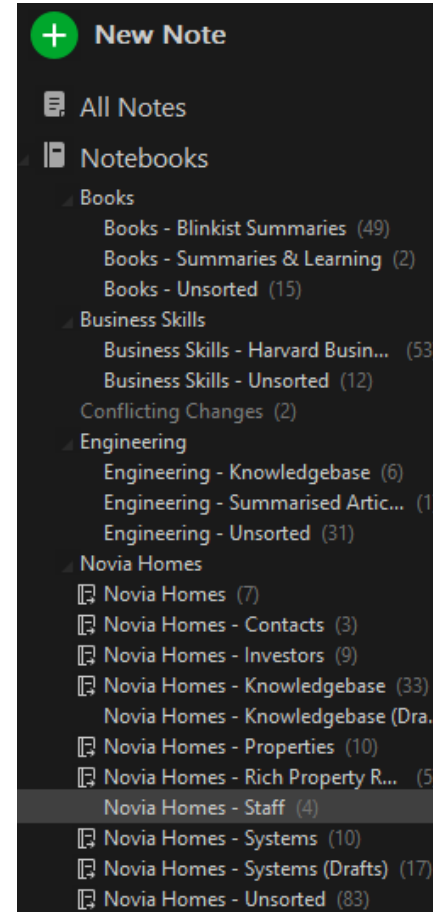
03333 034 487 | rich@noviahomes.co.uk



Organise - Notebooks

Evernote

- ▶ Allow you to capture notes in one place.
- ▶ Notebooks can be grouped into sections.
- ▶ Setup is entirely up to you and what fits your way of working.



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Organise - Shortcuts

Evernote

- ▶ Notes can be added as shortcuts to the top menu for easy access.
- ▶ Work out where you go regularly to save time.

🌿 All Notebooks - towpingu@gmail.com - Evernote

File Edit View Note Format Tools Help

🔄 Sync | ★ | 📅 90 Day Goals | 📅 Accounts | 📅 Financial Review | 📅 Periodic Review | 📅 Snippets / Quotes | 📅 90 Day Goals | 📅 Rich/Chez Catch Ups

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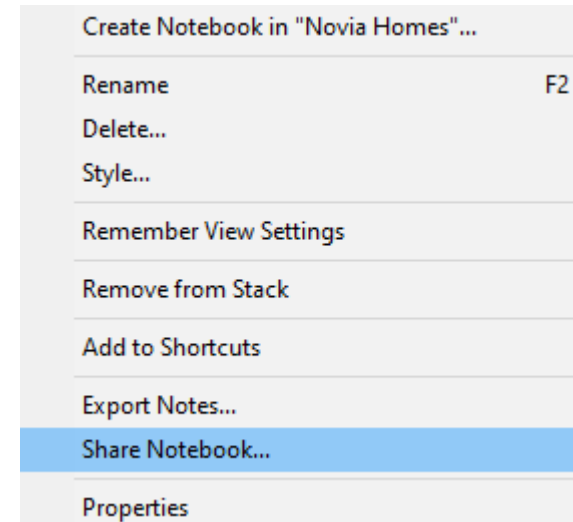
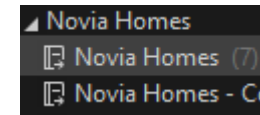
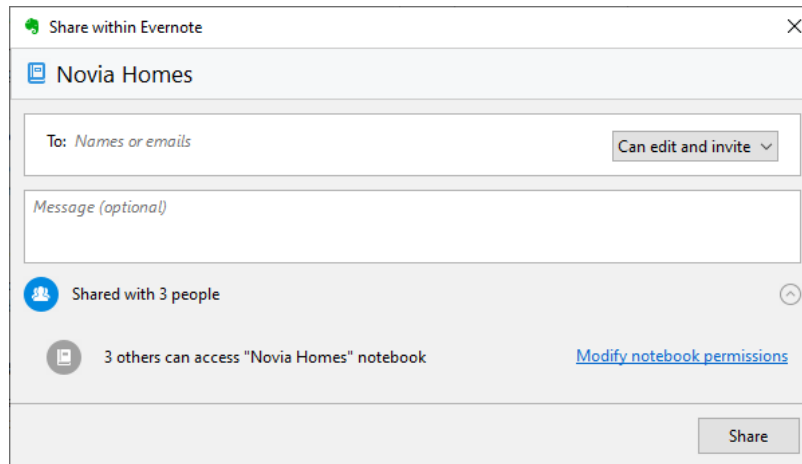
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Organise - Sharing

Evernote

- ▶ When working within teams sharing Notebooks is critical for common knowledge.
- ▶ Do this through right clicking them on the menu.



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Reflect

Evernote

- ▶ Some unsorted notes is fine.
- ▶ Progressive Summarisation.
 - ▶ Summarise those notes with good value.
 - ▶ Summarise collections of notes into core topics.

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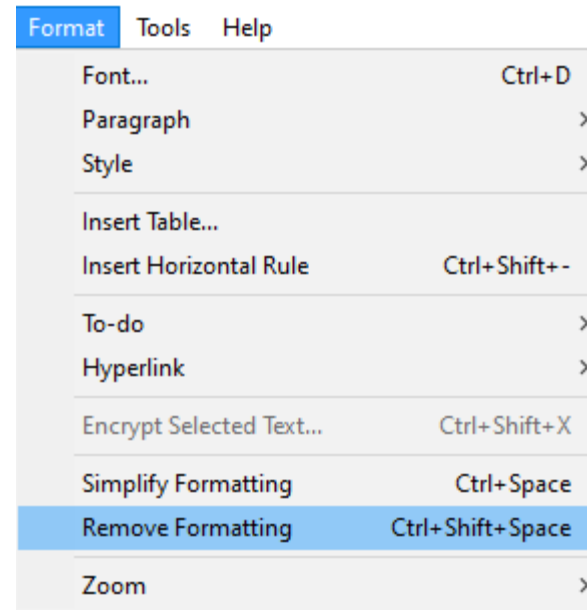
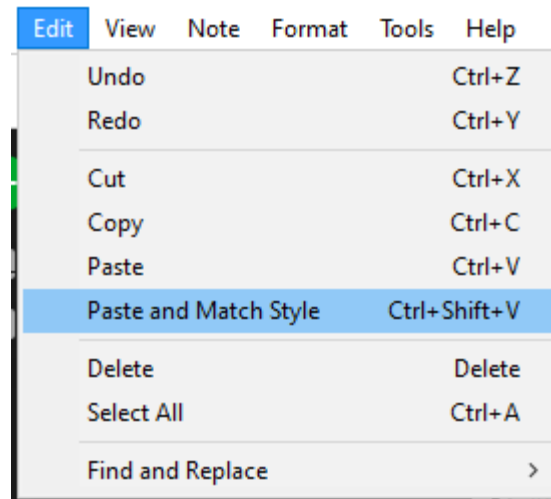
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Tips

Knowledge Management

- ▶ Email is not a knowledgebase.
- ▶ Tagging and the effort of maintaining is more cost than its worth.
- ▶ Formatting quirks when pasting.



Questions

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