

# Presenters



Meenal Sim

Customer Success Manager  
Asana



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Project Manager | Strategy, Execution and Innovation  
Compassion Australia



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Nonprofit Program Manager  
Asana



# Agenda

The three C's of collaboration

Compassion Australia

Improving collaboration by eliminating information silos

Customer Success

Getting started with Asana and best practices for navigating change

Q&A

The three C's of collaboration  
communication  
content  
**coordination**

# Teams struggle with coordination

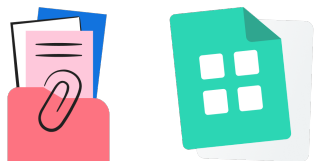
## COORDINATION

?

Plan | Process | Responsibilities

## CONTENT

### Files



Creating, sharing, storing  
documents and files

*(e.g. Dropbox, Drive, Box, OneDrive)*

## COMMUNICATIONS

### Messaging



Sending messages, making  
announcements

*(e.g. Gmail, Outlook, Slack, Teams)*



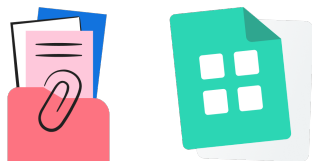
# Spreadsheets don't scale

## COORDINATION



## CONTENT

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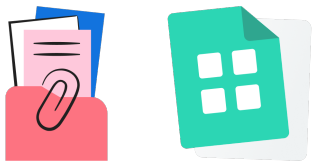
# Traditional project management tools aren't adopted

## COORDINATION



## CONTENT

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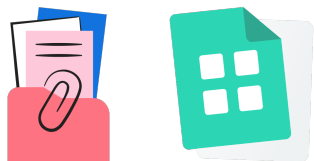
Asana is purpose built for team coordination

COORDINATION



CONTENT

Files



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COMMUNICATIONS

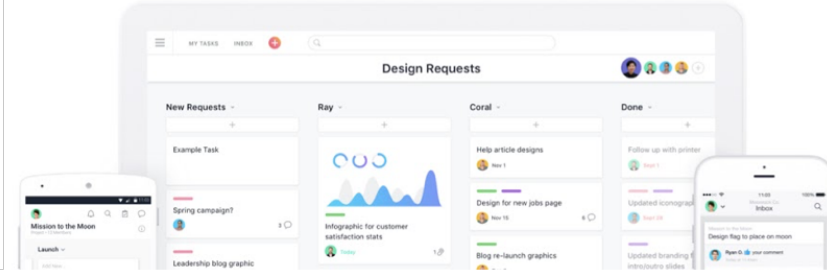
Messaging



Sending messages, making  
announcements

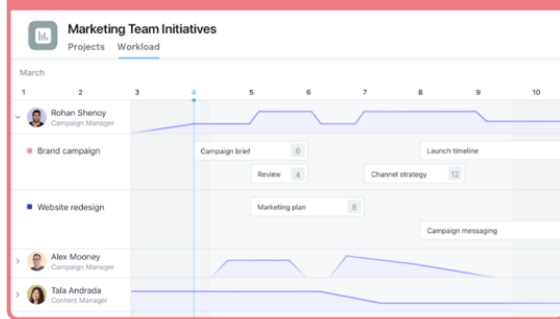
*(e.g. Gmail, Outlook, Slack, Teams)*

# Teams rely on Asana for their projects and processes



## Planning

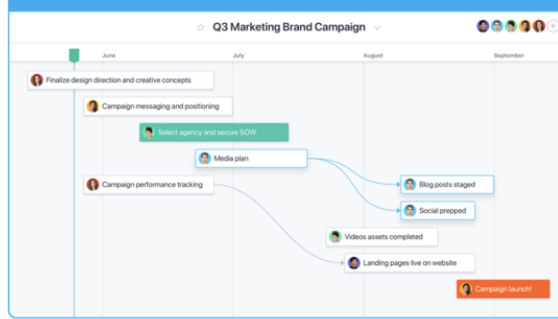
Promote balance, not burnout



Plan your objectives and gain visibility of workload across your whole team.

## Projects

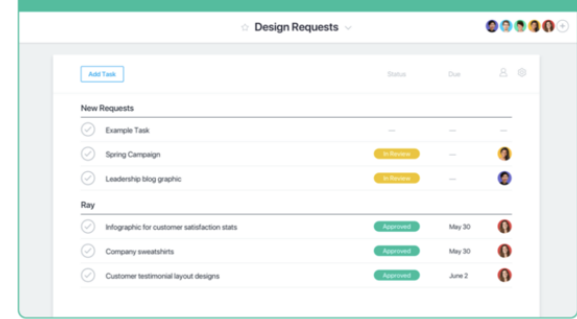
Hit your deadline every time



A single source of truth to organize projects, communicate and share content.

## Processes

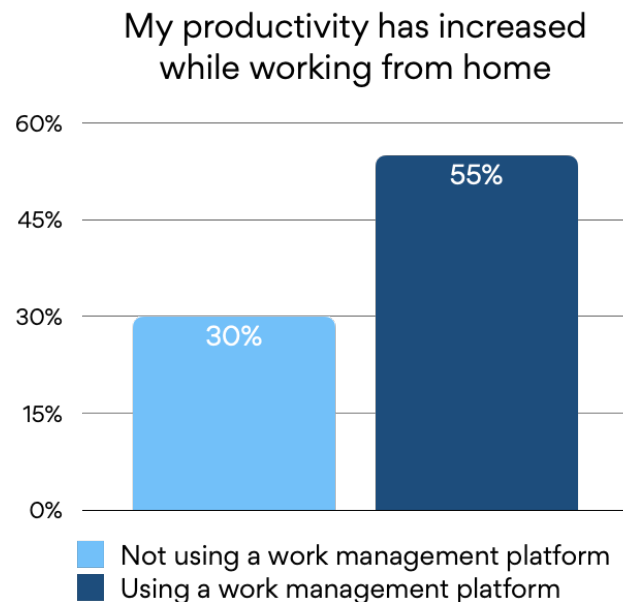
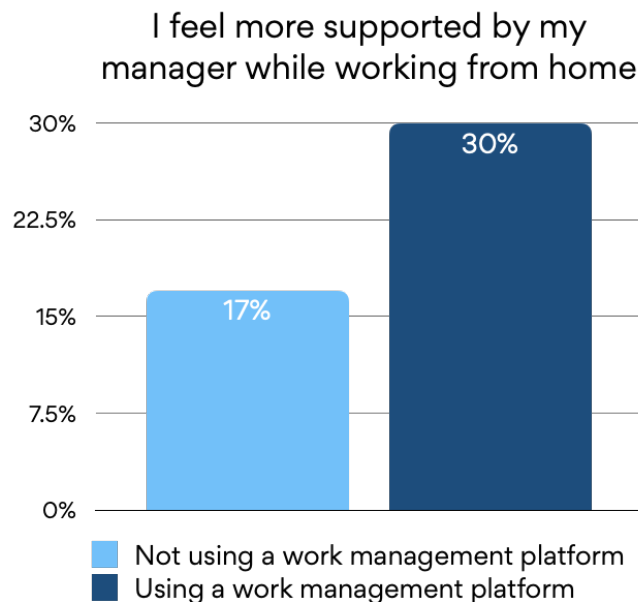
Automate important ongoing workflows



Standardize and automate your team's processes to prevent work from falling between the cracks.

# Anatomy of Work: Remote Teams

Asana released findings from the **Anatomy of Work: Remote Teams** survey on April 29, 2020 that evaluates the behaviors and attitudes of 5,140 full-time employees working from home from April 6 through April 15 in Australia, Germany, Japan, the U.K., and the U.S.



# Compassion Australia

Improving collaboration by eliminating information silos

# Compassion Australia

Compassion is a Christian international holistic child development organisation that assists children and their families living in poverty, regardless of their beliefs, gender or background.

- Australian sponsors support 120,000 Compassion assisted children and global sponsorships sit at over 2M within 25 under-resourced countries
- Since the beginning of our COVID-19 Appeal we have seen over \$2.8m come in to support Compassion assisted children and their families during this pandemic



Sarah-Jane Van Eeden

Project Manager | Strategy, Execution and Innovation  
Compassion Australia



# Compassion Australia- Why Asana?

We're able to do more with Asana because it .....

We turned to Asana because we needed to:

1. **Consolidate different project management tools into one.** Rather than using multiple tools for project management, we now use Asana as our one stop shop for all projects.
2. **Increase visibility of work across the organisation.** We now have increased visibility of work both within departments and across departments. An example of this is we used Portfolios to manage all projects that were initiated as a result of COVID-19.
3. **Have the ability to triage workflow.** We now have the ability to triage work, particularly in our IT department. This allows the team to have visibility of all work that is coming in, as well as visibility on resourcing capacity and resourcing restraints.



# Compassion Australia + Asana

## Consolidate different project management tools into one.

- Asana helps us manage all projects in flight,
- Custom templates standardize internal processes improving progress tracking

TEMPLATE 2: Project Plan

List Board Timeline Calendar Dashboard Everhour Progress Forms More...

This project is a template. [Learn more.](#) Use template

+ Add task

Incomplete tasks Filter Sort Rules Apps Fields

Task name	Assignee	Due date	Priority	Task Progress	
[READ ME] - Instructions for using this template					
Add task...					
▼ Project Team Annual Leave					
▼ Project Admin					
✓ Create project on SharePoint					
✓ Complete Lite PID			High	Not Started	
✓ Complete PID			High	Not Started	
✓ Set up project Team (Mandatory)					
✓ Kick off meeting (Mandatory)					
✓ Complete RACI Matrix (Recommended)					
✓ Complete Communication Plan (Recommended)					
✓ Complete Stakeholder Engagement Plan (Recommended)					
✓ Set up Project page on Project Hub (Optional)					
✓ Create a budget for project (Recommended for larger projects)					
✓ Create Risk Register for project (Recommended for larger projects)					
Add task...					
▼ Project Deliverables					
▼ Phase 1 (Enter dates Month - Month)					
✓ Task					
✓ Task					

FAQ standardizes template use



Project management instructions



Project deliverables tracking



Project phase tracking



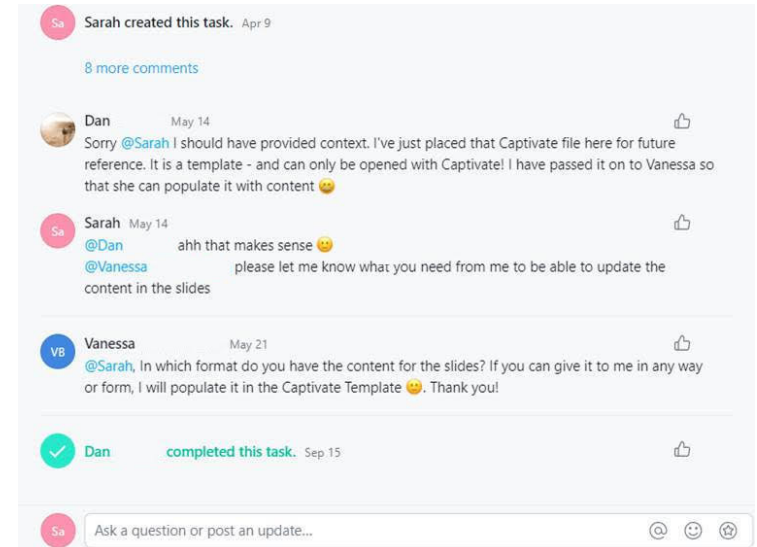
# Compassion Australia + Asana

## Increase visibility of work across the organisation

Asana teams help to eliminate information silos, facilitating a culture of transparency.

- ▶ MR - North East
- ▶ MR - Central
- ▶ Brand Experience
- ▶ People & Culture
- ▶ Compassion Staff
- ▶ Building & Logistics
- ▶ Accounts Team
- ▶ Technology Enablem...
- ▶ MR - South East
- ▶ CAU Internal Commu...

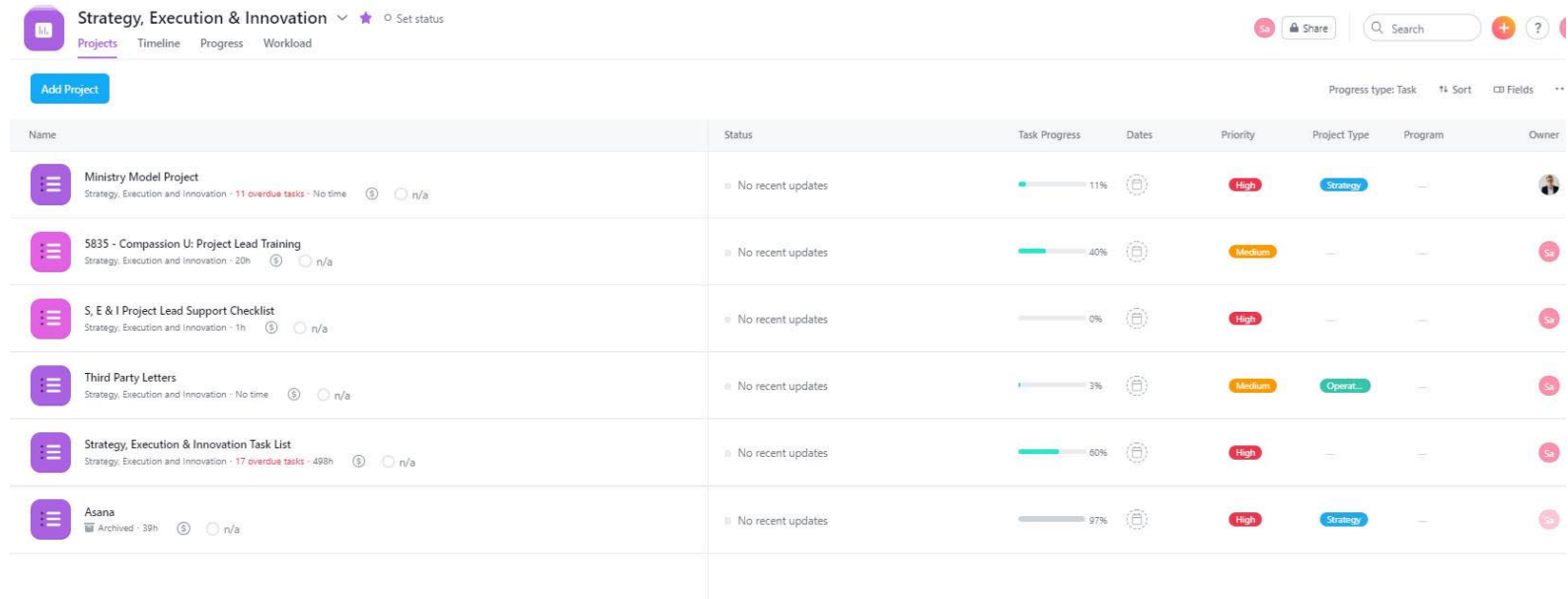
@Mentioning colleagues in tasks brings instant alignment and clarity to who is doing what by when





















# Compassion Australia + Asana

## Increase visibility of work across the organisation

Portfolios provide executives and stakeholders insight into dept priorities and surface the projects where work happens.



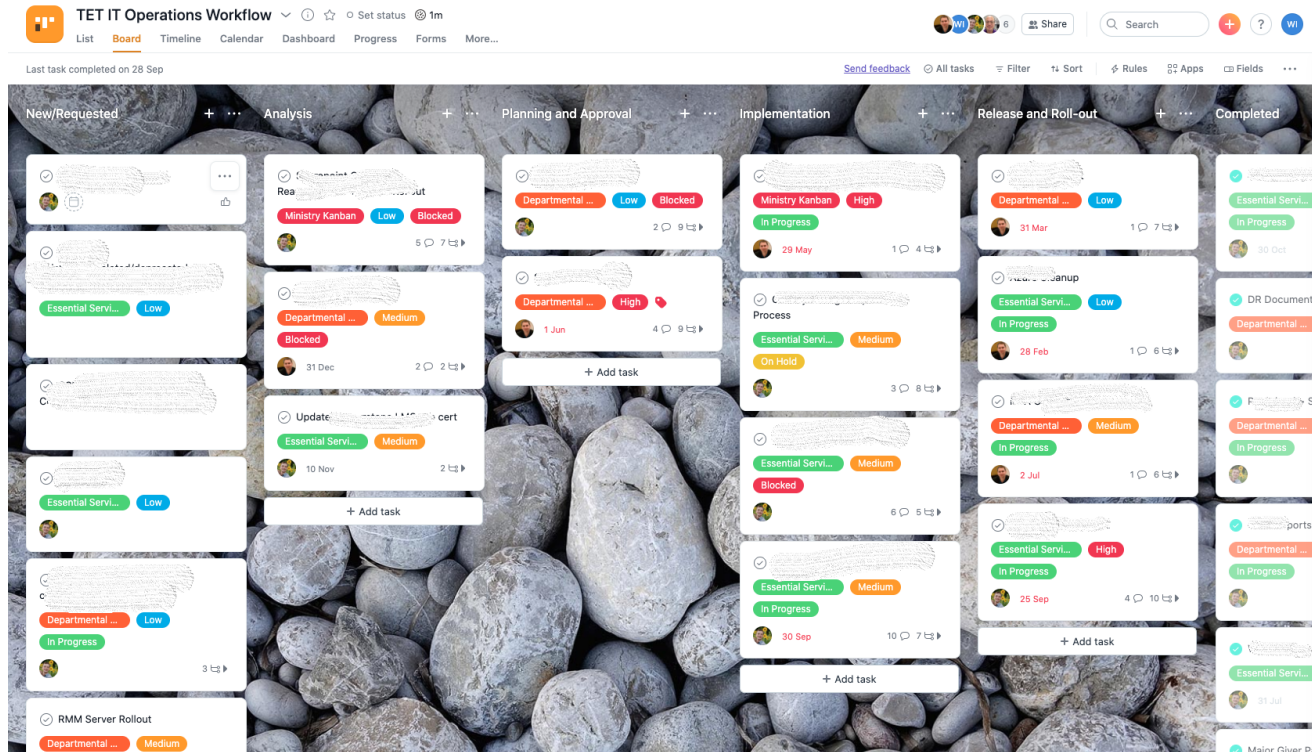
The screenshot shows an Asana portfolio view for the 'Strategy, Execution & Innovation' department. The interface includes a top navigation bar with tabs for 'Projects', 'Timeline', 'Progress', and 'Workload'. A search bar and a '+ ?' button are also present. Below the navigation bar is a table listing various projects. Each project row includes a project icon, name, details (like overdue tasks and time), status, task progress bar, dates, priority, project type, program, and owner. The projects listed are: Ministry Model Project, 5835 - Compassion U: Project Lead Training, S, E & I Project Lead Support Checklist, Third Party Letters, Strategy, Execution & Innovation Task List, and Asana (Archived).

Name	Status	Task Progress	Dates	Priority	Project Type	Program	Owner
 <b>Ministry Model Project</b> Strategy, Execution and Innovation - 11 overdue tasks - No time Ⓢ ○ n/a	No recent updates	11%		High	Strategy	—	
 <b>5835 - Compassion U: Project Lead Training</b> Strategy, Execution and Innovation - 20h Ⓢ ○ n/a	No recent updates	40%		Medium	—	—	
 <b>S, E &amp; I Project Lead Support Checklist</b> Strategy, Execution and Innovation - 1h Ⓢ ○ n/a	No recent updates	0%		High	—	—	
 <b>Third Party Letters</b> Strategy, Execution and Innovation - No time Ⓢ ○ n/a	No recent updates	3%		Medium	Operat...	—	
 <b>Strategy, Execution &amp; Innovation Task List</b> Strategy, Execution and Innovation - 17 overdue tasks - 498h Ⓢ ○ n/a	No recent updates	60%		High	—	—	
 <b>Asana</b> Archived - 39h Ⓢ ○ n/a	No recent updates	97%		High	Strategy	—	

# Compassion Australia + Asana

**Have the ability to triage workflow** using boards view.

Columns aligned with steps in workflow implementation, help teams understand their caseload & work “in flight”

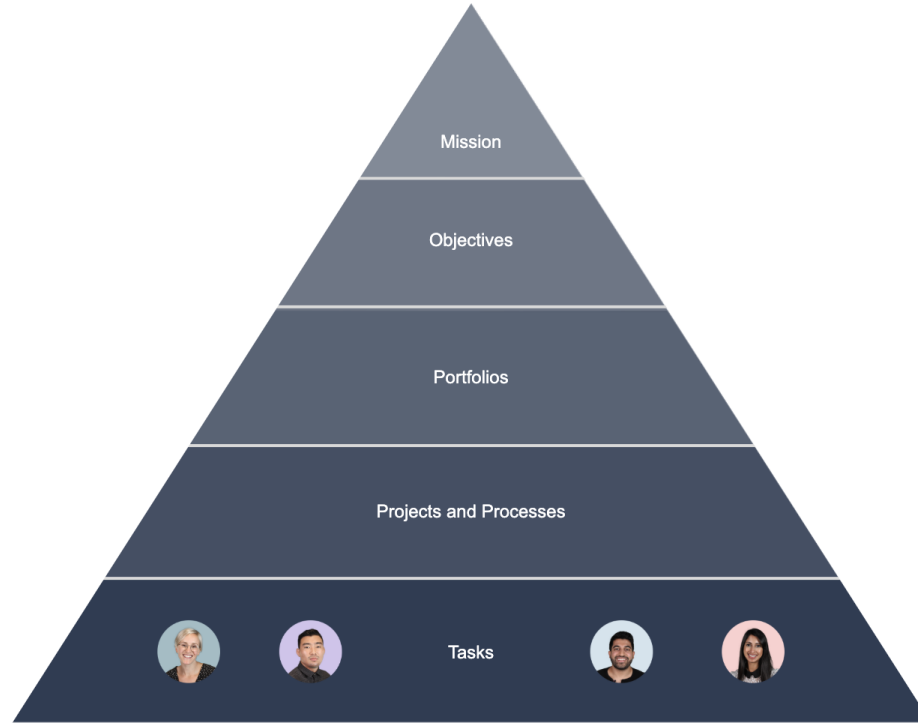


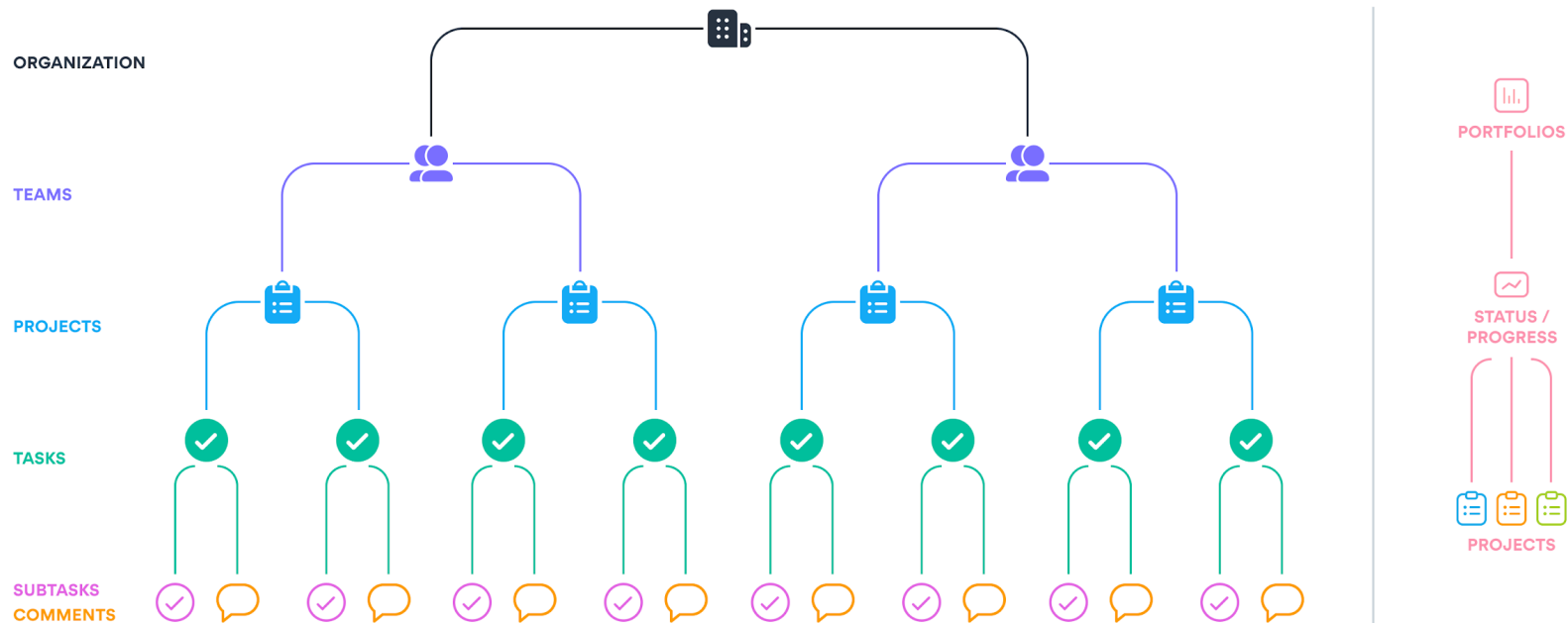
# Customer Success

Getting started with Asana and best practices for navigating change

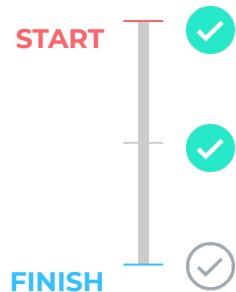
# The Pyramid of Clarity

Create Flow, Efficiency and Engagement





## Deadline-driven



- Tasks completed in sequence
- From point A to point B
- Project usually has a due date

E.g. Fundraising Campaigns  
Conferences  
Volunteer Onboarding

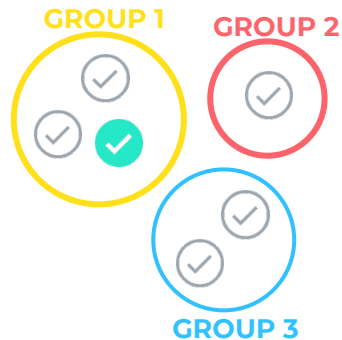
## Ongoing process



- Tasks move through stages
- Through an ongoing pipeline
- No project due date

E.g. Requests  
Board Meeting Minutes  
Approvals

## Planning and reference



- Tasks may not be completed
- Primarily for reference
- No project due date

E.g. Media Calendar  
Policies  
Brainstorming





“Our communication as a leadership team immediately improved when we began tracking our weekly goals in Asana.”

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SKYLER BADENOCH — CEO



“With Asana, we’re able to identify 10% more new grant prospects and achieve 17% funding growth because our work is more centralized, coordinated, and efficient.”

STEPHEN DANNER — DIRECTOR OF DEVELOPMENT

## What we hear

*“The way we’re doing things now works just fine.”*

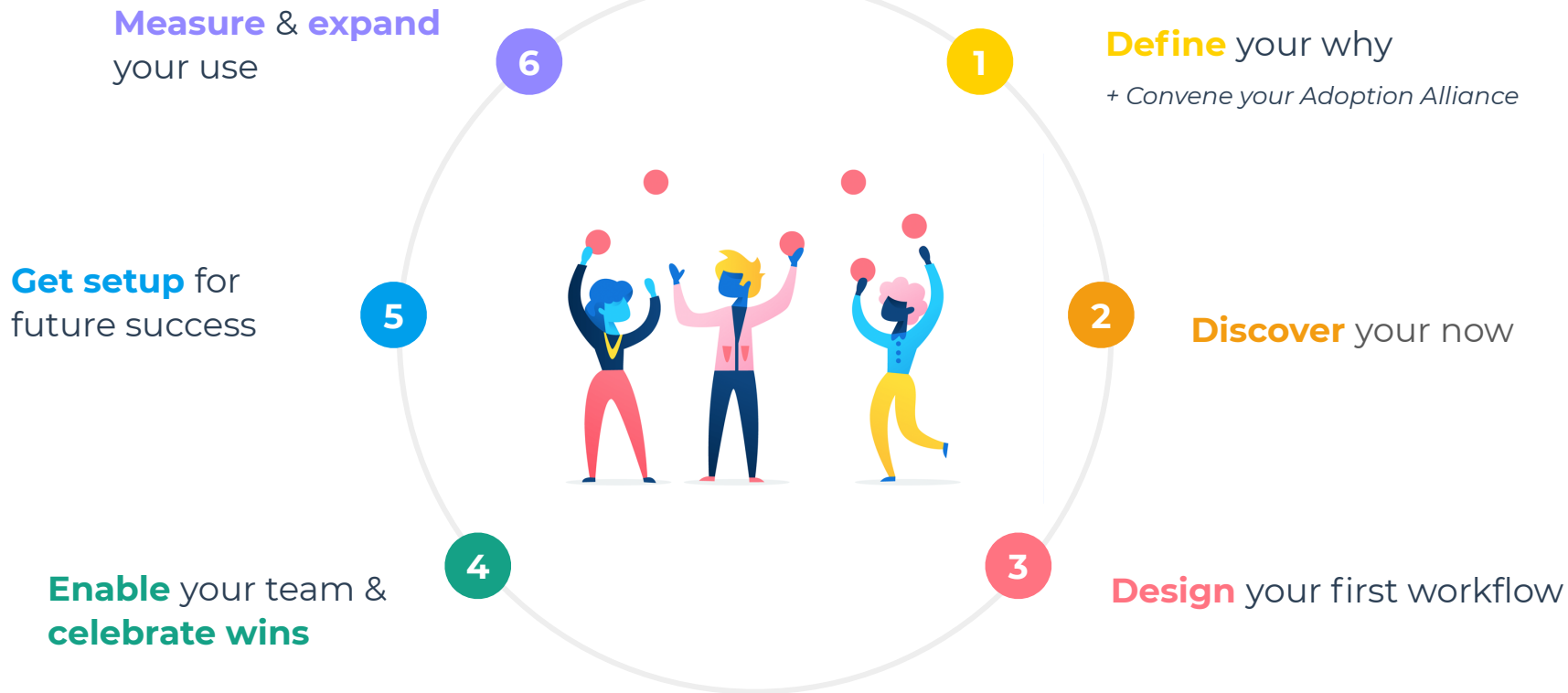
*“We’ve tried (something like) this before and it didn’t work.”*



*“We don’t have time to learn a new tool”*

*“We’re already using so many tools, why add another one?”*

# Asana Way of Change



## Setup conventions with your tool stack (What tool do you use for what?)

	Asana	Slack	Google Docs	Email
Purpose	~90% of our internal work!	Time-sensitive or emergency notifications; also special channels	Co-creation/ editing	External Communication
Type of comms	Actionable tasks, Mass comms, reference material	Urgent requests or questions, targeted announcements	Shared documents, reference material	Conversations with people outside of Asana
Appropriate for...	Staff/team Comms, Project updates, Individual tasks	Reminders (eg all hands, special events), targeted announcements	Policies, proposals, drafts	Vendors, press, candidates
Examples	Work and project tracking, project updates, announcements	Product or facility outages, meeting room changes, running late, casual or fun conversations	Comms drafts, proposals, presentation decks	Communicating with candidates, customers, or vendors



Set up integrations with other common tools

<https://asana.com/apps>



## Best practices

- ✓ **Invite people to projects**, not just teams
- ✓ **Manage personal to-do list** via My Tasks (private!)
- ✓ **Integrate** with and import from other tools
- ✓ Keep **communication in the context** of the work
- ✓ **Train** your team & let them know **what's in it for them**
- ✓ Set **clear conventions** from the outset
- ✓ **Celebrate**, celebrate, celebrate! (and quantify!)



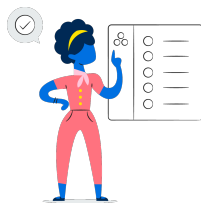
## What not to do

- ✓ **Change takes time**, don't try to change all processes overnight
- ✓ Creating **too many multiple layers** (i.e. sub-sub-subtasks)
- ✓ Avoid the **“task completer”** role
- ✓ Be conservative when **creating teams**
- ✓ Create tasks **without clear descriptions** or realistic **due dates**
- ✓ Let templates or **projects go stale & out-of-date**



## [Asana Guide & Support](#)

[asana.com/guide](https://asana.com/guide)  
[asana.com/support](https://asana.com/support)



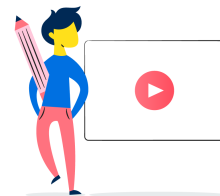
## [Community Forum](https://asa.na/nonprofitforum)

<https://asa.na/nonprofitforum>



## [Asana Academy](https://asa.na/nonprofitacademy)

<https://asa.na/nonprofitacademy>



## [Webinars & Workshops](https://events.asana.com/sydney)

<https://asa.na/bt>  
<https://events.asana.com/sydney>



## **Change Management Strategy**

<https://asa.na/changemgmt>

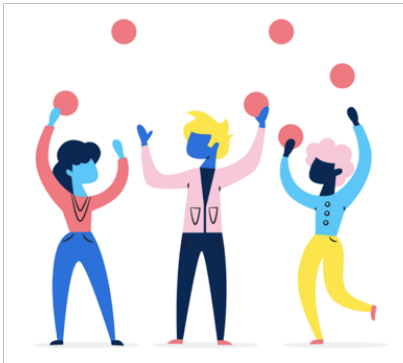


## **Asana Advisors**

[advisors.asana.com](https://advisors.asana.com)

# Asana for your Nonprofit

Nonprofits are asked to do a lot with a little.



We want to help you do more with more.

## Technology

Eligible nonprofits can apply for the Asana Nonprofit Discount (50% off an annual Asana Premium or Business subscription) through TechSoup

[asana.com/nonprofit](https://asana.com/nonprofit)



## Enablement

Asana Nonprofit Discount recipients have access to the Asana Advisors program where you can schedule a free 1-hour session with an Asana employee to help your team get the most out of Asana

[advisors.asana.com](https://advisors.asana.com)



Q&A

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Customer Success Manager  
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Thank you!