

# Template - Asana Project Summary

**Project/Process Name:** Write a clear and descriptive project name. Keep it as short as possible and abide by any naming conventions that are established in the team it will live. If your project is a template, always place that word ‘Template’ at the beginning so it can be easily identified.

**Project Type:** Specify if this is a time-bound or ongoing project

**Why Asana Statemen**t: “As a [insert team name], we use Asana to manage [insert project/processes name] to alleviate [these pain points] so that we can accomplish [these goals].”

Note: For some teams / departments, you may find it easiest to create a generic ‘why Asana’ statement for all the projects/processes you manage in Asana instead of creating a new one each time. You may alternatively adapt it for each occurrence.

**Project/Process Owner:**

*Instructions:*

1. *To complete this template, delete the text in each second column box and write in content for your actual project. Then copy to or apply the information into the actual project space as described in the third column of the table.*
2. *You should also attach this file to the project through the ‘Key Resources’ feature in the Overview tab. This should be done using the document management system integration (OneDrive-SharePoint, Dropbox, etc..) so that you can edit the document and keep this access live without ever needing to re-attach a new version. If the file location ever changes, you may need to redo this connection.*

| Item | What you should write | Where this goes in the Asana project |
| --- | --- | --- |
| Description | Write a general description of the project explaining what will be done, and how the project will be used. If you are going to create a new project template, specify this here and any additional details that should be known to help properly use the template each time it serves as the basis for a new project space. | Copy to ‘How we’ll collaborate’ text box in Overview Tab |
| Project Type | Specify whether this is a time bound or ongoing project. Barkun Consulting does not recommend using Asana for reference projects. | Copy to ‘How we’ll collaborate’ text box in Overview Tab |
| Goals | List the goals the project aims to help achieve. You may also comment on business objectives and pain points as well as what success looks like. You may also refer to items in the Goals (Business Subscription) module if you are using it. And link the project to a goal, if applicable. | Copy to ‘How we’ll collaborate’ text box in Overview Tab, or link using Goals Module (Business Subscription Only) |
| Task Naming Conventions | If applicable, specify the structure of any naming convention(s) you want to establish. | Copy to ‘How we’ll collaborate’ text box in Overview Tab |
| Timeline | **Time-bound project:** Identify the start and end dates of the project. You may alternatively describe the overall length of the project if you are not sure about these and formalize them later.  **Ongoing project:** While the project itself does not have a fixed timeline; you may put some commentary on how long an activity typically takes that you conduct within this process. | **Time-bound project:** Enter project dates in ‘Project Details’ feature. You may want to additionally copy some or all the text to the ‘How we’ll collaborate’ text box in Overview Tab  **Ongoing project:** Copy to ‘How we’ll collaborate’ text box in Overview Tab |
| Security | State what visibility level you will assign (Public to team, private). Remember that by default, all projects should be ‘public to team’, so if you stray from this, you should explain why. | Copy to ‘How we’ll collaborate’ text box in Overview Tab |
| Members | List all of the people who will be members of the project and identify any specific roles such as the project owner. Segregate them by their access, establishing who will have the right to edit and who will only have the right to comment. You may also want to make mention of what access members of the team in which the project lives have. **Use the following format:**  People who can edit:   * Project owner * Project member 1 * Project member 2   People who can comment:   * Members of the team * Project member 3 * Project member 4 | Copy to ‘How we’ll collaborate’ text box in Overview Tab |
| Approvals | If applicable, list any approval characteristics that will be part of this project. You should always specify who the approver will be. You may provide a brief overview of the approval process here or develop this in a separate document and mention its name. | Copy to ‘How we’ll collaborate’ text box in Overview Tab, and link additional documents using the ‘Key Resources’ feature. |
| Custom Fields | List any custom fields you intend to use in this project. If you will create a new one, you may want to all state the type of field and any options you will include in a dropdown menu | Add or create fields using ‘Customize’ Menu |
| Task Templates | State whether you will use a task templates and what information you will want in it. If you plan to have multiple templates, make a mention of this here. If you have any existing check lists, you can link them as a reference using the ‘Key Resources’ feature | Create template using ‘Customize’ Menu and link additional documents using ‘Key Resources’ feature |
| Forms | State whether you plan to create a form. If you will, what purpose will it serve and where will you publish a link to it for others to access so they can create submissions. | Create form using ‘Customize’ Menu and publish link to specified location. |
| Rules (Automations) | State whether you intend to use any rules to apply automations and what purpose they will serve | Create rules in the ‘Customize’ Menu |
| Integrations | List any integrations you will use in this project. You may want to describe the purpose for using them. | Dependant on the specific integration. Discuss with Admin |
| Risks | What risks could delay or derail the project, cause it to go over budget, or ultimately lead to failure | Can be left in this document |
| Risk mitigation techniques | How will we address the risks identified above to reduce their likelihood or impact and help assure project success | Can be left in this document |
| Deliverables | Describe the work products that will be created during this project and ultimately submitted or completed. This could be various types of reports, a physical product, or something else. | Can be left in this document |
| Resources | List all the resources that will be needed to complete the project. This may be money, people and hours of availability, physical space, computer technology, materials, specialized expertise or otherwise. For each one, comment on whether this resource currently exists within the organization and whether it is realistically available to you during your established project timeline. For all resources that are missing, identify where they can be found. You may also comment on purchasing lead times if relevant. | Can be left in this document |