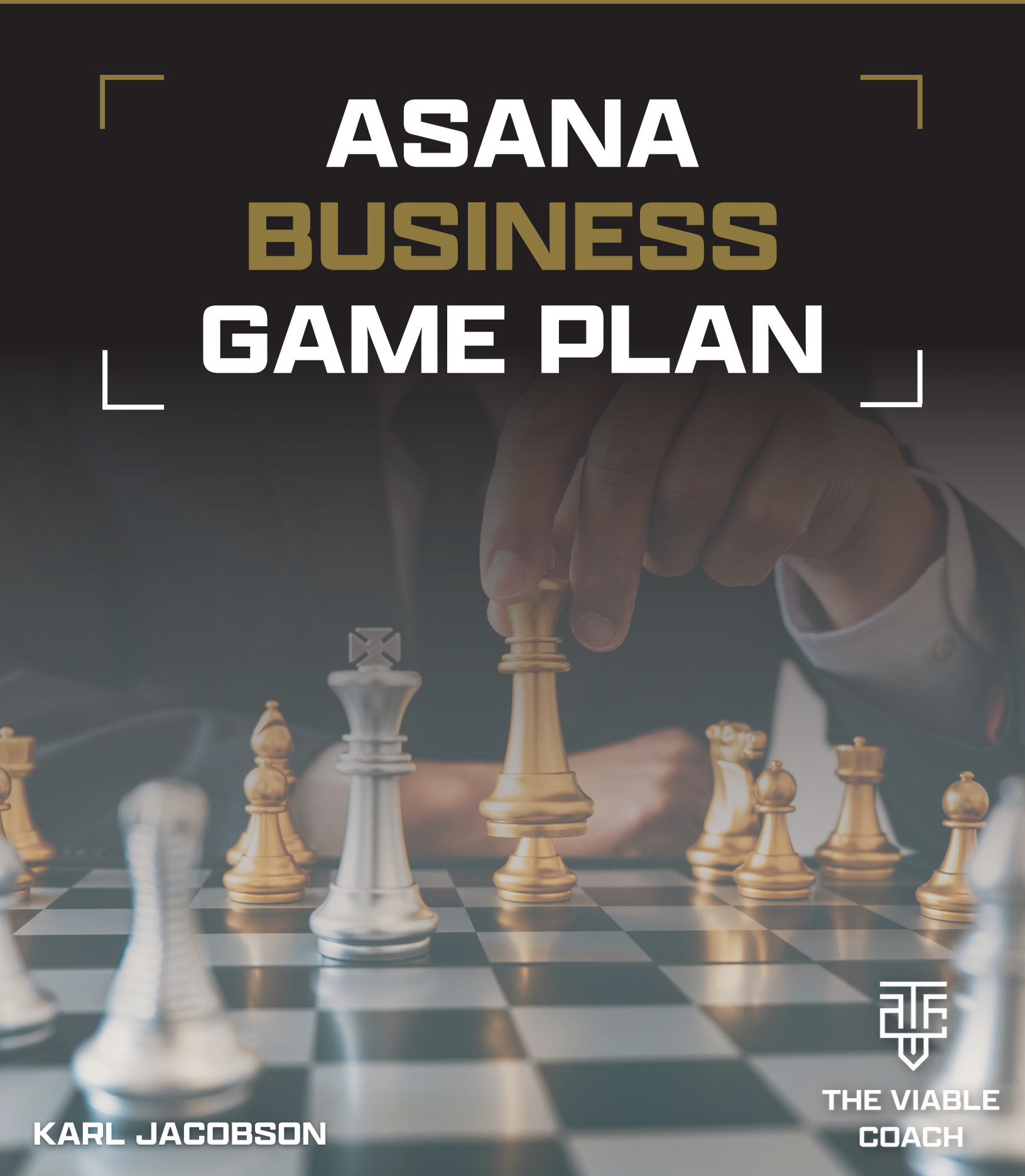
STREAMLINE & ORGANIZE YOUR BUSINESS
TO SAVE 10+ HOURS PER WEEK

ASANA BUSINESS GAME PLAN



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ABOUT

THE AUTHOR

WHO AM I?

I'M KARL JACOBSON, FOUNDER OF THE VIABLE COACH.

Here at The Viable Coach, I help entrepreneurs get more done and work less through simplified systems, productivity tools and time-management strategies. I've helped many people go from chaos to clarity to confidence in their business and life.

I've worked as a performance coach for over 12 years, and I've worked with over 40+ NBA clients, CEOs, small business owners and entrepreneurs just like you. I've owned and operated multiple successful businesses, and I want to help YOU DO THE SAME.

My mission here at The Viable Coach is to educate, equip and empower 100,000 purpose-driven entrepreneurs with the productivity skills that translate into viability. Simply put, I help you go further and faster in your entrepreneurial journey with productivity.

This Asana guide is your first step towards organizing your business and finally getting more done. Use this guide to help you take your business and life to the next level and achieve your biggest goals.

I'm glad you're here! Let's get started.

Karl Jacobson

Karl Jacobson

1 SET UP AN ASANA ACCOUNT

Set up your Asana account using your business or custom email address. This makes sure you are classed in the software as an “organization” and will get more functionality. It will give you the ability to use “teams” as shown below).

If you do not have a business email yet, you can set it up with G Suite (**here is the link**). If not then you can simply use your personal email address, but you will not have access to step 2 and will be classed as a “workspace”.

CLICK HERE TO SET UP YOUR ACCOUNT

AFFILIATE LINK

2 SET UP YOUR “TEAMS”

Now its time to break your business up into “teams”. Think of “teams” as parts or branches within your business. On the left hand side you can click on the “+” button next to the word teams.

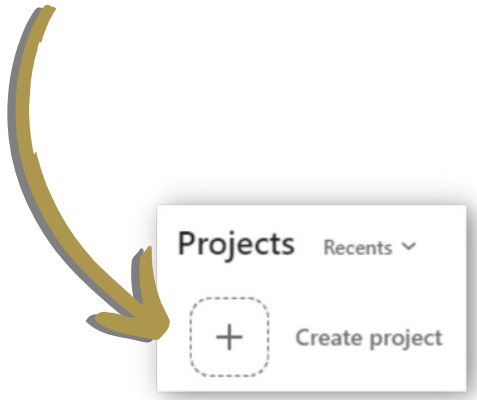
Make sure you set them up even if your a solopreneur and it’s just you right now. Part of the Asana business system is preparing you for your business growth - se we want to set up systems now for outsourcing in the future.

SAMPLE TEAMS:

- Marketing
- Sales
- Products & Services
- Operations
- Human Resources / Support
- Personal

3 CREATE INITIAL PROJECTS

These are larger groupings of work - whether ongoing or fixed. Keep the number of projects you have as low as you can (otherwise, it will be more of an organizational hassle, rather than an asset. To add a project click on the “+” button in the “Projects” section of the home page.



SAMPLE PROJECTS:

- Content Calendar
- Marketing Campaign
- Product Creation
- Product Launch
- Research and Development (R&D)
- Service Process

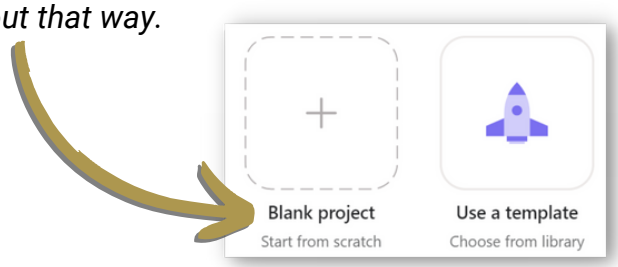
>>> VIEWS

Once you create a project in Asana, you will have the option of the following views:

- (1) List View
- (2) Board View
- (3) Calendar View

Any project can easily switch between the 3 options, so don't worry about which one you choose! It won't take long for you to discover which view is your favorite.

Note: *You will see an option to start with a "Blank Project" or use the built in Asana templates. Typically the easiest to start with a Blank Project (start from scratch) and build your project out that way.*



4 CREATE TASKS & SET-UP SECTIONS

You can now begin adding tasks and sections to your project.

When you add a task, you **must** do the following:

- ***Assign it to someone*** (even if it is just you right now, assign it to yourself!). Click "Unassigned" to do this.
- ***Set the date:*** you're going to complete it. Click "No due date" to add the date.
- ***Add a description:*** with any important details/files needed.
- ***Add any relevant subtasks:*** this will create a checklist of smaller action items under the task.

Optional: add tags for each task

Color-coding is one of the main reasons you can create a successful organizational system in Asana. Tags allow you to color code tasks within individual projects! (more on color coding below)

Click the 3 small dots top right of your task and then "Add tags."

5 CREATE MILESTONES

Make sure your project has milestones so you know if you're staying on track.

The milestone feature is only the Premium plan. The following hack will help you: create a tag and title it "Milestone".

6 ADD IMPORTANT LINKS & TEMPLATES

The first thing you want to do here is create a section at the top of your project and title it "Important Links." Then add links, important documents and/or files that team members might need as well as create templates for recurring tasks.

If you add files, you will save yourself and your team a lot of time searching for files.

When you add a file, start the filename with [FILE].

For recurring tasks, I recommend using templates and adding the steps as subtasks. This will create a checklist of all the steps you need to complete that task.

When you add a template, start the filename with [TEMPLATE].

To use this template do the following steps: click on the template > click on the 3 small dots in the top right corner > click "Duplicate Task" > rename the task with the current task's title.

For example, if you create YouTube videos on a regular basis, you would have a template for creating & publishing YouTube videos.

You would create the master template and title it “[TEMPLATE] YouTube Video”.

Then you would add all steps of creating a YouTube video as "subtasks."

Example Subtasks:

1. Write Script
2. Film Video
3. Edit Video
4. Upload & Publish Video

7 SET UP YOUR MY TASKS HUB

The “My Tasks” hub is where you will check in each day and get your daily action plan to achieve your goals.

In this section, you will see all tasks assigned to you across all projects.

In the “List View”, you can organize it by clicking 1 of the following:

- Mark for Today
- Marked for Upcoming
- Mark for Later

You can toggle between these 3 listed above. This will give you a great to-do list to work from.

>>> POPULAR FEATURE

You can also use one of Asana's most popular features, the **My Tasks Calendar View**.

The My Tasks Calendar view will give you a convenient color coded calendar with all of your to-dos.

By checking off tasks as you complete them, they fade into the background. By doing it this way, you can see what you have already accomplished and get a great sense of accomplishment as you go about your day.

8 TRACK YOUR PROGRESS

It's super important to track your progress and see what is and isn't working.

To do this, Click on the "Status" tab > click "On Track" to add in regular updates and let your team know how the project is going!

Click on the switch that says "Remind me to update every Friday" to get a reminder each Friday!

NEXT STEP

9 JOIN MY ONLINE COURSE
ASANA BUSINESS BLUEPRINT

There is so much more to teach you about Asana!

My online course, ***Asana Business Blueprint***, not only helps you master Asana, but also teaches you how to use it to hit your biggest goals.

You'll get step-by-step, easy-to follow video tutorials, done-for-you Asana templates and so much more.

CHECK IT OUT HERE!