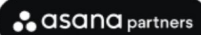# asana

Project Portfolio

By Carolyn Mitchell
Founder of
Blue Creek Digital Solutions

Workflow and Automation Expert

Agile Project Management

Asana Slack Google

Scrum + Kanban

asana partners

Certificate of completion

Carolyn Mitchell

YOU HAVE SUCCESSFULLY COMPLETED:

Asana Partner Services Specialist Training

Issued: October 28, 2023
Certificate No: e7ezumo9bw3m
Company name:

Create

- Home
- My Tasks
- Inbox
- Reporting
- Portfolios
- Goals

New Clients   +

- Client E-Commerc... 🔒
- Marketing Team S... 🔒
- Work Requests ... 🔒

Invite teammates

Help & getting started

Share   Customize

Overview   List   **Board**   Timeline   Calendar   Workflow   Dashboard   Messages   Files

≡ Filter   ↕ Sort   ⊡ Show fields

3 tasks completed today   ⋯

New Requests   +   ⋯

☑ Installing the Facebook Pixel
Not Started

☑ Advertising for leads
Not Started

☑ Connecting your CRM to your advertising
Not Started

☑ Setting up autoresponder for ad leads
Not Started

☑ Creating a pivot table of advertising responses

Backlog   +   ⋯

☑ Creating and sharing video content
Low priority   High effort   Other
Not Started

☑ [Example] Laptop setup for new hire
Medium priority   Low effort
New hardware   Not Started

☑ Creating business pages through your Facebook Manager Account
Medium priority   Medium effort
Other   Not Started

☑ Creating a call-to-action button
Low priority   Low effort
New software   Not Started

In Progress   +   ⋯

☑ [Example] Password not working
Low priority   Low effort
Password reset   Waiting

☑ Designing a cover and profile photo
Low priority   Low effort   Other
In Progress

☑ Updating page information
Medium priority   High effort
New software   In Progress

☑ Scheduling content through the Creator Studio
Low priority   Medium effort
Access request   In Progress

Completed   +

☑ Changing your business page template
High priority   High effort
New hardware   Done

☑ [Example] New keycard for Daniela V
High priority   Low effort
New hardware   Done

☑ Adding brand images
High priority   Low effort   Other
Done

1 ↳

+ Add task

asana

Overview **List** **Board** **Timeline** **Calendar** **Workflow** **More...**

🏠 Home
☑ My Tasks
🔔 Inbox
📊 Reporting
📁 Portfolios
🎯 Goals

⚡ Invite teammates
❓ Help & getting started

⚡ Filter   ↕ Sort   ⊞ Show fields

Created on Apr 24   •••   ⊞ Customize

Marketing ⚡ + •••

☑ Add the retreat to the ▮▮▮ website - checklist here

`Marketing` `Web Design`

https://docs.google.com/document/d/1...

☑ Promote the retreat on social media - Marketing ▮▮▮

`Marketing` ▮▮▮

☑ Send retreat out to email list - Marketing ▮▮▮

`Marketing` ▮▮▮

Pre-Event Official Plan ⚡ + •••

☑ Master Planner: Send final client info, schedule, requests to ▮▮▮ 7 days before retreat

`Pre-Event` `Retreat Planner`

`One week before event`

1 ⊟▶

☑ Schedule of Events:

`Pre-Event` `Experience Coordinator`

`One week before event`

6 ⊟▶

◇ Pre-Event Activities Complete

`Pre-Event` `Experience Coordinator`

`One week before event`

Event Performance ⚡ + •••

☑ Event Manager - Event checklist here

`Event` `Experience Coordinator`

`Day of event`

14 ⊟▶

☑ Front Desk Schedule and Special Instructions for Retreat:

`Event` `Front Desk Manager`

`JEC Front Desk` `Day of event`

4 ⊟▶

☑ Housekeeping Schedule and Special Instructions for Retreat:

`Event` `Housekeeping Manager`

Wrap Up ⚡ + •••

☑ After checkout checklist:

`Post-Event Wrap-Up`

`Housekeeping Manager`

`Day after event`

2 ⊟▶

☑ Collect actionable post-event feedback:

`Post-Event Wrap-Up`

`Retreat Planner` `Day after event`

3 ⊟▶

◇ Retreat Process Complete

`Post-Event Wrap-Up`

Carolyn Mitchell

Overview | List | **Board** | Timeline | Calendar | Workflow | Dashboard | Messages | Files

⚲ Share 🖌 Customize

⏲ Filter | ↕ Sort | ⊟ Show fields

Last task completed on Sunday •••

Web Content + •••

☑ New pages created by Marketing ▮ on both the ▮ websites - (list each experience as subtask below when added)

`Content Distribution Process` `Web`

`Landing Page` `Twice Monthly Task`

`360+`

👤 May 1   1 ⊟ ▶

+ Add task

YouTube Videos + •••

☑ New video sent out to ▮ email list with newsletter -

`Content Distribution Process` `Email`

`Video` `You Tube` `Bi-Weekly Task`

`Experience Coordinator`

👤 May 1   2 ⊟ ▶

☑ New video sent out to ▮ email list with newsletter -

`Content Distribution Process` `Email`

`Video` `You Tube` `Bi-Weekly Task`

`Experience Coordinator`

👤 May 1   2 ⊟ ▶

☑ New video published to YouTube Channel -

`Content Distribution Process`

`Social media` `Video` `You Tube`

`Bi-Weekly Task`

`Experience Coordinator`

👤 May 1   4 ⊟ ▶

Social Media Posts (IG + FB) + •••

☑ Marketing ▮ posts 6 per month each on ▮ they send us the copy in a Google doc, then we approve

`Content Distribution Process`

`Social media` `Post` `Facebook`

`Instagram` `360+`

👤 May 1   ▶

☑ Social media post on Facebook - ▮

`Content Distribution Process`

`Social media` `Post` `Facebook`

`Daily Task` `Experience Coordinator`

👤 May 1   4 ⊟ ▶

☑ Social media post on Facebook - ▮

`Content Distribution Process`

`Social media` `Post` `Facebook`

`Daily Task` `Experience Coordinator`

👤 May 1   4 ⊟ ▶

Task Backlog ⚡ +

☑ Email Follow Up March and April Deliverables

`Task Backlog`

👤   1 ⊟

☑ Email Follow Up ▮ page

`Task Backlog`

👤   1 ⊟

☑ B2B Landing page for ▮

`Task Backlog`

☑ Email Opt In on ▮

`Task Backlog`

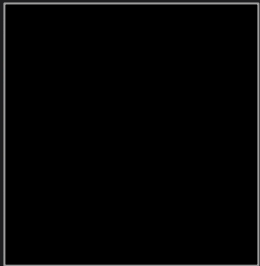+ Add task

asana

Home
My Tasks
Inbox
Reporting
Portfolios
Goals

Show more projects

Invite teammates

Help & getting started

Sales Pipeline CRM for ████ Cli...

Add to favorites   Set status   Share   Search   Upgrade

Overview   List   Board   Timeline   Calendar   Workflow   More...

Filter   Sort   Show fields

Created on Monday   Customize

New Lead

Client Name #5 (New Lead) Example

New Lead

+ Add task

Qualification (Contacted)

Client Name #1 (New Lead) Example

Qualification   Follow Up Call

Client Name #7 (New Lead) Example

Qualification

Follow Up Email (Brochure Sent)

+ Add task

Meeting

Client Name #2 (New Lead) Example

Meeting   Sales Call Scheduled

Client Name #8 (New Lead) Example

Meeting   Follow Up on Sales Call

+ Add task

Proposal

Client Name #3 (New Lead) Example

Proposal   Proposal Sent

Client Name #9 (New Lead) Example

Proposal   Finalize Proposal

+ Add task

Home

My Tasks

Inbox

Reporting

Portfolios

Goals

Invite teammates

Help & getting started

Hiring Process + Employee Life Cycle f...

Add to favorites   Set status

Share

Upgrade

Overview   List   **Board**   Timeline   Calendar   Workflow   More...

Filter   Sort   Show fields

Created on Mar 23   Customize

Recruitment

☑ Request for staff - [form with specifics needed - who, when, what will they do etc, job description, job scorecard] - Manager

Department Manager   Recruitment

☑ Recruiting begins - [Indeed, recruiters, Facebook] - ▮▮▮▮

Human Resources   Recruitment

☑ Costs need to be inline with budget - ▮▮▮▮

Human Resources   Recruitment

HR 1st Interview Candidates

☑ Candidate 1 Name

Mar 31   Do Not Proceed

1st Interview Candidate

☑ Candidate 2 Name

Mar 31   Do Not Proceed

1st Interview Candidate

+ Add task

HR 1st Interview Steps

☑ In the first call, try to determine the "GWC"- Gets it, Wants it, Capacity

Human Resources

1st Interview Steps

☑ Ask basic questions: [Form or Verbal?] Why did you apply here? What hobbies or interests do you have? Do you have a vehicle? Start date? Hours of availability? Do you

Human Resources

1st Interview Steps

HM 2nd Interview Candidat...

☑ Candidate 3 Name

Mar 31   Proceed

Do Not Proceed

2nd Interview Candidate

☑ Candidate 4 Name

Mar 31   Proceed   Apr 3

Do Not Proceed

2nd Interview Candidate

+ Add task

Create

Home

My Tasks

Inbox

Reporting

Portfolios

Goals

New Clients

ar

Client E-Commer...

Invite teammates

Help & getting started

Search

Client E-Commerce Process

Add to favorites   Set status

Share   Customize

Overview   List   Board   Timeline   Calendar   Workflow   Dashboard   Messages   Files

Filter   Sort   Show fields

Mark complete

🔒 This milestone is private to members of this project.   Make public

Create A+ Content   Create

Add task

⬡ Milestone

⬡ Listing Selected (Name of Listing)

Listing Selected (Name of Listing)

Create A+ Content   Yes

www.exampleclient.com

ar   Tomorrow   27

Select Listing

Check Sales

Identify the Listing (Mark this and

Keyword Research

Keyword Research (Mark this and

Create Copy

Create Copy

Submit Copy for Brand Approval (I

Copy Approved? No, repeat steps

Upload Copy

View all subtasks

Add task

Assignee	ar archer719928@icloud.com ✕ Recently assigned ⌄
Due date	📅 Tomorrow ✕
Projects	🟦 Client E-Commerce Process Create A+ Content ⌄
	Add to projects
Dependencies	Add dependencies
⬡ Stage	Create A+ Content
⬡ Actionable	Yes
A Item Link	www.exampleclient.com
Description	

What is this milestone about?

ar   Ask a question or post an update...

Collaborators   ar   +   🔔 Leave milestone

SEO Blueprint Roadmap

○ Set status

ar 🔒 Share ⚙ Customize

✓ All tasks ⚊ Filter ↕ Sort Created today •••

Lead Gen + Sales + •••

⊘ Lead Gen
High 🏷
ar Tuesday 3 ⛀▾

✓ Content Creation Tuesday ar
✓ Facebook Ads Tuesday ar
✓ Email Outreach Tuesday ar
+ Add subtask

⊘ Sales
High 🏷
ar Wednesday 3 ⛀▾

✓ Discovery Call Wednesday ar
✓ Proposal Call Wednesday ar
✓ Follow Ups Wednesday ar
+ Add subtask

Strategy Sprint + •••

⊘ Client Onboarding
Medium 🏷
ar Thursday 5 ⛀▾

✓ Create G Folder Thursday ar
✓ Onboarding Email Thursday ar
✓ Account Accesses Thursday ar
✓ Discovery Questions Thursday ar
✓ Project Kickoff (Inte Thursday ar
+ Add subtask

⊘ Project Planning (Sprint 1)
Medium 🏷
ar Thursday 2 ⛀▾

✓ Setup Project Plan Thursday ar
✓ Communicate Intern Thursday ar

Content Sprint + •••

⊘ Content Workbooks
Low 🏷
ar Feb 23 1 ⛀▾

✓ Add URLs that we wil Feb 23 ar
+ Add subtask

⊘ Content Brief
Low 🏷
ar Feb 23 3 ⛀▾

✓ Research each page i Feb 23 ar
✓ Record KWs in Conte Feb 23 ar
✓ Create page outlines Feb 23 ar
+ Add subtask

+ Add task

Link Sprint +

⊘ Link Acquisition
Low 🏷
ar Feb 24 1 ⛀▾

✓ Secure Best Possible Feb 24 ar
+ Add subtask

+ Add task

☰ 🎴 **Sprint planning** ⌄ ⓘ ☆ ○ Set status

List **Board** Timeline Calendar Progress Forms More...

9 | 👥 Share | 🔍 Search | + | ? | 👤

Last task completed on Sep 19

✓ All tasks | ☰ Filter | ↕ Sort | ⚡ Rules | ⊞ Fields | •••

Backlog •••	Ready •••	In progress •••	Done •••	+ Add column
+	+	+	+	

Backlog

Design iOS navigation changes

10 Design

Scope performance improvements

5 Performa... 1 👍

Ready

Compile VOC for desktop and mobile apps

👤 Nov 18 – 29

6 Communi... 1 💬

Review press release for Q3 launch

👤 Nov 15

1 Communi... 1 👍

Redesign kickoff

👤 Nov 20

2 Performa... 1 👍 1 💬

In progress

Draft redesign overview spec for kickoff meeting

👤 Nov 4 – 15

10 Performa...

Mobile scheduling functionality

👤 Nov 11 – 29

8 Communi...

Implement new social sharing buttons in-app

👤 Nov 11 – 15

5 Mobile e... 1 🔀

Design mobile wireframes for scheduling feature

👤 Nov 19 – 22

10 Design

Done

✓ Implement new homepage navigations

👤 Nov 8

15 User exp... 1 👍

✓ Test top navigations

👤 Nov 7

2 Design

✓ Usability testing for new scheduling feature

👤 Nov 4

3 User exp... 1 👍

Created today

○ All tasks   ☰ Filter   ↑↓ Sort   ⚡ Rules   ⊞ Apps   ▭ Fields   ···

Agenda   +   ···

☑ Add cards (4 minutes)

☑ Read, comment, and "like" cards that you want to discuss live (5 minutes)

☑ Discussion of top-voted cards, ordered by number of likes (4 minutes per card)

☑ Recap, sprint goals, and team velocity checkin (5 minutes)

+ Add task

What went well   +   ···

☑ I thought we were going to have to spend a lot of time on in-product announcements but the framework was easy to replicate
👤   1 👍

☑ We were able to speed up the time it took us to build user interactions
👤   3 👍

☑ Pairing between infrastructure and core experience teams went really well—I learned a lot
👤   1 👍

☑ The new launch went so smoothly! Tons of positive customer feedback
👤   3 👍

+ Add task

What didn't go well   +   ···

☑ We thought we'd have a new engineer starting this week but he didn't accept his offer
👤

☑ Our launch timing keeps changing which is creating a lot of thrash
👤   4 👍

☑ I sunk a lot of time into developing a landing page that we decided not to publish?
👤   1 👍

+ Add task

Questions   +   ···

☑ How long is the off-sprint?
👤

☑ What is our hiring plan for the team?
👤   2 👍

☑ When's the next big launch?
👤   1 👍

☑ Do we have a long-term partnership plan with the infrastructure team?
👤   1 👍

☑ Can we build better partnerships with the marketing team?
👤   4 👍

+ Add task

Reference

☑ Feedback on sprint retros meetings

☑ Q4 sprint schedule

+ Add task

Website Launch ⭐ ··· 👥👥👥👥 10   👥 Share

Board Timeline Calendar Conversations Progress Files

Show Project Description

View: All Tasks ∨

Backlog ∨ ➕

QA new feature
👤   2💬

Create short URLs
👤

Optimize campaign tracking
👤

Final QA
👤

Forms submit data properly

Ready to do ∨ ➕

CSS/HTML validated
👤 Sep 14
High   Not ...

Videos have updated branding
👤 Sep 14
Med...   Not ...

Tracking codes inserted
👤 Sep 3
Low   Not ...

Mobile-friendly site parallels
👤 Sep 6
High   Not ...

Auto-responses working
👤 Sep 11

In progress ∨ ➕

Sync with Google Analytics
👤 Today
Med...   Revi...

Cookies notice
👤 Tomorrow
Low   Not ...

Terms and privacy policy updated
👤 Monday
Med...   Revi...

SEO keyword optimizations
👤 Monday
Med...   Revi...

RSS metadata
👤 Tuesday
Low   Revi...

Done ∨ ➕

✅ Font and image licensing
👤 Aug 1
Low   Done

✅ Page hierarchy
👤 Aug 3
Low   Done

✅ Sharing icons updated and working
👤 Aug 7
Low   Done

✅ Scripts and images are

+ Add column

🔍 Go to any project or task...   ➕ ? 👤

Sports and PE
On track

Overview | List | **Board** | Timeline | Calendar | Workflow | Dashboard | Messages | Files

Home
My Tasks
Inbox
Reporting
Portfolios
Goals

Teams

Everyone

Promotional Kit Re...
Extra Hours Board

Show archived projects

Creative

Sports and PE

Invite teammates

Help & getting started

2 tasks completed today

All tasks | Filter | Sort | Public link: Off | Customize

Writing

PE Lesson 7 SB
Writing · Student Notebook
Medium
Today – Nov 30 · 7

PE Lesson 7 SW
Writing · Seatwork · Medium
Today · 2 · 4

PE Lesson 7 PR
Writing · Pre-Reader · Medium
Tomorrow 9:00am · 1

PE Lesson 8 TG
Writing · Teacher's Guide
Medium
Today 8:30pm · 4

Pre-Proof

PE Lesson 7 TG
Pre-Proof · Teacher's Guide
Medium
Wednesday · 2 · 9

PE Lesson 6 PR
Pre-Proof · Pre-Reader · Medium
Today · 7

PE Lesson 6 SB
Pre-Proof · Student Notebook
Medium
Today · 13

PE Lesson 6 SW
Pre-Proof · Seatwork · Medium
Today · 6

Design

PE Lesson 5 SW
Design · Seatwork · Medium
Wednesday · 1 · 7

PE Lesson 5 SB
Design · Student Notebook
Medium
Wednesday · 2 · 21

PE Lesson 5 PR
Design · Pre-Reader · Medium
Wednesday · 8

PE Lesson 5 TG
Design · Teacher's Guide
Medium
Wednesday · 2 · 10

Post Proof

PE Lesson 4 PR
Post Proof · Pre-Reader · High
Wednesday · 10

PE Lesson 3 SB
Post Proof · Student Notebook
Medium
Wednesday · 3 · 19

PE Lesson 2 SB
Post Proof · Student Notebook
Medium
Wednesday · 2 · 19

PE Booklist 1-4
Post Proof
Tomorrow · 1 · 1

Search
Share

Overview **List** Board Timeline Calendar Workflow Dashboard Messages Files

➕ Add new ⌄   ✓ All tasks   ⏷ Filter   ↕ Sort   ○ Public link: Off   ⋯   📋 Customize

Task name	gnee	Due date	Team	Project	Priority	Completed on
⌄ **Writing** ⚡						
▸ ✓ PE Lesson 7 SB 7 ⛛		Today – Nov 30	Writing	Student ...	Medium	
▸ ✓ PE Lesson 7 SW 2 💬 4 ⛛		Today	Writing	Seatwork	Medium	
▸ ✓ PE Lesson 7 PR 1 ⛛		Tomorrow 9:00am	Writing	Pre-Rea...	Medium	
▸ ✓ PE Lesson 8 TG 4 ⛛		Today 8:30pm	Writing	Teacher...	Medium	
▸ ✓ PE Lesson 8 SB 7 ⛛		Nov 29 – 30	Writing	Student ...	Medium	
▸ ✓ PE Lesson 8 SW 4 ⛛		Wednesday	Writing	Seatwork	Medium	
▸ ✓ PE Lesson 8 PR 1 ⛛		Wednesday	Writing	Pre-Rea...	Medium	
Add task...						
⌄ **Pre-Proof** ⚡						
▸ ✓ PE Lesson 7 TG 2 💬 9 ⛛		Wednesday	Pre-Proof	Teacher...	Medium	
▸ ✓ PE Lesson 6 PR 7 ⛛		Today	Pre-Proof	Pre-Rea...	Medium	
▸ ✓ PE Lesson 6 SB 13 ⛛		Today	Pre-Proof	Student ...	Medium	
▸ ✓ PE Lesson 6 SW 6 ⛛		Today	Pre-Proof	Seatwork	Medium	
▸ ✓ PE Lesson 6 TG 9 ⛛		Today	Pre-Proof	Teacher...	Medium	

New! People custom fields
Add people fields to connect multiple teammates to a task.

Got it

Sidebar:
- 🏠 Home
- ✓ My Tasks
- 📥 Inbox
- 📈 Reporting
- 📁 Portfolios
- 🎯 Goals

Teams
- ⌄ Everyone
  - Promotional Kit Re... 🔒
  - Extra Hours Board
  - Show archived projects
- ⌄ Creative
  - Sports and PE

🔔 Invite teammates

❓ Help & getting started

Search   + Share   25

Overview   List   Board   Timeline   **Calendar**   Workflow   Dashboard   Messages   Files

November 2022 ⌄   Today   ▦ Color: Default   Weekends: Off   ◌ Public link: Off   ⋯   ▦ Customize

Mon	Tue	Wed	Thu	Fri
20 **21**	**22**	**23**	**24**	**25** 26
27 **28**	**29**	**30**	**December 1**	**2** 3
PE Lesson 7 SB 7 ⚘ 6:00am 🟦🟨				
PE Lesson... 4 ⚘ 8:30pm 🟦🟧🟩	PE Lesson 8 SB 7 ⚘ 6:00am 🟦🟨🟩			
PE Lesson 1 SW 10 ⚘ 🟨🟥	PE Lesson ... 1 ⚘ 9:00am 🟦🟧🟩	PE Lesson ... 1 ⚘ 9:00am 🟦🟥🟨🟩		
PE Lesson 1 PR 6 ⚘ 🟦🟥	PE Lesson 1 SB 19 ⚘ 🟦🟥	PE Lesson 2 SB 19 ⚘ 🟦🟥		
9+ more	8 more	8 more		
4 5	**6**	**7**	**8**	**9** 10

Sports and PE ⌄ ⓘ ☆ ● On track

Overview   List   Board   Timeline   Calendar   Workflow   Dashboard   Messages   Files

Share

Search

▶ 1 trigger moving tasks to this section

12 Fields

How are tasks being added to this project?

⤵ Manually

⚡ 22 Rules

ask templates

✓ PE Lesson 1 TG

✓ PE Lesson 1 SB

✓ PE Lesson 1 SW

✓ PE Lesson 1 PR

✓ PE Illustration assignment

Show 2 more templates

+ New! Send feedback

Section

Writing

✓ 7 incomplete tasks

When tasks move to this section, do this automatically:

💬 Send channel message

→ Move to "Pre-Proof" section
✓ Mark incomplete
👤 Assign to
📅 Set due date to 1 day from now
💬 Send channel message

+ More actions

Section

Pre-Proof

✓ 5 incomplete tasks

When tasks move to this section, do this automatically:

✓ Mark incomplete
⊟ Add 5 subtasks
👤 Assign to
⌄ Set Team Pre-Proof

✓ Mark incomplete
👤 Assign to
⊟ Add 6 subtasks
⌄ Set Team Pre-Proof

✓ Mark incomplete
👤 Assign to

2 Apps

Forms

7 Task Templates

Teams

Everyone +

🔒 Promotional Kit Re...

● Extra Hours Board

Show archived projects

Creative +

● Sports and PE

●
●
●

🙋 Invite teammates

❓ Help & getting started

Home
My Tasks
Inbox
Reporting
Portfolios
Goals

Teams

▾ Everyone   +

● Promotional Kit Re...
● Extra Hours Board
Show archived projects

▾ Creative   +

● Sports and PE

Invite teammates

Help & getting started

Share   Search

▶ 1 trigger moving tasks to this section

▶ 2 triggers moving tasks to this section

▶ 1 trigger moving tasks to this se

Section

Design

✓ 10 incomplete tasks

When tasks move to this section, do this automatically:

☑ Mark incomplete
⚏ Add 6 subtasks
⚲ Assign to
📅 Set due date to 1 day from now

☑ Mark incomplete
⚲ Assign to
📅 Set due date to 1 day from now

☑ Mark incomplete
☑ Assign to

Section

Post Proof

✓ 12 incomplete tasks

When tasks move to this section, do this automatically:

⌄ Set Team   Post Pr...

☑ Mark incomplete
⚏ Add 3 subtasks
⚲ Assign to
📅 Set due date to 2 days from now

☑ Mark incomplete
⚏ Add 3 subtasks
⚲ Assign to
📅 Set due date to 2 days from now

Section

Edits

✓ 1 incomplete task

When tasks move to this section, do automatically:

→ Move to "Complete" sectio
⌄ Set Team   COMPL...

⚲ Unassign

＋ More actions

12 Fields

22 Rules

2 Apps

Forms

7 Task Templates

New! Send feedback

Lesson 12

✓ Export Lessons 1-12 TG MT

`Lesson 12` `TG` `Export` `Last`

3 ⛶▾

⧖ Proof Lesson 1-12 TG MT

⧖ Edits Lessons 1-12 TG MT

✓ QC Lessons 1-9 TG MT

+ Add subtask

✓ Export Lesson 1-12 SB MT

`Lesson 12` `SB` `Export` `Last`

3 ⛶▾

⧖ Proof Lesson 1-12 SB MT

⧖ Edits lesson 1-12 SB MT

✓ QC Lessons 1-9 SB MT

+ Add subtask

Lesson 13

1 ⛶▸

⧖ Design Lesson 13 SB MT

`Lesson 13` `SB` `Design` `Last`

4 ⛶▸

⧖ Design Lesson 13 SW MT

`Lesson 13` `SW` `Design` `Last`

⧖ Export Lessons 1-13 SW MT

`Lesson 13` `SW` `Export` `Last`

3 ⛶▾

⧖ Proof lessons 1-13 SW MT

⧖ Edits Lessons 1-13 SW MT

✓ QC Lessons 1-10 SW MT

+ Add subtask

Add a name for this rule

When all of these triggers happen ⌄

→ **Task moved to a section**
Design

⌄ **Project changed**   🗑

Project changed   ⌄

Choose an option for Project

`Teacher's Guide`   ⌄

✓ `Teacher's Guide`

`Student Notebook`

`Add-on`

`Seatwork`

`Front matter`

Illustration Visual Update

Set status

Share

+ Add chart

Completed tasks

38

1 Filter

Incomplete tasks

55

1 Filter

Overdue tasks

12

1 Filter

Total tasks

93

No Filters

Completed tasks by section

Task count

10

5

0

Not Yet ...   In-progr...   Done
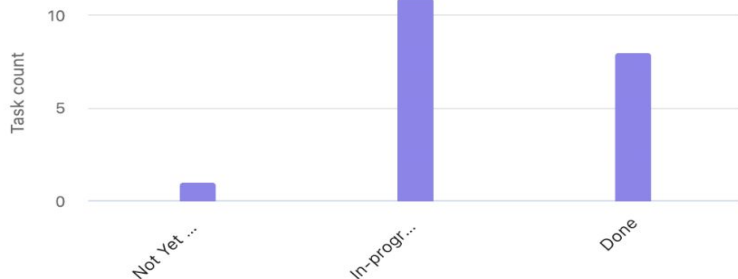
2 Filters

Total tasks by section

64

In-progress/Waiting for Appro...

Not Yet Assigned

Done
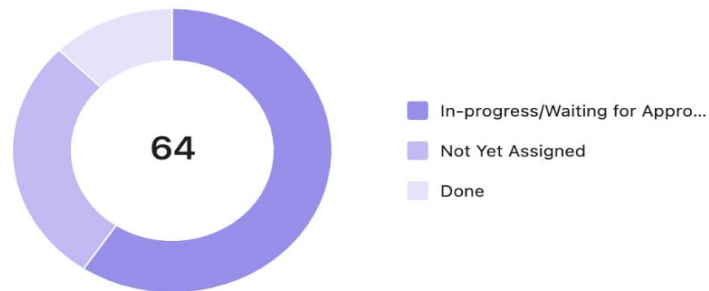
1 Filter

Total tasks by Lesson Number
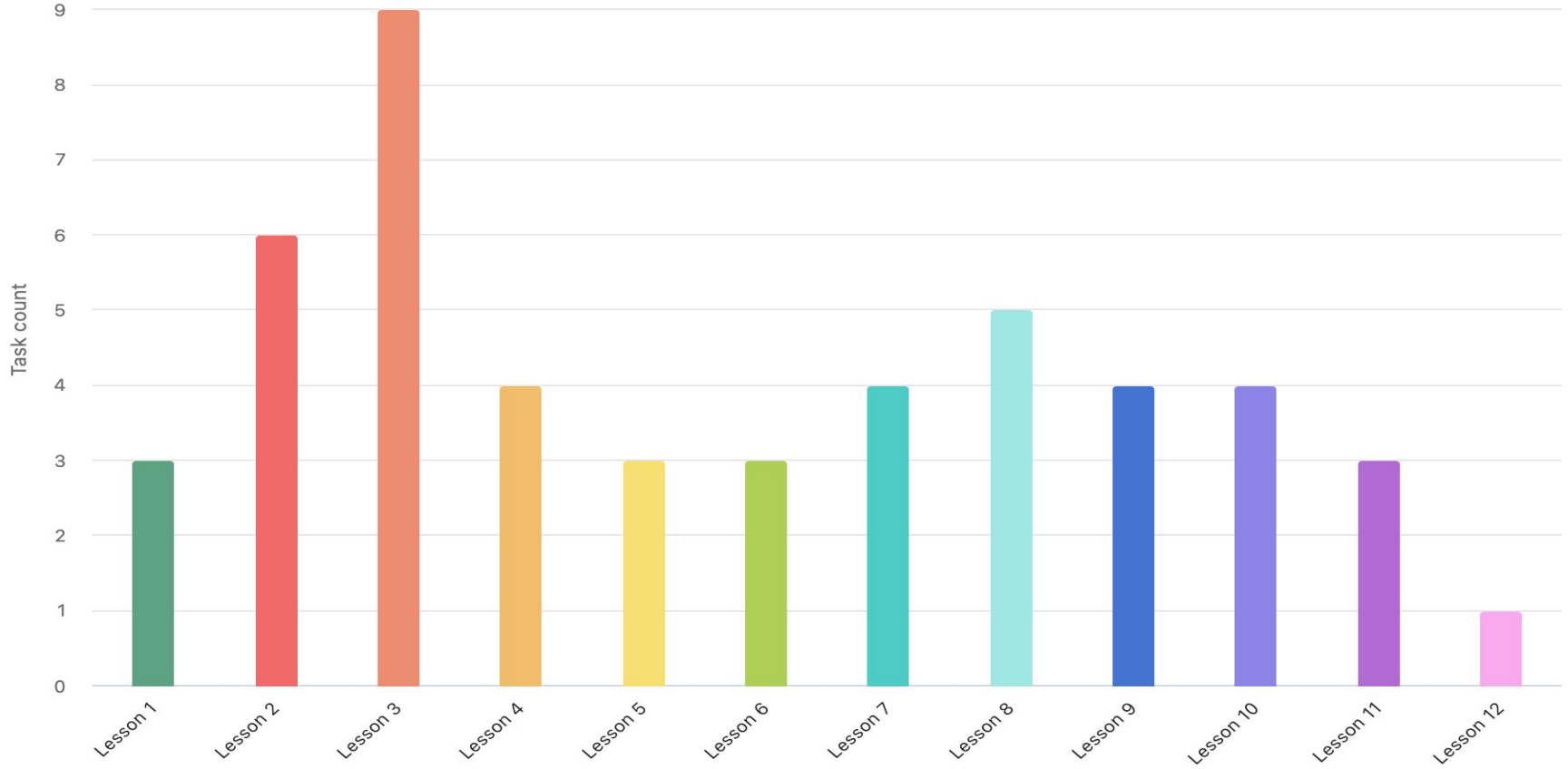
Boat Auction #1 ▾ ☆ ○ Set status

Overview   List   Board   Timeline   Calendar   Workflow   Dashboard   More...

CM   👥 Share   🔍 Search   ✚   Upgrade

➕ Add task ▾   ✓ All tasks   ☰ Filter   ↑↓ Sort   ⋯   ▦ Custo

Task name	Assignee	Due date	Projects	Tags	Priority
▸ ✓ Advertising 3 ⚑			🔲 Master Po...	Pre-Launch	Medium
✓ Full Specs			🔲 Master Po...	Pre-Launch	Medium
▸ ✓ Survey 3 ⚑			🔲 Master Po...	Pre-Launch	Medium
✓ Broker change YachtWorld listing			🔲 Master Po...	Pre-Launch	Medium
✓ Broker change their listing			🔲 Master Po...	Pre-Launch	Medium
✓ Create auction listing			🔲 Master Po...	Pre-Launch	Medium
✓ Equipment exclusions?			🔲 Master Po...	Pre-Launch	Medium
Add task...					

▾ POST-LAUNCH

▾ ✓ Create canned response 2 ⚑			🔲 Master Po...	Post-Launch	Medium
✓ Include link to auction				Post-Launch	Medium
✓ Send survey				Post-Launch	Medium
✓ Create FB/IG posts			🔲 Master Po...	Post-Launch	Medium
✓ Auction overlay picture on YachtWorld			🔲 Master Po...	Post-Launch	Medium
✓ Create timeline slide, GIF			🔲 Master Po...	Post-Launch	Medium
✓ Metrics from publishers			🔲 Master Po...	Post-Launch	Medium

Home
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ar CM ○   ✚ Invite people
● Master Portfolio
● Boat Auction #1   ⋯
● Boat Auction #2
● Boat Auction #3
● Boat Auction #4
● Project plan
● Work tasks
● Sprint Planning
● Engineering Proje...
● Former
● new

Invite teammates

❓ Help & getting started

We look forward to working with you.