

WHAT DOES MORE TIME GIVE YOU?

ASANA Starter Kit

for Freelancers + Small Teams

A complete road map to get started in Asana today.
Run your business so it doesn't run you.

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What Asana can do for you ...

- Be more productive than ever and save hours spent on work about work.
- Learn the powerful business skill of project management.
- Know exactly what to work on daily and tie actions to your business and client goals.
- Manage your team's workload more effectively.

SET UP YOUR ACCOUNT

Use your organization's email address, [@BusinessName.com](#) to set up your **Organization** in Asana. If you don't have a custom domain and use a @gmail.com or another email, you will be classified as a **Workspace** rather than an Organization.

Organizations have a little more functionality than Individuals.

For personal use or smaller teams without a custom domain, a Workspace should do the trick.

If you need to create multiple teams or work across different departments, an Organization may be the way to go.

If you don't have a custom domain and would like to set up Asana as an Organization, you can create a custom domain email through Google Workspace or through your WebHost provider.

Don't have an account yet? [Try Asana Today](#)

TEAMS OR WORKSPACE

Teams is the top container (projects and team members are contained within Teams, and the related tasks are contained in the projects). If you manage client accounts, create a team for each client. Create a Team for your company/business too.

- Client 1
- Client 2
- Your Business

Each project for that client will be organized under this team.

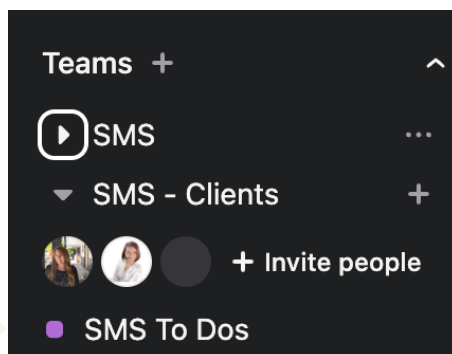
Workspaces (if you are an individual user or without a custom domain) Projects will be your top container, and you will invite users on your team to Projects. If you manage client accounts, create a project for each client. This will be your main client board. Regular/daily task will go here.

- Client 1
- Client 2
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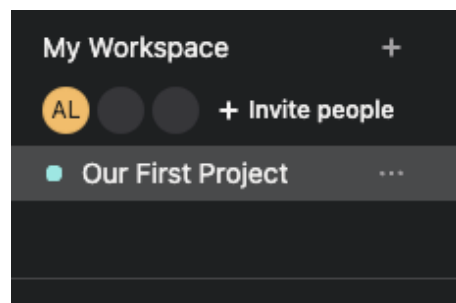
Create another project for special or larger projects and name it "Client Name - Project Name." Like this:

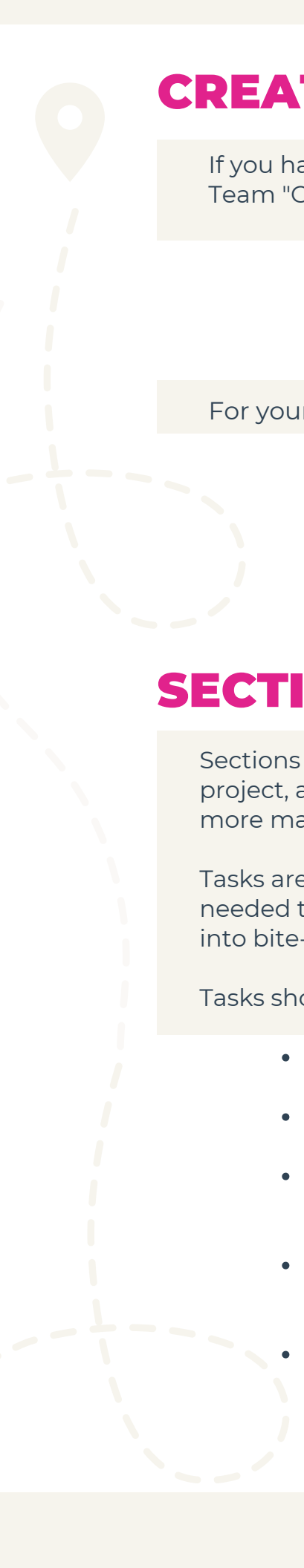
- Client Name - Giveaway Campaign
- Client Name - Brand Board
- Client Name - Content Creation

TEAMS



WORKSPACE





CREATE A PROJECT

If you have teams, create projects under that team. For a client under the Team "Client Name," your projects might look like this:

- Brand Guide
- Content Creation
- Project Name

For your business, Projects might look like:

- CEO Projects
- Idea Bank
- Brand Guide
- Annual Goals
- Company Guide
- Content Creation

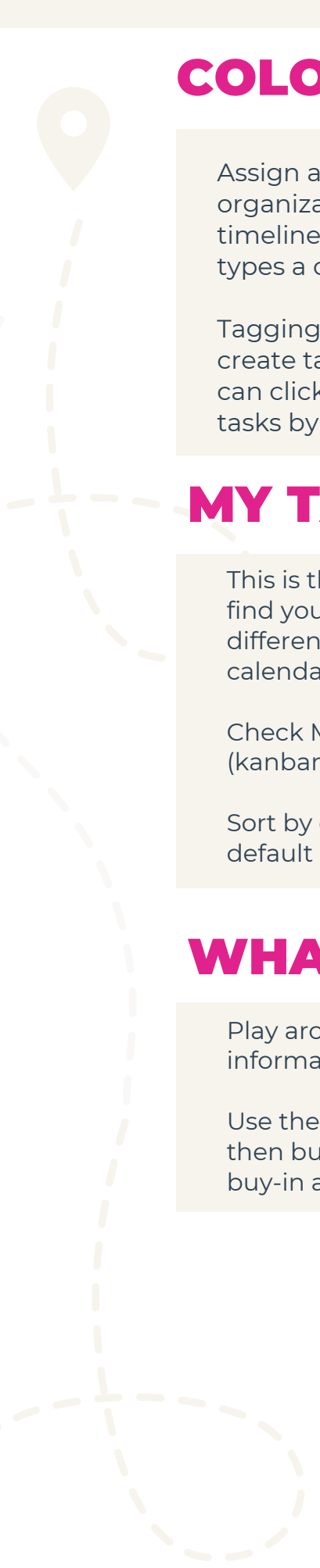
SECTIONS & TASKS

Sections are the next level down from a project and are housed in the project, along with tasks. Sections are how you break projects into smaller, more manageable pieces.

Tasks are the next level down from Sections and are the actual items needed to complete that section. Subtasks can further break tasks down into bite-sized steps.

Tasks should:

- Always have an assignee - even if you're a team of one (this will help you later when we are looking at the "My Tasks" list).
- Set a due date if there is one. You can leave it blank for ongoing tasks or assign it to recur regularly.
- Add a description - include important details to help complete the task. Attach files, documents or links to files and documents. All assets are needed to get the project done.
- Communication about the project can be done in the comments section, which is much more efficient than an email thread or slack back and forth.
- Add subtasks if your task requires smaller action steps. (Be sure to assign these to someone and give them a deadline so they show up in "My Tasks" list.)



COLOR CODING & TAGS.

Assign a color to your project to add a color-coding element to your organization. You will see colors; in the different “views” (calendar, list, timeline). I like to assign clients a color you may assign different project types a color. Whatever makes sense to you and your team.

Tagging also helps deepen your organization of tasks in a project. You can create tag categories to give context or to group similar tasks. Then you can click on the tags to view all tasks using that tag. Examples: matching tasks by quarter, type of topic, type of service, or matching tasks to goals.

MY TASKS.

This is the area that includes all your assigned tasks. This is the best place to find your daily top 3. View it in list, board, or calendar view. We all work differently, and you may prefer one view over the other. I flex between the calendar and list views.

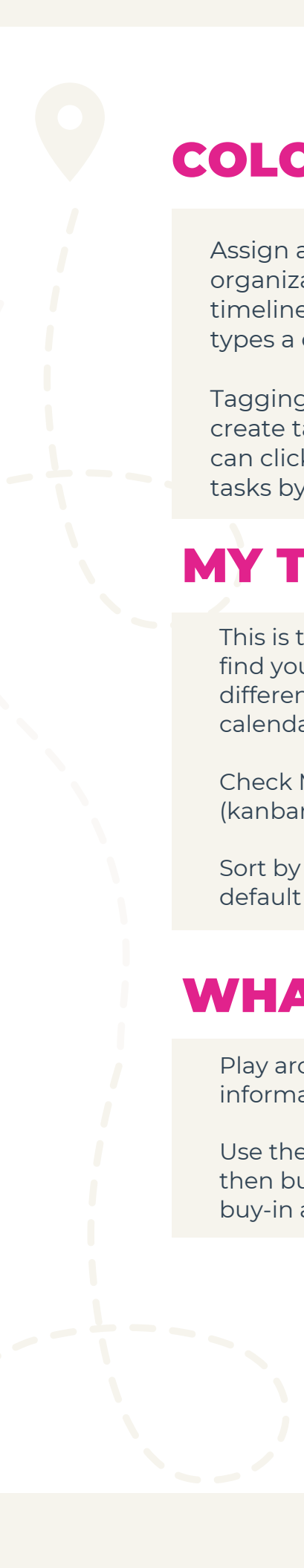
Check My Tasks daily. You can view it as a list (to-do list style), board (kanban style), or calendar.

Sort by due date to see what is coming up, name, project, etc., or use the default rule "Do Today" and add your own rules "Do Later," etc.

WHAT'S NEXT?

Play around with the templates in Asana to see other ways of organizing information or projects.

Use these core features to get started and figure out what you like best, then build your organization off what you find works best. Get your team's buy-in and input to evolve.



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Work With SMS!

Whenever you're ready, here are 2 ways I can help you:

1. Check out the **B2B Content Creation System** for small team marketers. This is the content ecosystem I have developed and used over the past decade. As the digital landscape shifts, so does this system—keeping you ahead in content mastery and digital marketing success.
2. **1:1 Strategy Session** to get you unstuck. Whether you need help with the campaign or tech strategy, help with set up or help with marketing team workflow – pick a time to work through it with me.

Amanda Long
SmartMarketingSquad.com



Follow Along!

