Team DigyCX Asana Standard Operating Procedures (SOPs)

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1. Overview

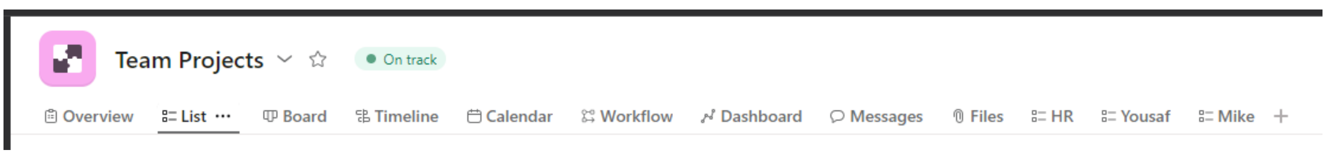
This document outlines the Standard Operating Procedures (SOPs) for DigyCX to manage projects within Asana. The goal is to define and standardize the use of Asana for Team DigyCX ensuring that projects are organized and executed effectively (on-time and on-budget).

2. Glossary of Terms used in this Document

2.1.1 Dashboard

A comprehensive overview of projects, providing a centralized view of the current status, progress, and details of all ongoing, upcoming, pending approval, and completed projects. Projects can be viewed as a list, a calendar, a timeline, or as a board view.

Here is a picture of the dashboard nav-bar showing the different views available on the Team Projects tab. This can be accessed from the Projects tab on the left-hand side of the sidebar in Asana.



2.1.2 Project

A project is a defined deliverable consisting of a project leader, creative brief, a timeline including due dates for the project and due dates for the subtasks, resources required, and other team members involved.

There are three types of projects:

1. **Simple Project** – Requires only one person to deliver a single item.
2. **Complex Project** – Requires a Project Leader, and one or more additional resources. A complex project can include multiple stages. Example: a video project may require a copywriter, a camera, a videographer, a video editor, talent, location, music, and lighting.
3. **Campaign** – A campaign involves multiple interrelated projects.

Projects go through the following stages:

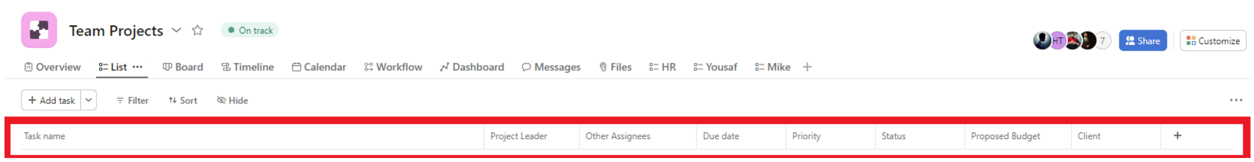
- **Upcoming Work**
- **Planning**
- **In Progress**
- **Awaiting Approval**

- **Completed**

2.1.3 Subsections

A categorized segment within a project where specific information is organized. This contains the following subsections: **Project Leader, Other Assignees, Due Date, Priority, Status, Proposed Budget, and Client.**

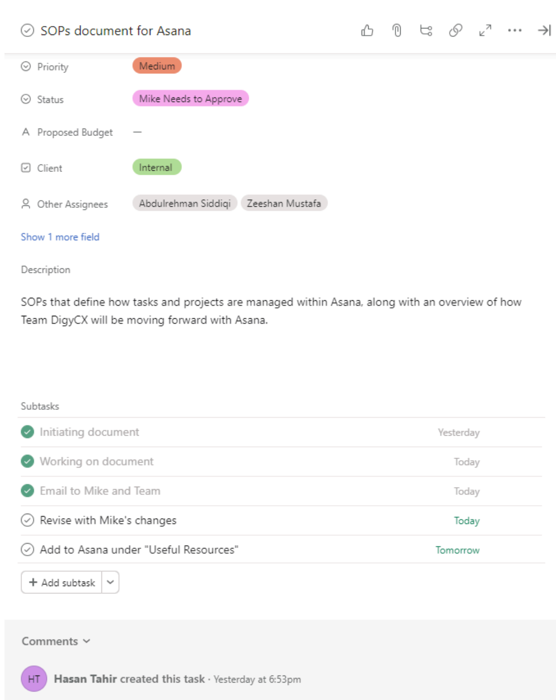
The sub-sections can be viewed under the Team Projects, mentioned as **'Task name'** at the bottom of the picture below:



2.1.4 Subtasks

Smaller, specific tasks within a project that can be assigned to individual team members. Subtasks help break down the project into manageable components.

Subtasks can be viewed by clicking on any project, which opens a project view that is displayed in the picture below:



Subtasks can be created by clicking ‘Add subtask’ under the subtasks list, and can be viewed at the bottom of the project view.

2.1.5 Project Leader

Team members who are primarily responsible for the successful execution and completion of a project. They are the main point of contact for the project.

They are responsible for the following:

- Ensuring that projects are executed efficiently and within specified timelines
- Performing a quality control process on projects to ensure that they meet quality standards, and align with client expectations.
- Collaborate with additional team members if they are assigned a complex project.
- Communicate with the client throughout the process of initiating, executing and finalizing a project. This includes the creative brief, project timeline, proposed budget, project requirements and resources working on the project.

2.1.6 Other Assignees

Other Assignees are secondary team members who are added to a project by the project leader. They are assigned specific roles within the project, but are not primarily responsible for the entire project, if the team is working on a complex project or a campaign

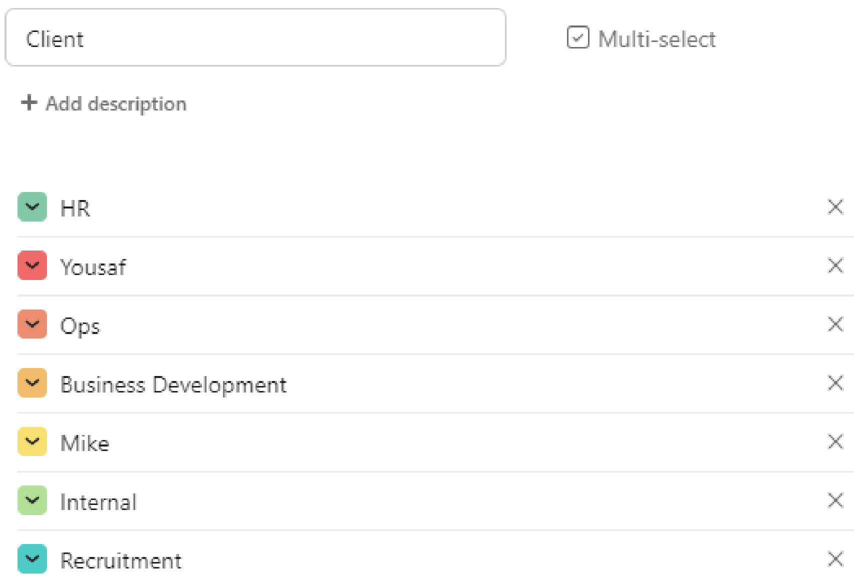
However, in the case of a simple project, the project leader will be the only assignee working on that project.

Secondary team members must collaborate with the Project Leader for all project requirements and resources allocated to the project.

2.1.7 Client

Clients are individuals or entities for whom a project is initiated. They are external stakeholders who have specific project requirements and expectations, providing feedback and approvals on the projects accordingly.

The following picture showcases a list of clients that Team DigyCX works with. The clients can be selected from a drop down list, which is illustrated below:

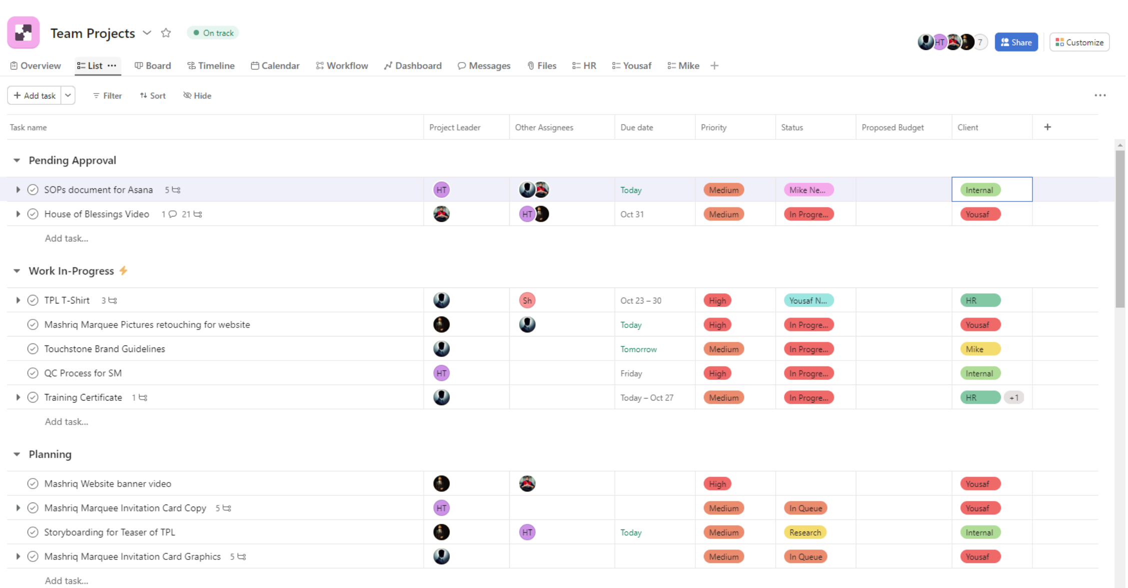


2.1.8 Sections

Sections are used to organize and prioritize tasks and projects. The subsections represent different phases of project management, such as **Pending Approval, Work in Progress, Planning, Upcoming Work, and Completed.**

Sections in Asana can be viewed by clicking on the Team Projects Dashboard, and be viewed under their respective categories from the list view.

The following picture shows where subsections can be viewed in Asana:



All subsections can be viewed by scrolling down to the bottom of the page on the Team Projects dashboard under the ‘List’ view.

2.1.9 Creative Brief

A creative brief is a document that outlines the strategic and creative elements required to execute a project.

Creative briefs are provided by the client to Team DigyCX, however in the event that a Creative Brief is not provided to the team beforehand, a request for the creative brief must be generated by the team to the client, prior to initiating any creative work.

The creative brief provides details about the **project overview, stakeholders (departments), project objectives, target audience, project timeline and other critical information necessary for project success.**

The template that is used for designing a creative brief is attached as under:

TOUCHSTONE Communications

Date Submitted: 14/10/22

Creative Brief

Project Overview:
T-Shirts Design for Touchstone Cricket Tournament 2022

Stakeholders (Departments)
Waqas Ahmed, Director Operations

Project Objectives
To facilitate Waqas and the concerned department with T shirt designs and source files to be used in the Touchstone cricket tournament.

Target Audience
Touchstone Associates, Directors and Leadership participating in the Touchstone cricket tournament.

Requirements

Key Deliverables
Source files for t-shirts made available by Monday eob

Project timeline
- Project requirements received by Waqas on Friday, 14th October, 2022
- Source files for the cricket tournament made available on Monday, 17th October 2022

2.1.10 Target Audience

The target audience is a specific group of individuals or demographics that a project is designed to reach and engage with.

The target audience can be defined under the following criteria:

- Category/Industry/Niche
- Age
- Demographics
- Location
- Average Income
- Education

3. Project Dashboard Structure

Team DigyCX currently manages projects using a dashboard named **Team Projects**, comprising five Sections:

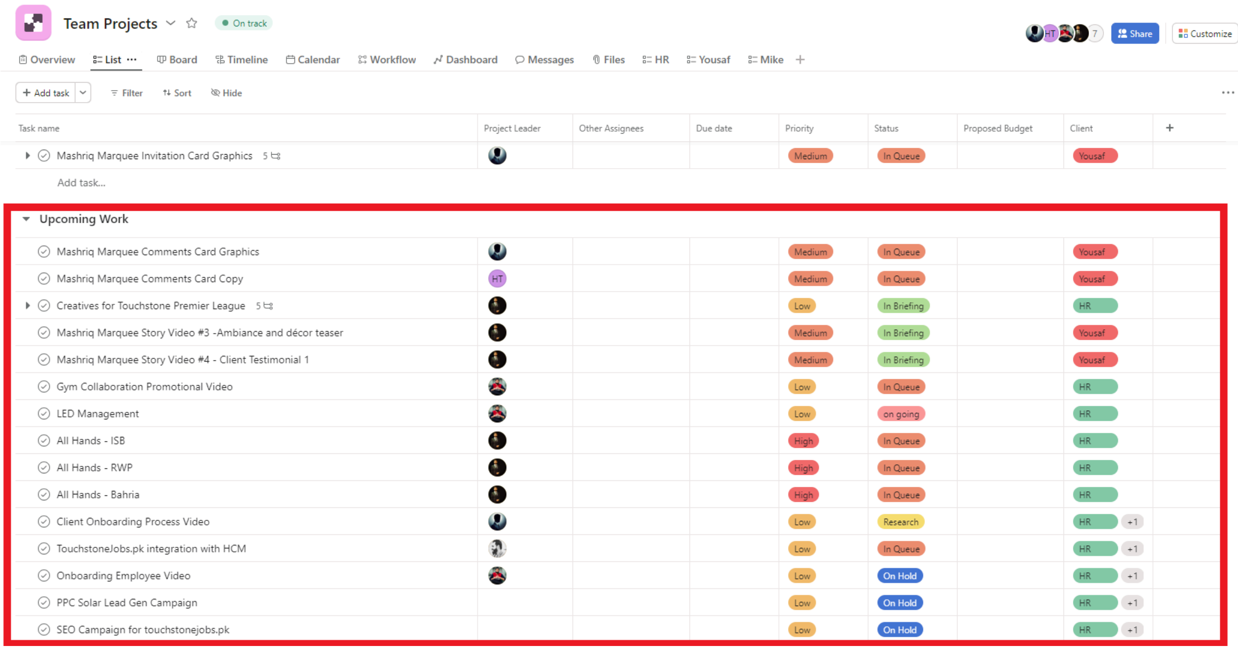
- **Upcoming Work**
- **Planning**
- **Work in Progress**
- **Pending Approval**
- **Completed**

3.1 Adding Projects to Sections:

3.1.1. Upcoming Work

The **Upcoming Work** section includes projects that have not been initiated and are in queue to be initiated once the client's briefing and requirements have been received.

This section can be accessed by navigating to the Team Projects dashboard, and is illustrated in the picture below:



Task name	Project Leader	Other Assignees	Due date	Priority	Status	Proposed Budget	Client
Mashriq Marquee Invitation Card Graphics 5				Medium	In Queue		Yousaf
Add task...							
Upcoming Work							
Mashriq Marquee Comments Card Graphics				Medium	In Queue		Yousaf
Mashriq Marquee Comments Card Copy	HT			Medium	In Queue		Yousaf
Creatives for Touchstone Premier League 5				Low	In Briefing		HR
Mashriq Marquee Story Video #3 -Ambiance and décor teaser				Medium	In Briefing		Yousaf
Mashriq Marquee Story Video #4 - Client Testimonial 1				Medium	In Briefing		Yousaf
Gym Collaboration Promotional Video				Low	In Queue		HR
LED Management				Low	on going		HR
All Hands - ISB				High	In Queue		HR
All Hands - RWP				High	In Queue		HR
All Hands - Bahria				High	In Queue		HR
Client Onboarding Process Video				Low	Research		HR +1
TouchstoneJobs.pk integration with HCM				Low	In Queue		HR +1
Onboarding Employee Video				Low	On Hold		HR +1
PPC Solar Lead Gen Campaign				Low	On Hold		HR +1
SEO Campaign for touchstonejobs.pk				Low	On Hold		HR +1

Important Guidelines:

- Review and assess each project's feasibility, resource requirements, and alignment with client needs before initiating work. Ensure that all necessary information is in place for a smooth project start.

- Develop a preliminary project timeline that outlines when the project is expected to commence. Timeline must include a specific **Due Date** for completion. A Due Date must be a single date and not a range of dates. Timelines should have sufficient and realistic time scheduled for revisions and resource calendars (such as Longhorns and vendors).

- Ensure that the required resources, both human and material, are available and ready for the project when it moves to the **'Work in Progress'** phase.

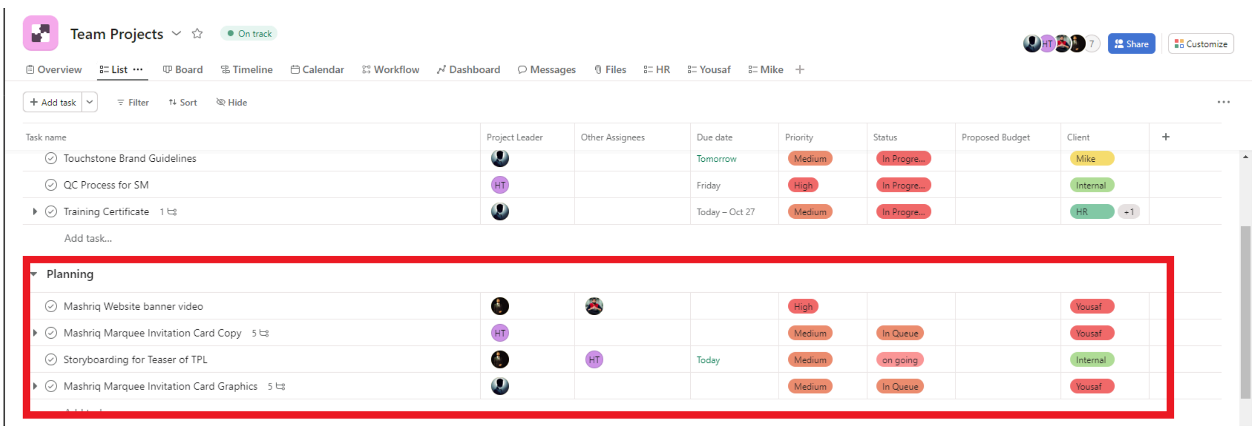
3.1.2 Planning

The **Planning** section includes projects that have moved from the ‘**Upcoming Work’** stage to the first phase of an active project called the Planning stage.

The following steps must be completed in the **“Planning”** stage within 48 hours for a project to move forward:

- Designate Project Leader. Project Leaders play a critical role in overseeing and managing projects from initiation to completion.
- Define timelines including dates for deliverables at each phase of the project such as creative concepts, scripts, storyboards, approvals, and final delivery.
- Completion of Creative Brief.

The Planning section can be accessed by navigating to the Team Projects dashboard, and is illustrated in the picture below:



Important Guidelines

- Check each subsection of the project comprehensively prior to adding a project here.

- Clearly define the objectives, scope, and deliverables of the project within the planning phase.

- The Project Leader of the project will function as the head of the project they are assigned to. For each project in this subsection, [subtasks](#) should be assigned to themselves or [Other Assignees](#) who are actively working on the project.

- Develop a comprehensive [creative brief](#) that outlines the creative and strategic elements of the project.

- Encourage team collaboration and brainstorming within the project. Team members should share ideas, insights, and suggestions to refine project concepts and strategies.
- Develop a project timeline that outlines key milestones and deadlines for different project phases. This helps ensure that the project stays on track.

3.1.3 Work in Progress

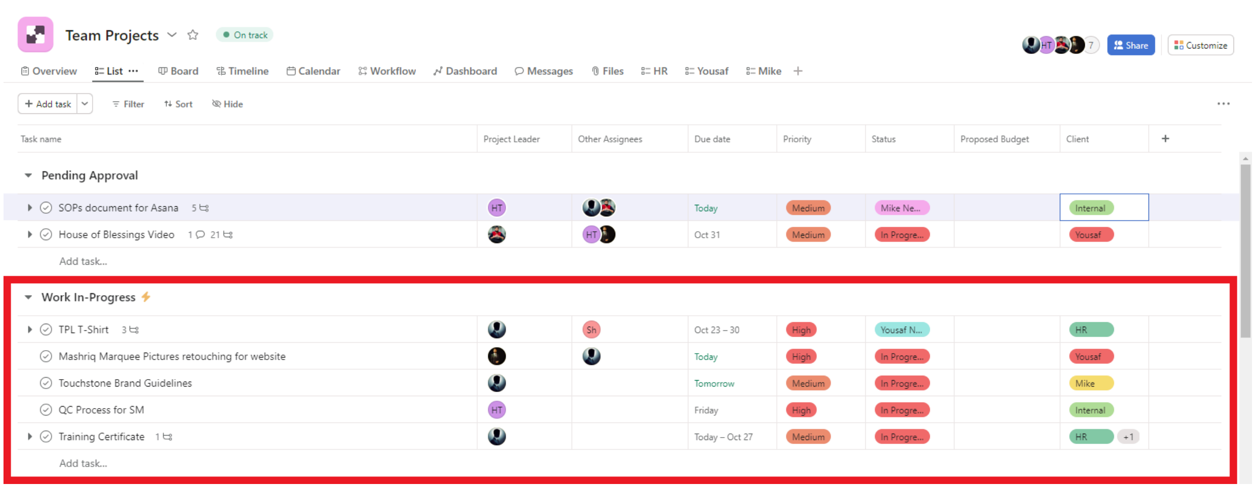
The **Work in Progress** section is the first stage of an active project where work is actually being performed (**beyond the Planning stage**).

Projects must only be added to this section once the briefing for the projects has been received and work has begun on the projects.

The following circumstances may cause a project to move back to the **Planning** stage:

1) Project briefing is unclear or incomplete in the Creative Brief.
2) There aren’t enough resources and team members to execute the project.
3) Project subsections have not been filled out correctly.

The Work in Progress section can be viewed under the Team Projects dashboard, and is illustrated in the picture below:



Important Guidelines

- Ensure that the project objectives, scope, requirements, and subtasks are clearly defined and understood by the team.

- Project Leaders responsible for projects in this list should regularly update the project's status to reflect their progress on the project.

- If the project involves client collaboration, ensure that client interactions are documented within Asana. Communicate client feedback and progress updates to the team promptly.

- Project Leaders should conduct regular reviews of projects in the list to ensure that they are on track and that team members have the necessary resources and support.

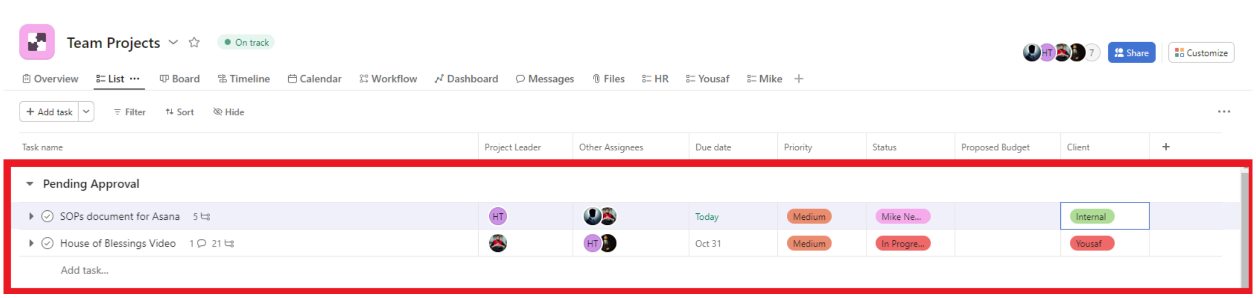
3.1.4 Pending Approval

Projects in the **"Pending Approval"** section should only be added here when a project has reached a stage where the client and/or management approval is required.

The outcome of the **"Pending Approval"** stage is one of the following:

- Approved as presented
- Changes required – **The Project is moved back into the Work in Progress stage.**
- Project canceled (**refer to Changes in Schedule**)

The Pending Approval subsection can be viewed in the Team Projects Dashboard, and is illustrated in the picture below:



Important Guidelines:

- Before adding a project to the ‘**Pending Approval**’ subsection, ensure that all aspects of the project to be approved have been completed, and it aligns with the client's requirements and expectations.

- The projects in this list are subject to client review. This includes subtasks, deliverables, and any other work completed by Team DigyCX that requires approval to proceed to the **Completed** stage.

- All relevant documentation, files, and any necessary information should be attached with the project. Ensure that the client has access to all the materials they need for a comprehensive review.

- Assign the designated client to the project under the **‘Status’** section, making it clear that their action is required.

- Notify the client when a project is assigned for their approval. Use the project description to provide context and any specific instructions related to the review.

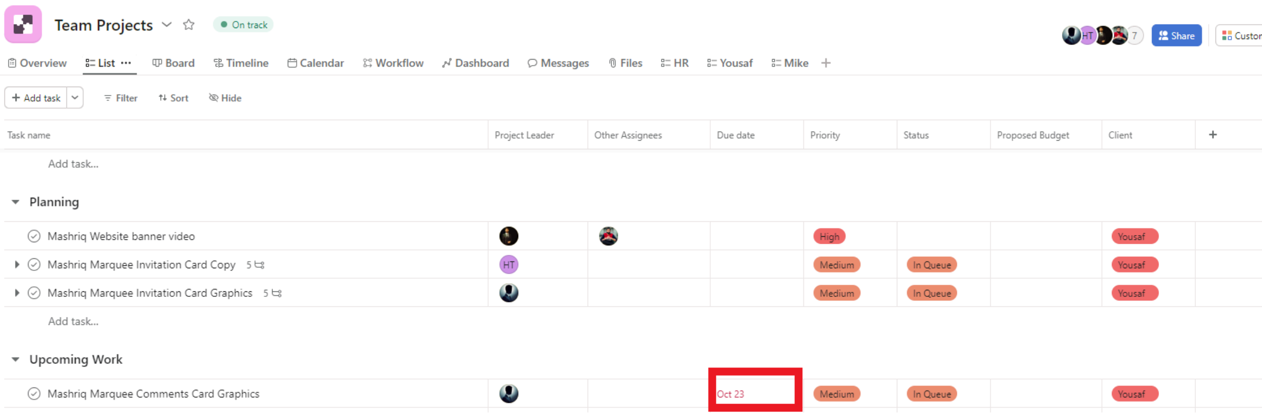
- Encourage the client to provide detailed feedback within the project comments. Make it clear that their input is valuable in ensuring the project aligns with their vision.

3.1.5 Changes to Schedule

The **“Changes to Schedule" section** outlines the guidelines that must be promptly followed in Asana when making changes to project deadlines or adjusting the schedule of an entire project.

When a deadline has been missed on a project, it will appear as ‘**red’** under the due date subsection. This means that work on this project is pending and has not been completed within the specified timeline.

The picture below shows how a project appears when it is overdue:



Important Guidelines:

- Always check the due dates and timelines of a project when they are added in the “Work in Progress” or “Pending Approval” section. Ensure that no due dates or timelines are marked as red.
- If a due date or timeline is marked as ‘red’, communicate with the client promptly and inform them the reasons for missing the due date.
- Two-way communication must take place between the Project Leader and the client to facilitate clarity in communication. This approach ensures that both parties are aligned and develop a mutual understanding throughout the process.
- The client must be immediately notified of the proposed schedule change, and should be provided with a new due date and a schedule of deliverables.
- Subsequently, a clear and honest explanation of the circumstances necessitating the schedule change or the change in project deadline must be provided to the client.This may include unforeseen challenges, resource constraints, or other factors impacting the project timeline.
- The client should be given the opportunity to approve or reject the proposed schedule change.

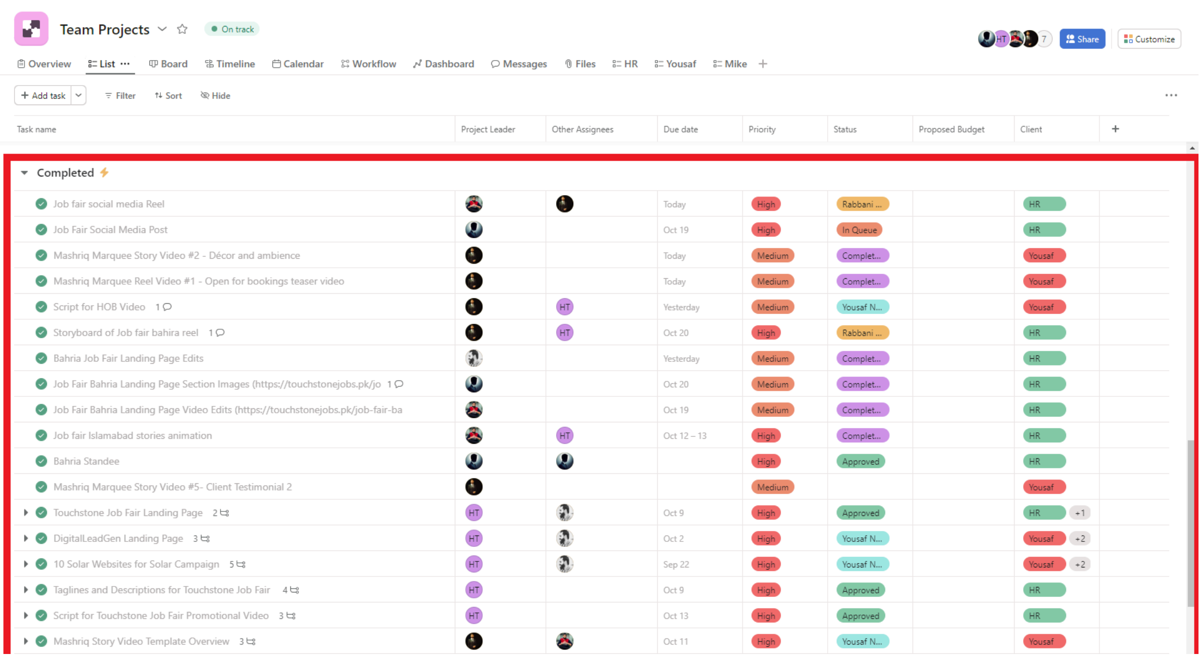
- The client also reserves the right to cancel the project due to a lapse in schedule. If the client chooses to cancel, the project should be canceled in a manner that respects the client's decision and safeguards their interests.

3.1.6 Completed

Projects are added to the **“Completed"** section once they have been completed, and approval has been received by the client to post/archive the projects.

Completed projects can be viewed later at the bottom of the **Team Projects** dashboard.

The following picture shows where the Completed Section can be accessed from in the Team Projects dashboard view:



Important Guidelines:

- Verify that all project components meet the quality standards, delivery dates, and criteria set forth by the client and the creative brief.

- Safely archive all project-related files, assets, and documents. This ensures that all project materials are securely stored for future reference.

- Share insights and lessons learned from the project with the team to enhance their collective knowledge and improve future project management.

4. Conclusion

By following these SOPs, Team DigyCX can efficiently manage and execute projects within Asana. Clear organization, communication, and project assignment will enhance collaboration and productivity of the team as a whole.