



HOW YOUR TASKS SHOULD LOOK IN A WORK MANAGEMENT TOOL

Examples of tasks found in work management tools demonstrating best practices outlined in *Chapter 6: Principles of Efficient Work Management*

THE ANATOMY OF TASKS

In *Come Up For Air*, chapter 6, I discussed several key strategies to keep in mind when utilizing work management tools. While the process of creating and assigning tasks may seem straightforward, the ultimate goal is not just to create tasks, but to establish a system that allows for the creation of clear and specific tasks for the purpose of increasing efficiency.

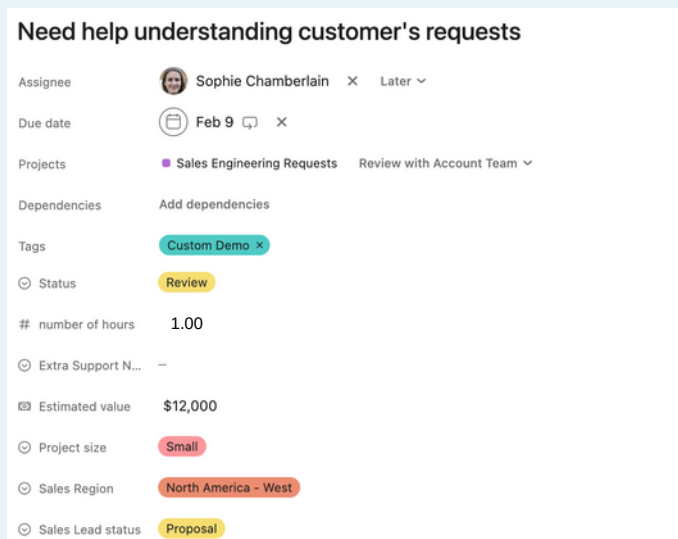
Below is an example of a task in Asana that incorporates the best practices covered in the book:

The screenshot shows an Asana task card for 'Prepare Q4 sales presentation'. The task is assigned to Sophie Chamberlain and has a due date of Tuesday. The description includes a clear instruction and a list of steps. Callouts point to various elements of the task:

- Task Title:** Prepare Q4 sales presentation. Callout: A short title that includes a verb.
- Assignee:** Sophie Chamberlain. Callout: One assignee responsible.
- Due date:** Tuesday. Callout: A clear due date.
- Description:** Create a comprehensive presentation that highlights the company's Q4 sales performance, achievements, and plans for the future. Callout: A clear and actionable description with relevant information required to complete the task, including specific instructions, attachments and links.
- Definition of Done:** Deliver the presentation to the sales team and other relevant parties during the quarterly status update. Callout: A definition of done so that everyone is clear on what needs to be achieved and when the task can be marked complete.

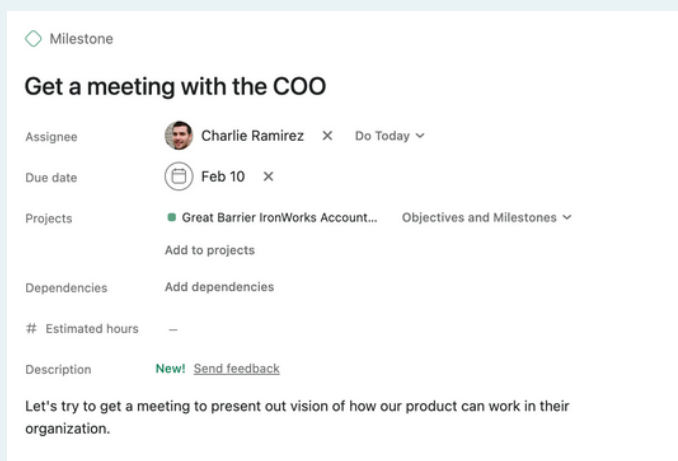
Additional task details visible in the screenshot include: 'Mark complete' button, interaction icons (thumbs up, pin, share, link, refresh, more, close), 'Add to projects', 'Add dependencies', and a 'New! Send feedback' link.

Custom fields and tags are some of the features I love in Asana that can help create clarity in a task by allowing you to add additional information and categorize tasks in a way that is meaningful to your team. Custom fields allow you to add specific details to a task such as priority level, budget, or project phase, which can help team members understand the importance and context of the task. Tags, on the other hand, allow you to categorize tasks by keywords, making it easier to filter and search for tasks and help to identify trends or patterns in the data.

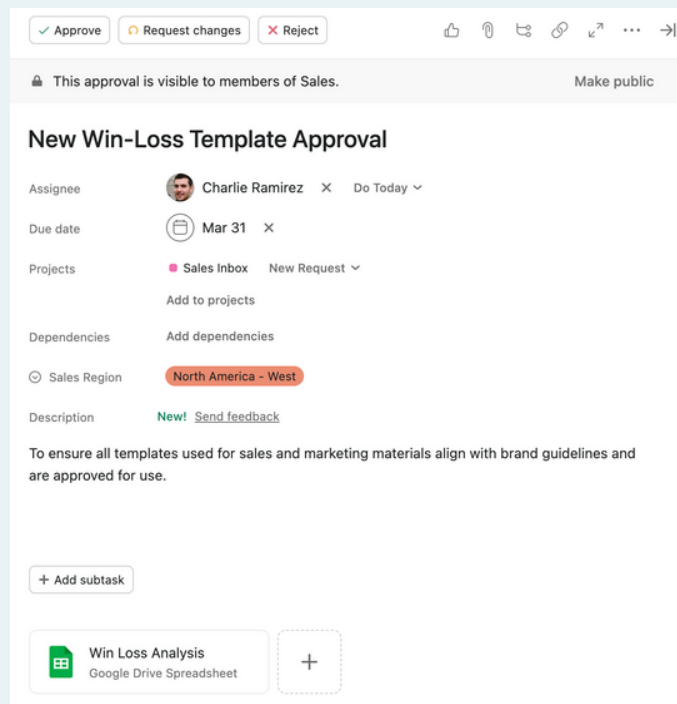


Another great way to use Asana tasks is by turning them into milestones or approval tasks. These types of tasks can make it easy to keep track of important parts of your project and make sure important decisions are made in a timely and organized fashion.

Milestone tasks are like signposts for your project - they mark important stages or achievements, like finishing a big phase or delivering a specific deliverable. When you set up milestone tasks, you can clearly communicate with your team what needs to be done and when, and quickly spot any problems or delays.



Approval tasks are a great way to make sure important decisions get made quickly and smoothly. They help track the approval process for things like documents, designs, and other deliverables. Approval tasks are assigned to one or more people who need to review and approve the task before it can be marked as done. This ensures that the final outcome meets the necessary standards and that everyone is on the same page before moving forward with the project.



Asana's task features can be a game changer for your team to stay organized and on track. All these features combined can help you streamline your team's workflow, increase productivity and ensure nothing falls through the cracks.



Book a call to learn how we can help you set up and operate your work management tool efficiently.