



HOW TO ESTABLISH YOUR ROUTINE USING ASANA

A detailed guide to staying on top of your Asana tasks based on concepts from *Chapter 6: Principles of Efficient Work Management*

THE ROUTINE: MY TASKS & INBOX

Like any new tool, using a work management tool should become a habit. If you can build it into your routine from the beginning, the habit will form quickly and you'll be in great shape.

In Asana, your routine will primarily revolve around two core features: Inbox and My Tasks. These are used to communicate about work with your team and prioritize your work, and there are similar features in most work management tools.

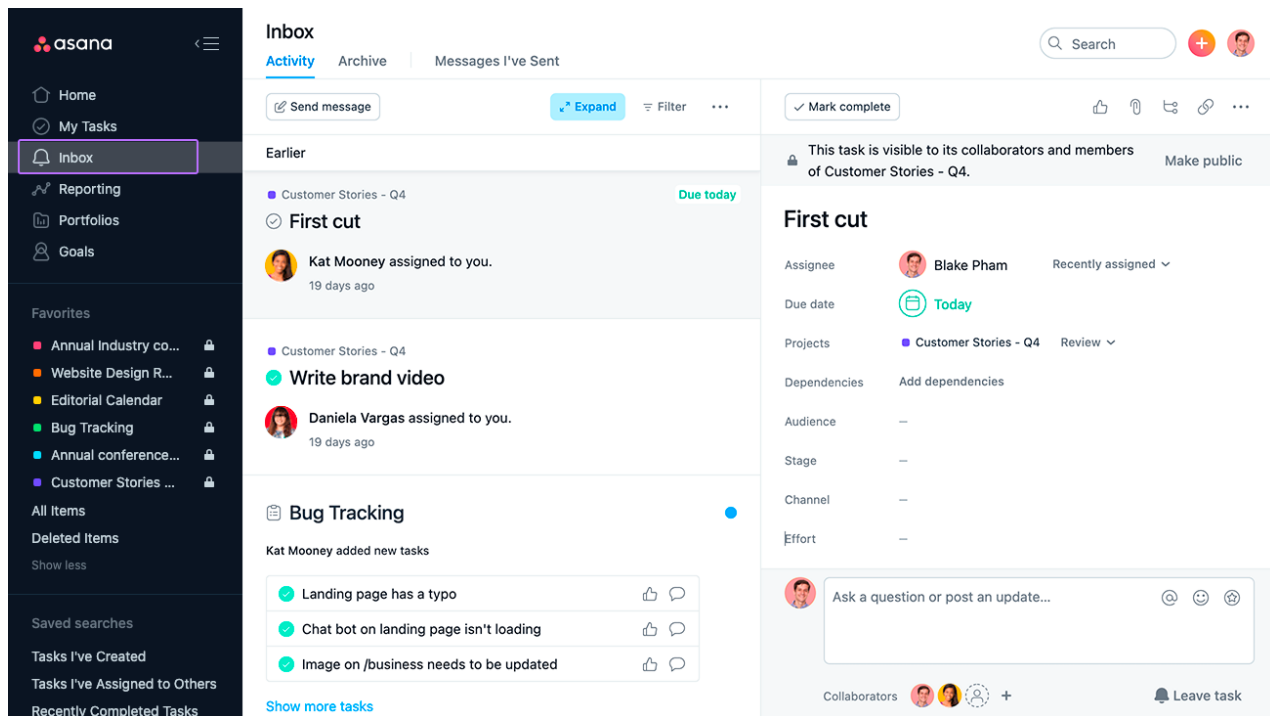
If you're just getting started with Asana, these are the 20% of features that provide 80% of the value of this tool.

If you ever feel like you're running around at work like a chicken with its head cut off, you'll love the organization and prioritization that these two features can bring to your daily life. Combined, they're like a to-do list on steroids, enabling you to quickly work through everything you need to get done each day.



THE INBOX

All communication is funneled into the Inbox. That means any time someone mentions you in a task comment or another message, it will appear in your inbox, just like email. Other situations that involve you—like a task being assigned to you or an update on a task that you're involved in—will also appear here. It's the central repository that allows you to stay up-to-date on your work.



Source: asana.com/guide/help/fundamentals/inbox

Upon opening Asana, the Inbox should be the first place you go. Luckily for you, we've already covered the principles of Inbox Zero—and those principles apply here as well. It's virtually the same process. As you work through your Inbox, you can Reply, Archive, or Defer messages as needed.

By responding to all comments and messages that involve you, you'll unblock everyone on your team so they can all move their tasks along. This should be a relatively quick process that you can do a few times throughout your workday.

If a message doesn't warrant a reply but you want to let the sender know you've seen it, you can "like" the message in Asana and many other tools to let them know you've read it.

Now, I'd like to address the elephant in the room. At this point in the framework, I've now asked you to get to Inbox Zero in email and check both your internal communication and work management tool every day. If not multiple times per day. And I know what you're thinking.

"Nick, I used to just check email. Now you're asking me to check three different tools multiple times per day? How is this more efficient than my old method? Doesn't this just make the whole 'context switching' problem worse?"

It's a valid concern, and I understand this might be a dramatic change to your daily workflow. But while there are downsides to having to check three different tools, the pros outweigh the cons.

Firstly, you should be spending less time in each tool because your time will now be split between the three. So, if you used to spend two hours a day in your email inbox, you may now spend 30 minutes in email, 30 minutes in your internal communication tool, and 30 minutes in your work management tool. That's 30 minutes less in total.

This happens because each tool is purpose-built and optimized for the retrieval of information. That means when you sit down to work on a task you'll have everything you need, instead of having to search through your email inbox to find a description of what your boss wanted or the PDF you need to get started. Each of these three tools, when used in the right ways, will make your daily workflow more efficient and painless.

These three tools can also help make your daily routine more efficient. People who don't work with clients or external partners probably only need to check their email once per day, and it will only take a few minutes. Instead, they can prioritize checking their internal communication tool a few times per day. The opposite may be true for a salesperson. Separating this communication means you can choose where you want to spend your time according to what matters most for your role, responding to the most important messages first instead of having to work through everything at once.

And let's not forget that this system is optimized for team productivity. This isn't just about you. Even if you don't save any time on an individual level, the system should save time for your team as a whole because everything is organized and stored in the right place, with the right levels of visibility so others can quickly find the information they need without disrupting anyone.

So, I know I'm proposing a significant change in your daily workflow, but remember that there are benefits outside of your own personal productivity at stake here. And in our experience, the vast majority of people experience major personal time-savings when using these three tools instead of relying on one or two.

MY TASKS

Let's get back to the daily routine. After you've gotten to Inbox Zero, you can then take a look at the tasks assigned to you. These are collected in a list called "My Tasks." Anytime you need to figure out what to focus on next, you can go to My Tasks.

Just like you might look over a physical to-do list as you start your day, it's important to check My Tasks when you first log on to Asana. If you actually are used to physical to-do lists, you'll find the ability to move tasks around in this tool quite refreshing. Shifting priorities, changing due dates, adding additional notes to a task, asking a quick clarifying question—this all can be done in just a few clicks within My Tasks.

I recommend checking this list at least once per day to see if any new tasks have been assigned to you and to reprioritize any of your other tasks if needed. If anyone has assigned a new task to you, it will appear at the top in a category called Recently Assigned in Asana, which functions similarly to an "in tray" in an office. This is an incredibly useful feature as you can review all your recently assigned tasks to gain clarity on each and prioritize them accordingly.

Here are a few steps you can take when sorting through any recently assigned tasks:

- 1.** Review the task description to make sure you understand what's being asked of you.
- 2.** If necessary, ask any clarifying questions to the person who assigned it by leaving a comment on the task and potentially reassigning it back to them.
- 3.** If the due date works for you, keep it. If not, update accordingly and let the assigner know.

Once you've done this, you can then move it out of the Recently Assigned section and into your main list of tasks. The list, by the way, prioritizes itself by due date—so you'll always see your tasks in order of when they're due.

Now, it's worth pointing out that some people feel overwhelmed by their work management tool because they now have a massive list of tasks assigned to them. They didn't have as many tasks before, so this new tool has just added more work to their plate. But the reality is that these tasks were always going to be assigned to them regardless of the tool. The only difference is that they now have visibility into what's coming in the future. Really, it's a benefit.

Always remember that you are not expected to do everything in your work management tool at once. You may have tasks assigned to you that won't need to be worked on for six weeks, so there's no sense in worrying about them now—your work management tool will actually help you fit them into your workload when the time is right.

This type of clarifying and prioritizing is the reason why tasks don't get "lost" in a work management tool. If you do this as new tasks are assigned to you, you won't have any surprises—and the same goes for tasks you assign to others.

Your Inbox and My Tasks list put YOU in control of how your days are organized and prioritized.

With just the My Tasks and Inbox features alone, you can start working efficiently in Asana. You can see how, at this point, it's like a dynamic to-do list that you can use to prioritize and organize your work.



Book a call to learn how we can help you optimize your efficiency using Asana.