Sharing Our Success (SOS) Submission Form

Chapter Name:	Central Massachusetts
Chapter Membership Size:	Small (Less than 100)
Chapter Contact Person:	Stan Skrabut
Email Address:	stan.skrabut@gmail.com
Phone Number:	(307) 287-8147
Chapter Board Position:	President
Chapter Website URL:	https://www.tdcentralmass.org/
Submission Title:	Improve Chapter Workflow with Project Management Templates
What did you do? (a 2-3 sentence summary of your effort):	Developed templates within a project management tool (Asana) to improve workflows, prevent missed key steps, and provide visability to the status of a process.
Who benefitted from this effort (Target Audience) Check all that apply:	Board Members
Why did you do it? What chapter needs were addressed?	Chapter dynamics often lead to frequent changes in board membership. This can result in the loss of knowledge about standard operating procedures and routine tasks during these transitions. Recognizing these challenges, the Central Massachusetts chapter utilizes the project management software Asana. This decision was made to efficiently document and maintain the critical, recurring activities essential for the chapter's operations.
What were the measurable outcomes? (May include data regarding financial gains, membership increases, target audience satisfaction levels, publicity for the chapter or for the profession, etc.)	Improved operations.

What steps did you take to implement this effort? (Remember that other chapter leaders will use this to replicate the effort. Be specific)

Asana offers a free license for up to 15 users on its web-based project management platform. As board rosters typically comprise fewer than 15 members, this ensures sufficient capacity for all Board members to collaborate. The platform enables users to create activities (tasks), schedule due dates, set reminders, and exchange messages related to these activities. Once an activity or task is established, it can be easily duplicated for recurring events.

The Central Massachusetts chapter has developed templates for several workstreams related to key CARE areas, including:
• Communications: Development and compilation of newsletter content.
• Financial Audit.
• Programming: Documentation of monthly programs.
• Governance: These templates are incorporated into SOPs for key workstreams.
• Onboarding: Ensuring new board members are thoroughly trained to perform their roles.
• CARE: Keep CARE and CARE+ activities fron of mind.

Having a mechanism to manage routine or repeated tasks reduces the clutter of emails, enhances focus on prioritization, and, as in the newsletter example, leads to a higher quality product due to standardized inputs.

Implementing Asana into a team's workflow and developing task templates with sub-tasks involves several key steps. Here's a structured approach to make this process smooth and effective:

1. Understanding Team Needs and Workflow:
   - Assess your team's current workflow, project management needs, and pain points.
   - Identify what types of projects and tasks are most common in your team.
   - Determine how Asana can address these needs and improve efficiency.

2. Setting Up an Asana Account:
   - Create an Asana account for your team or organization.
   - Add team members to your Asana workspace or organization.
   - Define user roles and permissions as necessary.

3. Basic Training and Orientation:
   - Provide an introductory session on Asana to the team.
   - Highlight key features such as task creation, setting deadlines, assigning tasks, and using the calendar view.
   - Utilize Asana's own training resources or user guides for comprehensive understanding.

4. Creating Projects:
   - Start by setting up a few essential projects that reflect your team's main areas of work.

- Use Asana's project templates or create custom projects based on your team's needs.

5. Developing Task Templates with Sub-Tasks:
   - Identify repetitive tasks or projects in your team's workflow.
   - Create a task in Asana that serves as a template. Include all standard information that every task of this type will need.
   - Add sub-tasks to this template task. Sub-tasks should represent smaller steps or components of the main task.
   - Use custom fields, due dates, and assignees for both tasks and sub-tasks as necessary.

6. Implementing and Customizing Workflows:
   - Set up custom workflows using Asana's Board or List view, depending on what suits your team's style.
   - Utilize features like Sections or Columns to organize tasks in a project.
   - Implement Asana's automation features (like Rules) to streamline repetitive actions.

7. Regular Review and Feedback:
   - Schedule regular check-ins with your team to gather feedback on how Asana is fitting into the workflow.
   - Be open to making adjustments to your Asana setup based on feedback.

8. Ongoing Support and Learning:
   - Provide resources for ongoing learning and troubleshooting (like Asana's community forum, help center, or a dedicated internal Asana expert).
   - Encourage team members to share tips and tricks they discover.

Is there anything you would do differently?	Keep improving processes. Identify opportunities to build other templates.
When did you start working on this effort?	Aug 01, 2022
When did this effort go live?	Aug 01, 2022
Approximately how many hours were spent working on this? Include an estimate of hours spent across all board members and volunteers.	10
What resources did you use? Check all that apply:	Board Members
Which board positions were involved in the effort?	All board members
Do you have any additional insights to share with other chapters implementing this effort?	It requires dedication to the process. It is useful to have Asana available during board meetings.
How did you become familiar with the Sharing Our Success (SOS) program? Select all that apply:	Chapter Leader ATD Chapter Leaders Conference (ALC) NAC Area Call Chapter Relations Manager (CRM)
Would you be willing to apply to present on this submission at the ATD Chapter Leaders Conference (ALC)? *Request for Proposals (RFPs) open in May of each year at td.org/alc. Selected session facilitators receive complimentary registration.	Yes