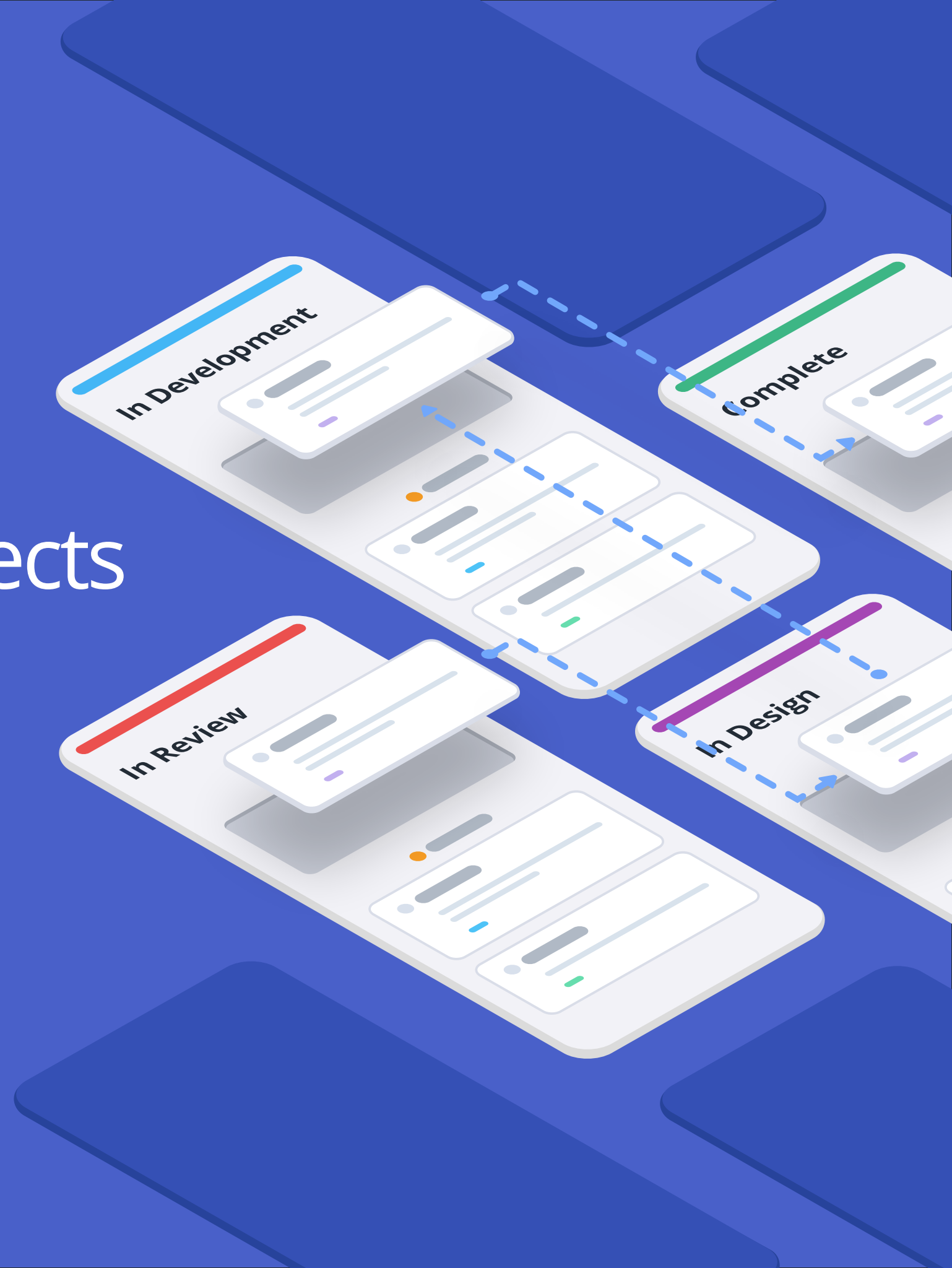


How to Use Teamwork Projects to Structure Your Work

teamwork.



- No matter what the scale, starting a new project, piece of work, or process can be daunting. You know where you want to end up, but what's the best way of getting there?

- Just like any other kind of journey, mapping out your route before you start makes it so much smoother. No matter how you like to manage your projects — Waterfall, Agile, or some other combination of various methodologies — your project management tool should be able to support you every step of the way.

- We designed Teamwork Projects to give you full flexibility, so you can structure your workflow in the best way for your organization and team members. But because there are so many options and features to make use of, it can be tricky to know which combination is going to make your work more efficient.

That's why we've put together this guide to help you get your bearings and start charting the best way to manage your work.

If you need to take an unexpected detour — or even make a U-turn and change direction entirely — that's no problem. Teamwork Projects allows you to tweak and change your process at any time, so you don't need to worry about getting stuck in a dead end.

And you don't have to go it alone: it also allows for transparent collaboration and super easy onboarding, all with 24/7 support, so you know that your team can come with you every step of the way.

Let's get started!

Building Your Project



Building Your Project



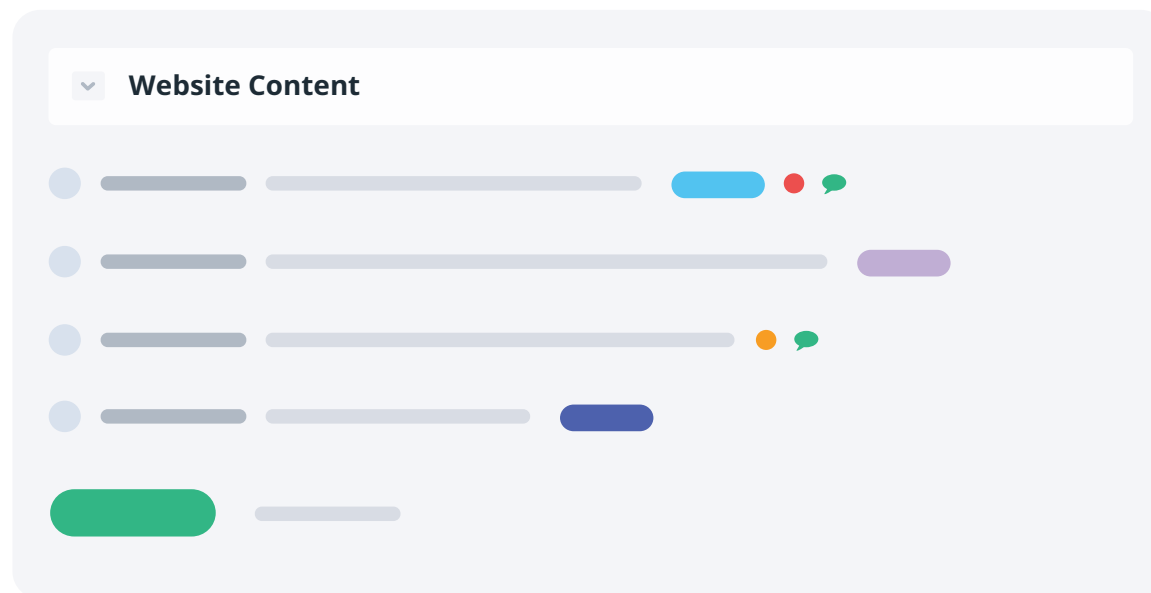
Tasks are the basic units of work in Teamwork Projects; they comprise the building blocks of your project. And like any good building block, that means that you can adapt them to support whatever structure works best for you.

Building Your Project

- Whether you use Waterfall, Agile, Kanban, Scrum, or your own personal blend, we know that different projects — or even different stages of the same project — require different approaches. That's why, in Teamwork Projects, you have the option of using both List View and Board View to manage your workload. They both offer all the support, transparency, and accountability that you expect from Teamwork Projects, and they both enable you to optimize your projects in different ways — even more so when used together.
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Task Lists

- Sometimes, having a list of tasks is the most effective way to group your work together and keep an eye on its progress.
- Within a task list, you can assign tasks to users, create subtasks and dependencies, add tags, and set priorities and deadlines as necessary.
- Task lists are perfect for when you have lots of tasks that you need to get through, and they come with the added bonus of watching your to-do list shrink as you accomplish each one.

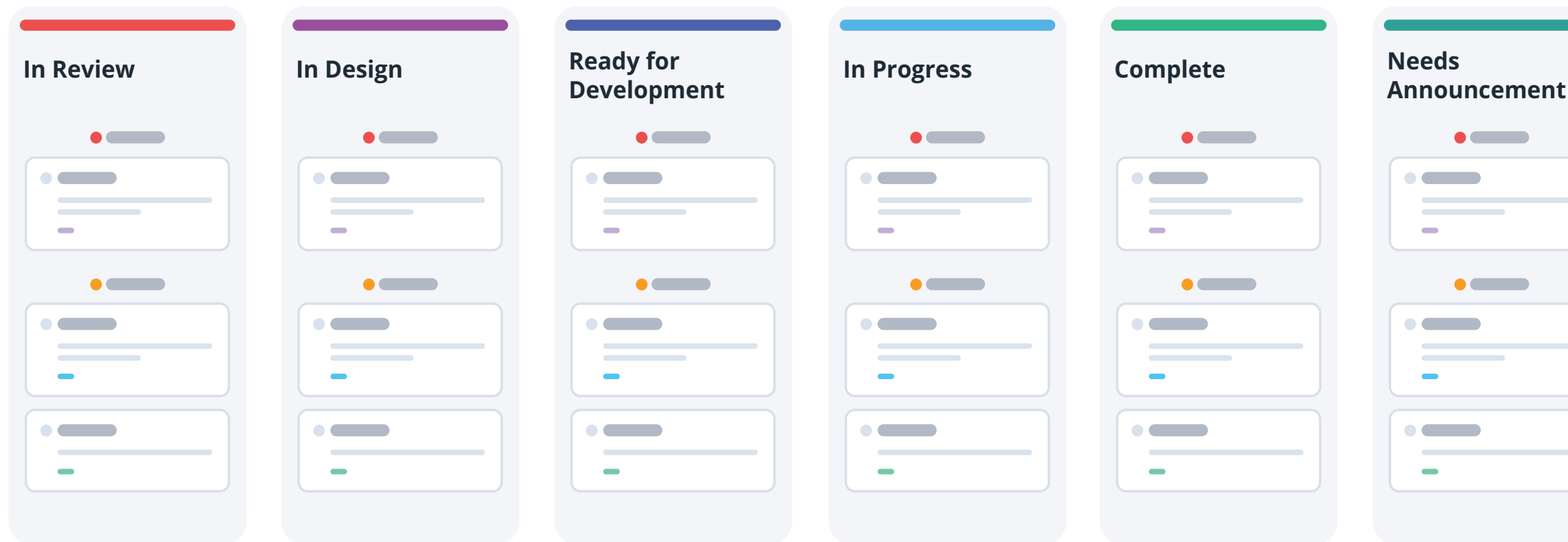


Boards

- At other times, you'll want to visually represent your task's journey as it moves through a process. Here's where Board View comes in: instead of a static list, you can move a card, which represents a task, through a number of columns, which represent the different stages it needs to go through before it can be successfully completed.
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- With boards, you can define your own columns for each process, and quickly see where each task stands and what still needs to be done before you can reach your goals. Lots of methodologies use this approach, most notably Kanban, which in its most simple form has three columns: To Do, Doing, and Done.

Building Your Project

- In this way, Board View gives you a visual representation of your workflow, but it's more than just that. While it is great for providing an at-a-glance snapshot of where everything stands with your project (as well as visualizing any potential bottlenecks or other workflow issues so you can pre-empt them before they become problems), it also provides you with a new way of thinking about your project and how best to approach it at each stage of its progression.
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Setting Up Your Board View



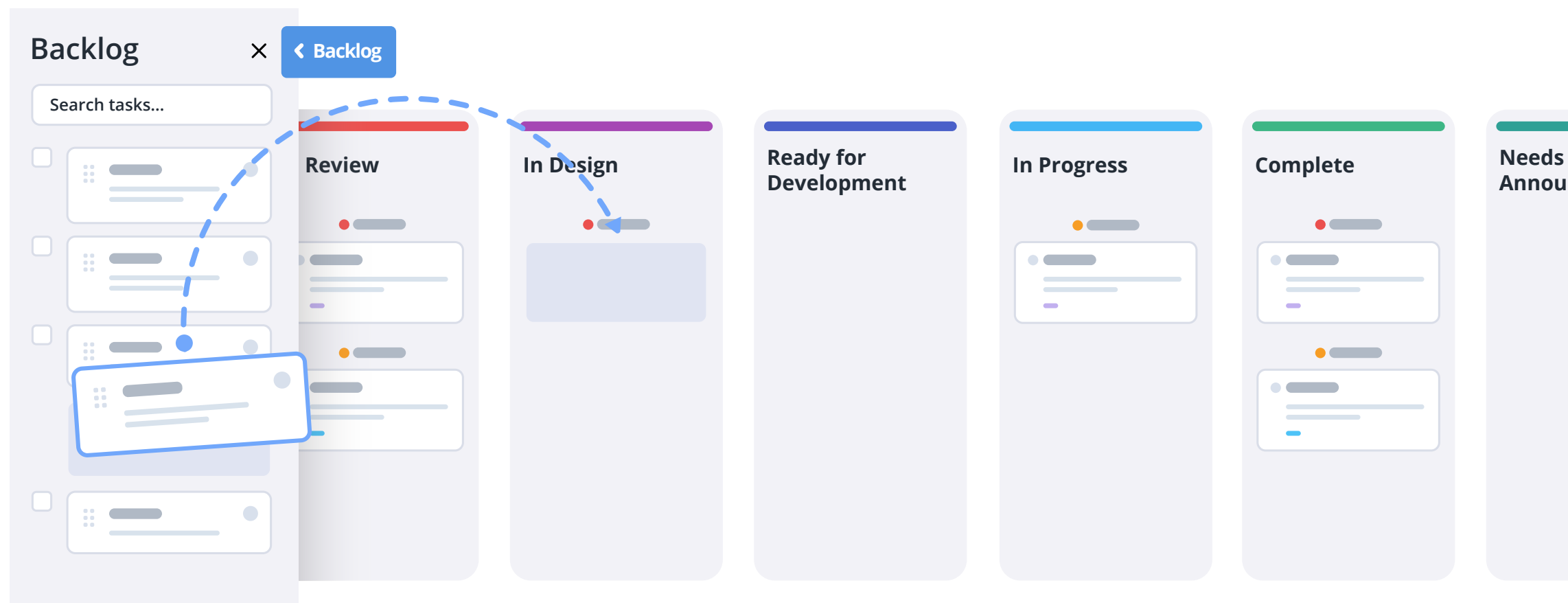
Setting Up Your Board View



When you create a new board, you have the opportunity to select which tasks are useful for you and your team to see represented as cards, allowing you to curate your workflow to be as streamlined and efficient as possible.

Setting Up Your Board View

- To help with this, when you first switch to Board View, you'll find that your new board isn't automatically cluttered with all of the existing tasks on the project.
- Instead, once you set up your board with the columns you want, you'll find any pre-existing tasks in the Backlog, and you can choose which ones you want to include in each column by dragging and dropping them to the right place.
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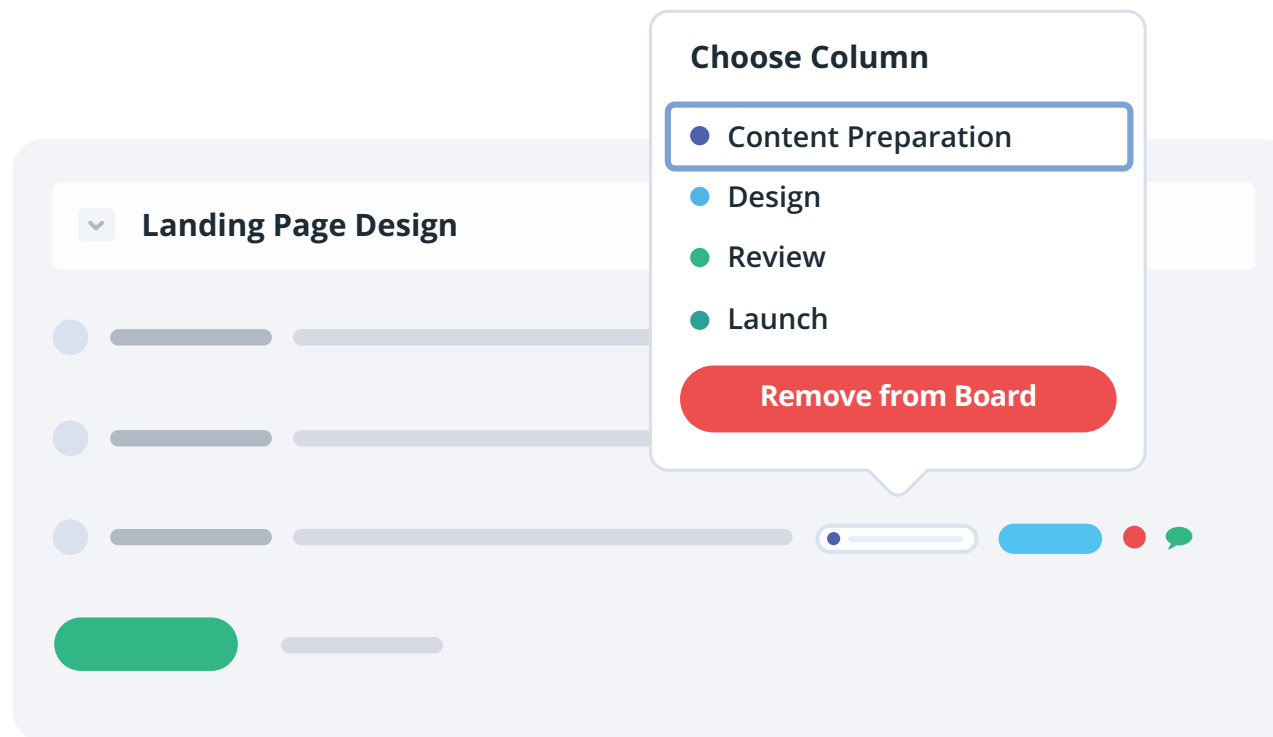


Setting Up Your Board View

- Once your columns are in place, you can quickly add new tasks by selecting Add a Card.
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- When you create a card, it will automatically create a task version of the card, too. An easy rule of thumb to remember is that you can have a task without having a card, but you can't have a card without having a task.
- Accordingly, when you add a card, you can add it to a particular Task List at the same time, so you can keep everything organized at every level.
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Setting Up Your Board View

It's important to note that a task can only exist in one column at a time. Because the columns represent a flow for the task to progress through, this helps to keep your project moving smoothly, and keeps everything unified and integrated regardless of where, or how, you're viewing your task.



Setting Up Your Board View

- To help you streamline your process, you can also set up triggers. Triggers allow you to automate actions when creating or moving cards from one column to another. You can set triggers to instantly send notifications or mark tasks as complete, decreasing the time you spend updating your board each day. For example, if you have a column called Design, you can create a trigger so that any card that is moved into that column is automatically assigned to your designer.
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Ultimately, the synergy between List View and Board View means that no matter how you or your team individually prefer to use Teamwork Projects, you can have full flexibility while still always being kept in the loop.

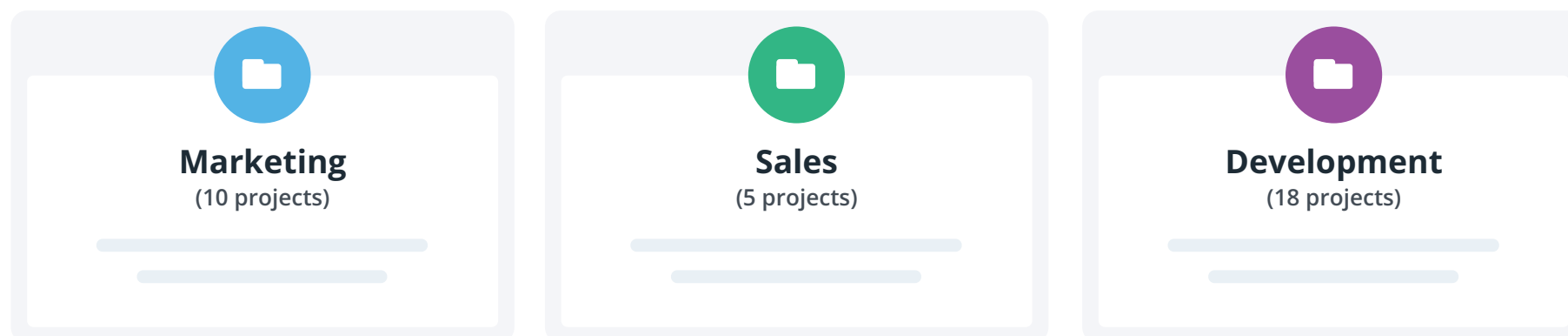
What's more, whether you're totally new to using Board View or using boards is all you've ever known, your boards will be underpinned by the full functionality of Teamwork Projects, so you can switch up your structure how and when you need to.

Setting Up Your Board View

Portfolio

- One of the most helpful aspects of using boards is being able to track your overall progress at a panoramic level.
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- With Portfolio, you can zoom out and apply this to your projects, too. In Portfolio, you can see your projects represented as cards, and move them through various columns or stages, just like you would with any other piece of work in Board View. You can also click on a card to see a quick view of the project summary.
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Representing your projects as cards allows you to keep tabs on the bigger picture and quickly check the status of multiple projects at a glance. It's an easy way of giving your team a quick visual 360 on where everything stands, and helping you to determine what's left to do before you can reach your goals.



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Choose
Your Own
Adventure:
Task Lists or
Board View



Choose Your Own Adventure: Task Lists or Board View



There's no wrong way to start making progress, but if you're trying to decide how to start mapping your workflow, we've put together some quick questions you can ask yourself at the outset.

Choose Your Own Adventure: Task Lists or Board View

● Do you have an ongoing process that you need to continually move new tasks through?

A: Not at this time.

B: Yes, I do!

● Do you need to group lists of tasks together to work towards one overall goal or significant milestones?

A: That would be great.

B: Not really, it's more about progressing tasks than grouping them together.

● Do you need to have lots of subtasks, that can each be assigned to different people, or one task that gets reassigned as it moves towards completion?

A: Lots of different subtasks for different people.

B: One task that get reassigned.

Would it be helpful for you to have a visual representation of where all your work currently sits within the workflow process?

A: I'd prefer to just check things off.

B: Yes, very much so.

Do you use the same process across multiple projects?

A: I use the same templates sometimes, but they don't always follow the same pattern.

B: Yes! Most of my projects follow the same workflow method.

Choose Your Own Adventure: Task Lists or Board View

- If you answered **Mostly As**: Your current project sounds like it would be best suited to start with **Task Lists**. If you decide later on that you'd like to set it up as a board, that's no problem — it's super easy to create a board from an existing list.

- If you answered **Mostly Bs**: It seems like your project could benefit from using **Board View**. We hope the info in this guide has been useful in helping you figure out how boards can streamline your project's journey from beginning to end, but if you're looking for a little more inspiration, keep reading for some real-world case studies on how our customers do it.

- If you answered **A Mix of As and Bs**: That's cool too! You can utilize both **List View** and **Board View** at different stages of your project so you can fully tailor your process for each step of the way.

This Is How We Do It



This Is How We Do It



We love hearing how our customers use Teamwork Projects to Get Things Done.
Here are some of our favorite ideas for how to use Teamwork Projects to structure your workflow, courtesy of real project managers.

This Is How We Do It



Stephen Hurford

Lead Project Manager,
[DesignFive](#)

Who they are

DesignFive is a full service digital production agency, and Teamwork Projects is the core tool they use to deliver projects to their clients.

How they work

“I previously worked with a software company where we used Kanban as part of an agile process,” Stephen told us. “Kanban is a great style, and it easily translates to creative digital production. So that’s primarily how we run our workflow in Teamwork Projects.”

DesignFive sets up each client as a separate project. Because they bill by the hour, this also allows them to log time and add billing per client.

Stephen finds that he typically sets up the same 3 or 4 task lists for each project. Using task templates means that anyone on the team can spin up tasks themselves, while still ensuring that everyone is sticking to the right process.

When using Board View, Stephen has five columns in all of his boards:

This Is How We Do It

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- 1. My Column:** This includes master tasks that Stephen is personally responsible for, organized by due date.
 - 2. Ideation:** Tasks which are still under review from the client, or which need more planning before the task can go into production, organized by date.
 - 3. In Production:** Once a task has been moved to this column, he has a trigger set to assign today's date automatically. If it's not due today, he just changes the date.
 - 4. In Review:** Send to client for review. He automatically strips out the due date at this point because, as he says, "it's out of my control." This is listed by project rather than by date so he can get a quick overview of what's in review for which individual.

5. Approval: Task has not yet been formally closed but will be approved and closed soon.

"If you've got a general understanding of Kanban, then you'll realize why Board View is the most valuable thing you can use in Teamwork Projects."

— Stephen Hurford, DesignFive



Matthew Clements

Vice President, Technology and Analytics, [Red Rocks Credit Union](#)

Who they are

As VP of Technology and Analytics, Matthew oversees the IT and risk, governance, and compliance for the whole organization.

How they work

In the IT Department, Matthew's team operates a Scrum process with a 2-week sprint cycle, which involves staging, prioritizing, and assigning ownership of work.

They have light templates that they use to create their projects and set the time frame for their execution.

All of their tasks are assigned a due date when they're initially created. They typically assign the user as they create tasks on a project.

Matthew also likes using the Gantt chart view: "It gives a better perspective on how much work you're setting at once."

In Board View, the columns relative to their current sprint are **To Do**, **Doing**, and **Done**. They also have a **Staging** column which enables them to start prepping for items they've already pre-defined as a priority for the next sprint.

This Is How We Do It



Scot Luman

Project Manager,
[Kalon Creative](#)

Who they are

Kalon Creative build modern, user-friendly websites and apps for startups, small businesses, and growing companies.

How they work

Scot has each column in his board represent the high-level status of a project. The columns he uses are:

- 1. To Scope:** The client has inquired and requested an estimate.
- 2. Awaiting Approval:** The estimate has been sent.
- 3. Approved:** The team has received verbal or written acceptance of the estimate.
- 4. Needs Details:** The team has received the upfront payment as requested to begin the project. Now, they need to add dates, milestones, task order, and assignments to Teamwork Projects.
- 5. In Queue:** The details have been added and the project is ready to begin but it hasn't gotten to the start date yet.

This Is How We Do It

- 6. **In Progress:** Active design, development, and testing is currently happening.
- 7. **Closing:** Most or all features have been sent to the client for final approval.
- 8. **Complete:** The project has been shipped to production. The team then addresses any bugs or changes within scope for 60 days before archiving the project.

Within the **In Queue**, **In Progress**, and **Closing** columns, Scot also shows the project updates, which include a list of the team members assigned to the project and a summary of the project's current status, as well as any issues.

“Combining the ability to create quick project updates with Portfolio has cut our weekly update meeting times in half.”

— Scot Luman, Kalon Creative

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