



ISSI Technologies — Asana Playbook

A Philippines-first guide to launching, adopting, and scaling Asana in 90 days
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Executive Summary

Outcome-first. Pilot fast. Govern early. Automate smart. Measure weekly.

At-a-glance

- Focus on **2–3 measurable outcomes** (e.g., on-time rate, cycle time, approval speed).
 - Launch **1–2 pilot projects** in 30 days; expand after proof of value.
 - Establish **lightweight governance** (naming, fields, permissions) before scaling.
 - Implement **8–12 automations** to remove recurring manual steps.
 - Run a **weekly Ops Pulse (15 min)** using live dashboards to decide next actions.
 - Lean on **ISSI Tech** for security, migration, and scale-up guidance when needed.
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Who This Is For

- **Executive sponsors / PMO** needing predictable delivery & visibility
 - **Department heads / team leads** running repeatable workflows
 - **Admins / IT** responsible for security, governance & integrations
 - **Change champions** trusted to drive adoption
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Business Case (PH Context)

Common pain points: scattered chats, spreadsheet sprawl, unclear ownership, manual follow-ups, reporting in slides, compliance risk.

Asana value: one source of truth, clear ownership, automated handoffs, real-time reporting, enterprise-grade controls.

90-day target outcomes (examples):

- **30% faster** task cycle time (pilot workflows)
 - **≥85% on-time** completion for critical tasks
 - **100%** use of approved templates in pilot teams
 - **Weekly ELT/ExCom** portfolio review from live dashboards (no manual decks)
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The 90-Day Plan

We align to our 6-phase method and compress the first loop into 90 days.

Phase 0 — Kickoff & Success Metrics (Week 0)

Owners: Executive Sponsor • Project Owner • Asana Admin • 2–3 Change Champions

Decisions: outcomes & baselines • pilot workflow selection • scope & success criteria

Phase 1 — Discover & Design (Weeks 1–2)

Deliverables

- Process map (RACI, inputs/outputs, systems)



- Workspace structure (Org → Teams → Projects → Portfolios)
 - **Standards:** naming, custom-field taxonomy, permissions model
 - Integration shortlist (email, Slack/Teams, Google/Microsoft, CRM/ERP)
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Phase 2 — Build & Migrate (Weeks 2–4)

Deliverables

- Pilot **project templates & dashboards**
 - **Forms** for intake; custom fields; rules
 - Critical data migrated from legacy tools (pilot scope only)
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Phase 3 — Enable & Launch (Weeks 4–6)

Enablement

- Exec: 30-min briefing • Managers: 60-min workshop • Doers: 90-min lab
 - Launch pilots + **Daily 10** ritual (review My Tasks & team board)
 - Start weekly **Ops Pulse** (15 min: adoption + blockers + next actions)
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Phase 4 — Optimize & Automate (Weeks 6–9)

Focus

- Remove manual steps; add 8–12 high-impact rules



- Tune dashboards; standardize status fields & stages
- Expand intake via Forms; tighten SLAs & approvals

Phase 5 – Scale & Govern (Weeks 9–12)

Outcomes

- Promote pilot templates to **org-approved templates**
- Finalize governance (access, archiving, owners)
- Roll out to the next 2–3 teams with the same cadence

Success checkpoint (Day 90): outcome deltas achieved; adoption $\geq 75\%$ of active users weekly; portfolio dashboard reviewed by leadership.

Reference Architecture

Structure

- **Organization:** company domain
- **Teams:** departments (Ops, Sales, Finance, IT, HR, R&D)
- **Projects:** each workflow (e.g., Client Onboarding)
- **Portfolios:** strategic views (e.g., Operations Portfolio, OKRs)

Standards

- **Naming:** [Dept] – [Workflow] – [YYQ#] → OPS – Client Onboarding – 25Q3



- **Status** (custom field): Not Started / In Progress / Blocked / In Review / Done
 - **Priority**: P1–P4 with SLA tags (e.g., P1 = 24h, P2 = 3d)
 - **Ownership**: exactly one **Assignee**; escalate via **Approvals**
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Ready-to-Use Project Templates

1) Client Onboarding (Professional Services / BPO)

- **Sections**: Intake → KYC/Compliance → Setup → Delivery → Handover
- **Fields**: Industry, Client Tier, SLA, Billable?, Risk
- **Rules**: auto-assign by service line; overdue escalations; approval gates

2) Marketing Sprint (2-week cadence)

- **Sections**: Backlog → Committed → In Progress → In Review → Shipped → Retro
- **Fields**: Channel, Campaign, Asset Type, Effort (S/M/L), Impact (1–5)
- **Rules**: WIP limit; auto-create checklist subtasks per asset type

3) IT Change Requests

- **Sections**: New → Triage → Plan → Implement → Validate → Close
- **Fields**: Change Type, Risk Level, CAB Required?, Environment
- **Rules**: Risk = High ⇒ create Approval; CAB Required? = Yes ⇒ notify CAB



4) Operations – Order-to-Cash

- **Sections:** Intake → Review → Fulfillment → QA → Invoice → Reconcile
 - **Fields:** Customer Type, Payment Terms, Amount, Exception?
 - **Rules:** Exception? = Yes ⇒ assign Supervisor; due date = Today +1
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Intake & Approvals

Best practice

- Use **Forms** for request intake; map form fields to custom fields
- Add **Approvals** for gated steps (legal, finance, QA)
- Standardize **SLAs** via fields & rules (e.g., P1 auto-escalation)

Sample Rule Set

- When task moves to **In Review**, auto-assign **Approver** and set due date = Today +2
 - If task is **Overdue** and **Priority = P1**, post comment tagging **@Team Lead**
 - On **Form submit**, create task in **Onboarding**, route by **Client Tier**
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12 High-Impact Automation Recipes

1. Auto-assign by **Department** or **Issue Type**
2. Set **Due date** based on **Priority**
3. Convert checklist templates into **Subtasks**
4. Auto-create **Follow-up tasks** after approval
5. Post **Slack/Teams** message when status becomes Blocked
6. Auto-apply **Tags** for reporting (e.g., Billable)
7. Create a **Weekly roll-up task** for project leads
8. Mirror **Form field** → **Custom field** for dashboards
9. Auto-archive tasks closed >90 days
10. Create **Risk task** if Amount > threshold
11. Duplicate **Project Template** when CRM stage = Won
12. Trigger **n8n** webhook to update CRM/ERP

Reporting & Dashboards

Widgets to include

- On-time completion (last 30 days)
- Tasks by status & by assignee
- Cycle time by stage (if dates tracked)



- Overdue critical tasks (P1/P2)
- Top blockers (count of tasks moved to Blocked)
- Adoption: tasks completed per active user

Weekly Ops Pulse (15 minutes)

1. Review dashboard
 2. Decide 3 actions
 3. Log decisions in a task + @mentions
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Governance & Security Basics

Right-sized standards for scale

- **Access model:** Teams for defaults; sensitive projects private-by-default
- **Admin controls:** SSO/SAML (if available), required 2FA, guest controls, SCIM de-provisioning
- **Data hygiene:** naming conventions, required owner field, duplicate/close policy
- **Compliance:** avoid regulated data in free-text; enforce least-privilege; use audit trails
- **Archiving:** close projects quarterly; archive tasks >90 days (unless regulated)

For regulated orgs (BFSI/healthcare), consider enabling **Audit Logs / Audit Log API**, **DLP/eDiscovery integrations** (via available suites), **data residency** options, and HIPAA domain enablement (with BAA where applicable). Align configuration to internal policy & regulator guidance.



Migration Notes (Wrike, Monday, Trello, Sheets)

- **Scope small first:** pilot-critical data only
 - **Map fields 1:1:** maintain a data dictionary
 - **Freeze** old tool for pilot scope to prevent drift
 - **Train with your data:** screenshots and live tasks
 - **Validate** with users before archiving legacy projects
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Adoption Toolkit

Role-based enablement

- **Execs:** Portfolio + OKRs • **30-min** briefing
- **Managers:** Reporting, workload, approvals • **60-min** workshop
- **Doers:** My Tasks, comments, rules, forms • **90-min** hands-on lab

Communication templates

- Sponsor launch email (why now, what changes, where to get help)
- Team norms (response SLAs, @mention etiquette, meeting simplification)
- Help center (short Looms, FAQ, template gallery)

Champions program

- 1 per team • Bi-weekly sync • Share wins • Log feedback



- Recognition badges • Invite-only advanced tips
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KPIs & ROI

Adoption

- % active users weekly • % projects using approved templates

Delivery

- On-time completion (critical tasks) • Cycle time per stage

Efficiency

- **Hours saved from automation** = (Avg. manual mins removed × volume) ÷ 60
- **Meetings removed** (count/length) due to dashboards & async updates

Example ROI

- If 40 users save **25 minutes/day** → ~16.7 hours/day
 - At **₱800/hour blended** → ₱13,360/day (~₱2.7M/year at 200 days)
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Quick-Start Checklist

- Executive Sponsor named
 - Project Owner & Admin assigned
 - 2 pilot workflows selected
 - Success metrics & baseline captured
 - Naming & fields standard agreed
 - Intake Form built
 - Project template built
 - 8–12 rules configured
 - Training delivered (3 roles)
 - Dashboard live; Ops Pulse scheduled
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Appendices

A — Policy & Governance Starters

Project naming guide • Custom fields catalog (Status, Priority, Department, SLA, Risk, Billable, Customer Tier) • Workspace roles • Archiving SOP • Incident response play

B — Training Outlines

30-min Exec Briefing • 60-min Manager Workshop • 90-min Doer Lab

C — Email & Chat Templates

Sponsor launch email • Manager weekly update • “Stuck/Blocked” escalation

D — Intake Form Field Examples

Contact • Department • Request Type • Priority • Due-by • Data Sensitivity • Approver • Attachments

About ISSI Technologies & Contact

ISSI Technologies helps Philippine and global teams ship faster with Asana—through process design, migration, automation, enablement, and right-sized governance. We combine **local context** with **enterprise-grade** practices so your teams can focus on meaningful work.

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*Success with Asana is about **fit, focus, and follow-through**. Use this playbook to prove value in weeks—not months. When you're ready, we'll help you secure it, scale it, and simplify the hard parts.*