

# Asana

How we use Asana at Akvo to get things done.

- Asana For Internal Team Coordination
- Asana For Project Execution [TBC]
- Objective & Key Results

# Asana For Internal Team Coordination

New to Asana at Akvo? Check out the [Asana - Fundamentals](#) wiki.

In addition to using Asana for coordinating and managing the execution of client work, we also use it to coordinate the internal work specific to the Tech Team. We use a number of Asana Projects grouped in Asana Teams.

## Naming Convention

All Asana Teams used to group the Asana Projects are use the following naming convention: `Team - Tech - <project group name>`.

## Project Organization

### Team - Tech - General

**Asana Team Privacy Setting:** Public to organization

**Asana Project Privacy Setting:** Shared with Team - Tech - General

This is the Asana Team that contains the main internal projects for the Tech Team.

Project	Description
Leave Requests	The project for leave request validation.
Professional Development	The list of courses that everyone is taking as part of the professional development goals. This is public so that everyone can see what others are learning and eventually create small cohorts.

<b>Project</b>	<b>Description</b>
DevOps Roadmap	The DevOps roadmap, <i>backlog</i> section is where we keep any big ideas for upcoming quarters.
DevOps - Daily Task	Ad hoc tasks that ensure our internal hosting capabilities are top notch. Any task related to our operation and supporting team will be logged here.
Support & Quality	Tasks related to the development of support & quality skills and services.
Design	Tasks related to the development of design skills and services.
Internal	Tasks related to short-term internal projects.

# Asana For Project Execution

## [TBC]

New to Asana at Akvo? Check out the [Asana - Fundamentals](#) wiki.

Estimated + Actual Hours => To create a feedback loop

1 Asana Team per client project

Each Asana Team should at least have 2 Asana Projects:

- Timeline
- Sprint

For small client projects

- Describe the structure of the sprint board. Create a template for this in Asana.

For big client projects

- Describe the structure of the sprint board. Create a template for this in Asana
- Add a Backlog Asana Project. Describe the structure (sections) and to use it. Create a template for this in Asana
- Add a Feedback project with a form. Describe the structure (sections) and to use it. Create a template for this in Asana.

Boom!

# Objective & Key Results

## Introduction

Objectives & Key Results (OKR, alternatively OKRs) is a goal-setting framework used by individuals, teams, and organizations to define measurable goals and track their outcomes. We will use this framework to increase our focus and intentionality.

We use Goals feature in Asana to manage our team OKRs.

## Basic Principles

We stick to a 2-level goals hierarchy:

- The top level goals represent the Objectives.
- The sub-goals represent the Key Results.

Objectives are defined and tracked yearly.

Key Results are defined and tracked quarterly. KRs can be repeated (these KRs are generally important things that we need to track all year long, but for which the analysis makes sense at a higher frequency).

OKRs are public to the entire company.

The OKR management process is a collaborative process to which everyone is expected to contribute.

## Management Process

### Accountability

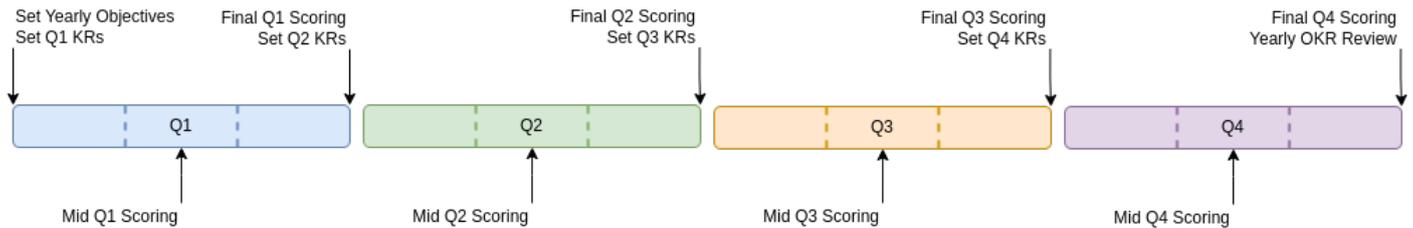
The CTO is ultimately accountable for the performance of the Tech Team and therefore accountable for the OKR process. Tech Team Management is responsible for its day-to-day

execution.

Objectives and Key Results are owned by a single person. That person is accountable for achieving the target. The owner can share or delegate the execution with approval of Tech Team Management. That approval is required to make sure that people have enough capacity to do the work.

# OKR Management Calendar

The OKRs are managed following the calendar below.



Activity	Description
Set Yearly Objectives	<ul style="list-style-type: none"> <li>Tech Team Management sets the objectives based on the past year and the already identified goals and challenges for the upcoming year.</li> </ul>
Set Q# KR's	<ul style="list-style-type: none"> <li>Tech Team Management sets the goals for the quarter, factoring the inputs from team members.</li> </ul>
Mid Q# Scoring	<ul style="list-style-type: none"> <li>Each goal owner updates the scores that best reflects their current progress.</li> <li>The scores are reviewed and discussed at the following Tech Team Management Meeting.</li> </ul>
Final Q# Scoring	<ul style="list-style-type: none"> <li>Each goal owner provides the final scores for the quarter.</li> <li>The scores are reviewed and discussed at the following Tech Team Management Meeting.</li> <li>A team-wide review takes place at the following All Hands.</li> </ul>
Yearly OKR Review	<ul style="list-style-type: none"> <li>Tech Team Management compiles the data on OKRs and shares an analysis with the entire team.</li> </ul>

# Collaborative Nature Of The Process

The member of Tech Team Management directly manage the entire Tech Team. As such they are expected to socialize and proactively collect feedback on KR: suggestions to achieve current targets, suggestions for future KRs, etc...

All team members are expected to proactively participate in the OKR process by either providing direct feedback to members of the Tech Team Management during their 1-to-1 and during the planned team-wide discussion blocks such as the All Hands. Feedback and suggestions are welcome at any other time.

You can suggest KRs at **anytime** by adding a task in the [OKR Suggestions](#) project in Asana.

It's super simple:

- Create a task in the **Suggestions** section using the Key Results Template.
- Assign it to yourself so we know who made the suggestion.
- Select the objective. If you are not sure, you can pass.
- Fill in the description as explained in the task template.

## Managing OKRs With Asana

### Create An Objectives

Fill in the form as follows:

- **Title:** Short and clear statement
- **Goal Owner:** CTO
- **Accountable Team:** Team - Tech - General
- **Time Period:** FY##
- **Privacy:** Public
- **Members:** Team - Tech - General [Can edit] (automatically set once the Accountable Team is selected)
- **Parent Goal:** None
- **Update Method:** Automatic
- **Progress Source:** Sub-goals
- **Measurement:** Percent

The result should look something like below.

## Add goal ✕

What is a goal or key result you want to accomplish?

Goal title \*

Put A Human Being On The Moon

Goal owner

Guillaume Deflaux ✕

Company or accountable team

Team - Tech - General ✕

Time period ⓘ

FY24 Jan 1, 2024 – Dec 31, 2024 ▼

Privacy

Public ▼

Members ⓘ

10 Team - Tech - General ✕ Can edit ▼

Parent goal

Connect a parent goal

How will you measure progress toward success?  
[Learn to set measurable targets](#)

Update method \*

Automatic ▼

Progress source \*

Sub-goals ▼

Measurement \*

Percent ▼

Cancel Save goal

Feel free to set a description for the objective once it is created.

## Create A Key Result

Fill in the form as follows:

- **Title:** Short and clear statement
- **Goal Owner:** Anyone in theory, Tech Team Management member in most cases
- **Accountable Team:** Team - Tech - General

- **Time Period:** Q# FY##
- **Privacy:** Public
- **Members:** Team - Tech - General [Can edit] (automatically set once the Accountable Team is selected)
- **Parent Goal:** Select the corresponding parent goal
- **Update Method:** Manuel
- **Measurement:** Choose the appropriate option
- **Current Value:** Input the starting value
- **Target Value:** Input the target value that we intend to achieve by the end of the quarter

The result should look something like below.

## Add goal ✕

What is a goal or key result you want to accomplish?

Goal title \*

Goal owner

Company or accountable team

Time period ⓘ

Privacy

Members ⓘ

Parent goal

How will you measure progress toward success?  
[Learn to set measurable targets](#)

Update method *	Measurement *	Current value *	Target value *
<input type="text" value="Manual ▼"/>	<input type="text" value="% Percent ▼"/>	<input type="text" value="0%"/>	<input type="text" value="100%"/>

## Scoring Scale

Once the goal is created, the description **must** be updated to specify the scoring scale of the KR.

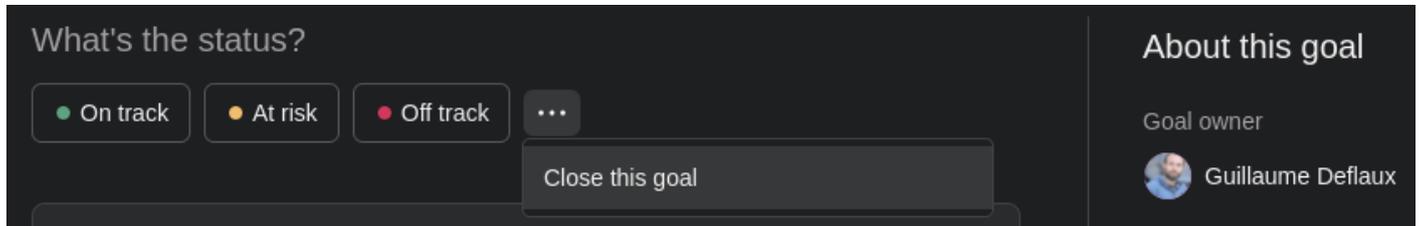
For the scoring scale we use a % scale, even for discrete targets, since in most cases some work is done even if the goal is not achieved. Each step builds on the previous one.

- 0% - Nothing done / dropped
- 30% - Did something, but not enough for change to materialize
- 50% - Goal partially achieved

- 70% - Goal achieved (actual target)
- 100% - Goal surpassed (good to think about what surpassing the goal is)

# Score A Key Result

Scoring KRs is done using the Status Update feature.



If you are performing the Mid Quarter Scoring, click on one of the highlighted statuses.

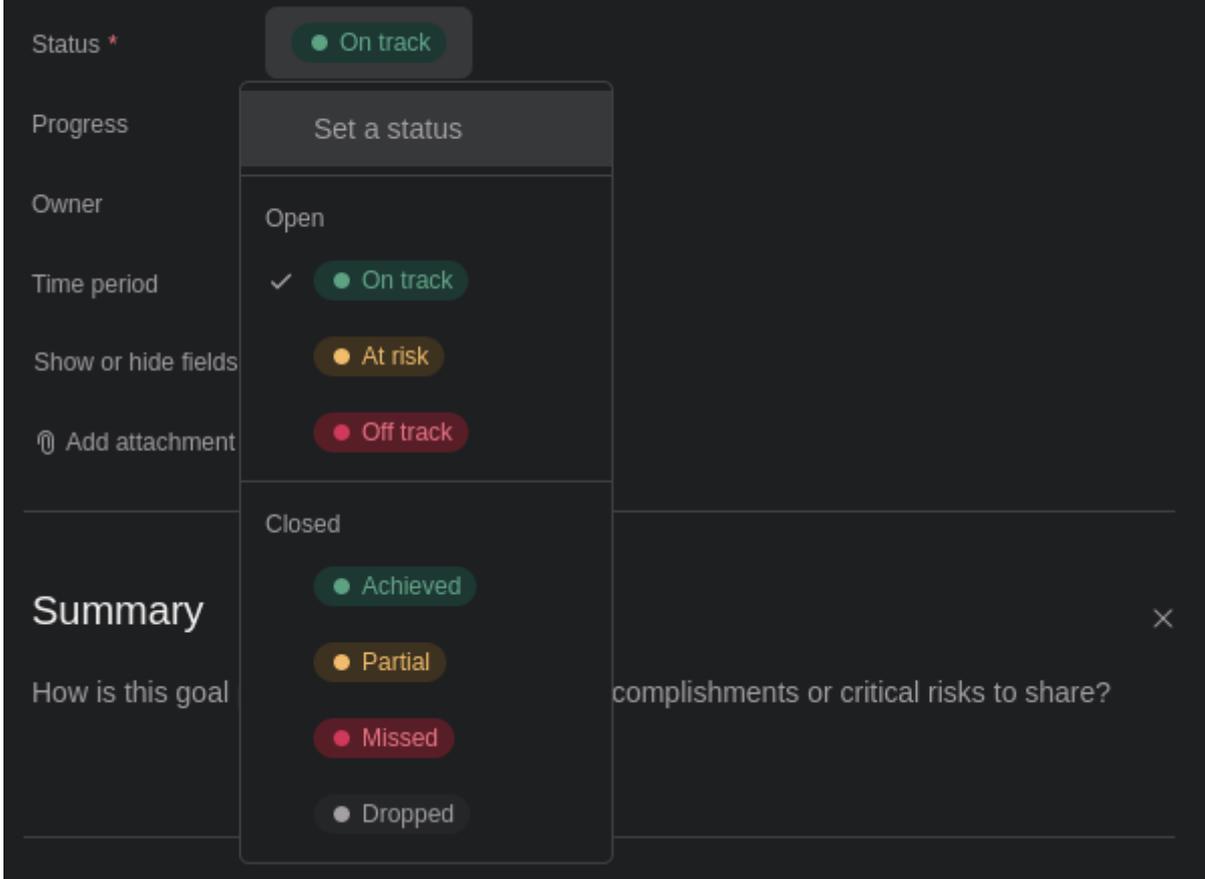
If you are performing the Final Scoring, click [Close this goal](#).

Scoring a Key Result implies the following 3 steps.

## 1. Setting The Status

Select the appropriate status. See description below.

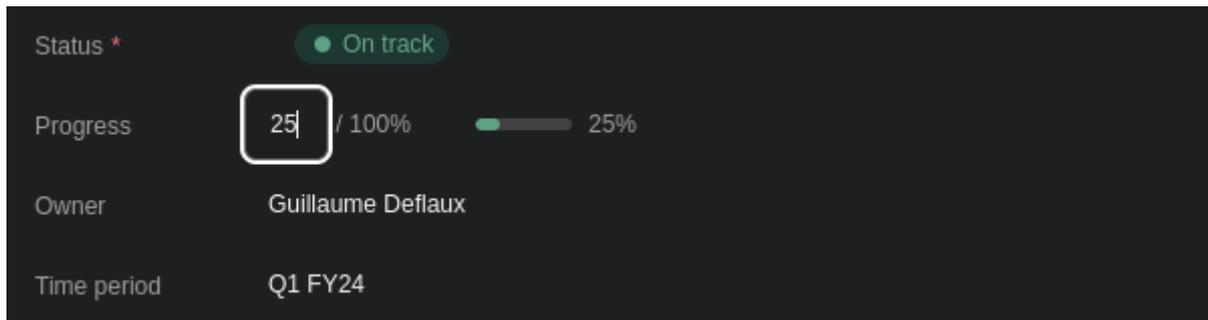
# Status update - Dec 29



Status	Description
<b>Open Statuses</b> - Relevant for <u>mid quarter</u> scoring	
<input type="checkbox"/> On Track	You expect to achieve the target.
<input type="checkbox"/> At Risk	You think it's going to be difficult to achieve the target, but that it's still doable.
<input type="checkbox"/> Off Track	You don't think you will be able to achieve the target.
<b>Closed Statuses</b> - Relevant for <u>final</u> scoring	
<input type="checkbox"/> Achieved	All things considered, you think that the target was achieved.
<input type="checkbox"/> Partial	You did not achieve the target but did reasonable progress.
<input type="checkbox"/> Missed	You did not do substantive progress.
<input type="radio"/> Dropped	You decided to drop the target during the quarter.

## 2. Updating The Progress (Score)

Score the KR according to the on the scoring scale

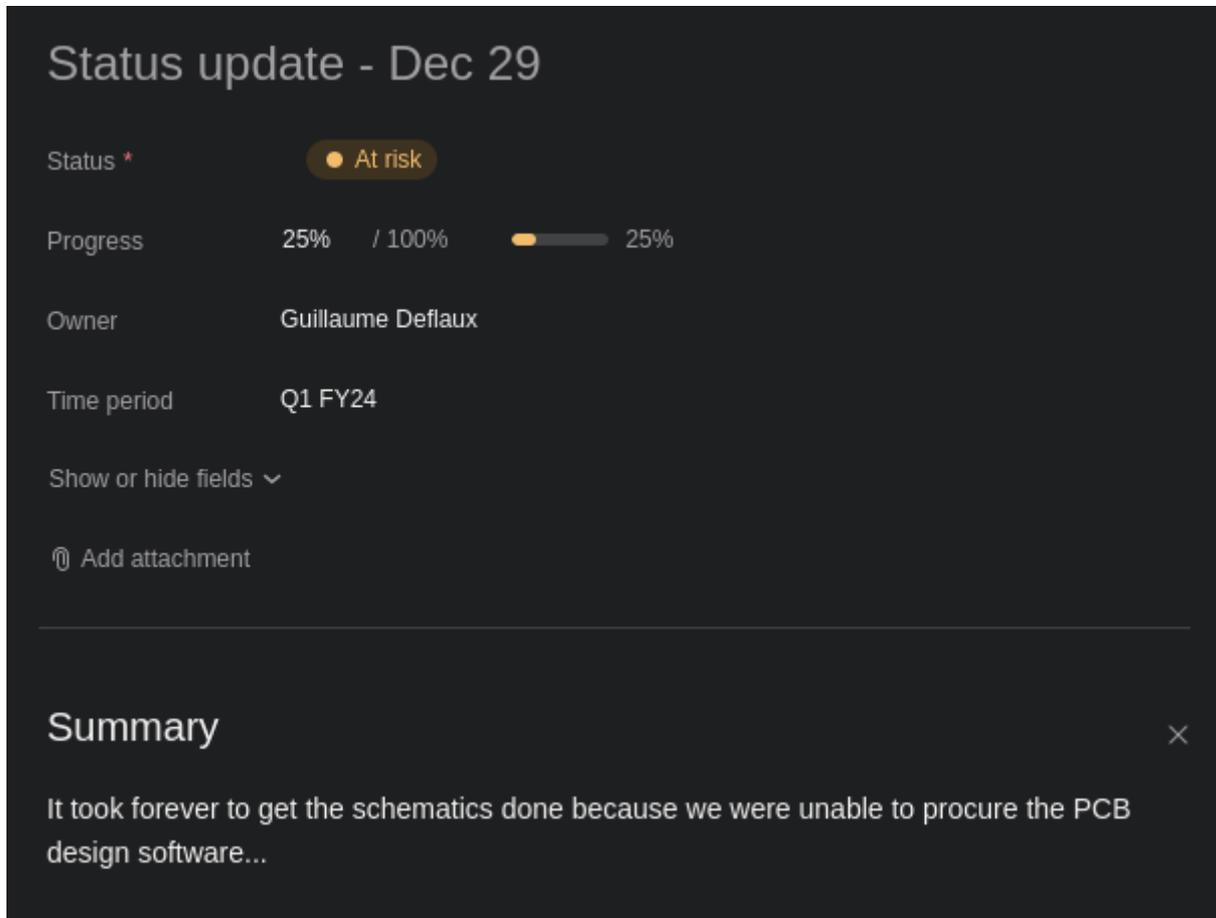


A screenshot of a task update form with a dark background. The 'Status' field is set to 'On track' with a green indicator. The 'Progress' field shows '25 / 100%' with a green progress bar. The 'Owner' is 'Guillaume Deflaux' and the 'Time period' is 'Q1 FY24'. The number '25' in the progress field is highlighted with a white border.

Status *	● On track
Progress	25 / 100%  25%
Owner	Guillaume Deflaux
Time period	Q1 FY24

## 3. Provide Context

Fill in at least the Summary section.



A screenshot of a task update form with a dark background. The 'Status' field is set to 'At risk' with an orange indicator. The 'Progress' field shows '25% / 100%' with an orange progress bar. The 'Owner' is 'Guillaume Deflaux' and the 'Time period' is 'Q1 FY24'. Below the form fields is a 'Show or hide fields' dropdown and an 'Add attachment' button. A 'Summary' section is open, showing the text: 'It took forever to get the schematics done because we were unable to procure the PCB design software...'. A close button (X) is visible in the top right of the summary section.

Status update - Dec 29

Status *	● At risk
Progress	25% / 100%  25%
Owner	Guillaume Deflaux
Time period	Q1 FY24

Show or hide fields ▾

 Add attachment

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**Summary** ×

It took forever to get the schematics done because we were unable to procure the PCB design software...