STUDIO EVERGREEN

PROVEN PROJECT PROCESS

HOW TO LEVEL UP YOUR PROCESS WITH ASANA

Create a fool-proof process using Asana to streamline your porcess, easily duplicate fo multiple projects, and elevate your client experience.

A Step-by-Step Guide

FOR DESIGNERS

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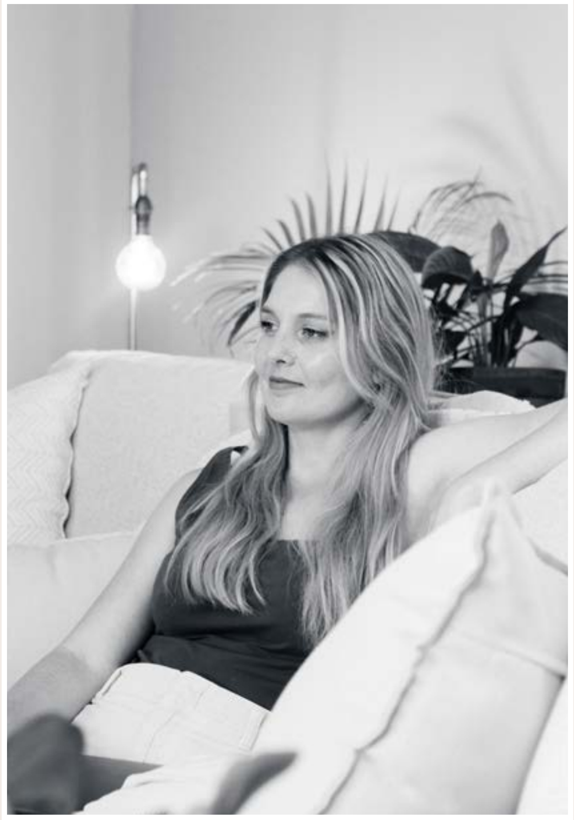

HEY, DESIGNER FRIEND!

I'm Robyn, founder and designer *of* Studio Evergreen

I'm a brand strategist and designer based in sunny South Africa. I'm an Enneagram 1/ENFJ, which means that I thrive on being organised and structured. Before I created a clear process for all my client projects, I'd find myself spending ages setting up the project, explaining things to the client in back-and-forth emails, and getting incredibly frustrating feedback often days or weeks after it was supposed to be delivered. I felt frustrated, burnt out and doubting my own abilities. Sound familiar?

But then I realised, in order to solve all those issues, I just needed to do ONE thing well - create a clear project process that worked for both me and for my clients. Now, I use Asana for all my projects with clients, and my process is something I've spent months tweaking and refining. And honestly, it's been one of the best things for my biz growth. Here are 5 things I noticed once I implemented a proper process:

1. A smoother and faster onboarding experience
2. Less time spent in emails
3. Better and more defined feedback
4. More trust is developed
5. The project stays on track

I created this resource to help designers just like you skip the trial-and-error phase I worked through and go right to setting up a Proven Project Process that not only sets you apart from competitors, but also removes the overwhelm and back-and-forth from booking more projects.

x Robyn

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SO YOU'VE SIGNED ON A CLIENT, now what happens?

You've connected with a prospective client, mapped out what you'll be creating for them, and they've signed your contract, paid your deposit, and come on board. Great! Now what? Part of creating a smooth experience for both you and your client is having a great process in place.

WE CREATE A PROJECT PROCESS

I love Asana because a) it's free to use for individuals, b) it's really easy to use once you know what you're doing, and c) it keeps the project streamlined and on track. No more back and forth over email or scrolling endlessly trying to find that one comment the client made. No more crossing fingers and hoping that the client will actually follow the project timeline. No more spending hours setting up each project when you sign on a new client. Your biz just got a whole lot easier.

And the best part? Once you've set it up, it's as easy as duplicating the template, adjusting it to suit the client and their project, and adding them to the board. And who doesn't love saving time (and let's be honest, your patience)?

the BASICS

STEP 1: SIGN UP TO ASANA

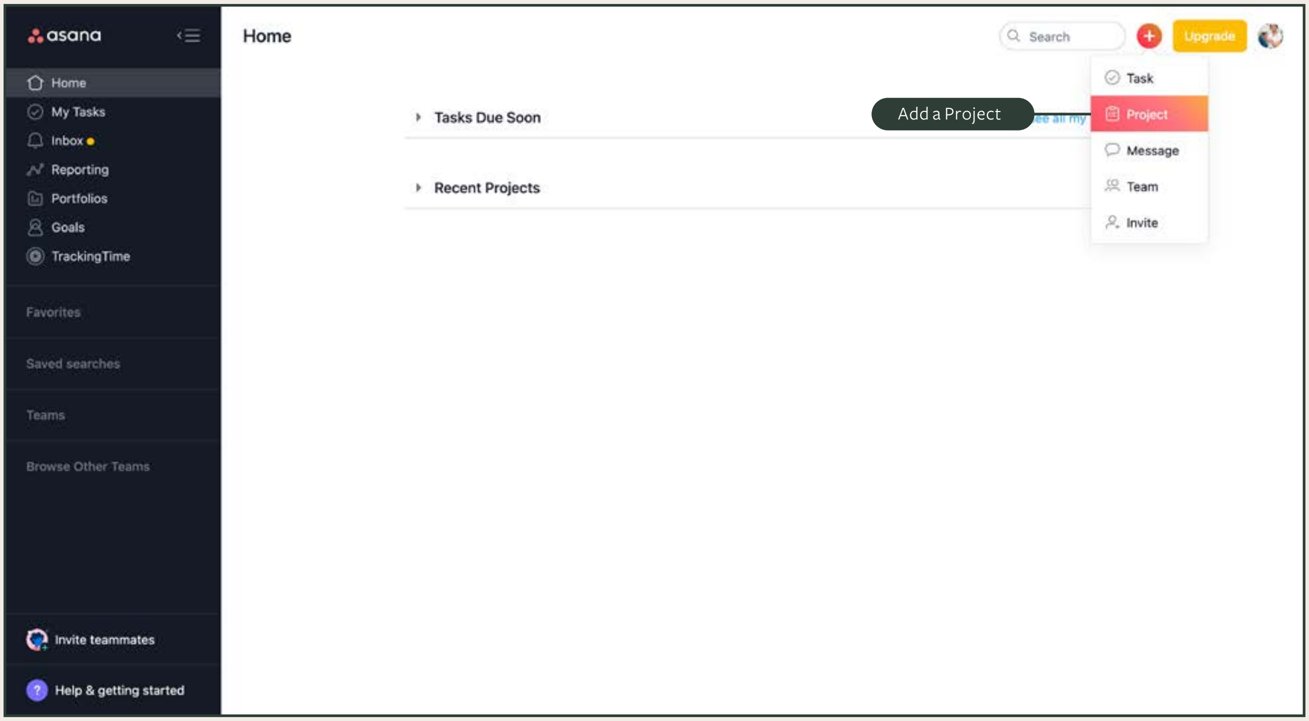
If you've never used Asana before or haven't set up an account yet, I guarantee you're going to love it.
Firstly, you're going to need to create a free account.

STEP 2: ADD A PROJECT

Once you're in, head over to the '+' button and select 'add project'. Projects are a great way to separate your clients in Asana. Or if you have multiple projects on the go with the same client, you can separate them into a new 'project' for each. For now, let's set up a template that we can duplicate for each new client project.

HELP TUTORIALS

If you're having trouble getting setup and getting your head around how the basics work, take a look at their help videos.



GETTING ORGANISED & setting it up

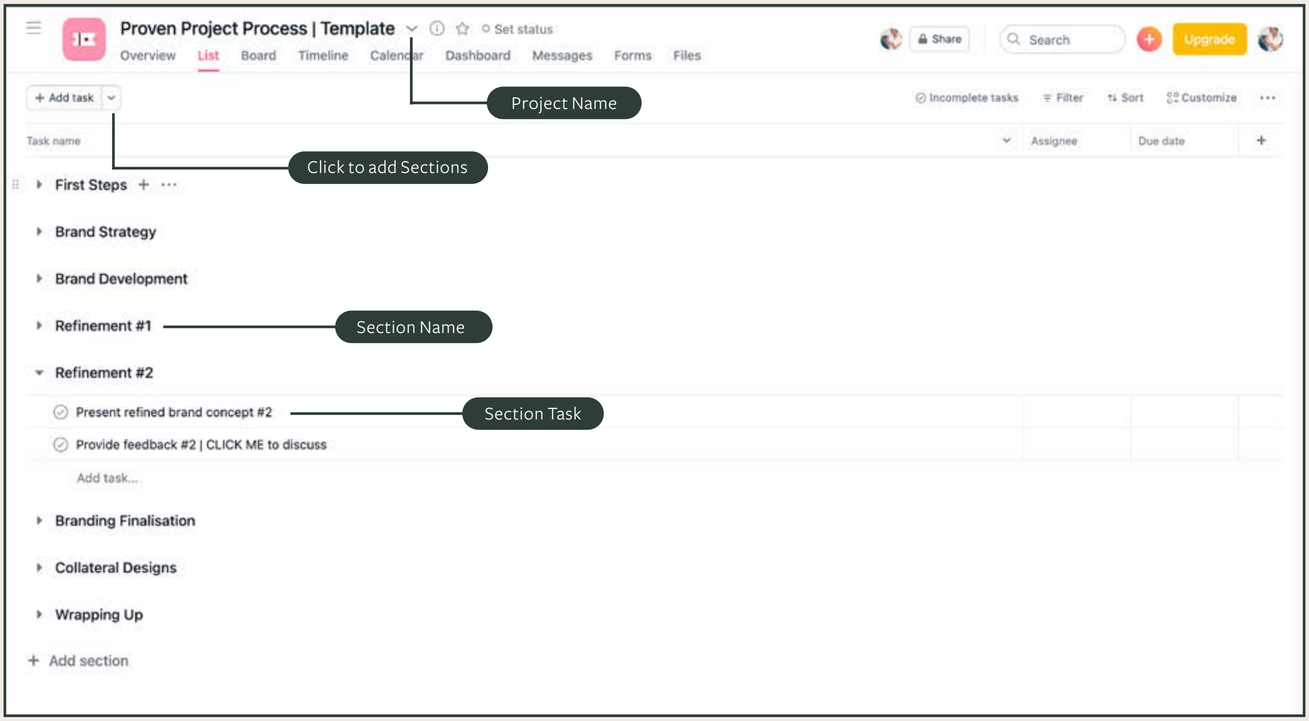
STEP 1: CREATING SECTIONS

Before we do anything, it really helps to know what stages your project goes through. Think about your entire project process from beginning to end, and divide it into sections. For example, if you're a brand designer, your project stages probably looks something like the screenshot below.

Dividing the whole project into sections not only makes it easier for you as the designer to guide the process and ensure a smooth process, it also makes it more digestible for the client who most likely has never worked with a designer before.

Our goal is always to make the process as seamless as possible for the client, and to make them feel cared for throughout the entire process.

To add sections to your project, click on the "Add Task" button with the drop-down arrow and select "Add Section". Repeat as many times as you need to in order to list out all your sections. You can click and drag them into order.



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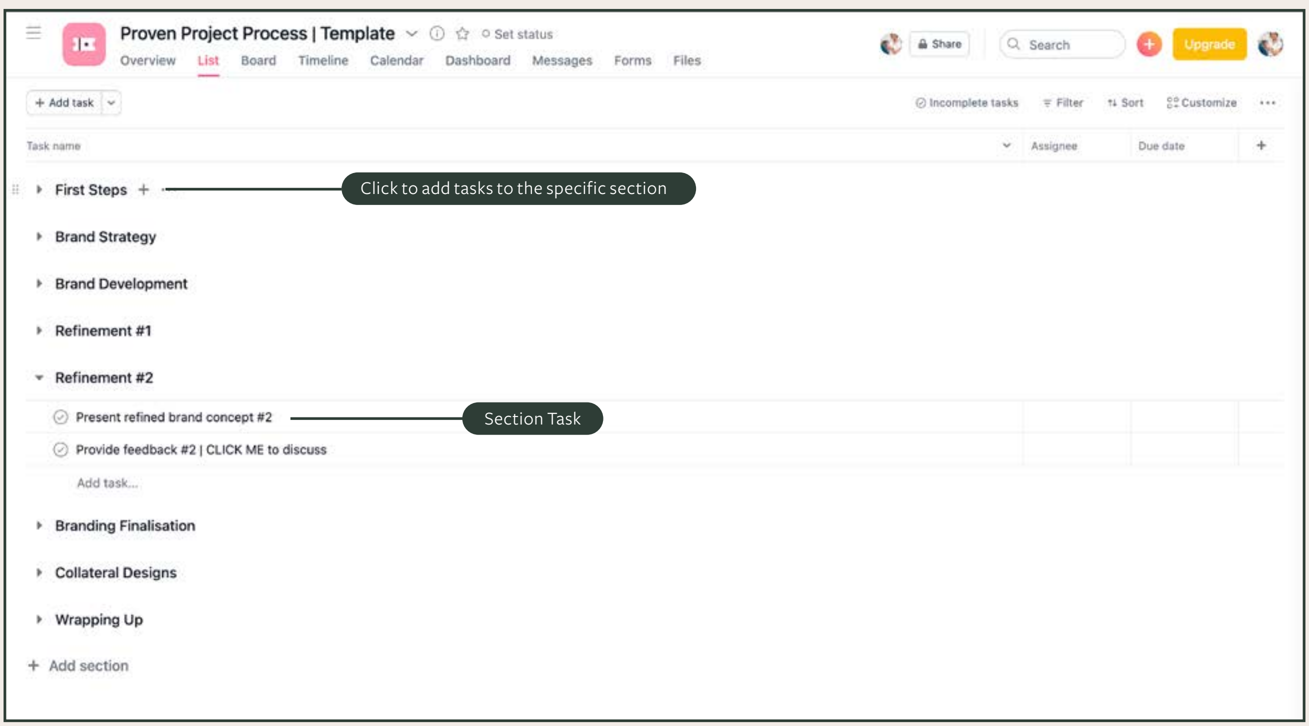
STEP 2: CREATING TASKS

Now that you've got your sections, list out all the main tasks that go under each section. For example, under 'Brand Development', you might have exploration, creation, presentation, and feedback.

Sectioning the tasks both you and your client will do into stages helps make it easier to manage and focus on what comes next, while still establishing clear boundaries for you and your client.

To add tasks to your sections, click on the "+" next to your section. Alternatively, you can click on the "Add Task" button with the drop-down arrow and then drag it into the correct section. Repeat as many times as you need to in order to list out all your tasks in all your sections. You can click and drag the tasks into order.



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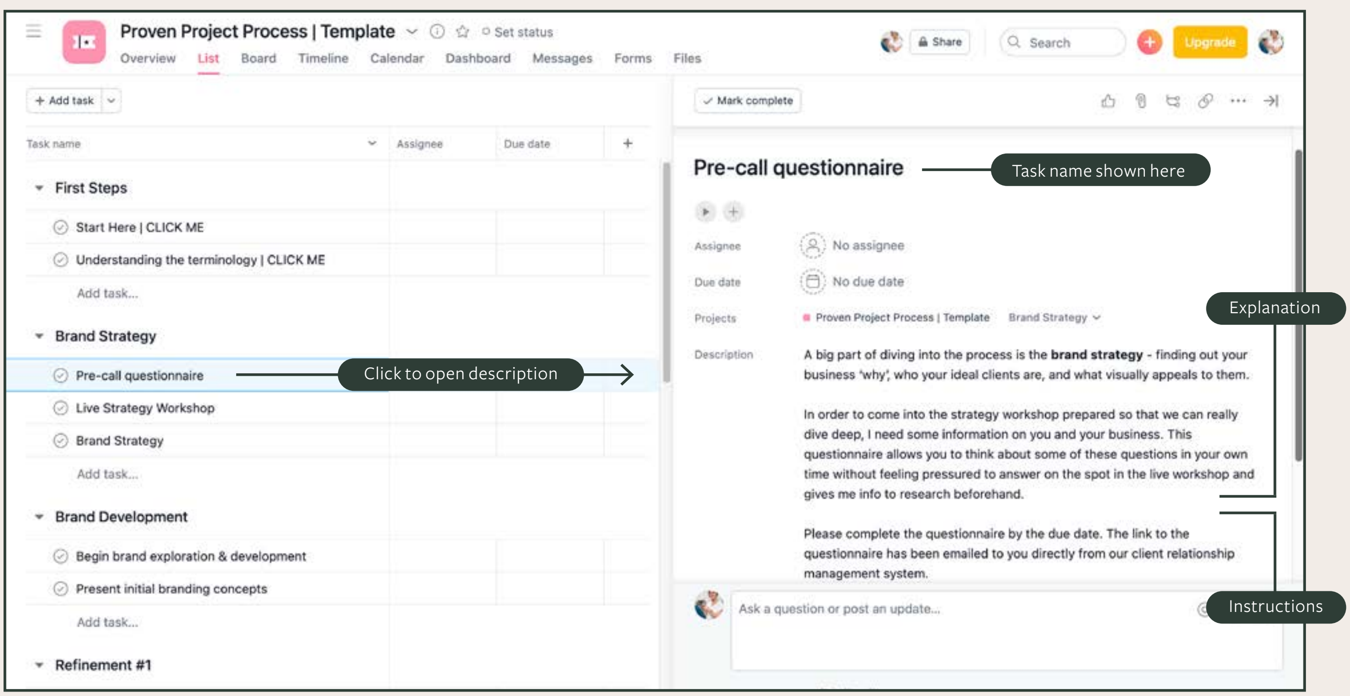
STEP 3: CREATING DESCRIPTIONS

You've made it this far! Now that the framework of your process is all sectioned and organised, it's time to define each task. If you click on a task, you'll see the description panel pop up on the right-hand side. Use this description section to explain what each task is.

PRO-TIPS:

- Always include a description of what you will be doing for each task so that the client can easily see what that stage entails. This helps them understand the process, have peace of mind knowing they are being guided through this process, and follow along as you work without needing to check in via email or message.
- For tasks that the client will be responsible for, include clear instructions on what they need to do. This helps limit them asking questions on what comes next or how to do things, so more of your time can be spent on creating the work.
- Always mention what comes next. Whether it's directing them to the next task, reminding them when the presentation will be ready for them to view, or directing them to links they need to access.
- If there are certain sections that will change every time for every client and you aren't able to create it beforehand in the template, put "(Coming soon...)". This allows you to go back in later and change it without it being a blank task that might confuse the client.



CONVERTING YOUR TEMPLATE into a client project

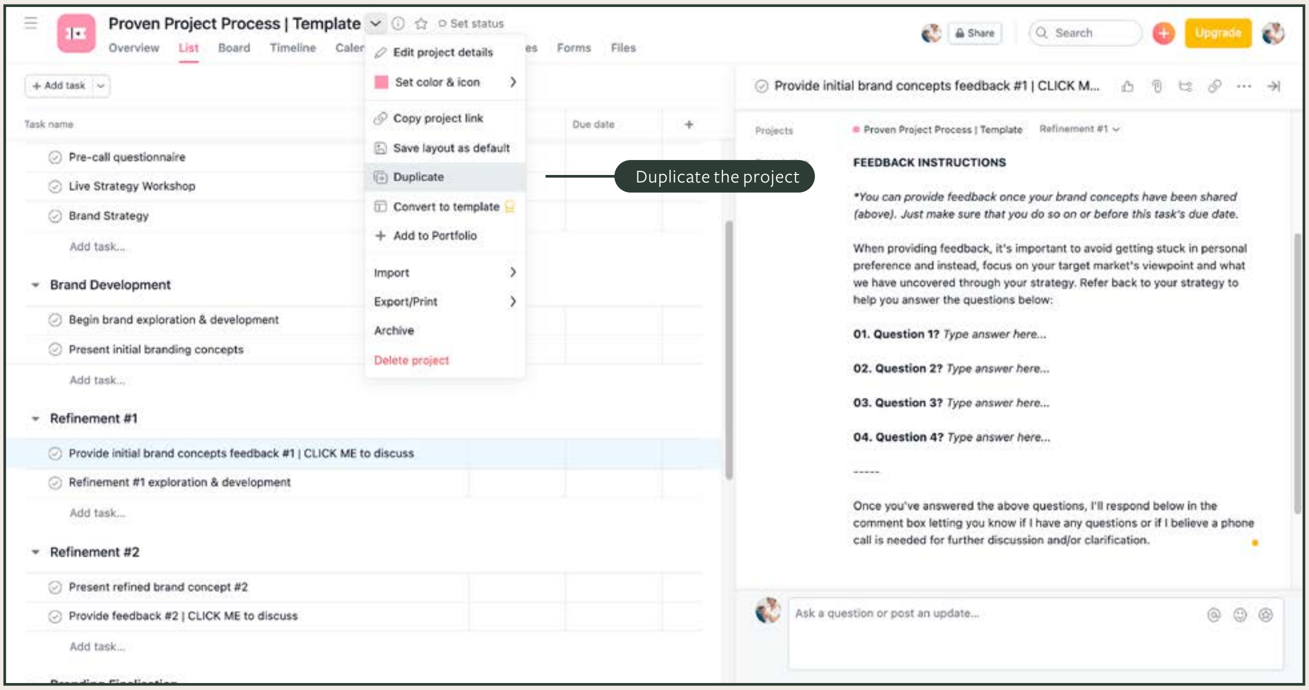
STEP 1: DUPLICATE YOUR TEMPLATE

You've made a streamlined and organised template! Great stuff. Go ahead and duplicate the entire project, changing the project name to the name of the client's business.

STEP 2: ADJUST THE PROJECT

Go in to your new project and adjust anything to make sure it's exactly suited to what you and your client will be working on. For example, if you're working on a branding project with a client and you won't be creating any collateral designs, but you've included a collateral designs section in your template, go ahead and delete those sections and tasks.

DUPLICATE & ADJUST YOUR TEMPLATE



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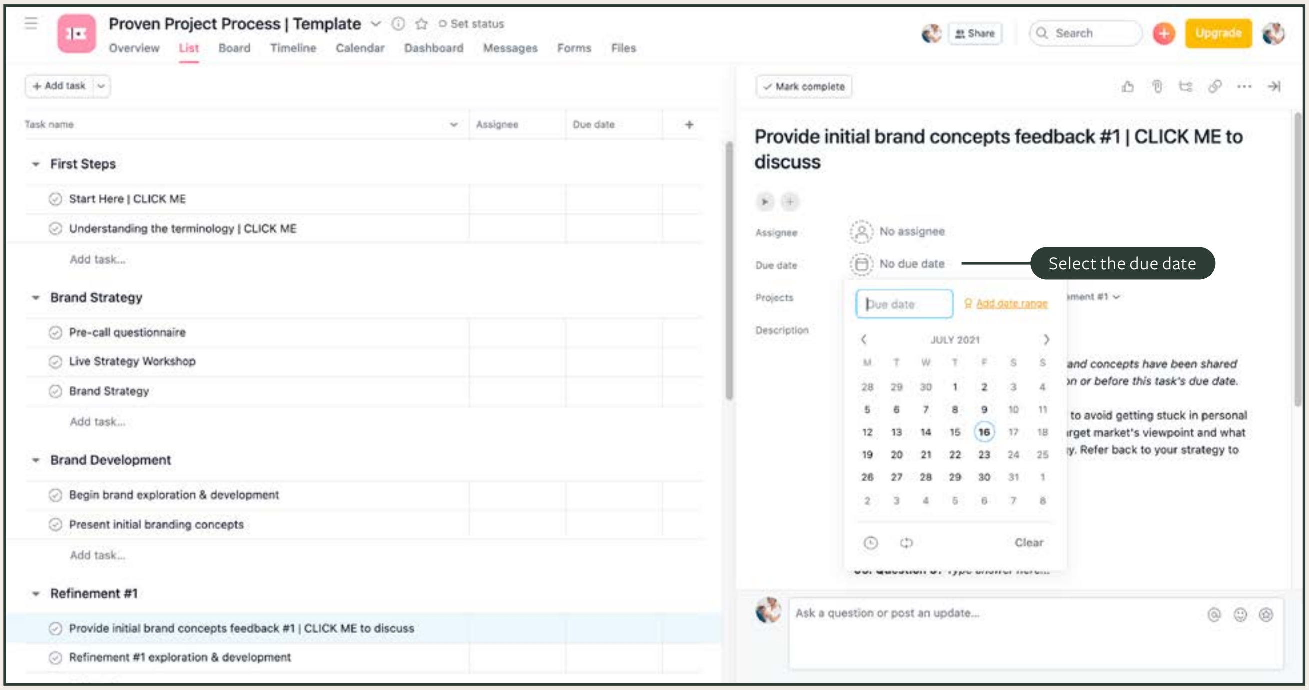
STEP 3: ADD THE DUE DATES

Next up, you'll add in your due dates. These due dates help outline the timeline of the project so that it stays on track and the client can easily see what's coming next that they need to be ready for. If you have a clear idea of the entire project, go ahead and set everything up right from the beginning. If you're unsure how long each stage will take or how long should be allotted for each task, you can play it by ear section by section as you work through the project.

ADD THE DUE DATES



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STEP 4: INVITE THE CLIENT

In order for the client to see the board and follow along, you will need to invite them to the board. You can add them to the board and invite them via email. Add instructions for them to follow on how to join Asana and what do once they've joined so it's super easy for them to come on board.

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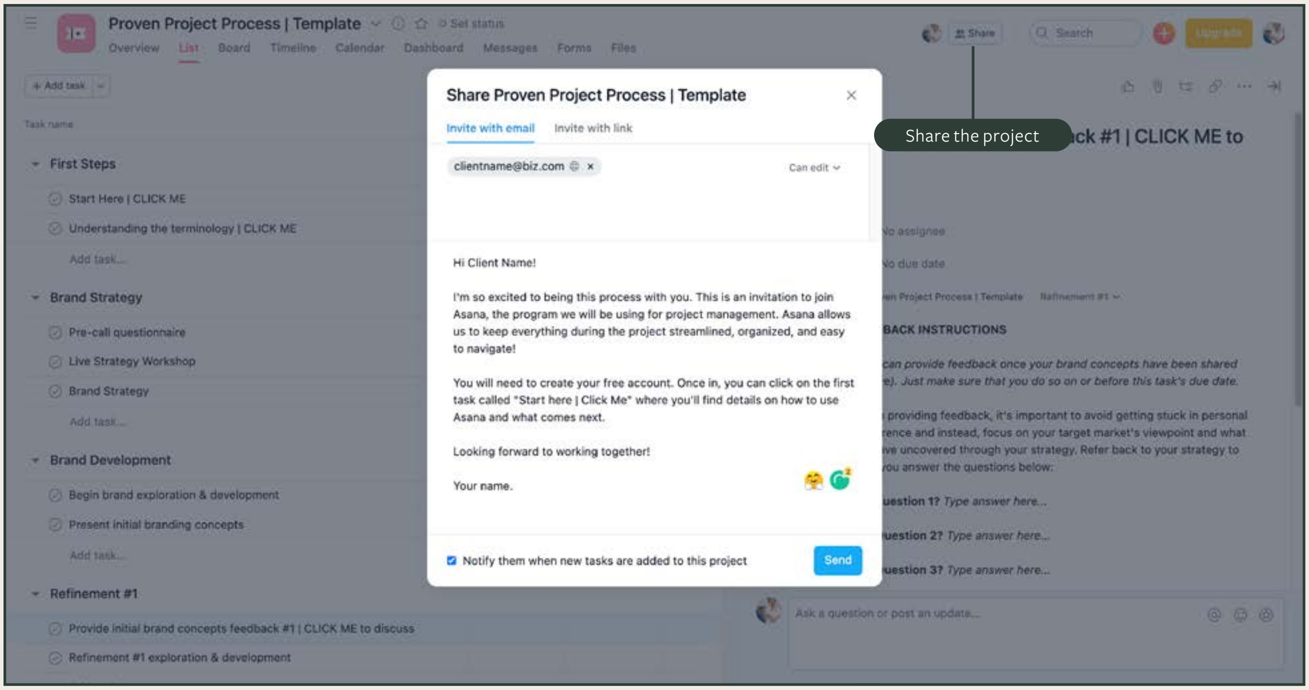

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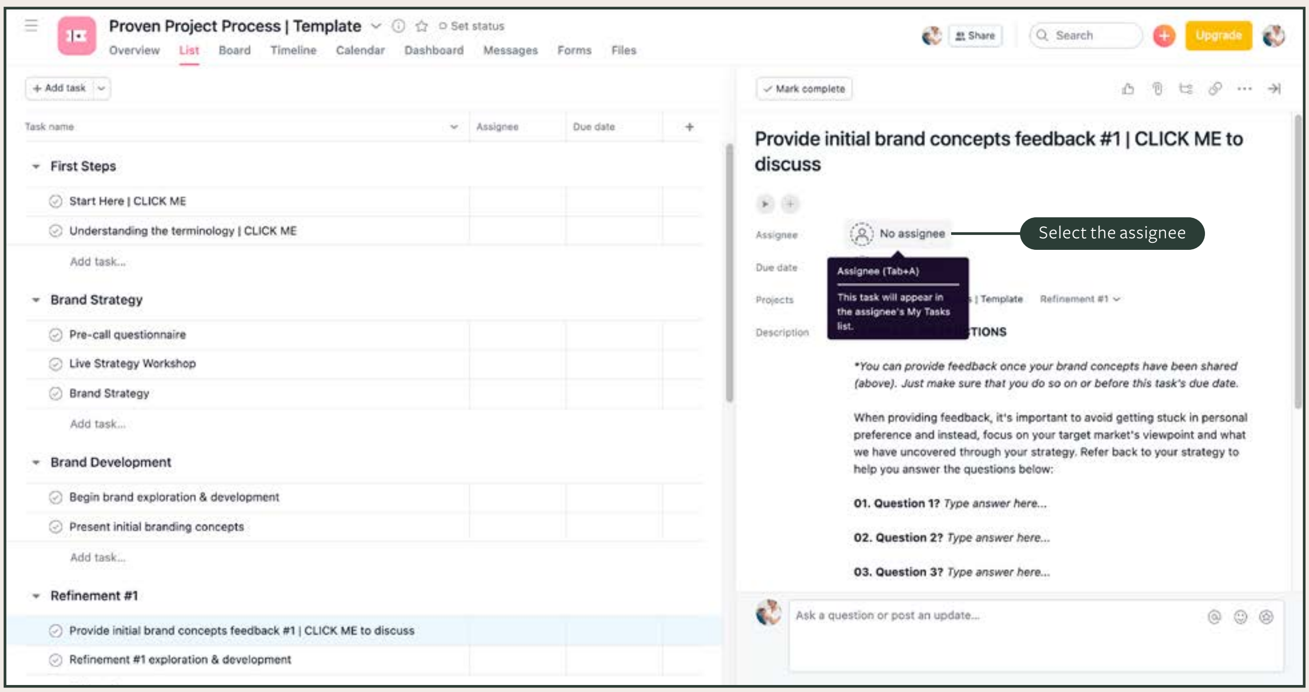
STEP 5: ASSIGN THE TASKS

Now that your client has joined the project board, it's time to assign the tasks. Assigning tasks divides them up into ones the client will be responsible for, and the ones you will be responsible for. Once assigned, it's clear for both you and for the client to see the entire project and be prepared for a smooth process.

STEP 5: ASSIGN THE TASKS



GUIDING THE CLIENT through the process

Now that you've created this fantastic, streamlined project process for your client, it's time to guide them through it for a smooth project experience.

Keep in mind this is probably the first time the client has worked with a designer, and possibly even a clear project process. This is your opportunity to blow them away with your process and really establish yourself as the expert. Guiding them through the process will not only make them feel cared for and comfortable with the project process, but it also cements that feeling that they made the best decision for their biz choosing to work with you. They know they're in good hands.

And, on the plus side, it minimizes the back and forth of email, those random check in like "Hey, just checking in to see how the project is going!", and general troubleshooting. That gives you more time to focus on creating beautiful work, presenting your concepts and work clearly, and supporting the client through the project.

PRO-TIPS:

- Record a "How-to" video showing the client how to use Asana and add that to your template project so it's ready for every client project. You can use Loom, Zoom or even the recording app on your computer like QuickTime Player.

- Create a canned email you can use to invite the client to the project board, including the link to Asana, letting them know they need to create a free account to join the project board.

- Use your refinement round tasks to give them guided feedback questions to make sure they answer the questions you need to refine the work, and gives them the prompts to help them communicate their thoughts and feelings.

- Use your own brand messaging to carry through a level of high-end consistency from your social media, your site, how you speak on calls with clients, right through to how you describe the tasks and ask for feedback. Don't be afraid to show your personality and connect human-to-human.

MEET ROBYN

Hi! My name is Robyn and I'm the owner and creative behind Studio Evergreen, a boutique strategy and branding studio based in sunny Ballito, South Africa. Studio Evergreen is known for its clean and modern design style and strong emphasis on rooting everything in a thorough strategy. I help creative business owners like you gain clarity and confidence in your brand and biz to connect with your dream clients, attract higher budget clients, and chase your big biz dreams.

My desire is to help designers create an elevated process that not only sets them apart from competition, but also removes the overwhelm and confusion from booking more projects.

LEARN MORE ABOUT STRATEGY + BRANDING FOR CREATIVE BIZ OWNERS

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