

# CCI ASANA OBJECT DIAGRAM

## PROJECT INTAKE

1 Project Intake Form

\*Form includes conditional logic that will route to the appropriate project template

## PROJECT TEMPLATES

### DIGITAL CAMPAIGN TEMPLATE

**Purpose:** Capture a step-by-step procedure for projects like emails, ads, social, preview decks, etc.  
**Data Source:** CCI marketing team & agency partners

### TRADITIONAL CAMPAIGN TEMPLATE

**Purpose:** Capture a step-by-step procedure for projects like brochures, pamphlets, infographics, etc.  
**Data Source:** CCI marketing team & agency partners

### SALES TOOLS TEMPLATE

**Purpose:** Capture a step-by-step procedure for projects like channel partner sheets, fact sheets, case studies, etc.  
**Data Source:** CCI sales team

### QUARTERLY REPORT TEMPLATE

**Purpose:** Capture a step-by-step procedure for projects like quarterly campaign reviews, fiscal reviews, etc.  
**Data Source:** CCI marketing team, CCI leadership team, & agency partners

### VIDEO PROJECT TEMPLATE

**Purpose:** Capture a step-by-step procedure for projects like product videos, promotional videos, etc.  
**Data Source:** CCI marketing team & agency partners

### GENERAL PROJECT TEMPLATE

**Purpose:** Capture a step-by-step procedure for bespoke projects like I&D cards, books, etc.  
**Data Source:** General CCI teams

\*WIP ideas, templates subject to change based on needs and priority.

## PORTFOLIO REPORTING

### SUMMARY REPORT



**Purpose:** The whole ecosystem, not just the projects Level owns, what everyone is working on in one view.

**Data Source:** Includes lines items for all live projects, who owns them, their start date, and due date.

### AT RISK TASKS REPORT



**Purpose:** Show tasks that have been marked at risk so appropriate next steps can be put in place.

**Data Source:** Includes any tasks tagged at risk from all live projects.

### PAST DUE TASKS REPORT



**Purpose:** Show tasks that are past their due date and who is responsible for completion.

**Data Source:** Includes past due tasks from all live projects.

### LAUNCH TASKS REPORT



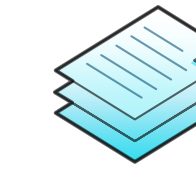
**Purpose:** Show upcoming launch dates for marketing campaigns or other types of launch initiatives.

**Data Source:** Includes tasks tagged for launch from all live projects.

\*WIP ideas, reports subject to change based on needs and priority.

## PROJECT ARCHIVING

### DEDICATED SPACE FOR INACTIVE PROJECTS



**Purpose:** Keep a clean reporting system and project environment by placing inactive projects in a specific Asana team.

**Data Source:** Includes projects marked as complete or canceled.

## AUTOMATIONS

### PAST DUE NOTIFICATIONS



**Purpose:** When a task goes past a due date, send an alert to the task owner to provide an update.

### LAUNCH NOTIFICATIONS



**Purpose:** When a campaign launches, send an alert to the appropriate stakeholders.

### AT RISK NOTIFICATIONS



**Purpose:** When a task or project is flagged at risk, send an alert to the appropriate stakeholders.

### MILESTONE SHIFT NOTIFICATIONS



**Purpose:** When a project milestone shifts its due date, send an alert to the appropriate stakeholders.

### MICROSOFT TEAMS NOTIFICATIONS



**Purpose:** Key alerts (launches, date shifts, etc.) integrated with the appropriate Microsoft Teams channels.

\*WIP ideas, automations subject to change based on needs and priority.