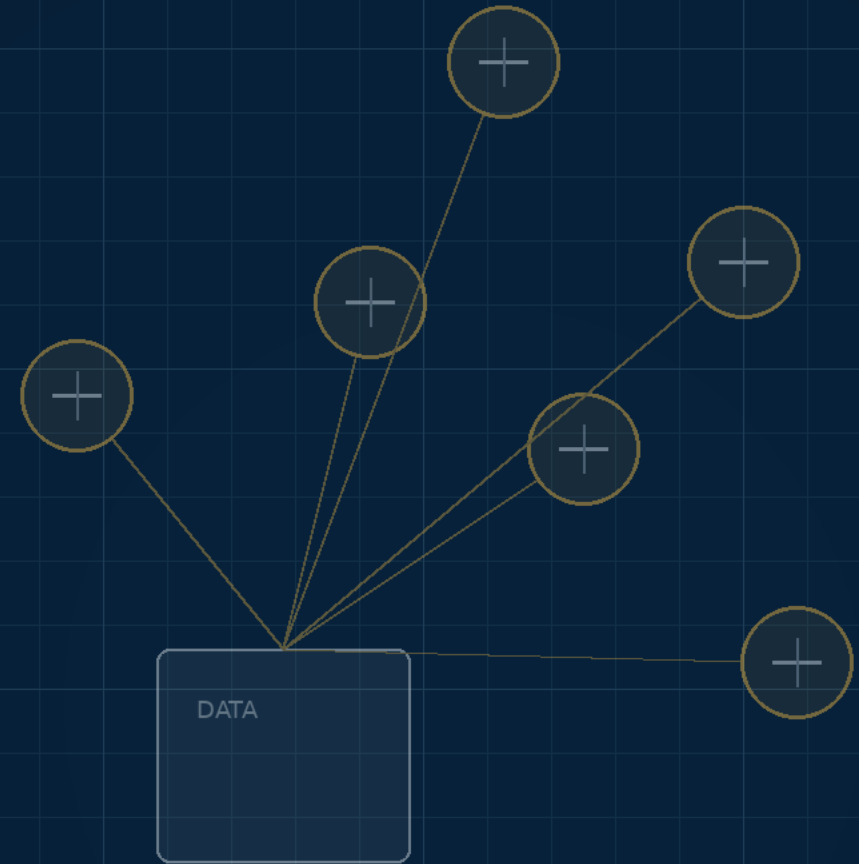


Not Everything Belongs in Asana

... but some work is worth the investment.



Quick demo

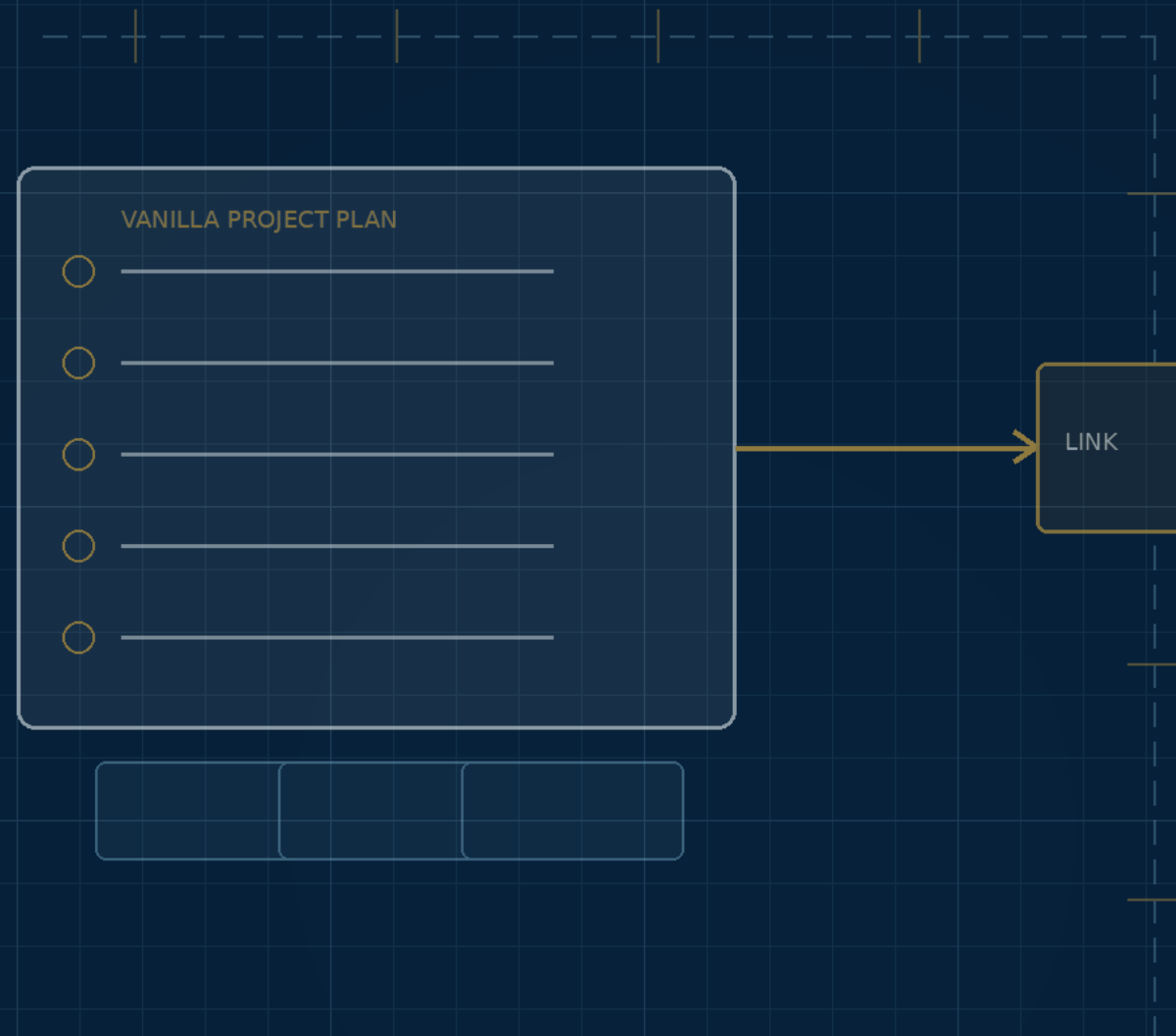
Implementation “Happy Path” Example

Vanilla project plan

Template → quick plan → client-ready link

Proof before philosophy.

This first demo: simple, fast, and useful.

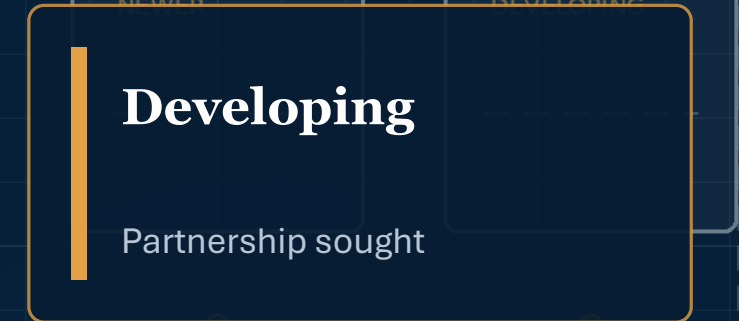
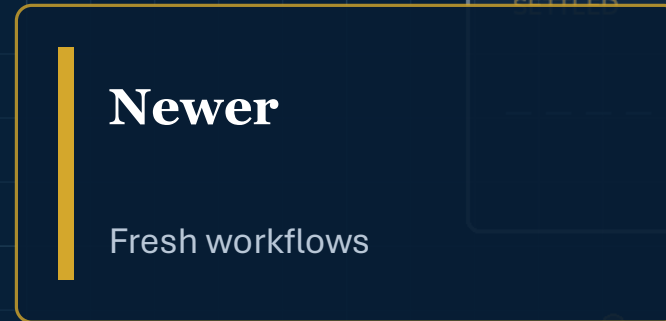
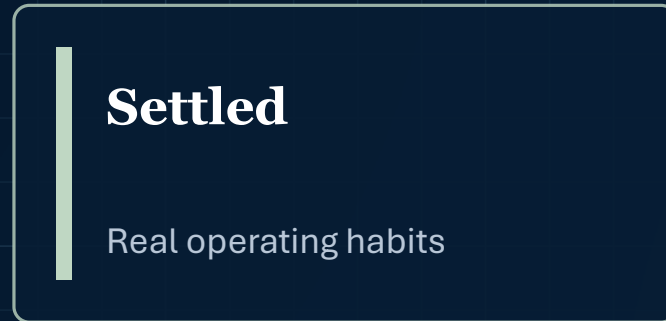


DEMO 1: Vanilla Template

Asana: use template, trim plan, share link

CI is ahead, not finished

Early adopter means active learning



The value gets bigger when partner teams participate.

Workflow, not tool worship

The question is where the work can actually move.

Not everything belongs in eMoney.

But the important information does. Connected to goals, assumptions, risk, timelines, and tradeoffs, facts become insight.

Not everything belongs in Asana.

But the right work does. Connected to ownership, timing, history, reporting, and handoffs, tasks become reusable work.

Salesforce Jira Teams Confluence ServiceNow Power BI Asana

Better input creates better signal

Asana is only as good as the data we put into it.

Forms

messy request → structured work
50% bounceback → 10%

CIMI intake

route → own → track → report

**If we want better reporting, better handoffs, and better visibility,
the first win is better intake.**

Good structure makes the next version easier

Templates are starting points, not monuments.

Recipe

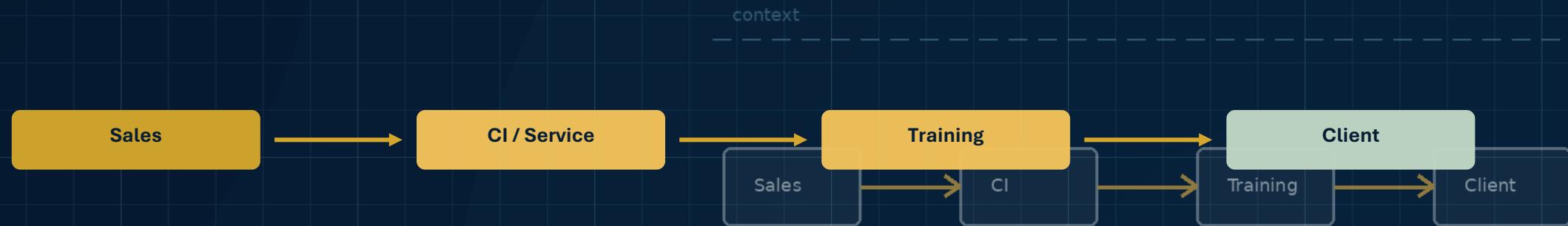
Use the template. Trim what you do not need.
Keep enough structure to trust the work.

Reuse

A plan that can be shared, tracked, updated,
copied, and improved next time.

Handoffs need a spine

Some work gets messy as it crosses teams.



context + owner + next step

Asana: certificate workflow + cross-team handoff

The value compounds later

Search, capacity, and reporting turn work into management signal.

Search

working history

Capacity

tradeoffs, not vibes

Power BI

broader reporting

Better input → better visibility → better decisions

Goals connect the why to the how

Use loose thinking and structured rollups together.

Idea board

post-its on a wall
seen, grouped, shaped

Goal rollups

projects, views, progress, ownership

The “why” is landing. The next step is making the work visible.

A relationship is not one record

A major enterprise client is a living system of work.

**Client truth + product truth + service truth
= reporting & understanding**

The working story lives between the records.

Find the work worth the investment

A quick filter for what should become reusable.



AI features do not fix scattered work. It gets more useful when the work is already shaped well.

Less lost work. More reusable work.

The goal is not more Asana,
It's less churn and lost opportunity

**Not everything belongs in Asana.
But some work is worth the
investment.**

Questions, tangents, and discussion

