backstage ops

Asana Done Right: The Team Reset Kit

Turn Asana from an afterthought into your operating system

HOW TO USE THIS KIT

start here!

1
Block **45 minutes** on your calendar this week and work through the steps in order.

2
Steps 1–3 (this page) set up your foundation. **Steps 4–5** bring your team along.

3
Finish with the **AI prompts** on page two for a second set of eyes on your setup.

1 Set up your home base 15 MIN

Three places, three jobs. Get these right and Asana stops feeling noisy.

Settings: set the rhythm
Add your photo, time zone and working hours. Then agree on which days each person updates Asana... not sacred, but consistent.

Inbox: your to-review list
Err on the side of overcommunicating. Acknowledge every comment and mention, then clear it daily.

My Tasks: your to-do list
Every task gets a due date. Sort by date so today is always on top.

Red due dates
Red means renegotiate the same day, or check in before you log off. Pushing a date on purpose is prioritizing.

2 Choose your structure on purpose 10 MIN

Neither option is right for everyone. Pick the one that fits your business model, your reporting needs and how your brain works.

OPTION A
Containers by division
Best if you:

- plan to stay relatively small
- don't need reporting inside Asana
- value simplicity first

OPTION B
A project per client or contract
Best if you:

- have fewer than ~30 clients
- want strong reporting in Asana
- plan to scale inside the tool

3 Name tasks so they do the work 10 MIN

A good task name tells you how long it takes and what done looks like, before anyone opens it.

```
TIME ESTIMATE • VERB-FIRST ACTION
30m • Record overview of deliverables
```

Add a flag like FIRM for hard deadlines.
Keep colors and tags consistent across projects, so the same label always means the same thing (e.g., Quarterly Goals, Book Launch).

Get in Touch
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about getting Asana set up for your team
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4 Write a few team agreements 10 MIN

You can't hold people accountable to a tool you never agreed on how to use. Start with these, keep the list short and adjust together.

- [ ] **Requests become tasks.** Not Slack messages or hallway asks.
- [ ] **One owner, one due date.** Always.
- [ ] **Updates live in the task.** Comments, not side conversations.
- [ ] **Set Asana days.** Everyone knows when each person updates.
- [ ] **Red gets handled.** Renegotiate, or check in before you log off.

Where our agreements will live (so the leader AND team can find them): _____

5 Schedule your weekly review 5 MIN A WEEK

Favorite each team member's task list, then add a weekly recurring task for yourself to look through them. Scan for red dates, missing owners and missing due dates. It's less about checking up and more about catching where you haven't communicated clearly yet.

> WHEN DATES GO RED, TRY SAYING
>
> *"I'm noticing some red due dates in your task list... could you update them when you get a chance and let me know once done? Going forward, let's update any red dates on your Asana days."*

+ Bonus: let AI take a second pass

Paste these into Claude (or your AI tool of choice) with Asana connected. Swap the [brackets] for your own details.

> PROMPT 1 · THE WEEKLY REVIEW
>
> I lead a [5]-person team, and Asana is our operating system. Review the open tasks in our [Services] project. List anything overdue, missing an owner or missing a due date, and suggest a realistic new date for each based on the workload you can see. Don't change anything in Asana... this is a draft for me to review. If anything's unclear, ask me 1–2 questions first, and flag anything you're unsure about.

> PROMPT 2 · THE CLEAN-UP AUDIT
>
> Act as an operations reviewer for our Asana workspace. Look across our [Marketing] and [Sales] projects and flag redundancies, task names that don't follow our format ([time estimate • verb-first action]) and unclosed loops, like tasks waiting on a reply. Group what you find by issue, explain why each matters and recommend a fix. Recommend only... I'll decide what changes. Tell me what you couldn't see or aren't sure about.

The rule: AI reviews and suggests. You decide what changes.

Want a hand setting this up?

Backstage Ops partners with operators and leadership teams to build systems that hold up as the business scales.

Book a 30-minute call →