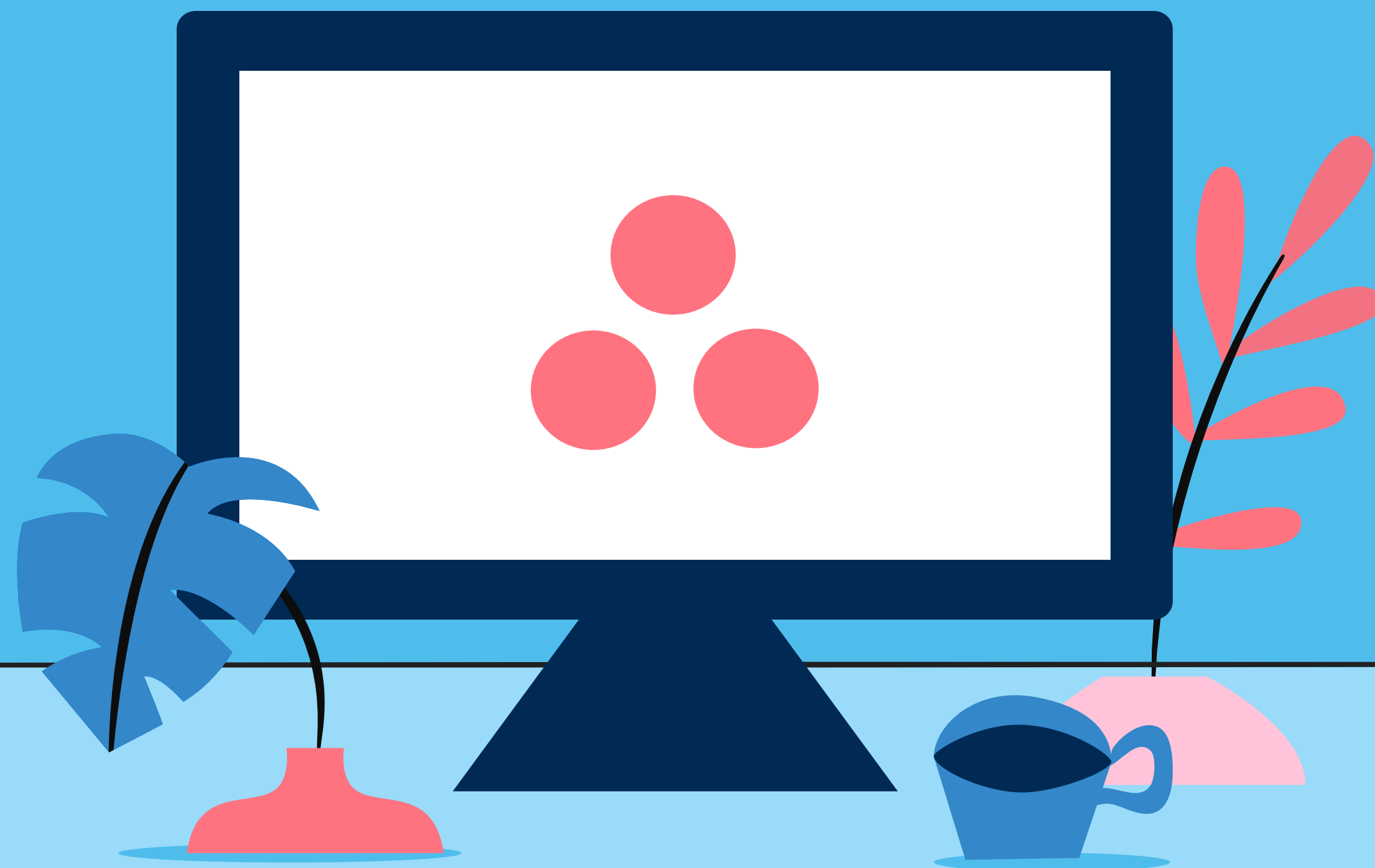


A GUIDE TO BETTER COLLABORATION

# What is work management — and why your team needs it



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# Introduction

A few years ago at [Viessmann](#), Professor Dr. Martin Viessmann and his son (now co-CEO), Max, realized the importance of moving the heating and refrigerations systems company into the age of smart appliances and the Internet of Things. Along with introducing product innovations, he also wanted to improve the way the company operated internally, ushering Viessmann’s business and operational teams into what he calls the **“age of effective collaboration.”**

It makes sense that the Viessmann family would believe in embracing technology. Viessmann is a century-old company and, for Martin and Max, the organization needed to continually modernize both their products and their workplace to keep thriving decade after decade.

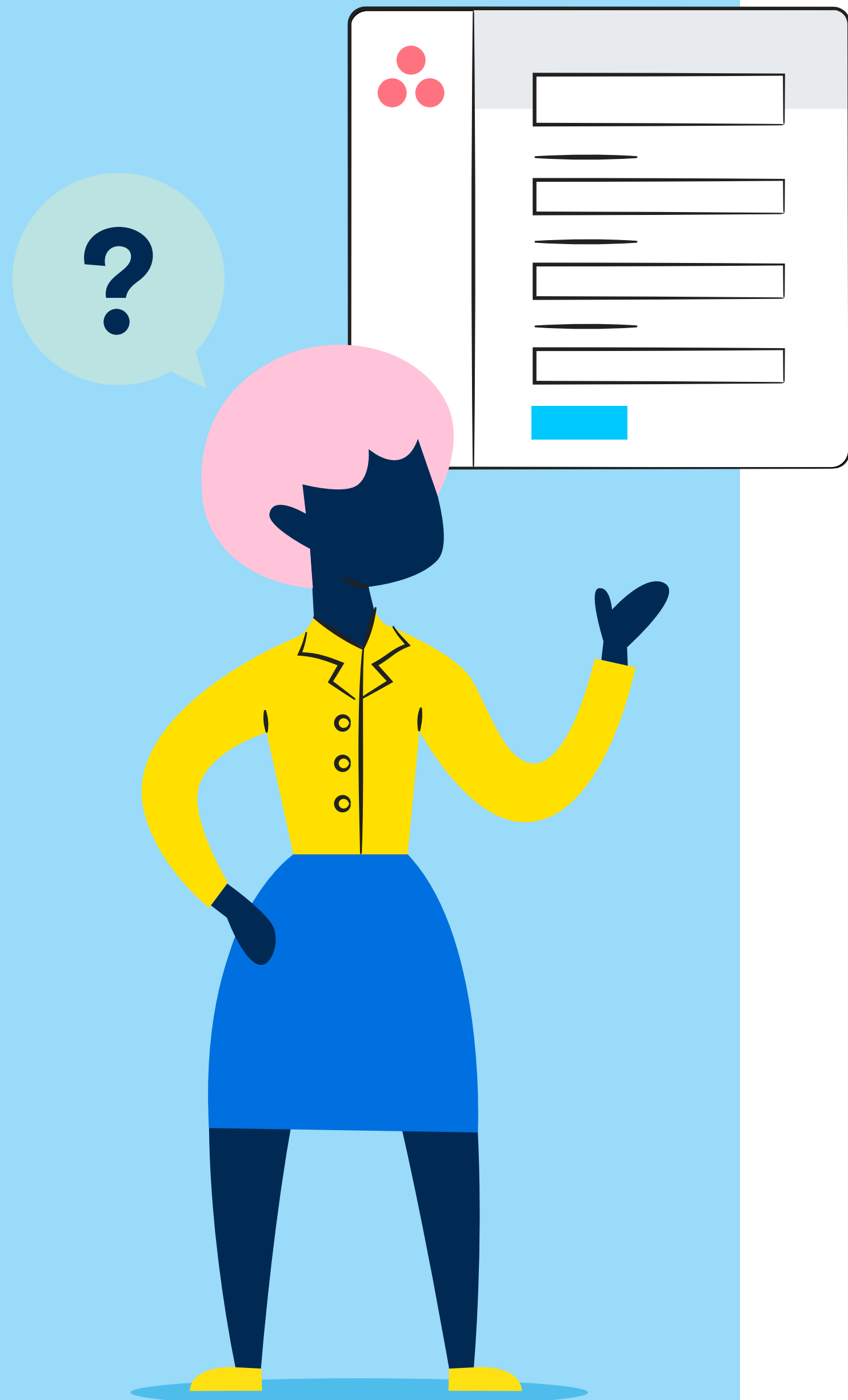
That’s where Alexander Pöllmann, Smart Office and Collaboration Manager at Viessmann, comes into the story. He was tasked with planning and implementing the **“future workplace”** and embracing the “the age of effective collaboration” at Viessmann. Doing so would allow the century-old company to pivot into the world of ultra-modern, advanced appliances.

Before Alex began introducing new technologies, he took some time to better understand the organization’s needs.

**What did he find?** Employees needed a tool to easily connect, collaborate, and do more together in an increasingly distributed company. As Viessmann had grown over the decades, many people worked in different countries and timezones, complicating collaboration—especially since there wasn’t a single source of truth for everyone to go to for managing work across teams.

Alex’s goal was to ensure a smooth, organization-wide digital transformation for how Viessmann employees all work together. A critical piece of this digital transformation was implementing work management.

In this ebook, we’ll give you an in-depth definition of work management, including how it differs from project management. Then we’ll look at some of the common problems related to managing and orchestrating work—and how work management can solve them. Finally, we’ll cover the core features to look for when selecting a work management platform for your team.



# 1 What is work management?

Coordinating work across teams is chaotic—especially if you have to dig through emails or messaging apps to find information. Without a system for planning, organizing, and executing work, confusion and chaos grow, causing teams to move slowly, miss deadlines, and fail to achieve their most ambitious goals. That’s where work management can help.

## **But, what, exactly is work management?**

When an organization fully embraces work management, they end up creating a real-time system of clarity and accountability that helps teams plan, organize, and execute all of their work with far less friction.

HERE'S HOW ASANA DEFINES IT:

Work management is a systematic approach to orchestrating an organization's workflows—be it a project, an ongoing process, or routine tasks—to provide the clarity teams need in order to hit their goals faster. It's about coordinating people and work across all levels of an organization to ensure that everyone has the information they need to accomplish the work that matters most.



## Work management vs. project management: what's the difference?

Although people sometimes conflate work management with project management, they are different. Related, sure, but definitely different.

Work management is a broad system, which includes projects, planning, and processes. Therefore, project planning or management, is a part of work management, but isn't the whole thing. Let's break it down for you:

**Projects:** A project is any piece of work that a person or team works on with a specific goal in mind and is typically time-bound. Some example projects are a product launch, a new office opening, or producing an ebook.

**Processes:** A process is a repeating cycle of actions that don't have an end date. Some examples of processes are content publishing calendars, weekly code reviews, or creative intake and production processes.

As its name would imply, project management deals almost solely with projects, large and small. Project management methodologies have been around for decades, creating standardized practices anyone can follow to complete a discrete piece of work. Two common types of tried and true project management methodologies are Waterfall and [Agile](#). Waterfall methodologies dictate that project stages are completed in a linear sequence, while Agile methodologies split projects up into small sections, which your team works through in iterative cycles.

# Why today's teams need work management

From the outside, most businesses look like they are managed easily. But from that view, we only see the accomplishments at the end—and not the journey to get there. We don't see the late nights and early mornings. We don't see the tasks that slip through the cracks. We don't see the misaligned teams and lost messages. The reality is that all teams face challenges, especially when it comes to managing and coordinating work.

In this section, we'll discuss three common problems teams face when managing work. Then we'll look at how work management can help solve those problems, enabling people and teams to become more productive—and even feel happier at work.



## TOO MUCH WORK ABOUT WORK

Think about your day and how you normally work. What are the tasks and activities that fill up your time the most? **According to our [Anatomy of Work Index](#), which surveyed over 10,000 knowledge workers around the world, chances are high that you spend the majority of your time—60% of your day—on “work about work.”**

What is work about work? It’s all the activities that take time away from meaningful, skilled work. That includes communicating about work, searching for information, switching between apps, managing shifting priorities, and chasing down project statuses. Work about work is so ingrained in almost every office culture that we don’t even realize these tasks are wasting our time—we just consider it part of the job.

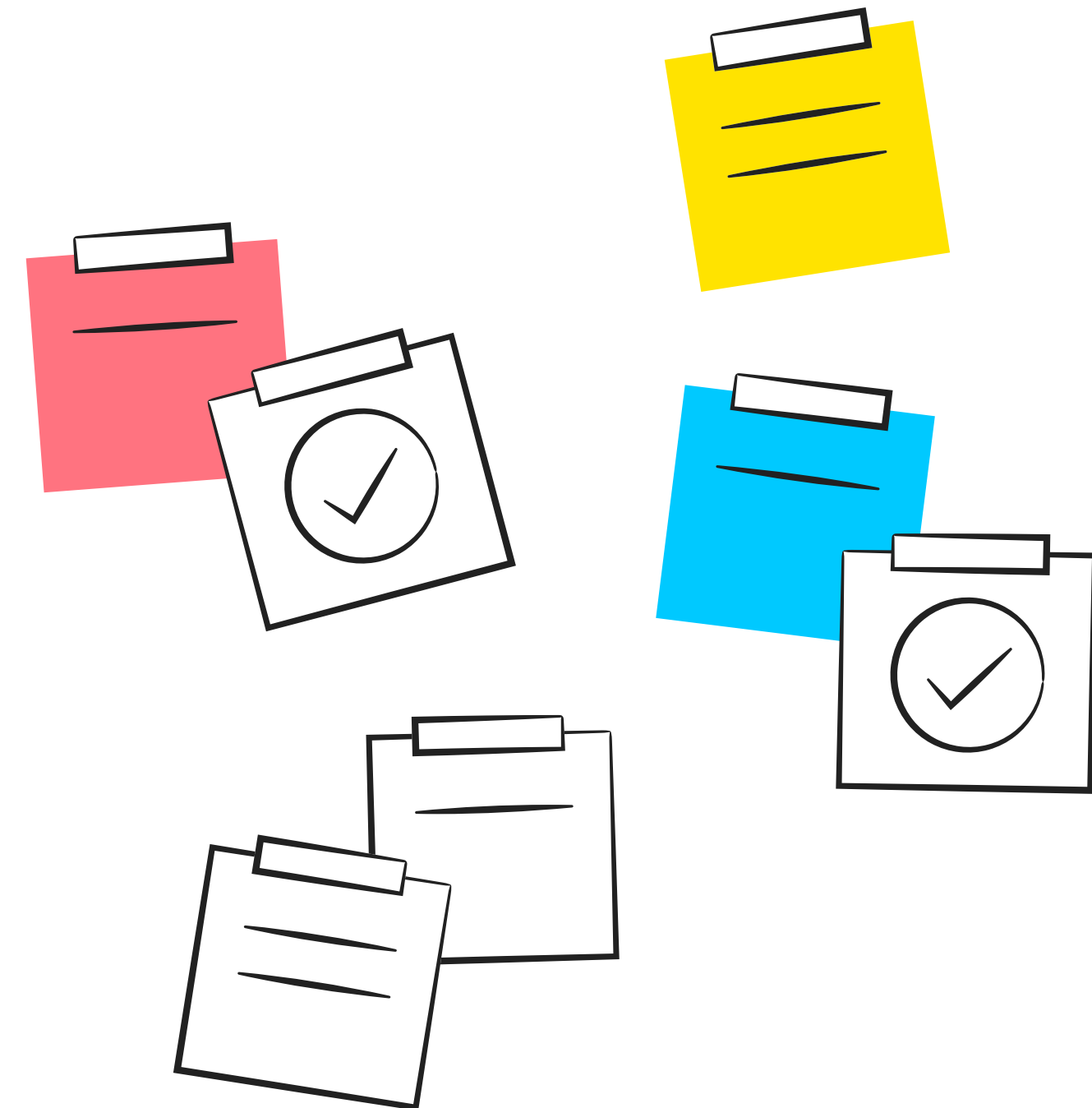
In reality, all of these ancillary tasks add up, making it so that **most people spend only 27% of their job on skilled work**—in other words, the work they were hired to do in the first place. Too much work about work often leads to overworked employees and packed days. For instance:

**35% of global knowledge workers only take one or fewer breaks in a day**  
**30% of global knowledge workers regularly work late from the office or at home**  
**(in Japan, the number is over 80%)**

In addition, the [Anatomy of Work Index](#) found that **82% of respondents feel close to burning out at work**. That’s challenging, both for the individuals experiencing burnout and for the managers and leaders trying to keep their teams engaged and at their best.

## MORE TIME SAVING, LESS TIME WASTING

When you think about it, most of the work about work we do everyday, like figuring out who’s doing what or keeping deadlines up to date as a project evolves, could be automated. Rather than getting bogged down in the small details that are easy to lose track of—shifting due dates, assigning tasks to the right person—a work management platform with [automation](#) capabilities can do that for you.





## INEFFICIENT PROCESSES SLOW TEAMS DOWN

At the root of work about work are inefficient processes, which are fueled by an over-reliance on emails, spreadsheets, and meetings to communicate about and manage projects and initiatives. This way of working may be the norm, but coordinating across disparate technology and processes often fails to deliver the real-time alignment and clarity companies need today. Redundancies and bottlenecks lead to slower processes.

**Again, according to the Anatomy of Work research, nearly two-thirds of meetings are deemed unnecessary.** Yet ineffective meetings aren't the only culprit of inefficiency. Siloed email chains also impact agility and cross-functional alignment—all it takes is to leave one person off the initial email chain to create confusion.

**With an expected [320 billion emails to be sent in 2021](#), office workers face unprecedented levels of email communication.** While messaging apps have alleviated some of our global reliance on email, too many conversations in too many channels can have a negative effect on productivity, deepening silos and adding to distractions.

## BETTER ORCHESTRATION

Teams need a living system to help orchestrate their efforts. A system where everyone can see, discuss, and execute their shared priorities in one place. Both day-to-day work and long-term projects can become much more frictionless with standard processes and a dedicated work management platform, resulting in less chaos across the team and the organization.

A work management system becomes the one place where everyone can coordinate their work and communicate about it. Gone are the days of accidentally forgetting to add someone to an email chain or digging through a team member's cloud filing system when they've left the organization or are on vacation. When everyone works in the same place and with the same processes, it becomes easier to align individual tasks and productivity with broader team and organizational goals.

## LACK OF CLARITY ACROSS TEAMS

Everyone knows that time of year—when company goals are communicated, top down, and then quickly fade into the background as calendars fill and work gets underway. Although successful companies are often good at creating goals and missions at the very top of an organization, those goals don't always connect with the projects and tasks individuals are working on day to day—and that's a problem.

**The Anatomy of Work Index found that, on average, only 43% of knowledge workers are clear on their organization's objectives for the year and only 46% understand how their work adds value to their company.** This makes it harder for team members to stay motivated since they don't know whether their work has any impact. Plus, if no one knows what direction they're supposed to go, it's all the more challenging to align and work as a team.

Instead, teams are more engaged and likely to go the extra mile when they have clarity on how their work ladders up to organizational goals. **Findings from [recent research](#) reinforces this: 75% of aligned workers agree that they feel empowered to make strategic decisions or pursue new business opportunities, compared to 22% of unaligned workers.**

## MOVING FROM CHAOS TO CLARITY

To be effective, organizations need to provide clarity and visibility to everyone across an organization. Individuals and teams need to understand how their work contributes to company-wide priorities, ensuring they feel empowered, engaged, and connected to the work that matters most.

Work management platforms provide a single source of truth for everyone—at all levels of an organization. By creating a single, go-to source, information stays structured and organized, making it easy to break down big strategic objectives into projects and tasks. For individual contributors, that type of format helps people understand how they fit into the bigger picture and how their tasks support strategic objectives. And, for managers and senior leaders, it gives you a bird's-eye view on the entire operation so you can rest easy knowing how things are progressing.



## 2 The three essential pieces to work management

Work about work, inefficient processes, and lack of clarity across teams get in the way of a team's success by slowing them down and making it harder to accomplish their goals

Luckily, you and your team can overcome these work coordination hurdles. That's where work management comes in. Here's how a work management platform (like Asana) can help you and your organization reframe the way you think about—and do—work.

# Organizing the elements of work

There are three core elements that define work within a team or organization. They are:

- **Tasks**
- **Projects**
- **Portfolios of projects**

A work management platform makes it easy for teams and organizations to plan, organize, and execute work based on these core elements. Let's dig deeper into each element.

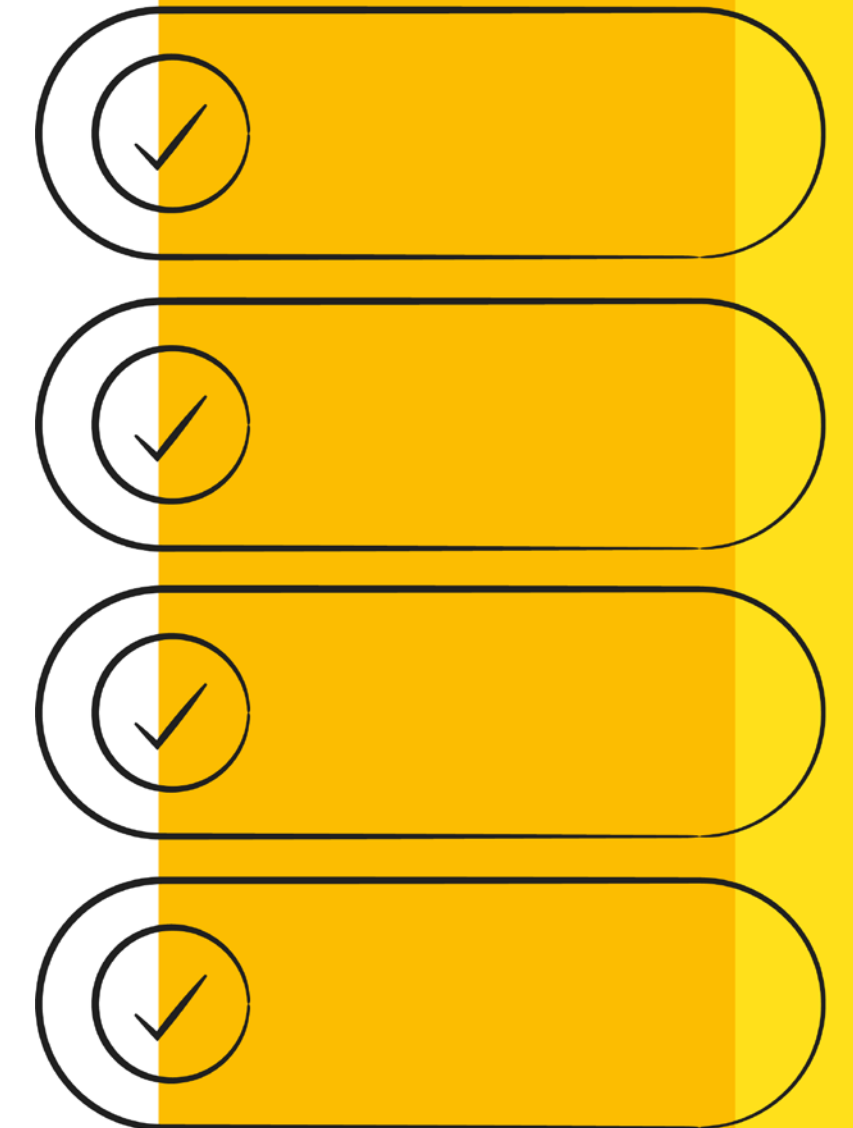
First, tasks represent individual pieces of work. Tasks can be recurring—like running a monthly report—or discrete—like writing a blog post. No matter what industry you're in or what project your team is working on, every well-crafted task needs to provide clarity on three things: **who** is **doing what** and by **when**. It seems basic, but if tasks are created and assigned without the who, what, and by when hashed out immediately, the lack of accountability will create confusion.

Tasks, when grouped together, make up the second core element of work: a project. Projects represent

the larger goal a team is trying to achieve, like launching a new product or kicking off a brand campaign. In other words, all projects, no matter how big or small, are simply comprised of several individual tasks.

[Portfolios of projects](#) are the third key element of work. In short, they are groups of projects. They are most useful for a manager (or individual contributor involved in multiple projects) to keep track of many projects, ensuring that departments hit important milestones, like quarterly goals. Progress tracking with portfolios builds transparency and trust across teams, creating seamless coordination across all levels, from senior leaders to managers to individual contributors. From a project portfolio, you can start with a bird's-eye view of the entire initiative and then drill down into individual projects, all the way to the task level.

The best work management solutions bring these three elements together seamlessly, giving you and your team clarity and accountability on your most important initiatives. A work management system creates the structure and keeps everything, from the



# Dynamic views

As appealing as it is to have a one-size-fits-all solution for managing your team workflows, everyone works differently and each project is unique. Although an overall structure is important for standardizing how work information is captured and organized (e.g. tasks, projects, and project portfolios), a work management solution with dynamic ways of viewing that information can further unlock your team's efficiency.

At the individual level, people should be able to view their own tasks easily and clearly, away from the clutter of a large project. Whether it's a list view or a calendar view, everyone needs a place to see their "to-dos" in a way that works for them and makes it easy to focus on top priorities.

At the project level, some projects are better suited for certain types of visualizations than others. An event with a large check-list of small but important tasks is probably best visualized in a list-view. However, for an agile workflow, like web development, a [board view](#) might be better, and a content calendar probably benefits from—you guessed it—a calendar view.

For large and more complex projects with many stakeholders and cross-functional partners, it's important to have a work management system that allows people to toggle between different views. For example, a product marketing manager might want to see all deliverables in a list view one day, and the next day, they may need a timeline view to ensure everyone's due dates line up well.



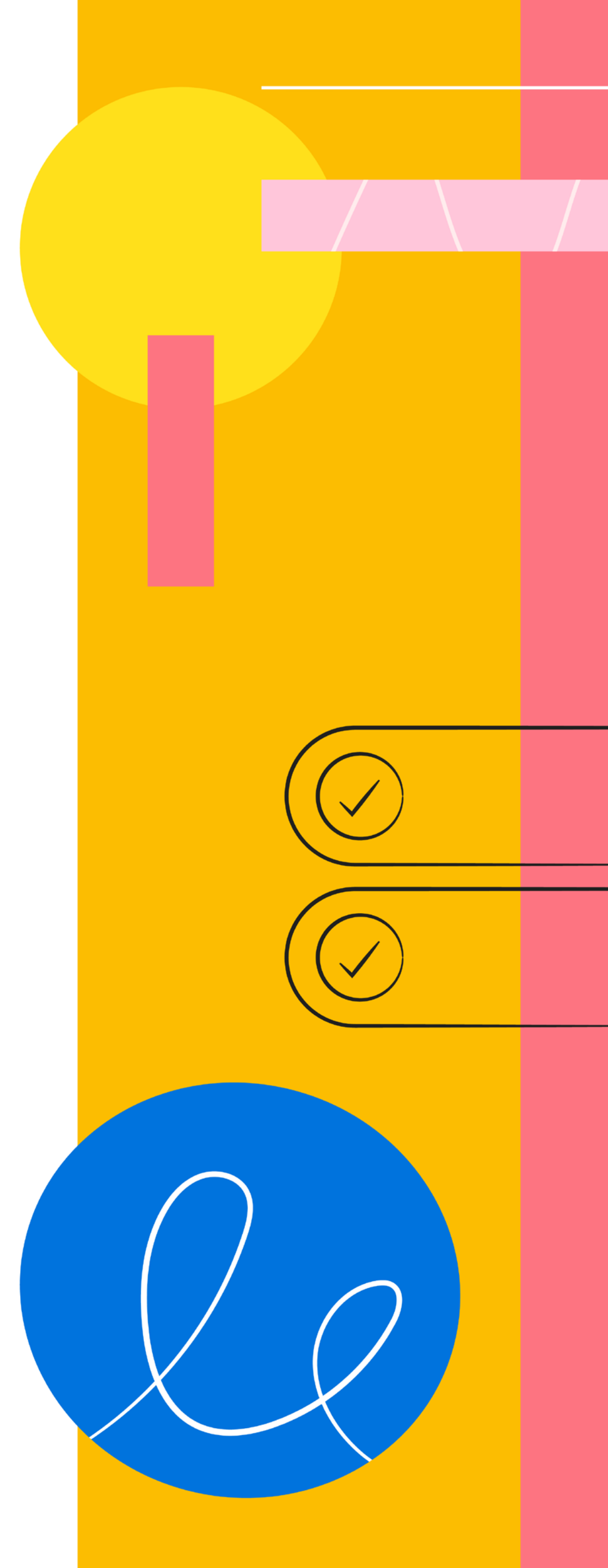
# Automated processes

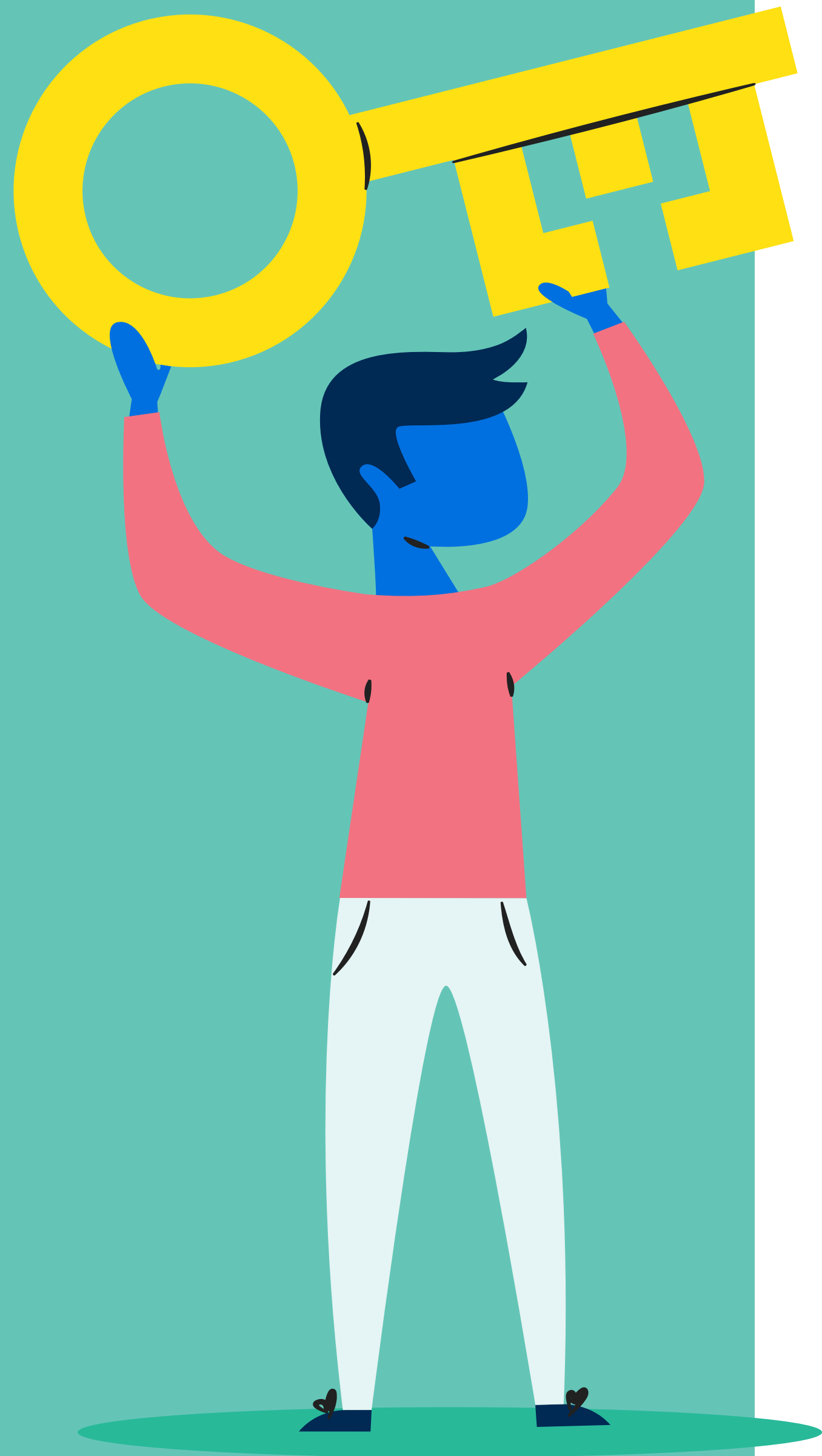
So much of the work about work we do involves ongoing or repeated processes—and you might not even realize it.

Projects may feel unique, with different stakeholders and deliverables, but many elements are very similar. For example, most product launches follow the same steps—even if they don't involve the same people—almost every time. What if you could templatzize that? A work management solution allows you to create a template for projects and processes your team does often so you don't have to start from square one designing the workflow every time. This also ensures that you don't miss any critical steps, like getting budget approval or legal sign-off on campaign creative. Sure, each project has its own quirks, but you don't have to reinvent the wheel each time.

It's also possible to automate some of the smaller, nitty-gritty tasks that take up your team's time, too, like assigning the right work to the right teammate, setting or shifting due dates, and handing off work at the right time. When your team uses a work management solution with automation features,

streamlining many processes ensures no one misses any critical steps—and helps your team move more quickly. For example, with the right solution, you could create a system where requests for creative support submitted through a form are automatically turned into a task with the right assignee and a date.





### 3 Work management in action

Any team or organization that wants to plan, manage, and execute its work more effectively (and efficiently) can benefit from a work management platform.

At Asana, we've seen [customers](#) of all company sizes and industries adopt work management and create more clarity and accountability for their teams. Here are a few teams that use work management to move faster towards accomplishing their biggest goals.



## G2

### MARKETING AND CREATIVE

G2's review site, newsletters, and events support a marketplace of millions of software buyers and software vendors. To successfully execute their marketing strategies for reaching and engaging with both groups, [G2's marketing team](#) has to be organized, efficient, and aligned on strategy.

Before adopting work management, team members were often misaligned on priorities because they developed their overall strategy separately from their program and campaign plans.

Now G2 uses Asana to organize everything in one place—from strategic planning to key initiatives to individual campaigns. Since moving all of their work into Asana, the team is more aligned on strategies, goals, and priorities. They've also been able to optimize their performance and launch campaigns 2x faster to drive traffic, increase reviews, and generate revenue.



## Guru

### SALES AND MARKETING

Guru, a real-time knowledge management solution, is a rapidly growing startup with teams in both Philadelphia, the company's headquarters, and San Francisco. Although the company uses Slack and Zoom to communicate, which work great for meetings and small tasks, the two teams had a difficult time coordinating and aligning when it came to larger projects, especially since they are in different offices.

Both teams would spend several hours a week in status meetings and items kept falling through the cracks, which can slow down a high-growth company. Since the marketing team already used Asana, they decided to loop in sales, train them on the platform, and start working in the shared environment.

Now that both teams use Asana, they have a single source of truth for all projects between sales and marketing. Instead of sitting through status meetings on Zoom several times a week, anyone, at any moment, can see who is working on what. Ownership is clearly delineated, and everyone knows what parts of the project are theirs and what parts are someone else's responsibility. That clarity removes ambiguity, allowing people to focus on work instead of checking in to see who owns what, untangling crossed wires, or doing double work.



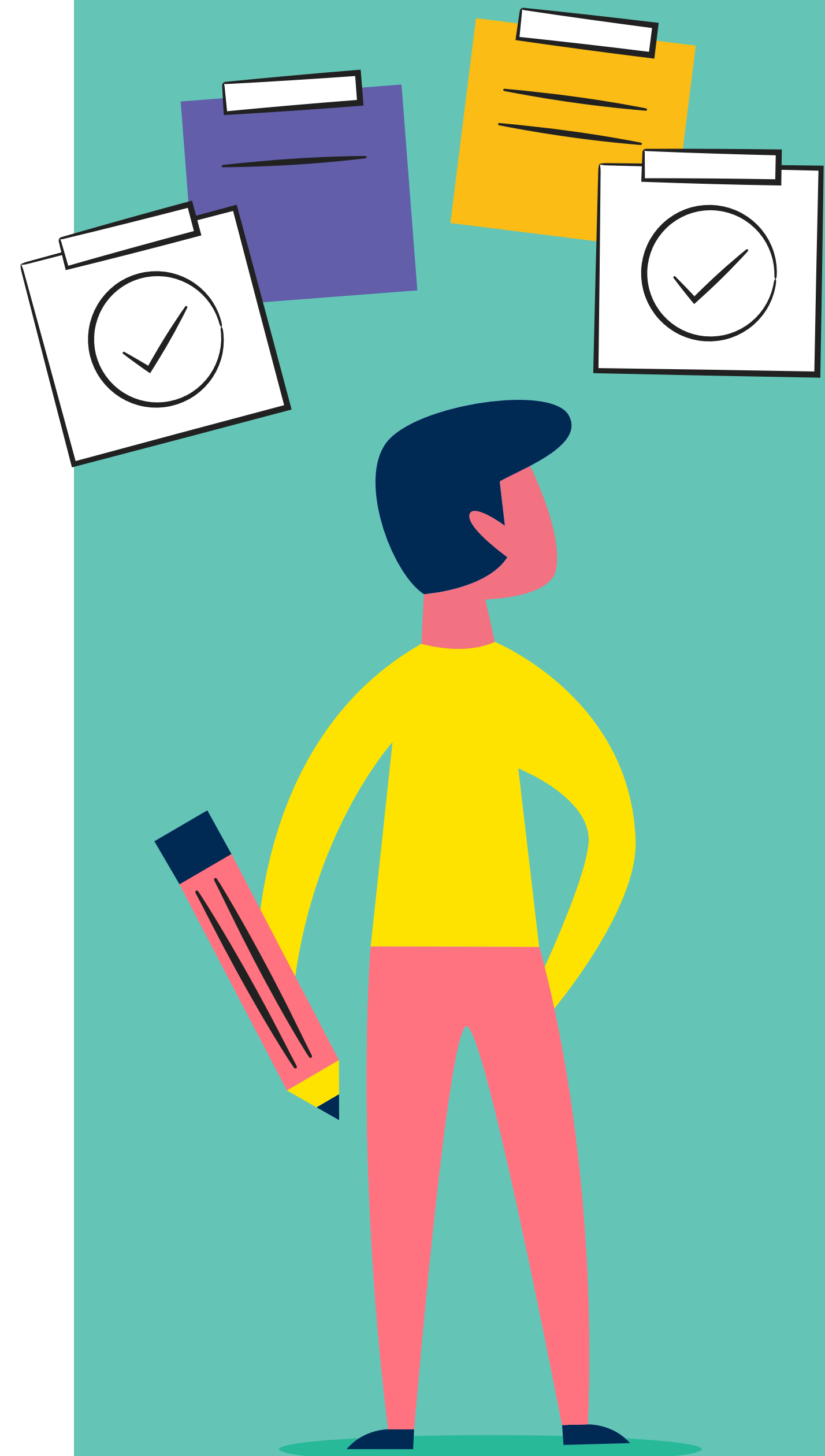


## Viessmann

### OPERATIONS

Founded in 1917, Viessmann is a family-owned, multi-billion dollar heating and refrigerations systems business with over 12,000 employees in more than 70 countries around the world. Although the company is over a century old, they've embraced technology, both in the types of machinery they build, and also how the business itself operates. To stay relevant a century after their founding, Viessmann has embraced digital transformation, both in their products—like incorporating the Internet of Things into many of their offerings—and to their internal processes.

As part of their internal digital transformation strategies, the executive and [operations team](#) at Viessmann now use Asana to capture high-priority product and organizational changes, collaborate cross-functionally, and manage work requests for quality management and production. They are agile and can proactively respond to the changing needs of their market more quickly than ever before.





## 4 A new way of working: Are you ready for work management?

When teams and organizations aren't well coordinated, with everyone operating their own way and in their own silos, work about work grows, creating chaos and confusion. That misalignment, in turn, slows down individuals, teams, and entire organizations, making it difficult for everyone to do their best work.

Work management is an ongoing commitment to processes and systems of work that will help you and your team move faster, accomplish more, and maybe even feel happier. When a project ends, you don't end work management. It keeps you and your team aligned and focused, enabling you to do better work, faster.

If you're ready to see what Asana and work management can do for your organization, [talk to us today](#).



Ready to try work  
management?

Talk to us.

