

STAND 8 SOLUTIONS

Case Studies

Below is a summary of some of our notable Asana related projects.

National Council on Aging (NCOA)

The National Council on Aging was founded in 1950 as the first charitable organization in the U.S. that would advocate for older Americans with service providers and policymakers

Asana Platform Training

- Need - NCOA was a new user of the Asana platform and requested assistance with configuration of the platform as well as coaching and training key staff on best practices and techniques to ensure they get the most out of the platform.
- Solution - STAND 8 provided a certified Asana Pro to NCOA to help organize the Asana workspace for efficiency, define how to invite 3rd parties to the platform and assign tasks, recommend, and implement best practices, coach and train key staff, and answer additional questions throughout the engagement.

Along with the engagement described above, STAND 8 also provided a Project Management consultant to conduct 30-45 minute training sessions with the NCOA project teams on basic project management to help them better understand the basics of how to properly manage a project, small group coaching for specific team members who manage subgrantee projects, and ongoing coaching of one team member who was being moved to an associate project management role.

AT&T

AT&T Inc. is an American multinational telecommunications holding company headquartered at Whitacre Tower in Downtown Dallas, Texas. It is the world's third largest telecommunications company by revenue and the third-largest provider of mobile telephone services in the U.S.

Asana Platform Training

- Need: AT&T Global Supply Chain organization requested Asana platform training to improve the awareness, understanding and adoption of Asana and its current configuration within the organization.
- Solution - To accurately level set AT&T's knowledge and use of Asana and its best practices as well as define and prioritize the training requirements, STAND 8 completed an initial 2-week Discovery. The Discovery focused on the three following areas:
 - Stakeholder working sessions to understand current pain points to center training around
 - Explore PowerBI external data sources, the data contained in each of those sources, and how that data should be combined to provide meaningful business trends and insights
 - Assess current and define future Asana automation rules and configuration

Asana PowerBI Buildout

- Need - AT&T Global Supply Chain organization needed to add additional reporting capabilities in their Asana implementation around data integrity and consistency. As project and task owners submit intake requests and update existing projects, there can be various places where data is missing or not entered properly. This data needs to be presented to the Asana admin in an easy-to-view dashboard so that they can correct the issue directly in the form or by reaching out to the responsible party, identifying possible

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training gaps that should be addressed. In addition, they needed various dashboard views and reporting capabilities to get project health metrics, as well as role-based dashboards (executive stakeholders vs. engineering stakeholders vs. project owners

- Solution – STAND 8 integrated Asana with Power BI to facilitate the creation of reports and visualization of projects and tasks. Our team then built a variety of reports to illuminate data integrity issues, exception reports, changes to templates (i.e., automation rules), project health metrics (velocity reports), and provide insights for business stakeholders and project managers. This was accomplished by leveraging AT&T's cloud-native tech stack to build out the required databases, web hooks, and data pipelines needed to add the requested functionality. Prior to completion, our team provide the AT&T admins with solution documentation and runbooks, as well as access to updated backend configurations as required so these functions can be performed without any coding or development by AT&T. The solution high-level architecture consisted of Asana, Databricks, Snowflake, PowerBI Desktop, and PowerBI Cloud Service, Python, Amazon RDS, PostgreSQL, and AWS Lambda.

DirectV

DirectV is an American multichannel video programming distributor based in El Segundo, California. Originally launched on June 17, 1994, its primary service is a digital satellite service serving the United States.

Asana Implementation & Integration

- Need - DTV Video, Customer Experience & Ops organization needed assistance with implementing Asana and proper setup with project templates, reporting, and processes to allow their teams to improve productivity and visibility into project/program/portfolio status. They also needed Asana to be integrated with Quickbase, Salesforce, and PowerBI to allow for data sharing, analytics, and dashboards
- Solution – STAND 8 met with the project stakeholders to understand their project management requirements and then implemented and configured the Asana instance with the templates, forms, reports, and workflows necessary to enable immediate (MVP1) and future project management requirements.

Additional capabilities implemented by STAND 8 included:

- Integrating Asana with Quickbase via APIs to allow Quickbase to act as a ticketing system while Asana assumed the role of the project management and workflow tool. Data, such as the creation, updating, and completion of projects and tasks, were connected between the two platforms.
- Building an intake form as a web form to simplify the intake process to push tasks into Asana and Quickbase as required as well as email perspective team members of work requested. The form included a sidebar that allowed for additional information such as an introductory video and department dictionary so the requestor would have knowledge of the departments being impacted via their request. The form also pulls data from Salesforce.

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- Integrating Asana with Microsoft PowerBI to build dashboards to pull status analytics from Asana and allow them to be displayed, filtered, and sorted as requested.

Asana Capacity Planning Automation

- Need - DIRECTV was looking for guidance and help to streamline their project planning and grooming activities. Their teams were having difficulty tracking and routing a large set of incoming initiatives, balancing resource capacity, stopping the line to respond to critical bugs, and accurately hitting time to complete; further complicated by the ever-changing (re) prioritization and stack ranking of projects. The teams (User Experience and Design) support multiple divisions of the enterprise who are on different sprint schedules and PI plans. Their challenge was to know if at any given point in time in the future, if one or more of their team members, (or if an entire role), were overcommitting their time. Since this team supported multiple engineering teams each with multiple concurrent projects, it was hard to do capacity planning effectively.

More specifically, DIRECTV was looking for a data-driven approach to solve the following:

- Capacity Planning - how to effectively calculate resource capacity
 - UX Scoring/ Value - how to consistently estimate work effort
 - PI Planning - how to develop a PI plan that is resistant to flux and allows the team to complete planned work
 - Internal Intake/ Process - how to create a process whereby incoming features are fully triaged and groomed prior to commitment.
 - Transparency - how to arm design and product leadership with the ability to run reports and/or view dashboards of capacity, project status and future roadmap.
- Solution – STAND 8 conducted a series deep dive session to fully understand the requirements for various capacity, resource, and project planning Asana Boards. During this time, we designed and rapidly developed working prototypes of Asana forms, templates, portfolios and project boards for the immediate use by DIRECTV team.

Additional scope included:

- Updating Asana to support new dashboard views
- designing and building custom MVP Asana Portfolios and Projects views to pull and organize Asana data allowing department and project leaders to:
 - Identify staff and role allocation, as well as over-subscribed resources - identify sprints that are crossing acceptable load thresholds and identify projects that are “At Risk” from carryover
 - Identify unplanned work being brought into the PI (e.g., scope creep, critical bugs, etc.) - show project estimated completion dates and overall health and show project roadmap at various timeline views (weekly, monthly, PI, quarterly).
- Discussions with and guidance for project leaders with how to score projects consistently for capacity and resource planning
- Discussions and design on how to integrate with VIPER 1-N list, Jira (bug tracking) and possibly, Notion based on working sessions with the team.

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- Training sessions for team members on how to use Asana, varying in roles and depth of training.

STAND 8 created an automated cloud-based solution using AWS Lambdas, a step-function, and a database. The automation takes a list of active projects from a named portfolio in Asana and gathers information about all the tasks, subtasks, assignees, roles, person days (estimated time to complete the task), start dates and due dates, as well as information about vacations, holidays, and default capacity of each potential assignee by week, and organizes that information into new target portfolios used for planning by Assignee, by Role, and by Project

Viper Re-ranking

- Need – DirecTV has a specific classification of projects called “Viper”, in order to become a Viper project, the project must meet certain criteria, in addition, there are many approved Viper projects vying for the capacity of the implementation teams. As new proposed projects go through the intake process and get approved, or as other projects are changed or cut, or as market conditions change, the stakeholders from multiple teams get together to adjust the prioritization or “ranking” of these projects by adding decimals to their rank number to position them between or ahead of other projects. Some people gave them the same rank number, and then dragged them in the Asana UI to a higher position. This makes the rank numbering confusing.
- Solution – STAND 8 used AWS lambdas to create a service which can renumber the “rank” into whole numbers based on a number of factors including if the project is already in flight and at what stage the project is in the process in addition to re-ranking them based on its position within the board if two projects share the same rank. This service runs on a nightly basis but can also be triggered on-demand by moving a task in a special Asana project into a section labeled “Run now”. When the service is finished re-ranking the projects it places the task back into a “not running” section.

Morningstar

Founded in 1984 and headquartered in Chicago, Illinois, Morningstar, Inc. is a global financial services firm that provides an array of investment research and investment management services.

Teamwork and SharePoint migration to Asana – Discovery & Implementation

- Need - Morningstar needed assistance with migrating projects, workflows, documents, and data from Teamwork and SharePoint into Asana. The primary goal would be to minimize the amount of disruption and loss of productivity due to cut-over from one system to the other, learning curves with the new system, etc.
- Solution - STAND 8 met with business stakeholders and project administrators across all business units to understand how they are using Teamwork, document and decide which Teamwork customizations to migrate to Asana, and design and execute a roadmap to build an apples-to-apples project portfolio, workflow, Kanban board, automation rules, reports, and underlying “Sync Engine.” The migration followed a 3-Phase approach is summarized below
 - Phase 1: Beta group(s) migrates to Asana, provides feedback, team iterates on improving functionality, optimizing training program, refactor data tooling as required.

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- Phase 2: Migrating 1st core business units (e.g., Research), optimize and harden migration process and training, etc.
- Phase 3: Rollout remaining groups

Part 1 of the migration included importing .csv extracted data from SharePoint into Asana as the list of in-scope projects to migrate. Those projects that had a TeamID listed in the import file had their Teamwork project data migrated to Asana via API integration. Part 2 involved creating a sync engine that connected to Asana so that the Power BI team had stable and reliable access to Asana data. The underlying database was AWS Redshift. The Redshift database was configured for real-time Asana data access, as well as provided Power BI via an AWS PowerBI gateway to pull historical data as part of data warehouse capabilities native to Redshift.

Teamwork and SharePoint to Asana – On-going Support

- Need - Morningstar needed ongoing, as-needed support for the Asana integrated solution delivered by STAND 8. The primary goal of this support would be to minimize Morningstar's dependence on STAND 8 to maintain the daily health of the solution, implement additional enhancements to the solution as requested and defined by Morningstar, and quickly recover the solution from any unexpected outages.
- Solution - STAND 8 provided a 60-hour block of time that is being used at the request of Morningstar to cover various support needs that may arise over the next twelve (12) months. STAND 8 has providing technical consultants to support the following activities:
 - Knowledge Transfer
 - STAND 8 will work with Morningstar to design and deliver a series of sessions focusing on more elaborate and more granular level knowledge transfer via screenshare with specific Morningstar staff selected by them
 - Scaling-up Solution
 - STAND 8 will provide ongoing design and development (Implementation) of enhancements to the existing Solution as requested by Morningstar
 - Detailed requirements for these enhancements will be provided to STAND 8 by Morningstar
 - Where gaps in details exist, STAND 8 will work collaboratively with Morningstar to close these gaps to ensure requirements are mutually understood and agreed upon
 - Disaster Recovery
 - STAND 8 will provide on-call support for any incidences Morningstar encounters with the Solution that they are unable to resolve themselves
 - If an incidence occurs, Morningstar will notify STAND 8 via email at s8support.mstar@stand8.io and provide a summary of the incidence and its severity level (see Severity Level definitions below)
 - Subject line of notification email will be a such:
 - "Morningstar Asana Trouble Ticket – <incident date> - <severity level>" (e.g., "Morningstar Asana Trouble Ticket – 12/1/22 – Severity Level 2")

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- Once STAND 8 receives notification via email from Morningstar, STAND 8 will acknowledge notification within 24-hours via email response to Morningstar and will take appropriate actions based on severity level of incidence

RVO Health (RVOH)

UnitedHealth Group has combined certain Optum Health assets with Red Ventures' healthcare portfolio to create a new consumer health joint venture called RVO Health. RVOH's mission is to give people a better way to health & wellbeing. They own and operate the largest health & wellbeing platform in the US, helping nearly 100 million people a month seek information, find a doctor, save money, and take action around their health & wellbeing. Their portfolio of industry-leading websites, products and services touches every part of the health and wellness journey.

- Need – RVOH is a joint venture between Optum Health (UnitedHealth Group's provider arm) and Red Ventures (RV), they have historically been using the Asana workspace subscription of RV. RVOH now needs to migrate off the RV Asana workspace and onto their own RVOH Asana workspace.
- Solution – STAND 8 completed an initial Discovery phase to gather details on RVOH's teams, users, projects, portfolios, intake forms, rules (automations), custom fields and values, attachment volume, existing Asana plug-in and API integrations, and other details necessary to define an approach and estimate the work of migrating these into their own RVOH instance. This was followed by an Implementation phase that is focusing on migrating RVOH's teams, users, projects, portfolios, custom fields and values, attachments, and historical task details from the RV Asana workspace to the RVOH workspace while maintaining relationships and assignees, all with minimal disruption to the teams involved in the migration.

At the conclusion of the Implementation phase, STAND 8 will provide post-migration support to assist with creation/recreation of intake forms, rules (automations), or other automations or customizations that arise from RVOH users due to the migration as well as assist any users with Asana best practices. This will be delivered via 40-hour bucket of support hours.

MiddleGround Capital

MiddleGround Capital (MGC) is a private equity firm based in Lexington, KY with over \$2.0 billion of assets under management. They make control equity investments in lower middle market B2B industrial and specialty distribution businesses. MGC works with its portfolio companies to create value through a hands-on operational approach and partners with its management teams to support long-term growth strategies.

- Need – MGC requested assistance from an experienced Asana consultant to help optimize and expand their existing use of Asana with focus on the following:
 - Restructuring current processes to match a new, optimized blueprint
 - Enhancing team engagement
 - Improving the overall effectiveness and value of the Asana operations.

As a mandated from MGC executive leadership, Asana became the primary collaboration tool, replacing email for task-related communication. More specifically, Asana will be utilized for:

- Manage projects - efficiently adhere to SOPs and help drive value creation for portfolio companies and MGC

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- Manage work requests, approvals, and meeting requests - custom task templates will be created to standardize request submissions and/or Asana Forms can be used to gather necessary information
- Solution – MGC team members are required to utilize Asana's task comments and project updates to collaborate and communicate progress, enhancing transparency, enable real-time collaboration, and ensure everyone is aligned on firmwide priorities and current statuses, resulting in reduced reliance on check-in/status update meetings.

Asana is helping MGC scale by automating manual processes, centralizing information, and streamlining workflows. This has resulted in reduced "work about work" and enable team members to focus on high-value tasks. As the organization grows, Asana will facilitate efficient onboarding of new team members and seamless adaptation to evolving business needs.

Specific deliverables (requirements) defined by MGC included:

1. Audit & Blueprint - Perform an in-depth audit of our existing Asana practices. Develop a tailored blueprint for restructuring and optimizing Asana within our organization. This blueprint should map out the stages of restructuring, training, and timeline for completion.
2. Restructuring Asana (per Blueprint) - Based on the blueprint, lead the restructuring and development of our Asana environment. This will involve customizing workflows, editing and developing Asana Rules (automations), and aligning the environment with our unique business needs and processes.
3. SOPs Integration- Assist in integrating our existing Standard Operating Procedures (SOPs) into Asana. This will involve identifying the most efficient ways to build our SOPs into the platform in a manner that provides clear value to each team, thus driving engagement. The consultant will collaborate closely with each team to ensure a seamless SOP integration.
4. Decision Matrix and Travel & Expense Integration - Advise us on the optimal methods to incorporate our Decision Matrix and travel/expense requests within Asana.
5. Hoshin/Goals - Assist us in capturing and tracking our company Hoshin within Asana, most likely using Asana's Goals feature.
6. Reporting - Work with MGC Teams to build out valuable reporting features within the platform to track project progress, manage workloads, and ensure timely completion of tasks and projects. Dashboards will be configured to provide visibility into key metrics and milestones, enabling stakeholders to make informed decisions and allocate resources effectively.
7. Asana Proficiency Measurement - Develop a method to measure Asana proficiency, usage, and excellence. This might not be a traditional exam, but rather an innovative system that could include data extraction or other creative methodologies. We need expert guidance on this aspect.
8. Custom Asana Development/Extending the Platform - Aid in custom development for Asana. For instance, help us connect Asana to a reference table so that when a person changes roles, the change is automatically reflected throughout the system (Rules, Custom Fields, Projects, etc.), minimizing manual updates. Identify and integrate relevant Asana extensions, plug-ins, or integrations with other tools used within the company.
9. Ongoing Support - Provide ongoing support to our team as they adapt to the optimized Asana environment. This may include troubleshooting, answering questions, and providing additional training as needed.

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The overall approach consists of the following three (3) phases:

1. Discovery
2. Implementation
3. Scale

STAND 8 has completed the Discovery phase with deliverables to including those listed in Item #1 (Audit & Blueprint) above. The Implementation phase is expected to begin in Q12024.