

JAIRUS

**UNDERSTANDING
PROJECT
TEMPLATES**

TEAMWORKING TRAINING

PROJECT TEMPLATES

Teamwork projects are set up using project templates that align with the unique steps tied to executing each deliverable Jairus offers clients.

THE ROLE OF TASK LISTS IN PROJECT SETUP

Task Lists help organize more complex projects in Teamwork, allowing us to separate out different phases of a project or different components. Examples include:

- In our recurring projects, such as monthly blog posts, we set up one project per quarter, with separate task lists for each month in that quarter's blog post: i.e. Task List 1: January Blog Post; Task List 2: February Blog Post; Task List 3: March Blog Post
- For our webinar development project, we have separate task lists related to pre-webinar logistics, pre-webinar promotion, and post-webinar follow up.

THE USE OF SUB-TASKS IN PROJECT SETUP

For very complex projects, you may also see Tasks broken down into Sub-Tasks. Our Quarterly SEO projects are an example of this. There are many projects related to our SEO program each month. To keep those projects and related tasks organized in Teamwork, we use Tasks and Sub-Tasks.

Sub-Project as a Task

Sub-Tasks

Watch for the dropdown arrows that indicate there are sub-tasks

The screenshot displays a list of tasks in a project management tool. Each task entry includes a dropdown arrow, a count of sub-tasks, an assignee, the task name, a menu icon, a duration, a due date, and a status tag. The tasks are:

- SEO Onboarding: New Client (6 sub-tasks, Anyone, 12h 30m (24h 15m total), 6, SEO Projects Menu)
- Broken Link Audit & Fixes (2 sub-tasks, Anyone, 1h 15m (2h 20m total), 2, SEO Projects Menu)
- Broken Link Audit & Fixes (SEO) (1 sub-task, Anyone, Start: Day 1 - Due: Day 60, 45m, With SEO Te...)
- Audit Review (AM) (1 sub-task, Anyone, Start: Day 2 - Due: Day 62, 20m, Pending)
- Website Content Audit (3 sub-tasks, Anyone, 1h (2h total), 3, SEO Projects Menu)
- Keyword Research & Review (3 sub-tasks, Anyone, 2h (3h 45m total), 3, SEO Projects Menu)

A dropdown arrow next to the number '3' for 'Website Content Audit' is circled in black.

Project Template Examples

Recurring Project: Quarterly Digital Ad Monitoring

The screenshot displays a project management interface for a recurring project. At the top, a breadcrumb trail reads: Home / Projects / Digital Ads / Q3 Digital Ad Monitoring / List. A blue banner at the top left states "This project is a template" with a "Use template" button on the right. Below this, the project name "Q3 Digital Ad Monitoring" is shown with tabs for "List", "Files", "Time", "Dashboard", and "More...". A search bar for "Assignee or task name" and a "Filter" button are also present. The main area shows a list of task lists on the left and a detailed view of the "Account General Time" task list on the right. The task list view includes a header with "Account M... +1" and "Account Team Project General Time", followed by a sub-section for "July Digital Ads Launch & Monitoring Task List" (20 tasks) and another for "August Digital Ads Launch & Monitoring Task List" (20 tasks). Each sub-section contains a description and a list of tasks: "Media Plan & Launch" (3 tasks, 0h 1h 5m total), "Ongoing Campaign Monitoring" (4 tasks, 0h 2h 50m total), and "Digital Ad Receipts (Delete if not needed)" (2 tasks, 0h 25m total). The interface also shows "Incomplete tasks" counts and time estimates for each section.

Home / Projects / Digital Ads / Q3 Digital Ad Monitoring / List Take a tour of List View Send feedback

This project is a template Use template

Q3 Digital Ad Monitoring List Files Time Dashboard More... Automate

64 tasks Assignee or task name Filter Add task list

Task lists

- All lists 64
- Account General Time 1
- July Digital Ads Launch & Monitoring Task List 20
- August Digital Ads Launch & Monitoring Task List 20
- September Digital Ads Launch & Monitoring Task List 20
- Notice of Project Completion 3

Account General Time 1 task Incomplete tasks 0h / 0h

Account M... +1 Account Team Project General Time

+ Add a task

July Digital Ads Launch & Monitoring Task List 20 tasks Incomplete tasks 0h / 4h 20m

This is the task list template for Monthly Recurring Paid Digital/PPC Ads Launch & Monitoring

- 3 Anyone Media Plan & Launch 0h (1h 5m total) 3
- 4 Anyone Ongoing Campaign Monitoring 0h (2h 50m total) 4
- 2 Anyone Digital Ad Receipts (Delete if not needed) 0h (25m total) 2

+ Add a task

August Digital Ads Launch & Monitoring Task List 20 tasks Incomplete tasks 0h / 3h 50m

This is the task list template for Monthly Recurring Paid Digital/PPC Ads Launch & Monitoring

- 3 Anyone Media Plan & Launch 0h (1h 5m total) 3
- 4 Anyone Ongoing Campaign Monitoring 0h (2h 20m total) 4
- 2 Anyone Digital Ad Receipts (Delete if not needed) 0h (25m total) 2

+ Add a task

September Digital Ads Launch & Monitoring Task List 20 tasks Incomplete tasks 0h / 3h 50m

Notice of Project Completion 3 tasks Incomplete tasks 0h / 0h

Project Template Examples

Recurring Project: Quarterly Blog Post Development

This project is a template Use template

Q1 2026 Blog Post Development List Files Time Dashboard More... Automate

40 tasks Filter Add task list

- Task lists
- All lists 40
- Account General Time 1
- January Blog Task List 12
- February Blog Task List 12
- March Blog Task List 12
- Notice of Project Completion 3

Account General Time 1 task Incomplete tasks 0h / 0h

Account M... +1 Account Team Project General Time

+ Add a task

- January Blog Task List 12 tasks Incomplete tasks 0h / 6h 30m
 - Anyone Project Brief Creation (AM) Start: Day 1 - Due: Day 3 15m With Account Team
 - Anyone Copywriting (Copy) Start: Day 6 - Due: Day 14 2h 30m Pending
 - Anyone Copywriting Review (AM) Start: Day 7 - Due: Day 16 15m Pending
 - Anyone Copywriting Review (AD) Start: Day 7 - Due: Day 16 15m Pending
 - Anyone Internal Copywriting Revisions (Copy) Start: Day 8 - Due: Day 18 30m Pending
 - Anyone Add Blog Image (AC) Start: Day 9 - Due: Day 20 15m Pending
 - Anyone Final Internal Review (AM) Start: Day 10 - Due: Day 22 15m Pending
 - Anyone Final Review & Client Proof (AD) Start: Day 11 - Due: Day 26 30m Pending
 - Anyone Client Revisions (AM or Copy) Start: Day 12 - Due: Day 33 45m Pending
 - Anyone Final Account Review (AD) Start: Day 1 - Due: Day 34 15m Pending
 - Anyone Posting (Web) Start: Day 13 - Due: Day 37 30m Pending
 - Anyone Confirm Publication & Archive Project (AM) Start: Day 17 - Due: Day 38 15m Pending
- + Add a task

February Blog Task List 12 tasks Incomplete tasks 0h / 6h 30m

Anyone Project Brief Creation (AM) Start: Day 12 - Due: Day 14 15m With Account Team

Anyone Copywriting (Copy) Start: Day 13 - Due: Day 21 2h 30m Pending

Project Template Examples

Non-Recurring Project: White Paper Development

Home / Projects / Content & Collateral / Development: White Papers / List [Take a tour of List View](#) [Send feedback](#)

This project is a template [Use template](#)

D Development: White Papers | List | Files | Time | Dashboard | More... Automate

40 tasks Assignee or task name | Filter | Add task list

Task lists

- All lists 40
- Account General Time 1
- White Paper Development Task... 14
- White Paper Download Landing... 15
- White Paper Download Autores... 7
- Notice of Project Completion 3

Account General Time 1 task Incomplete tasks 0h / 0h

- Account M... +1 Account Team Project General Time
- + Add a task

White Paper Development Task List 14 tasks Incomplete tasks 0h / 11h 45m

This is the task list for a white paper, case study or e-book creation

- Anyone Project Brief Creation (AM) Start: Day 1 - Due: Day 5 30m With Account Team
- Anyone Copywriting (Copy) Start: Day 6 - Due: Day 12 3h 30m Pending
- Anyone Copy Review (AM) Start: Day 11 - Due: Day 13 30m Pending
- Anyone Copy Review (AD) Start: Day 12 - Due: Day 14 30m Pending
- Anyone Internal Copywriting Revisions (Copy) Start: Day 13 - Due: Day 17 45m Pending
- Anyone Final Copy Review (AM) Start: Day 14 - Due: Day 18 30m Pending
- Anyone Design (Designer) Start: Day 17 - Due: Day 21 2h 30m Pending
- Anyone Design Review (AM) Start: Day 20 - Due: Day 22 15m Pending
- Anyone Design Review (AD) Start: Day 20 - Due: Day 23 15m Pending
- Anyone Internal Design Revisions & File Mockup (Designer) Start: Day 22 - Due: Day 24 45m Pending
- Anyone Final Internal Review (AM) Start: Day 24 - Due: Day 26 15m Pending
- Anyone Final Review & Client Proof (AD) Start: Day 25 - Due: Day 32 30m Pending
- Anyone Client Revisions/Finalize File (Designer) Start: Day 32 - Due: Day 35 45m Pending
- Anyone Provide Final File to Client & Archive Project (AD) Start: Day 30 - Due: Day 36 15m Pending
- + Add a task

Almost all projects will align with our established processes that tie into project templates. There are occasionally some exceptions that require a template to be adapted during project setup. Examples of that could include:

- When a client provides copy to us, so we don't need our standard copywriting tasks
- When we're only designing a landing page and the client is handling the setup, so we don't need our web development tasks
- When we're replicating an existing project and don't need as many internal revisions tasks

Be sure to share any special details that would change your project setup when you submit your new project request.