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.

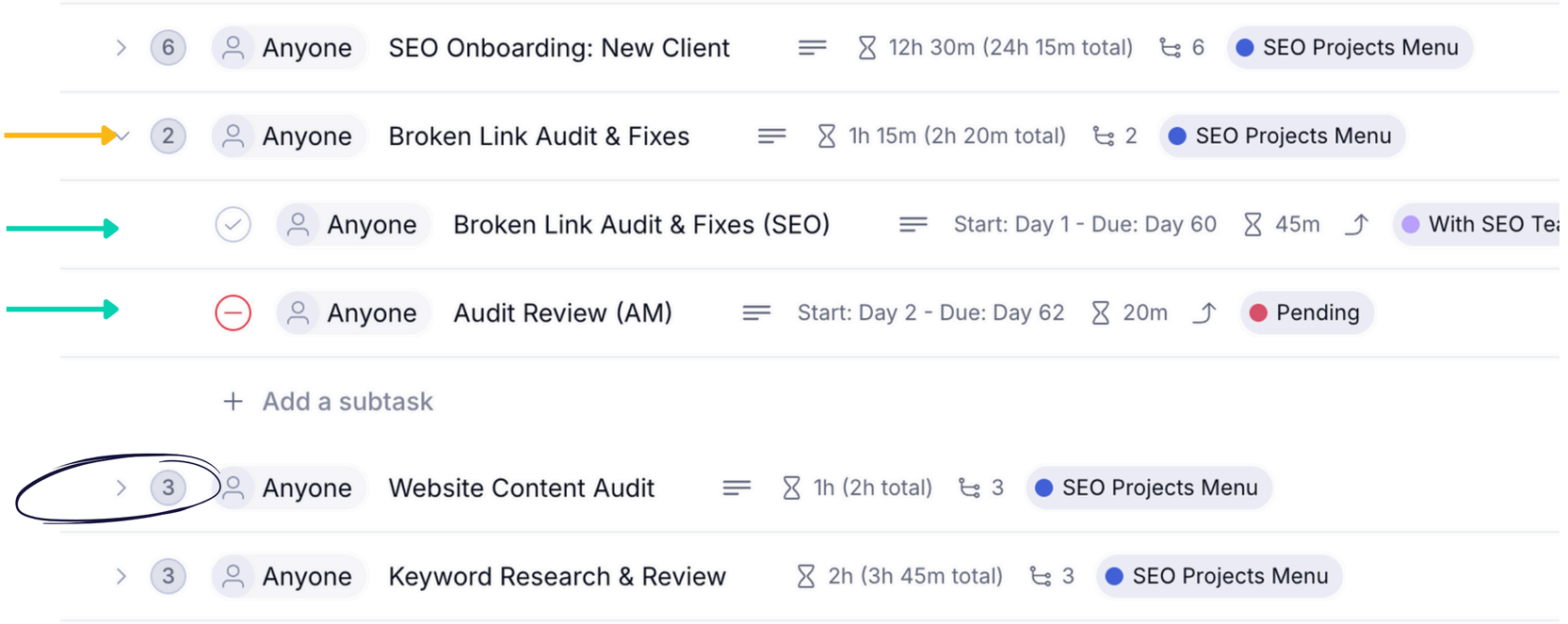
THE USE OF SUB-TASKS IN PROJECT SETUP

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

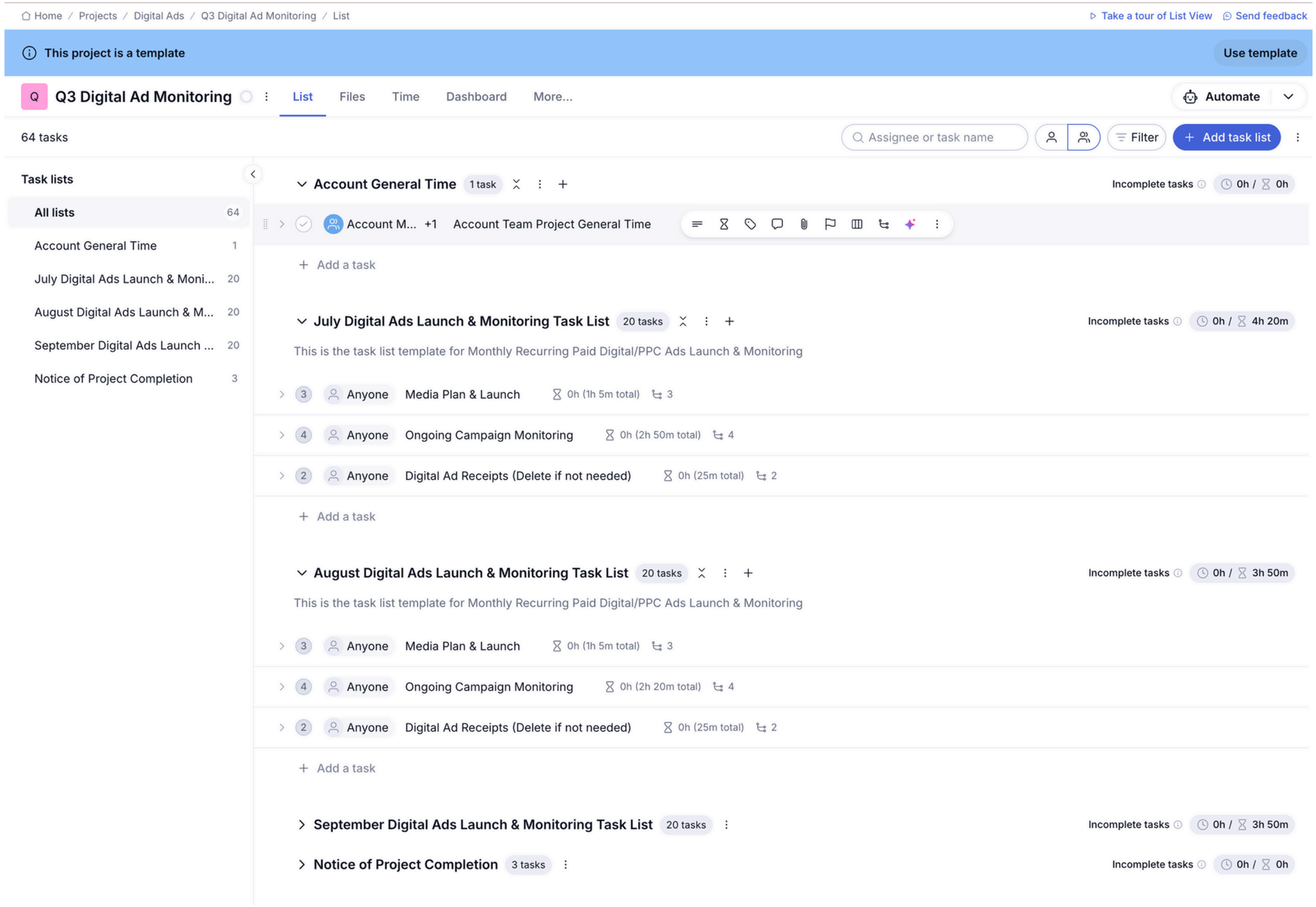
Sub-Tasks

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



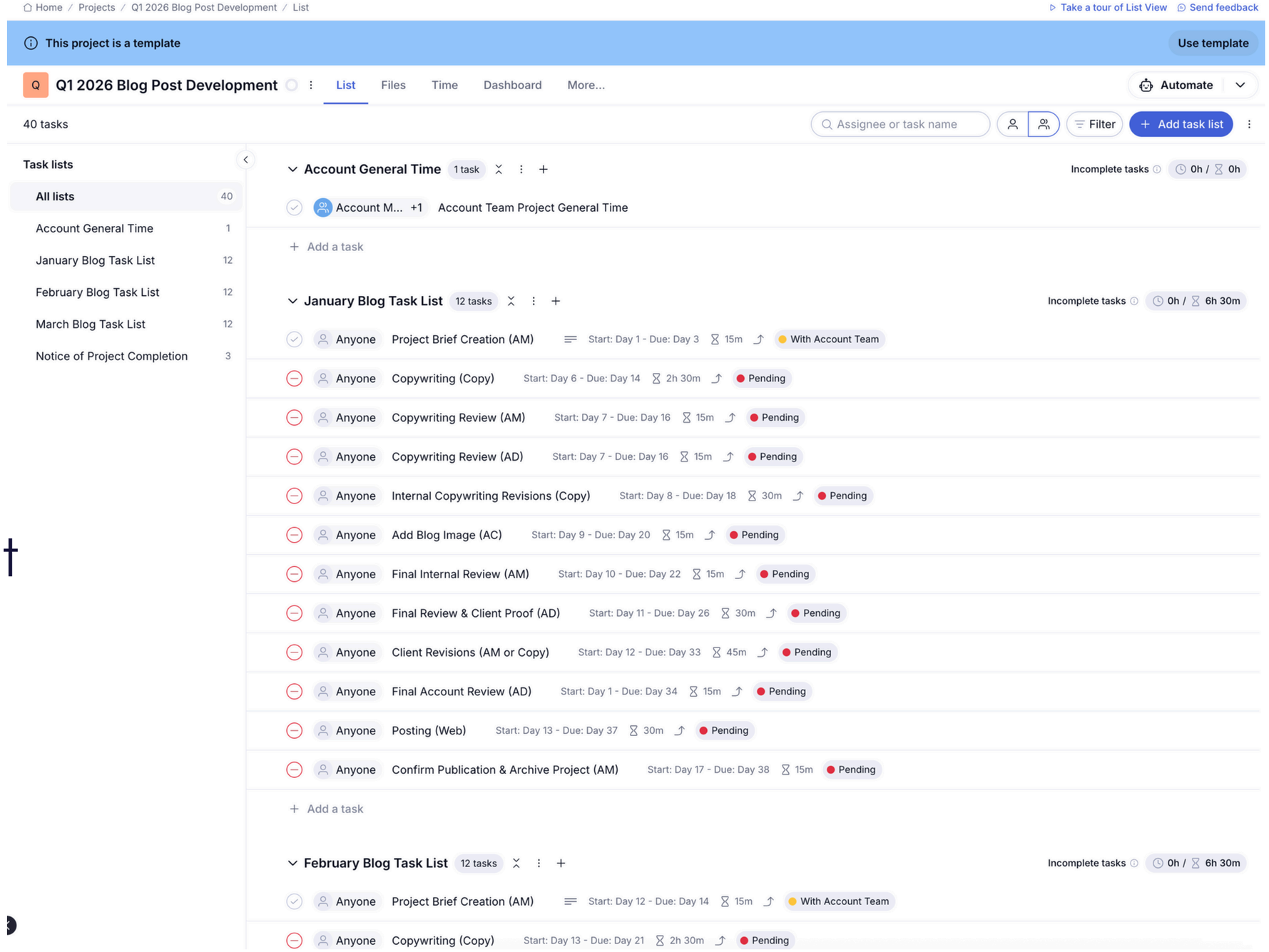
Project Template Examples

Recurring Project: Quarterly Digital Ad Monitoring



Project Template Examples

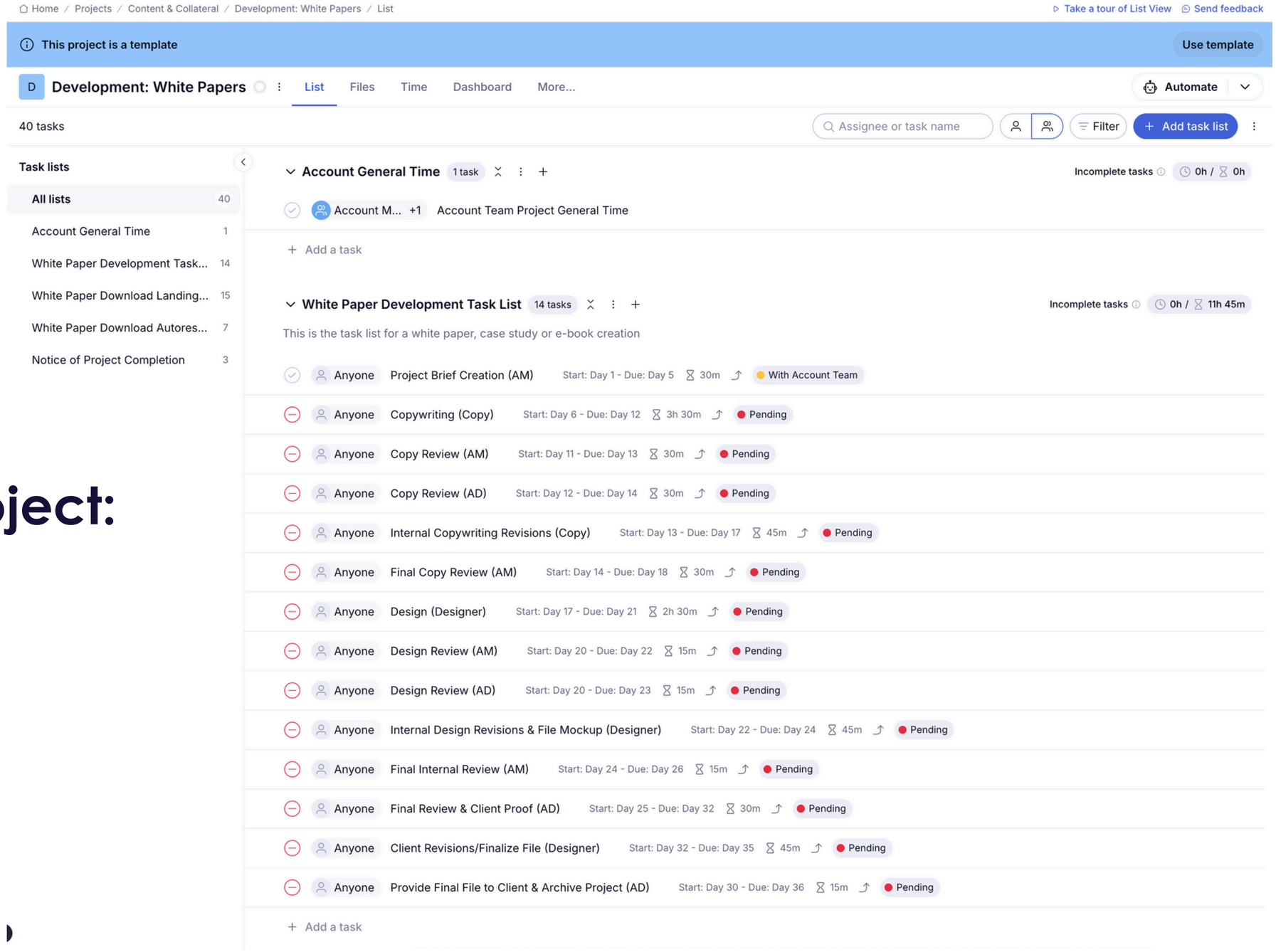
Recurring Project: Quarterly Blog Post Development



Project Template Examples

Non-Recurring Project:

White Paper Development



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.