An automated onboarding system in Asana that cut project chaos and gave back 10+ hours weekly to the agency founder."

Role: Workflow Architect

Tools: Asana, Google Drive, Automations

Client Onboarding System – Creative Marketing Agency

Overview | List | Board | Timeline | Dashboard | Gantt | Calendar | Note | Workload | Files | Messages | Workflow | +

+ Add task   Filter   Sort   Group   Options

Name	Assignee	Due date	stage	Status	Priority	Name	
Client Intake & Kickoff ⚡							
Send welcome email with onboarding form	MERCY IKUL...	16 Jun	Kickoff	Complet...	High	Mercy	
Client fills intake form	samanderso...	16 Jun	Kickoff	Complet...	High	Sam Anderson	
Create client folder in Google Drive	MERCY IKUL...	17 Jun	Kickoff	Complet...	Medium	Mercy	
Schedule kickoff call	MERCY IKUL...	17 Jun	Kickoff	Complet...	High	Mercy	
Assign Internal Team Roles 5	samanderso...	17 Jun	Kickoff	Complet...	High	Sam Anderson	
Add task...							
Strategy & Asset Collection ⚡							
Internal strategy session 4	jennyblu@g...	18 Jun	Strategy	Complet...	High	Jenny	
Request Design Assets from Client 3	MERCY IKUL...	18 Jun	Strategy	Complet...	High	Mercy	
Create Asana Subproject: Campaign Plan 4	MERCY IKUL...	18 – 19 Jun	Strategy	Complet...	Medium	Mercy	
Confirm Ad Platforms to Be Used	MERCY IKUL...	19 Jun	Strategy	Complet...	Medium	Mercy	
Collect Past Performance Reports 3	samanderso...	19 – 20 Jun	Strategy	Complet...	Medium	Sam Anderson	
Setup & Execution ⚡							
Set Up Campaign in Ad Platforms 5	jennyblu@g...	Tomorrow	Execution	In progr...	High	Jenny	
Write Ad Copy Drafts 4	sarahop@g...	23 – 24 Jun	Execution	In progr...	High	Sarah	
Design Ad Creatives 4	Olugbemie	23 – 24 Jun	Execution	In progr...	High	Gbemi	
Review & Approve Creatives	jennyblu@g...	Friday	Execution	Not start...	High	Jenny	
Schedule Posts & Ads	jennyblu@g...	Friday	Execution	Not start...	High	Jenny	
Add task...							
Launch & Review ⚡							
Launch Campaign 4	jennyblu@g...	30 Jun	Launch	Not start...	High	Jenny	
Monitor Performance Daily 4	jennyblu@g...	30 Jun – 6 Jul	Launch	Not start...	High	Jenny	
Send 1st Performance Report 4	jennyblu@g...	7 Jul	Launch	Not start...	High	Jenny	
Internal Review Meeting 4	samanderso...	8 Jul	Launch	Not start...	Medium	Sam Anderson	
Final Handover							
Upload Final Report to Drive 4	MERCY IKUL...	14 Jul	Handover	Not start...	Medium	Mercy	
Send Thank-You Email & Testimonial Request 4	MERCY IKUL...	14 Jul	Handover	Not start...	Medium	Mercy	
Archive Project in Asana 3	MERCY IKUL...	14 Jul	Handover	Not start...	Low	Mercy	
Add Client to Referral Program	MERCY IKUL...	14 Jul	Handover	Not start...	Low	Mercy	

+ Add task

Client Intake & Kick... 5

Send welcome email with onboarding form
Kickoff Completed High Mercy
MI 16 Jun

Client fills intake form
Kickoff Completed High
Sam Anderson
sa 16 Jun

Create client folder in Google Drive
Kickoff Completed Medium Mercy
MI 17 Jun

Schedule kickoff call
Kickoff Completed High Mercy
MI 17 Jun

Assign Internal Team Roles
Kickoff Completed High
Sam Anderson
sa 17 Jun   5 ⊟ ▶

Strategy & Asset C... 5

Internal strategy session
Strategy Completed High Jenny
je 18 Jun   4 ⊟ ▶

Request Design Assets from Client
Strategy Completed High Mercy
MI 18 Jun   3 ⊟ ▶

Create Asana Subproject: Campaign Plan
Strategy Completed Medium Mercy
MI 18 – 19 Jun   4 ⊟ ▶

Confirm Ad Platforms to Be Used
Strategy Completed Medium Mercy
MI 19 Jun

Collect Past Performance Reports
Strategy Completed Medium
Sam Anderson
sa 19 – 20 Jun   3 ⊟ ▶

Setup & Execution 5

Set Up Campaign in Ad Platforms
Execution In progress High Jenny
je Tomorrow   5 ⊟ ▶

Write Ad Copy Drafts
Execution In progress High Sarah
sa 23 – 24 Jun   4 ⊟ ▶

Design Ad Creatives
Execution In progress High Gbemi
OI 23 – 24 Jun   4 ⊟ ▶

Review & Approve Creatives
Execution Not started High Jenny
je Friday

Schedule Posts & Ads
Execution Not started High Jenny
je Friday

+ Add task

Launch & Review 4

Launch Campaign
Launch Not started High Jenny
je 30 Jun   4 ⊟ ▶

Monitor Performance Daily
Launch Not started High Jenny
je 30 Jun – 6 Jul   4 ⊟ ▶

Send 1st Performance Report
Launch Not started High Jenny
je 7 Jul   4 ⊟ ▶

Internal Review Meeting
Launch Not started Medium
Sam Anderson
sa 8 Jul   4 ⊟ ▶

+ Add task

Final Handover 4

Upload Final Report to Drive
Handover Not started Medium Mercy
MI 14 Jul   4 ⊟ ▶

Send Thank-You Email & Testimonial Request
Handover Not started Medium Mercy
MI 14 Jul   4 ⊟ ▶

Archive Project in Asana
Handover Not started Low Mercy
MI 14 Jul   3 ⊟ ▶

Add Client to Referral Program
Handover Not started Low Mercy
MI 14 Jul

+ Add task

+ Add task   < Today >   Weeks —

	June		July			
	W25	16 - 22	W26	23 - 29	W27	30 Jun - 6	W28	7 - 13	W29	14 - 20	W30

▼ Setup & Execution
je Set Up Campaign i... 5 ⊟ Due tomorrow
sa Write Ad Co... 4 ⊟ 23 – 24 Jun
je Review & Approve Crea... 4 ⊟ Due Friday
je Schedule Posts & Ads Due Friday
OI Design Ad Cr... 4 ⊟ 23 – 24 Jun

▼ Launch & Review
je Launch Campaign 4 ⊟ Due 30 Jun
je Monitor Performance... 4 ⊟
je Send 1st Performa... 4 ⊟ Due 7 Jul
sa Internal Review M... 4 ⊟ Due 8 Jul

▼ Final Handover
MI Upload Final Repo... 4 ⊟ Due 14 Jul
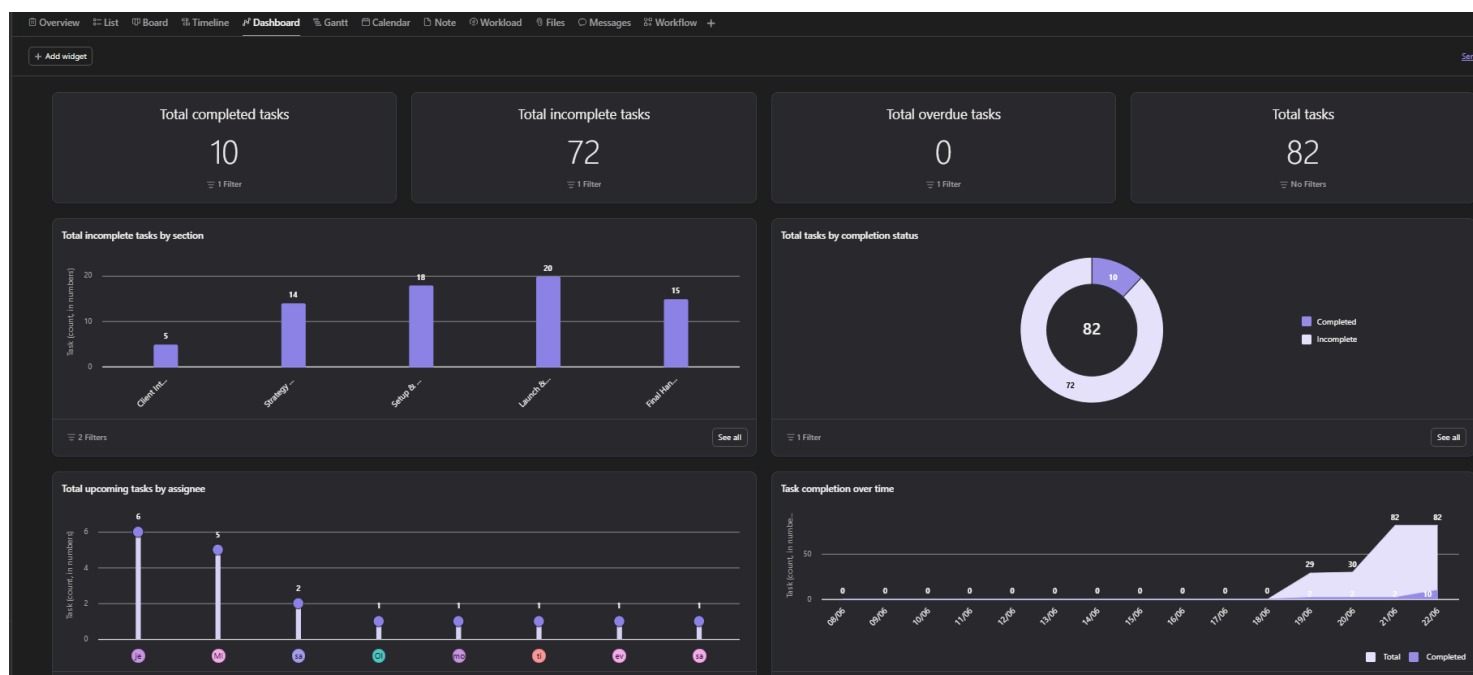MI Add Client to Referral P... Due 14 Jul
MI Archive Project in ... 3 ⊟ Due 14 Jul

The Workflow: Built for Clarity, Not Chaos

This is a fully automated onboarding and project execution system I designed inside Asana for a creative marketing agency. The goal was to eliminate chaos during client onboarding, streamline communication across teams, and ensure nothing falls through the cracks from the welcome email to the final performance report.

I broke the workflow into five clear stages:

1. Client Intake & Kickoff

2. Strategy & Asset Collection

3. Setup & Execution

4. Launch & Review

5. Final Handover

Each section includes pre-assigned tasks, start/end dates, custom fields (status, stage, priority), and clear ownership.

But the magic?

I added automation throughout the system. Tasks are automatically assigned, status changes trigger next steps, and reminders keep everyone on track with zero micromanagement.

I also created visual dashboards that give clients a bird's-eye view of task progress, overdue items, and section-by-section breakdowns.

This project isn't just a checklist. It's a living system built to run itself and scale with ease.

What This System Delivered

- Reduced onboarding time by up to 50%

- Improved team accountability and transparency with clear ownership

- Enabled automated task handoffs and progress tracking

- Gave the agency real-time visibility into task status and deadlines

- Freed up the founder's time from micromanaging operations