

Asana Governance: Naming Conventions & Custom Field Taxonomy

ISSI Technologies governance starter for consistent reporting and scale.

1. Project, Portfolio, and Team Naming

Goal: make it obvious what a thing is, where it belongs, and which quarter or period it covers.

1.1 Project pattern

[Dept] - [Workflow] - [YYQ#] - [Descriptor (optional)]

Examples:

- OPS - Client Onboarding - 25Q3
- IT - Change Requests - 25Q3 - Network
- MKT - Campaign - 25Q4 - Q4 Product Launch

1.2 Portfolio pattern

[Area] Portfolio - [YY]

- Operations Portfolio - 25
- Strategy Portfolio - 25

1.3 Team naming

[Dept] Team

- Ops Team
- Finance Team
- IT Team

2. Task and Section Naming

Tasks should start with a verb and include a strong noun. Sections define stages or categories.

- Create onboarding runbook
- Validate security questionnaire
- Submit invoice for approval

3. Custom Field Taxonomy (Starter)

Use these fields across projects for consistent dashboards and rules. See CSV for details.

- Status
- Priority
- SLA (days)
- Department
- Stage

- Risk
- Owner
- Approver
- Customer Tier
- Billable
- Data Sensitivity
- Environment

4. Status and Priority Standards

Status: Not Started; In Progress; Blocked; In Review; Done

Priority: P1 (urgent); P2; P3 (default); P4

SLA offsets: P1 = +1 day, P2 = +3 days, P3 = +5 days, P4 = +10 days

5. Dates and Versioning

Date format: YYYY-MM-DD

Quarter format: YYQ# (e.g., 25Q3)

Version suffix for templates: v1, v1.1, v2

6. Archiving & Ownership

Each template and portfolio has an Owner. Archive closed projects quarterly. Use private-by-default for sensitive work.

7. Do and Don't

- Do: keep names short, standardized, and searchable.
- Do: include quarter codes for time-bounded work.
- Don't: mix languages or add emojis in official names.
- Don't: create fields with duplicate meaning (e.g., Priority vs Urgency).

This guide is a starter. Adjust to policy and extend the taxonomy as needed.