



pixel bakery design studio

402 302 0323
2124 Y St Ste. 122
Lincoln, NE 68503

How to Project Manage in Monday.com

Using the main PM, Individual Tasks, Project Lifecycles, and Project Boards

Last Updated: Jun 16, 2022

1. Main Project Management Board

Item	Creative Lead	Project Manager	Status	Priority	Timeline	Services	Last Updated	Honeybook
Onyx Coffee - 30-Second Animation	[Avatar]	[Avatar]	Discovery	Very High	May 23 - Aug 19	#Animation	1 week ago	
Educare Lincoln - '22 Annual Report	[Avatar]	[Avatar]	Discovery	Very High	Jun 7 - Jul 31	#Animation	1 week ago	
NDOT - Day in the Life of...	[Avatar]	[Avatar]	Discovery	Very High	Jun 1 - Dec 31	#VideoPro... #PostPro...	1 week ago	
BIA - Animated Explainers	[Avatar]	[Avatar]	In Production	Very High	May 3 - Jun 30	#Anima... #PostPro...	3 weeks ago	
SNACKLINS - 2022 Q2 Retainer	[Avatar]	[Avatar]	In Production	Very High	May 1 - Jul 31	#SocialKit #Retainer	1 week ago	
Marq - Animated Explainer	[Avatar]	[Avatar]	On Hold	Very High	May 9 - Jul 1	#Animation	1 hour ago	
Kodiak Cakes - #1 Flipjack Video	[Avatar]	[Avatar]	Stuck	Very High	Feb 14 - Mar 31	#Animation	3 months ago	
ICLE - 1L2A	[Avatar]	[Avatar]	In Post-Production	Very High	May 25, '21 - Sep 1, '22	#Vide... #Ani... #Post...	1 month ago	Honeybook
NGTC (Technologue Americana)	[Avatar]	[Avatar]	In Post-Production	Very High	May 25, '21 - Sep 1, '22	#VidePro... #Anima...	1 month ago	Honeybook
ICLE - Legacy Series	[Avatar]	[Avatar]	In Post-Production	High		#VideoProduction	1 month ago	Honeybook
Raikes Beef - Raikes Makes	[Avatar]	[Avatar]	In Post-Production	High		#Vide... #Post... #SocL...	1 week ago	
Country Stampede - Festival Production	[Avatar]	[Avatar]	Estimate Sent	Very High			Just now	
NE Impact - Mural Animations/AR (Two E...)	[Avatar]	[Avatar]	Estimate Sent	Medium			1 week ago	

1. **Why does PB use it?** This board's a quick way to see all active projects, all potential projects, and what phase each project is in. It's also helpful as a PM to glance at before or during discovery meetings to get a gauge for what a new project's deadline might look like based on the studio's workload.
2. **How often do I need to update?** The end of each week, if a new client has been signed, or if a project wraps.
3. **What does this board include?**
 - A list of all **active clients** and their associated projects. **NOTE:** if you have multiple projects with a single client, list these separately.
 - Any **potential clients** and their associated projects.
 - The **creative lead** for a project (usually the ACD)
 - The **Project Manager** for a project (hey, that's you!)
 - The **phase** a project is in (discovery, pre-production, stuck, etc.)
 - The **priority** of a project, based on deadline, budget, difficulty, etc.

pixelbakery.com

Internal Use Only – Confidential



pixel bakery design studio

402 302 0323

2124 Y St Ste. 122

Lincoln, NE 68503

- The full **timeline** of a project, from the initial discovery meeting all the way to the final due date you and the client have agreed upon.
- **Services**, such as animation, video production, social kit, etc.
- **Last updated** (Monday automatically updates this)
- Link to **HoneyBook** estimate (OPTIONAL)



2. Individual Tasks Board

Item	Person	Due Date	Status	Priority	Time Estimate	Actuals	Files
<input type="checkbox"/> InExhaust - Usability Audit / Next Steps	[Avatar]	Jul 10 - 24	Needs Review	High			[Icon]
<input type="checkbox"/> NDOT - Type out call template/voicemail template	[Avatar]		Needs Review	High			[Icon]
<input type="checkbox"/> Marq - Adjust timeline	[Avatar]		Needs Review	High			
<input type="checkbox"/> PM Process Docs / Training	[Avatar]		In Progress	High			
<input type="checkbox"/> TA - Interviewees/scheduling	[Avatar]		In Progress	High			
<input type="checkbox"/> 11.2A - PM out tutorial, E02, and E03 (and social media)	[Avatar]		Next Up	High			
<input type="checkbox"/> Start spreadsheet / Monday board with NDOT contacts	[Avatar]		Stuck	High			[Icon]
<input type="checkbox"/> BIA - Schedule videos to be sent to client	[Avatar]		In Review - Client	High			
<input type="checkbox"/> PB - Case Study General Mock-Up (Mobile + Desktop)	[Avatar]		Next Week	MEDIUM			
<input type="checkbox"/> PB - Make Monday tutorial / PM blog post	[Avatar]			MEDIUM			
<input type="checkbox"/> Personal - Create 'lack toes and tolerance' stickers	[Avatar]			LOW			
<input type="checkbox"/> + Add Item							[Icons]

1. **Why does PB use it?** This board is everyone's starting point when they come in for their work day. Anything you need to get done or need the Studio to get done goes in here.
2. **How often do I need to update?** Every single day! Multiple times throughout the day if people are finishing tasks or if you're adding new ones.
3. **What does this board include?**
 - Each person has their own **individual board** that includes their personal daily tasks.
 - Each **task**, for organization purposes, must start with the client name followed by the task you need the studio member to complete, as shown. If the task is internal, label as "PB – Task Name"
 - Assign each task to the specific **teammate**, so they receive notifications if the task is updated, commented on, etc.
 - Always include **due dates** of when you need tasks completed by.
 - **Status indicators** for your teammates to let you know where they are with a task. Is it in progress? Does it need to be reviewed by the ACD? Make sure to reiterate with your team that they need to be using these status indicators.
 - The **priority** of a task. Our "very high" status has changed to a hot potato. Don't ask why, but it stuck. You are in charge of setting priorities. I always organize everyone's list based on priority, which is usually directly associated with the due date.
 - The **time estimate** for each task. You're also in charge of setting this and mastering how long it'll take to complete a task, such as storyboards, a video rough cut, etc.
 - The **actual time** it took to complete a task. The creative or board owner is in charge of adding this as they complete a task. Use this information to help educate yourself on how long certain tasks take to complete.



- A **files** column, where people can add project files for easier accessibility.

NOTE: You can also add subtasks to main tasks! Do this by clicking the arrow to the left of the main task, and it will provide you with a dropdown where you can add subtasks. This can be handy if there are multiple components that need to be completed in order to finish a larger task. It can also help to not overload someone's board, so don't be afraid to use liberally.

<input type="checkbox"/>	▼ 1L2A – Tutorials (can compile into one video after recording each) 4				Jun 14 - 20	Next Up	HIGH
<input type="checkbox"/>	Subitems		Owner	Status	Priority	Date	Time Estimate
<input type="checkbox"/>	Audio Setup					-	
<input type="checkbox"/>	Webcam Setup for both Mac and PC					-	
<input type="checkbox"/>	Lighting Setup					-	
<input type="checkbox"/>	Getting on Riverside/how to use					-	
<input type="checkbox"/>	+ Add Subitem						



3. Project Lifecycles Board

The screenshot shows the 'Project Lifecycles' board in Asana. The left sidebar contains a navigation menu with options like 'Project Management', '2022 Weekly Schedules', 'Pixel Bakery - Management', 'Project Budgeting', 'File Management', 'Proxy Management', 'BA - Animated Explainers', 'Educare Lincoln - 22 Annual Rep...', 'KLE - TL2A', 'KLE - Legacy Series', 'Kodak - #1 Flagship Video', 'Mang - Animated Explorer', 'NDOT - Day in the Life', 'Rallies - Rallies Makes', 'SNACK - 2022 Resainers', 'T.A. - ESD Site', and 'PB Web Hosting'. The main area displays three project sections:

- SNACKLINS - June** (20 items / 2 Subitems): Timeline from May 27 to Jun 7.
- Educare Lincoln**: Timeline from Jun 8 to Jun 29. Tasks include Discovery (In Progress), Pre-Production (In Progress), Production, and Post-Production.
- Onyx - Coffee Process Animation**: Timeline from May 1 to Jun 24. Tasks include Discovery (Done), Pre-Production (In Progress), Production, and Post-Production.

The 'Pre-Production' section is expanded, showing a list of subtasks with their status, assignee, due date, time estimate, and actuals.

Subitems	People	Status	Due Date	Time Estimate	Actuals	Files
Solidify 45s script with client	[Avatar]	In Progress	Jun 8 - 13			
Get any logo assets from client	[Avatar]	Done	Jun 8 - 10			
Rough storyboards for internal review	[Avatar]	Done	Jun 13 - 17	2 hrs	2	
Style frame for client review	[Avatar]	In Progress	Jun 13 - 17	2 hrs		
Client review time	[Avatar]	CLIENT	Jun 17 - 21			
Clean storyboards for client review	[Avatar]		Jun 21 - 24	3 hrs		
Find VO artist options	[Avatar]		Jun 20 - 24	1 hrs		
Find music options	[Avatar]		Jun 20 - 24	1 hrs		
Send VO artist options, music options, and clean storyboards to client	[Avatar]		Jun 24			
Client review time	[Avatar]	CLIENT	Jun 24 - 28			
Begin asset creation	[Avatar]		Jun 29 - Jul 6	3 hrs		

1. **Why does PB use it?** This board is used to manage every task within a project's lifecycle. It allows everyone to see where projects are at, tasks for each phase, an overall timeline, and helps keep everyone on the same page. It's also amazing to refer to during client meetings if they ask about next steps or if you want to communicate deadlines.
IMPORTANT NOTE: Try to get the team to communicate the most via this board.
2. **How often do I need to update?** Multiple times throughout the day, every day.
3. **What does this board include?**
 - The **four phases** of a project with their designated statuses, the people in each phase, and timelines.
 - **Subtasks** under each phase with the person in charge of completing the task, the task status, the due date, time estimates, actuals, and files.
 - This channel is and should become increasingly used to communicate within Monday, either to give updates, to post files in, etc. Make sure to remind creatives of that.



pixel bakery design studio

402 302 0323

2124 Y St Ste. 122

Lincoln, NE 68503

NOTE: Refer to the other two documents – [Lifecycle of an Animation Project](#) and [Lifecycle of a Video Production](#) – to get a better understanding of what tasks might be included in each phase of a project. Remember that no two projects are the same, but these are good guides to follow until you get the swing of things.



4. Individual Project Boards

Item	Title	Company	Type	Phone	Email
Brittney Lippincott	Marketing & Special Events Coordinator	BIA-NE	Client		brittney@biame.org
Paula Dodds	Outstanding Operations & Creative Content	BIA-NE	Client		paula@biame.org
Peggy		BIA-NE	Client		peggy@biame.org
Jordan Lambrecht	Director	PB	Studio		jordan@pixelbakery.com
Samee Callahan	ACD	PB	Studio		samee@pixelbakery.com
Olivia Boldt	Project Manager	PB	Studio		olivia@pixelbakery.com
Dan Hinz	Animation Lead	PB	Studio		
Rebecca Cook	Concept Artist	PB	Studio		

1. **Why does PB use it?** These boards were created for exact moments like this: to easily be able to hand off clients and projects to people that follow me as a PM. By keeping track of this info, you can do the same for the person that succeeds you. These are also quick ways for creatives to go in and find documents they need, and for leadership to keep track of COGs.
2. **How often do I need to update?** Once a week.
3. **What does this board include?**
 - In these separate project boards, I generally make a Contacts, Documents, and Project Costs boards.
 - The **Contacts** board includes all people on a project, including Studio members. Try to include as much client contact info as possible.
 - The **Documents** board (shown below) contains all meeting notes, client assets, internal documents, deliverables, and project documents. Basically, include everything that can be found on Google Drive and the Server, plus all clerical documents.
 - Finally, the **Project Costs** board (can also be called 'Accounts Payable', as shown below) keeps track of any mileage, props, equipment rental, contractor, or internal costs. Here, you can upload invoices and keep track of project totals.



pixel bakery design studio

402 302 0323

2124 Y St Ste. 122

Lincoln, NE 68503

BIA – Documents

Use this space to keep track of any documents/files generated during the lifecycle of a project. The Main Table... See More

Main Table | File View | Online Docs | +

Integrate | Automate

New Item | Search | Person | Filter | Sort | Hide

Meeting Notes

Item	Created By	Client Acce...	File Upload	File URL	Comments	Tags	+
Pre-RFP Submission Meeting Notes	PB Team						
Kick-Off Meeting Notes	PB Team						
+ Add Item							

Internal & Clerical Docs

Item	Created By	Client Acce...	File Upload	File URL	Comments	Tags	+
Client Brand Exploration Survey	PB Team			https://www.honeybook.com/app/flow/62742...			
+ Add Item							

Client-Provided Assets

Item	Created By	Client Acce...	File Upload	File URL	Comments	Tags	+
BIA NE Logo B&W	Client						
BIA NE Logo eps	Client						
BIA NE Logo REV eps	Client						
BIA NE Logo REV Color eps	Client						
Branding in Action – 2022 Conference	Client						
Branding in Action – Blazing Trails Fundraising Event	Client						
Branding in Action – Flyers	Client						
Branding in Action – Holiday Social Post Graphic	Client						
Branding in Action – Print Ad	Client						
+ Add Item							

Project Documents

Item	Created By	Client Acce...	File Upload	File URL	Comments	Tags	+
Script Living Doc	PB Team						
Milanote Board	PB Team			https://app.milanote.com/1N0a911qV97j7p...			

Accounts Payable

Click to Edit

Integrate | Automate / 1

New Item | Search | Person | Filter | Sort | Hide

General

Item	Vendor / Contractor	Invoice / Receipt	Status	Amount	Billable	\$BilledClient	Billed2Client?	Date Paid	Project Cost Tr...	+
Q1 – Samee's Mileage			Not Paid	\$533.02		\$0			-	
+ Add Item				\$533.02 sum	0 / 1	\$0 sum				

Props

Item	Vendor / Contractor	Invoice / Receipt	Status	Amount	Billable	\$BilledClient	Billed2Client?	Date Paid	Project Cost Tr...	+
Q1 – Michaels			Not Paid	\$35.97		\$0			-	
Q1 – Target			Not Paid	\$74.99		\$0			-	
Q2 – Amazon Order			Not Paid	\$50.79		\$60.876	Not Yet		-	
+ Add Item				\$161.63 sum	1 / 3	\$60.876 sum				

Contractors

Item	Vendor / Contractor	Invoice / Receipt	Status	Amount	Billable	\$BilledClient	Billed2Client?	Date Paid	Project Cost Tr...	+
Q1 – Product Photography	Adam Schultze		Paid in Full	\$600		\$0			-	
+ Add Item	Adam Schultze			\$600 sum	0 / 1	\$0 sum				

pixelbakery.com

Internal Use Only – Confidential