CU I&E Submission: Asana Project Management for External Vendors [1]

Category

Finance & Accounting

Submitted By

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Project Description

The Finance and HR team at the Renée Crown Wellness Institute created a project management system in Asana to track all payments to external vendors. As a research Institute that centers equitable community partnerships, we process a significant volume of external payments in support of our community-based participatory research. To facilitate mutual understanding between study investigators and Institute administrators, we created a comprehensive system to track all external payments from inception to close out.

This Asana system contains systems for requesting new payments, clarifying payment mechanisms, tracking scopes of work and purchase orders, paying invoices, modifying purchase orders, and sunsetting agreements. Institute leadership, study investigators, and administrators all have access to this project management system and unique roles for each employee type is detailed in a comprehensive internal Standard Operating Procedures document.

Project Efficiency

The greatest efficiency lies in having one central place for tracking external vendors. When a team member needs information about an external vendor, the information is easily located in

less than one minute. The system also clarifies unique roles for each employee type to streamline workflows and reduce inefficiencies and duplication of effort. It is innovative to have one system that works for multiple stakeholders at the Crown Institute.

Project Inspiration

We were inspired to create this system to streamline our workflows and increase transparency between the administrative team members, Institute leadership, and study personnel.

What Makes You Happiest about this Project?

We get happy about this project when it works as intended and saves people time and energy. This happens nearly every day because it is easy to track the details of our relationships with external vendors in this system.

Additional Information

Source URL: https://www.cu.edu/controller/i-e-awards/past-submissions/cu-ie-submission-asana-project-management-external-vendors

Links
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