Add effort estimates using work management tools

Previously, you discovered that work management tools can help you focus on project planning, team alignment, and resource allocation, and you even explored how tools like Asana can help you create a backlog. You also learned that adding estimates to backlog items informs planning practices by helping you and your team understand how much effort it will be to finish each item or user story.

In this reading, you'll review how to use work management tools to add effort estimates, similar to the previous activity where you updated the Virtual Verde Product Backlog manually. This example will showcase these skills using Asana; however, you can also apply these concepts to other tools!

Work management tools and effort estimates

It isn't always easy to estimate how much time it will take to complete a task. We often underestimate the time it takes to do something, which can create issues with expectations, deadlines, and budgeting on big projects.

To avoid this, you can practice relative estimation by comparing the effort of that task to the effort for another task to create the estimate instead of trying to determine exactly how long it will take.

Note: If you would like to follow along, you can create an Asana account for free here. When you sign up, your free 30-day Premium trial will start automatically. If you signed up for Asana in an earlier course and are still within the 30-day trial, you can log in to that account to access Premium features. You can also access free tools like ClickUp or Monday to explore their interfaces!

Upload a CSV file to create a new project

In the activity *Add estimation*, you updated the Virtual Verde Product Backlog by adding effort estimation to user stories and acceptance criteria. You can apply the same concept to the work management tools you're using! Previously, you learned about using templates in tools like Asana in order to create new projects, but you can also upload a CSV file to input project details. This is a great option for moving your workflow out of a spreadsheet software like Excel or Google Sheets directly to the work management tool your team uses. That way you can get started right away on any project.

From your dashboard, you can click the Create button to create a new project. Instead of choosing the Use a template option, you can select Import spreadsheet to upload a CSV file. You'll be prompted to name the project—in this case, the project will be called Virtual Verde Backlog.

Create a new project

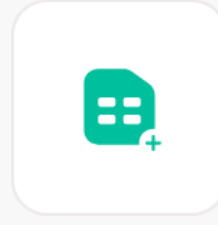## How would you like to start?

Blank project
Start from scratch

Use a template
Choose from library

Import spreadsheet
Add from another tool

After uploading the CSV file of your choice, you'll be able to preview the project to ensure that the upload was successful before finalizing the project.

Here's a preview of your Asana project

Go to your project or make changes if something doesn't look right.

[Make changes] [Go to project]

Importing 115 rows as tasks

User story / Acceptance Criteria	Section/Column	Subtask of	Epic	Description	Value	Estimate (Story Points)	Order
Credit or return policy	Backlog		Plant Care Initiatives	As a plant owner, I wan…	$		27
Customer chat	Backlog		Plant Care Initiatives	As a plant owner, I wan…	$		25
Instruction manual	Backlog		Plant Care Initiatives	As a plant owner, I wan…	$$$		4
Low maintenance options	Backlog		Plant Care Initiatives	As a plant owner, I wan…	$$$		7
Plant care kit	Backlog		Plant Care Initiatives	As a plant owner, I wan…	$$		13
Video tutorials	Backlog		Plant Care Initiatives	As a plant owner, I wan…	$$		21
Cut Flower arrangement	Backlog		Flowering plants	As a customer, I want t…	$	3	29
Succulents: single	Backlog		Succulents	As a customer, I want t…	$	5	28
Bonsai Trees: Browsing	Backlog		Bonsai trees	As a customer, I want t…	$$	5	20
Bonsai Trees: Care and Maintenance Booklet	Backlog			As a customer, I want t…	$$		

Add the effort estimation

When you import the CSV file, Asana automatically generates some custom fields for your Backlog: in this case, it has added "Epic," "Value," and "Estimate (Story Points)."

You can type directly in the "Estimate" column to add estimates to your Backlog items. In this case, it's the same estimates from the last activity:

- Low-maintenance options: 8

- Plant care tips: 8

- Plant care tools: 13

- Watering reminders: 5

- Expert help and advice: 8

- Return policy: 5

Sort user stories

Depending on how you want to organize the stories in your backlog, you might choose to sort by any of the custom fields. This allows you to customize the organization of your backlog.

In this case, the project will be sorted by "Value." After sorting, you can select the three dots at the upper-right corner of the Backlog and choose Save layout as default. This will make sorting by "Value" the default layout for this project. Once you've organized your user stories, you can switch to Board view to work with them in a Kanban-style Backlog. Finally, to make Board view the default layout, just select the three dots at the upper-right corner of the Backlog and choose Save layout as default.

Key takeaways

The beauty of using a tool like Asana to manage a Backlog is how quickly and easily you can convert your plans into action! You can give each user story an assignee and a due date to make it clear who's responsible for what, and when it needs to get done. Then, you can keep everyone on the same page by publishing weekly status updates, highlighting accomplishments, progress, and blockers.

For more information, and to practice using Asana for Agile and Scrum processes, check out Asana for Agile and Scrum.