

Manager
Fills Out
Form



Data is sent to
Google Sheet

Form
submission
triggers script.

Deck is created
based on
Template and
submitted info

Link to new
deck is emailed
to submitter
(and/or others)

Spreadsheet change triggers Asana
Task Creation. The Asana task contains
brief description as well as a link to the
generated Deck

Parent Task Creation Triggers sub-task creation
for individuals to fill in missing data. Every
Assignee has edit access to the deck.

Within seconds of submitting the form we have:

- Formatted deck containing all info submitted through form
 - Anyone with access to the shared drive can edit this deck
 - Emails have been sent containing a link to the deck.

Within minutes we have*:

- An Asana parent task with subtasks to verify information and fill in anything missing.
 - Contains link to document so it's always easy to find

* there is a slight delay for Asana task creation after submitting the form.

Each Assignee adds or verifies
their info in the deck

Each Assignee marks their subtask
as complete.

Parent task is marked as complete.

Working on uploading new record to
client servicing in Insightly when parent
task is marked as complete.

Deck is ready to be sent out.

I'd like to create a logo database eventually so
that you just select brands that we work with
from a dropdown and it autopopulates their
logos into correct spot.