

Monday.com

As our team continues tighten the number of staff, increases in efficiencies, tracking and workload management are more important than ever. Monday.com will help streamline our workflows, improve visibility, and make our daily tasks easier to manage.

1

What is monday.com?

- ▶ A Work Operating System (Work OS)
- ▶ Central place to track, manage, and organize work
- ▶ Flexible for simple tasks or complex workflows

2

Key Benefits for Our Team

- ▶ Clear ownership and accountability
- ▶ Less manual tracking
- ▶ Real-time visibility
- ▶ Consistent processes

3

Monday.com Board Example

Board 1

Main Table | Workload | Dashboard | Kanban | Gantt | Cards | Form | Files Gallery

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

Group Title	Item	Person	Status	Date	Estimated work...	Files	+
Group Title	Item 1	[Avatar]	Block	Nov 30, 2022	5		
	Item 2	[Avatar]	Working on it	Nov 30, 2022	10		
	Item 3	[Avatar]	Done	Nov 30, 2022	20		
	Item 4	[Avatar]	Working on it	Dec 10, 2022	15		
	Item 5	[Avatar]	Done	Dec 24, 2022	20		
+ Add Item					70	sum	
Group Title	Item 4	[Avatar]	Block	Dec 5, 2022			
	Item 5	[Avatar]	Block	Dec 6, 2022			
	+ Add Item					0	sum

4

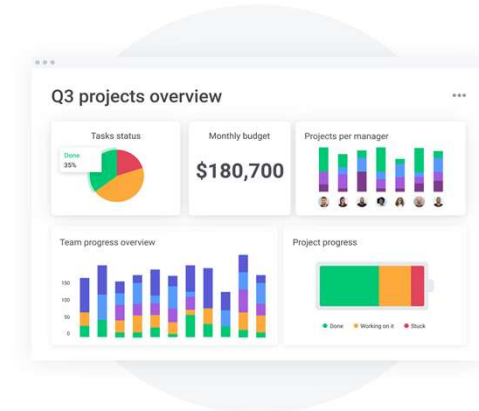
Forms (WorkForms)

- ▶ Used to collect requests and information
- ▶ Submissions become items on boards
- ▶ Replaces emails and spreadsheets

5

Reporting & Dashboards

- ▶ Visual summaries of work
- ▶ Pull data from one or more boards
- ▶ Always live and up to date



6

Why It Matters

- ▶ Form submitted
- ▶ Item created
- ▶ Work managed on boards
- ▶ Dashboards show progress
- ▶ Less confusion
- ▶ More consistency
- ▶ Better decisions
- ▶ One source of truth

7

Next Steps

- ▶ Annual Fee
- ▶ Training on boards and forms
- ▶ Standardized workflows
- ▶ Using dashboards for check-ins

8