Basecamp Webinar

Project Management 101 Series

Session goals and objectives

- Basecamp Orientation

- Assume the role of a Project Manager or Admin

- Practical application of Workshop content

- Apply Basecamp Best Practices

Session Content

- Signing up
- Creating a profile
- Setting up notifications
- Setting up a new project
- Communicating with your team
- Creating To-Dos
- Setting up automatic messages
- Handling Docs and Files
- Enabling Client Access
- Getting Support quickly

Demo: Signing up for Basecamp

3,929 businesses signed up for Basecamp last week. Join them!

"We can see exactly what needs to be done and when. We were missing tasks and deadlines before we found Basecamp. We're much more efficient now."
-Tina Lannin, 121 Captions

"Communication with clients now goes super smoothly."
-George Groves, Piehole.TV

Sign up with your email address:

julie@widgetco.com

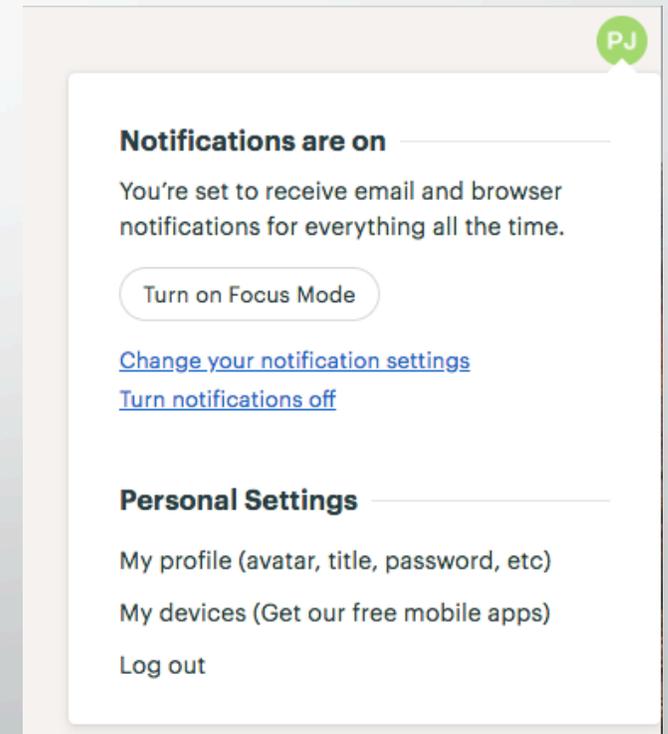**Start your free 30 day trial**

Or

Use your Google account

Navigating Basecamp

The Homepage

- Navigation Bar

- HQ

- Teams

- Projects

Update your Profile and Preferences

- Notification Settings (What/how/when)
- Profile settings
- Switching to Google Sign-in
- Devices (iOS and Android)
- Adminland

Projects

Client-side

- Adding Clients at the Project level

- Welcome letter with a link + Pin

- Client-side is now visible

- Turning off
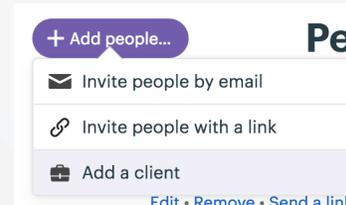
Projects - tools

- Campfire: Used for Group Chat

- Message Board: For more detailed content/discussions

- To-dos: Organize work assignments

- Schedule: Due dates, milestones and events

- Automatic Check-ins: Ask your team questions
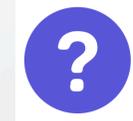
- Docs & Files: Organize reference materials

- Email Forwards: Forward emails into basecamp

Creating a new Project

- Click on New

- Provide a name

- Additional Settings
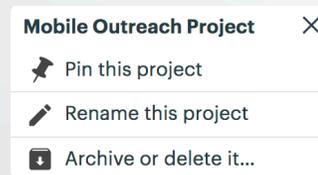
- Click on the Project Tile

- Setup Wizard
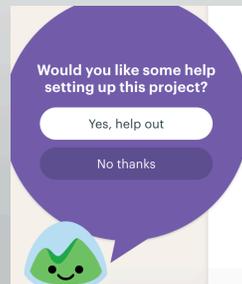
- Guided Setup

OK, great! First, do you have a start date or a deadline for the work you'll be doing?

Next, have any files (images, PDFs, Google Docs, etc.) that you'll need to work on the project?

Next, want to jot down a list of things that need to be done on this project?

Last step! Want to write a kickoff message to introduce this project?

Campfire

- Great for formal announcements
- Use @person to address them
- Chats show up in their "Hey!" activity
- Follow to show up in your feed

Message Board

- Structured conversations, great for
  - Announcements, Updates, Pitches, Focused Discussions
- Messages
- Message Categories [Announcements/FYIs/Heartbeats/Pitches/Questions]
- Control the audience
- Post immediately or save in drafts (Homepage)

To-do Lists

Define Event Space ① ▶ 1/5 completed

☐ Identify potential layout plans 📅 Thu, Apr 19 Ⓙ Joanne M.

- Assign tasks, due dates, add attachments

- Track Statuses

- Organize Tasks into Lists ✚ New list

- Drag and Drop ordering

- Add to-dos to lists Add a to-do

- Subscribe to get updates

- Share with the public 🔗 Get a public link

Schedule

- Create Events and track them here

- Lists to-dos and tasks due on specific dates

- Update task status in calendar

- Sync with your Google/Outlook/Apple calendar

- Share with the public 🔗 Get a public link

Automatic Check-ins

- Eliminate unnecessary meetings

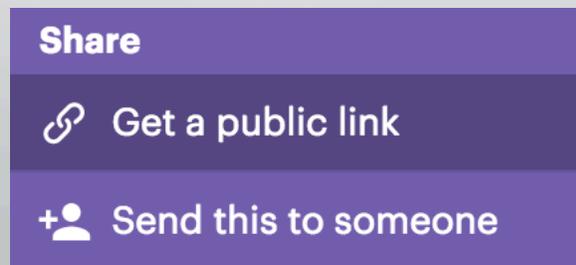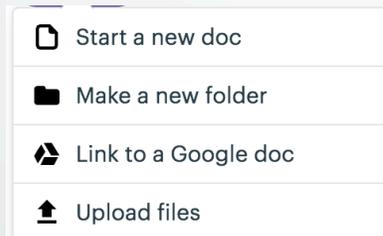- Posting a new question

  - Question / Frequency + Time / People to ask

- Options
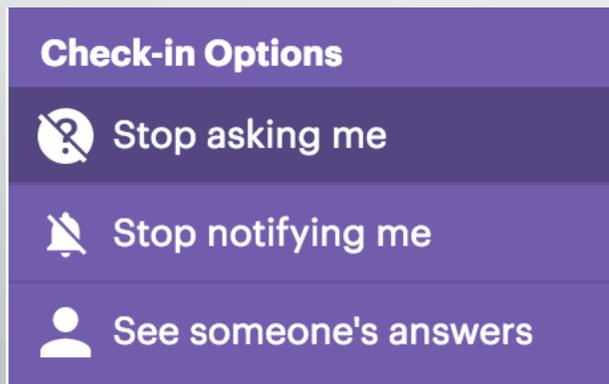
Docs & Files

- Put templates and shared documents here

- Create Documents

- Organize Files into Folders

- Link to Google Docs

- Drag files into folders

- Sharing Options

Getting help

- Help Menu ⊘

- Contact Support (scroll down)   Need a hand with anything? We're standing by!

- Additional options: Email/Twitter/Live Classes

Best Practices

- Campfire is NOT private

- Use the Document section for reusable files

- Archive old projects

- Start with a project, then roll out to a larger group

Conclusion

- Next Session: Asana
- Additional Resources:
  - Website link to download: http://www.samsena.com/PM-101-2018

Appendix: Permissions

Permissions

Who can do what?

Clients can only:

- Reply to emails sent from the Clientside. Learn more about working with clients.