



WORK  PERFECT

**THE ULTIMATE GUIDE
TO MONDAY.COM**

Your blueprint to success for work that flows –
from process to powerful productivity.

A white architectural floor plan is overlaid on a dark blue background. The plan shows a grid of rooms and corridors. A large room on the right contains a circular table and chairs. A smaller room above it has a desk and chair. A central area has a circular table with chairs. A dimension line labeled '1500' is visible in the lower right. The word 'CONTENTS' is written in a bold, orange, textured font in the upper left.

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YOU'RE ALL SET UP ON MONDAY.COM...

...the question is: what next? Whether you're a platform first-timer or an admin aficionado, you need to know which processes to prioritise when, and how to implement them effectively.

Knowing how to do so, however, can mean the difference between wasted hours or workflow harmony. So what do you do? What should you do?

This guide has been designed to answer just that. Your ultimate go-to for everything monday.com, **we've created a blueprint to help you champion change and empower your processes – from wherever you are on your productivity journey.**

Of course, managing change is never easy – especially when it comes to your everyday operations. Processes evolve, people come and go; new projects need new workflows. And let's not forget the ever-changing reporting requests from leadership. Staying on top of it all can often feel like an overwhelming task.

But with the right expertise and monday.com know-how, you can build a productivity powerhouse that keeps you in pole position of your processes – and delivering work that flows.

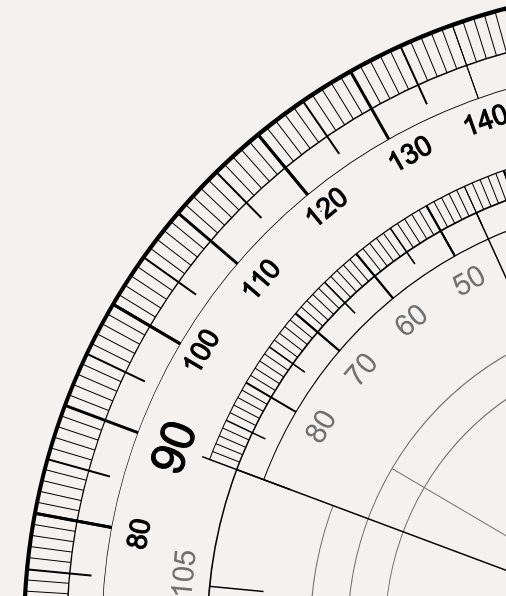
Throughout this guide, you'll find unique insights from monday.com experts to help you elevate everyday efficiencies. From how to set up for success (and what to do when you get there), to best practices on structuring workspaces and workflows – and even how to enhance your account architecture and accelerate user adoption as an advanced admin.

You'll uncover survey perspectives from other monday.com users for you to benchmark and check-in with, as well as a case study on how to harness the power of monday.com as a 'single source of truth' in your operations.

From day one to project done, this guide will navigate you through it all – helping you win with workflows that deliver a better monday.com experience, for all.

This guide will help you...

- ✔ Prioritise processes
- ✔ Streamline workflows
- ✔ Enhance efficiencies
- ✔ Champion change management
- ✔ Manage delivery
- ✔ Futureproof foundations for scalable growth



SETTING UP FOR SUCCESS: THE FIRST 90 DAYS

monday.com is a powerful platform for building processes with speed and simplicity – but move too fast, and you may well find yourself untangling hours of hard work that could have been easily avoided with the right planning in place.

In this chapter, we'll walk you through how to set up for success in your first 90 days.

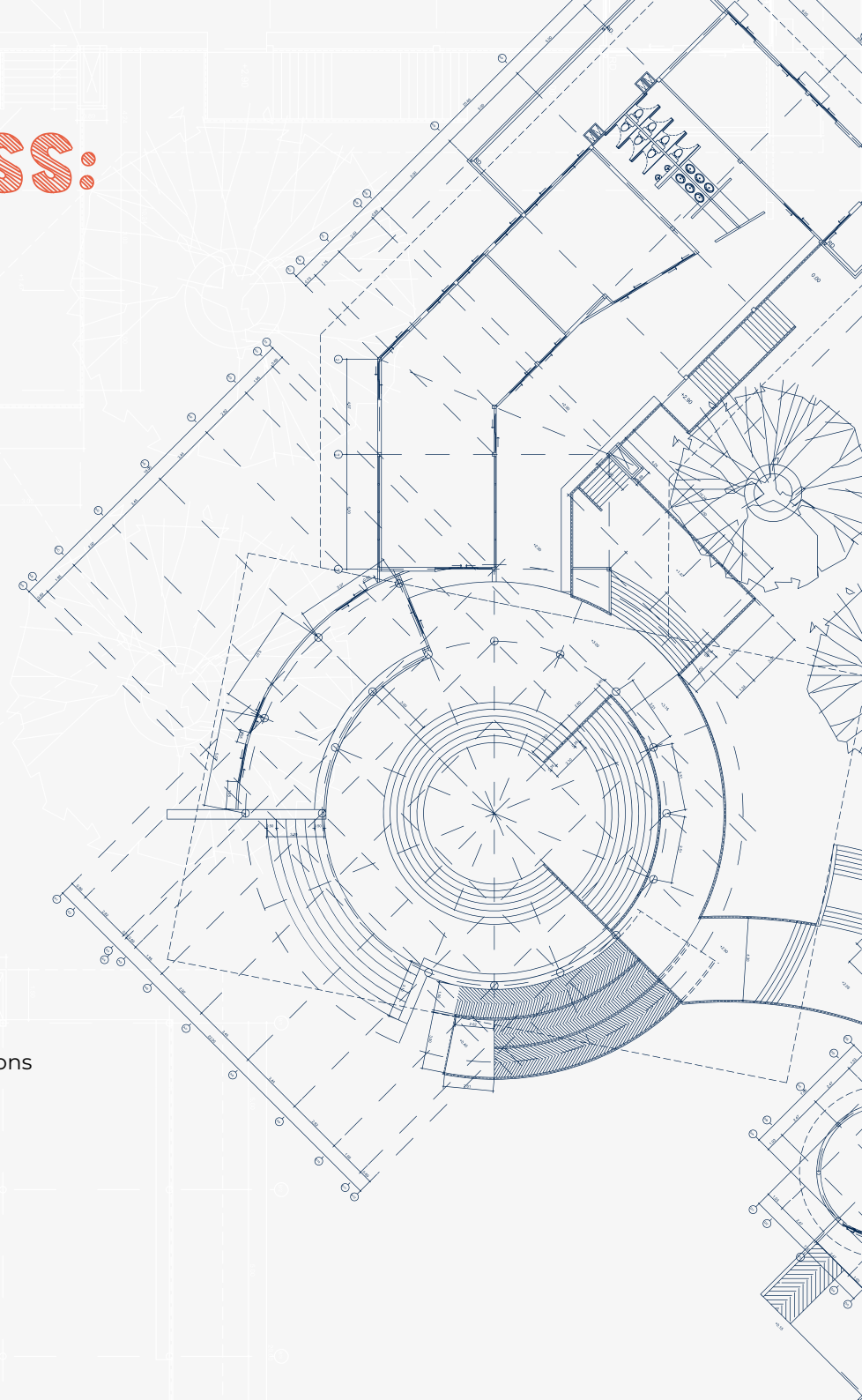
Onboarding your operations into monday.com is a case of 'measure twice, cut once' It's about getting clear with the what, when, who and how of your processes – before you start transitioning them into the platform.

With some expert insight from Sarah Taouk, Work Perfect's Project Manager and Change Management consultant, we've put together a step-by-step play of what to do when, and why.

BEFORE YOU START

Whether you're taking your first steps as a new admin or evolving your monday.com operations as a seasoned pro, the same rules apply: Down tools, take stock of your current processes and get clear with what you're looking to achieve strategically, before you do anything else.

Define your operational objectives. Get to grips with the processes that work for you, and those that don't. Get clear on business critical workflows that need protecting. Confirm key delivery data and reporting insights the business will want to engage with.





Admin top tip

Get clear on your 3 O's :
Objectives, Outcomes & Onboarding

As Sarah Taouk, Project Manager and Change Management consultant at Work Perfect, explains: **“You need to clearly articulate what you’re using monday.com for and what you want to track... once you put people in there and they start getting the hang of it, they’ll start running wild – which makes it harder for [operational owners] to get the right, high-level view of the data they need to track, because it needs to be standardised at a tactical level.”**

Success here is as much about managing your people as it is getting clear on your operational objectives; don't let excitement scupper efficient onboarding. Work out what you want to achieve, how that translates into monday.com – then communicate that back to your core user colleagues and wider stakeholders to avoid anyone getting ahead of themselves (or your plans).

And if you're an admin looking to take your next steps in monday.com, Sarah's advice is clear: **“Audit what you’ve already built and clean up what exists, to know where your gaps are...it’s essential to really understand what is in monday.com and what isn’t.”** Archive legacy projects and workflows; put a hold on anything 'new' and communicate updates and activities with your team to keep everyone aligned with current activities and next steps.

With clarity on your operational objectives and intended outcomes, you're now ready to introduce your people and processes to the platform.



“You need to clearly articulate what you’re using monday.com for and what you want to track.”

Sarah Taouk, Project Manager & Change Management Consultant, Work Perfect

THE FIRST 30 DAYS



While it's easy to get excited and invite new users into the platform post-haste, resist the temptation. Instead, focus on building the right process and workflow foundations first. Doing so will help you identify inefficiencies and iterate until you're happy they're fit for purpose.

When your users do join, they'll be met with a well-considered environment that's far more likely to deliver a positive experience and accelerate adoption.

As Sarah Taouk continues: **“Do you have an existing process that you're going to replicate in monday.com, or is it entirely new? Either way, will it duplicate your data entry? Are you working with another department, and are they filling out another spreadsheet that your users are now going to have to look at? Because if so, that's not going to encourage adoption if users have to look at data in multiple places.”**



Top tip
Protect your process builds and create a 'sandbox' for new users to learn the platform in a controlled environment.

Success here is not just about building the right processes, but about understanding the external relationships they hold and the reciprocal impacts they may have on one another.

Map your target processes and trace back all data inputs and outputs they require to work. Do the same for individuals and teams responsible for that data. Are there conflicting process duplications? How can they be solved? Does this process require reconsidering a wider workflow?

Once you've stress-tested your primary processes and mitigated any duplications this way, you can now consider inviting your users to join.

As Sarah concludes: **“It's important to get people comfortable with the platform, but only when you're ready. Offer them basic upskilling on the platform. Get them comfortable, as it's the first layer of resistance you can avoid...showing them how user friendly it can be is a real game-changer.”**



The Pro's Prep Checklist

Make sure you've asked yourself these questions before building anything...

- ✓ Is this an existing process?
- ✓ Which departments will this process impact?
- ✓ Where is data being captured currently?
- ✓ Will I duplicate any other data or workflows?

THE NEXT 30 DAYS



With your primary processes and core users now engaged at a basic level in monday.com, it's time to get specific. Solution-specific. While your users should now be versed in the platform's core functionality, they're still on a learning curve. Keep the momentum; this is where adoption tops or drops.

As Sarah explains: **“Your success is ultimately dictated by the people using the platform. At this point, you need to keep them engaged with solution-specific training, which includes establishing business rules such as defining what it means to turn a status to ‘done’. What it means to one person can be entirely different for another, so define that clearly and embed this in your day-to-day communications.”**

From defining status updates and naming protocols – to agreeing where and how to upload notes and assets – this is where user engagement elevates process efficiency in monday.com.

Over the next 30 days, you're looking to unlock new ways of working in the platform – keeping everyone aligned, creating common protocols and advancing a more granular understanding of process management across monday.com.



Top tip

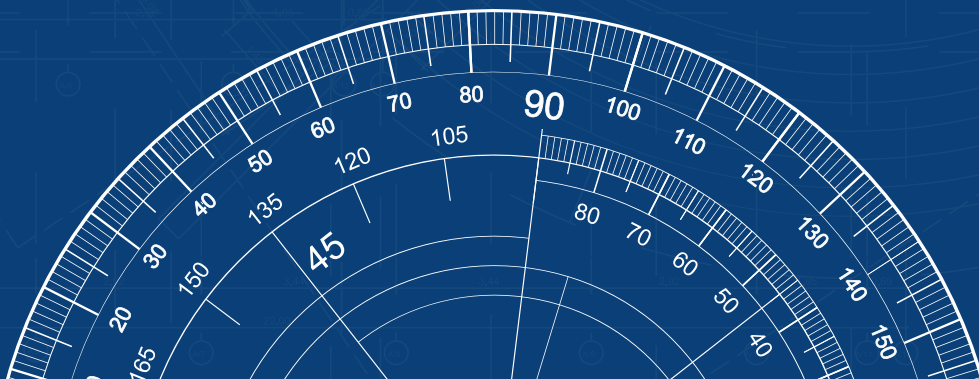
Create a monday.com 'Rules of Engagement' document for users to refer to when learning processes and protocols

Managing users, notifications & permissions: A checklist

When adding a new user into monday.com, make sure you have...

- ✔ Set the correct permission levels
- ✔ Added them to applicable Teams
- ✔ Asked them to complete their profile
- ✔ Invited them to specific Workspaces & Boards
- ✔ Removed unnecessary notifications
- ✔ Booked their onboarding training

For more practical user guides and how-to's, head on over to our [Ultimate Cheat Sheet](#)



GETTING TO DAY 90



If the first 60 days belong to planning, building, testing and training – your next 30 days are all about feedback and refinement. By this point, your processes and people should be working in relative harmony, but they won't be perfect. That's exactly where you want to be.

With your team well-versed in monday.com's functionality and your processes already delivering, you're now able to leverage insights that couldn't exist previously. These are gold-dust for process optimisation.

“What your workspace looked like at day 30 and day 60 would have been quite different; the same is true by day 90,” explains Sarah Taouk. **“In reality, you're going to be spending a lot of time taking feedback and working on revisions. So make sure you're keeping an open mind when you're moving between the 60 and 90 day marks.”**



Insider info

Find a monday.com champion in your team to support with training and feedback. It'll speed up the process and give you more time to work strategically.

Keep that open mind, absorb feedback and take the time to prioritise process revisions. Remember, not all feedback is created equally – it's on you to balance user needs with process impact and resource requirements.

The advice here: prioritise for inefficiency first, experience second; the former often solves the latter.

With processes live, revisions in progress and your team fully activated on monday.com, it's time to take stock and plan for your next 90 days. Send out a team survey, look at your team's usage stats and assess what's worked – and where you want to go next – to plan your operation's next phase of evolution.

Most importantly? Remind yourself of how far you've come and what your pre-monday.com world looked like.

Celebrate success and champion your operational wins with the business. Oh, and don't forget to wave goodbye to all those dusty spreadsheets you once used.



BUILDING BOARDS & WINNING WITH WORKFLOWS

Picture a blank desktop on a new computer. You start saving a few files on it. Now a few more. The desktop starts to look a bit messy, so you add a few folders to sort and store those files. You've created a system and things become more manageable. It makes sense. It's logical. It works (for most of us, anyway).

Understanding Hierarchy

The same is true with monday.com. The desktop is your account, the folders are your workspaces – and the files are your boards. The logic you used to segment and store them is no different, either. The one big difference between monday.com and that imaginary desktop? You're not the only user.

So it's hardly surprising that in a recent Work Perfect survey, 32% of monday.com admins said that 'finding the best way to structure boards and workspaces' was the hardest part of being an admin. Why? Because it requires strategic structuring that works for all, not just you.

To harmonise your hierarchy in monday.com, you need to zoom out and start with the biggest operational picture possible. Segment your operations by a common rule – whether that's by business function (eg; sales, marketing), people and teams (eg; client services, IT) or delivery workflows (eg; projects, campaigns) – and you've just identified your Workspaces.

32% of admins find it difficult to structure Boards and Workspaces

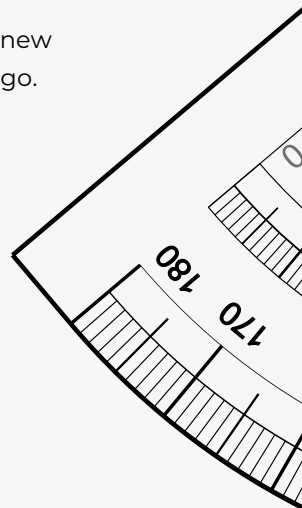
Source: Work Perfect's 'Admin Survey', 2023

From there, you can begin to create your hierarchy within each Workspace – getting more granular as you go – from folders to subfolders, boards to groups. The key here is to plan your hierarchy top-down, not bottom-up (to begin with, at least). And just like that new desktop, you can drag, drop and sort within your Workspace as you go.

Structuring Workspaces

Your Workspaces sit at the top of your main monday.com navigation sidebar. When structuring Workspaces, it's critical to think about your people responsible for managing them first.

As **Kim Berney, Senior Consultant at Work Perfect**, explains: **"From the get-go, think about how many admin users you want in there and get clear on your 'why' of having them. Define who can create and manage Workspaces, and whether they're able to be accountable for certain workflows within the Workspace."**





3 ways to identify your Workspaces:

- ✓ By business function
- ✓ By people and teams
- ✓ By delivery workflow



Doing so will help visualise stakeholders accountable to those Workspaces – in turn, helping you structure them with a consideration of the type of owner they are (or you want them to be). From here, it's about bringing them along on the journey to help you map out the Workspace's structure.

For an in-depth guide to Workspaces...

Check out our 'Ultimate Cheat Sheet' at the end of this guide.

As Kim Berney continues: **"It helps to set up a separate Workspace for you and your core team to work out a step-process for how things will work when it comes to managing the actual structure and permissions."**

Get that right, and you'll not only identify the right structure for your Workspace in relation to folders, boards, columns and dashboards – but you'll also identify the different user and permission types required for effective collaboration within the Workspace itself, with your core team at hand to advise and manage accordingly.



"Define who can create and manage Workspaces, and whether they're able to be accountable."

Kim Berney, Senior Consultant, Work Perfect

Managing folders

Folders are fantastic for categorising and organising multiple boards within a Workspace. They allow you to streamline your main Workspace's navigation for an effortless user experience, without having to create entirely new Workspaces or over-engineer boards.

Here's how to use them to manage your boards efficiently...

Do...

- ✓ Create folders to group similar boards and information
- ✓ Use a naming protocol everyone can understand
- ✓ Colour code folders for visual navigation
- ✓ Audit your folders and archive inactive boards

Dont...

- ✗ Leave folders empty for too long
- ✗ Use convoluted naming conventions
- ✗ Make users click through a folder maze
- ✗ Duplicate boards in multiple folders



BUILDING BOARDS & WINNING WITH WORKFLOWS

Structuring Boards

Boards are the beating heart of powerful processes in monday.com. They contain the data, deadlines and delivery information your teams need to execute efficiently. All roads lead back to your boards – so build them wisely.

Fortunately, doing so doesn't need to be as dramatic as it sounds. Before you get building, ask yourself this: what am I building the board for, and does this process already exist? If so, break it down to understand what works and what doesn't. If it's a new process, work with your core team to identify its moving parts – from data inputs to key outputs and everything in between.

Either way, you're looking for the critical components that form the pillars of your process. These pillars will be the first columns to add to your monday.com board. Define their column types, build them in and take stock of what other information needs to support them. These are your second wave of columns to build into the board.

For more on how
to build Boards...

Click here 

Head over to our 'Ultimate Cheat Sheet'

After a few waves and some iteration of column types, you'll eventually arrive at a board structure you're confident with. Now it's time to test it with a live environment. Your team.

As Kim Berney advises: **“Build a simple knowledge centre or set of step guides showing your team how easy the board is, for them to follow in their own time. You can also duplicate boards and their structure...and put those duplicate boards into a sandbox environment for your teams to test and learn with.”**

The key to a well-structured board is to make it comprehensive enough to work well, but simple enough to navigate. As teams become more advanced and process needs change, board structures will naturally evolve – elevating efficiency across the board.



Top tip

Identify your process core pillars and use them to build your first board columns.

BUILDING BOARDS & WINNING WITH WORKFLOWS

Creating dashboards (for individuals, teams & leadership)

Dashboards are your boards' brainpower. They present powerful insights from granular data – and used effectively, can inform truly transformative business decisions. But remember this: they can only work with the information your boards already contain.

16% of admins said creating dashboards executives actually use was the hardest part of their role.

Source: Work Perfect's 'Admin Survey', 2023

With that in mind, you need to know what the business needs to know before approaching a dashboard build. Whether it's profitability, leads, time to value or resource capacity, getting clear here is a case of building back. Make sure your boards can feed your dashboards the information they need, to present the insights the business wants.

Want to learn how
to build better
Dashboards?

Click here 

As Kim Berney goes on to explain: “If you don't ask the team to input certain data, you can't dashboard the results. If that data does exist and you can't see it, you need to find the issue in the architecture or the board. Either way, that's how to evolve your processes to build better dashboards – and ultimately, answer better questions.”

With the right board-level data in place, you can create dashboards that unlock new insights and communicate performance across both your day-to-day operations – and up into leadership. Whether you're creating Dashboards from single or multiple boards, remind your users to keep their boards updated for monday.com's real-time Dashboarding to truly shine.

Here's a few things to consider when building Dashboards for key stakeholders:

For leadership...

- ✔ Identify the key strategic data insights required
- ✔ Make sure the data exists at board level(s)
- ✔ Create a pilot Dashboard and evolve with feedback
- ✔ Protect sensitive Dashboards with private permissions

For teams...

- ✔ Agree key delivery data insights
- ✔ Streamline Dashboards to create multi-team visibility
- ✔ Ensure all teams have the right user permissions and access
- ✔ Check for data duplication across multiple Boards

For individuals...

- ✔ Define the user's specific use case
- ✔ Extract necessary Board data only
- ✔ Include performance-related widgets
- ✔ Ensure user-level permissions are controlled

ENHANCING YOUR ACCOUNT ARCHITECTURE



Archiving & Retrieval

The adage of a 'clean house, clear mind' could not be truer when it comes to monday.com. Workflows, processes and data you once thought essential become outdated; projects complete and new ways of working evolve.

Amongst this constant flux, it's important to keep your operations tight and your working windows tidy. And to do that, you'll need to remove certain things.

In doing so, you may make a few mistakes along the way; deleting data that's still used by other teams and Boards, or removing an entire workflow only to wish you had access to it further down the line.



Top tip

If you delete an item, you have 60 seconds to 'undo' it. Missed the chance? You can find it in your 'Trash' for up to 30 days later, ready to restore

Fortunately, with monday.com's archiving, retrieval and activity logs, you can keep things win-win – storing what once was, knowing who put it where, and retrieving it as needed. All while keeping your current processes polished for purpose.

As Work Perfect's Kim Berney puts it: **"As a general rule of thumb, audit every three months. Look at Boards and Workspaces; go into activity logs and see what's not being used. Get team leads together and archive anything that's no longer of use or ineffective...find out what's working and what's not, then archive, iterate and evolve. Less is most certainly more."**



Archiving

Allows you to remove information from your Workspace without deleting it, keeping it safe in your 'Archive' for referencing and restoration as needed.



Activity Logs

Allow you to see all user activity in a given Board. Great for retracing steps and tracking down missing information.



Retrieval

Whether it's restoring old templates or retrieving lost information, monday.com's Archive and Activity Logs work in tandem to keep you in control of your priority data.

ENHANCING YOUR ACCOUNT ARCHITECTURE

Security & Compliance

When you think of enhancing operational efficiencies in monday.com, security and compliance isn't necessarily the first thing that springs to mind. But consider this: 12% of admins Work Perfect surveyed said that ensuring data security and governance was the hardest part of their role.

Every workflow you create, every process you manage; they all contain sensitive data. And while monday.com follows the strictest of international [compliance and security standards](#), ensuring your data is confidently secure is just as much your own company's responsibility.

Here's how to secure a safe environment and protect your operations in monday.com:

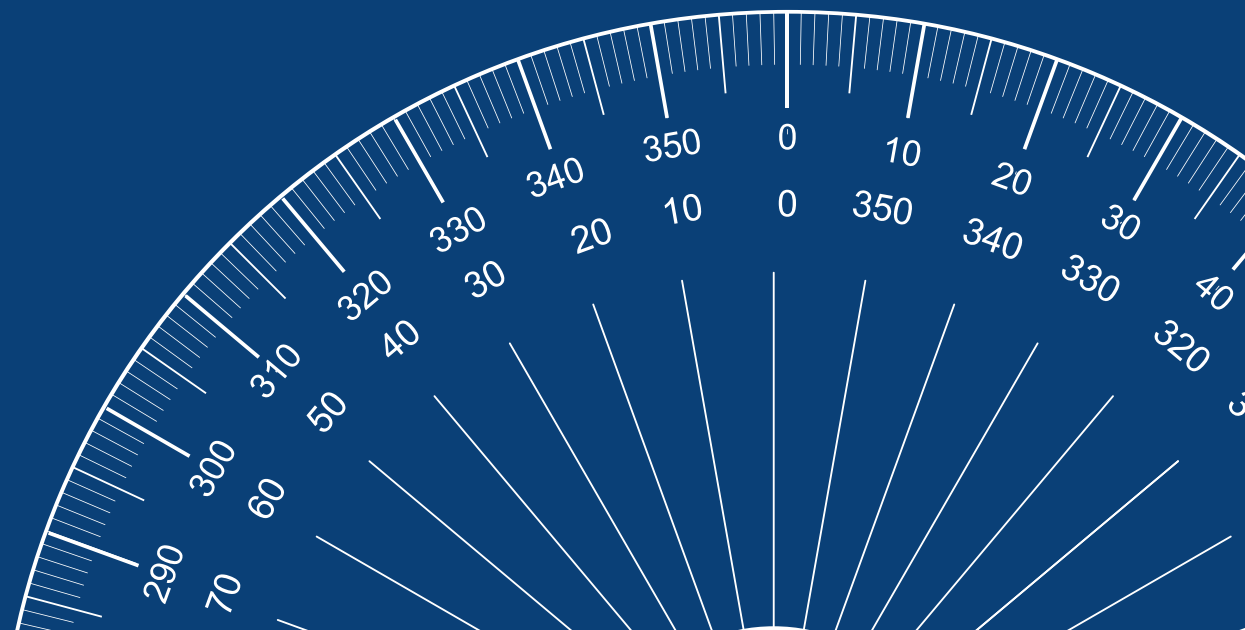
- Partner with your internal IT department for support and education
- Build and train a best practice guide to security for all users
- Enable two-factor authentication (2FA) for all users
- Audit your user permissions and data exports every quarter

With users able to login to monday.com on any device from anywhere in the world, it's not just about keeping your platform secure – it's about enabling your team to act as the first point of security. Wherever they are, for whatever they're doing.



Top tip

Create automated alerts and get notified of any non-compliant Board activities



ENHANCING YOUR ACCOUNT ARCHITECTURE

Automations & Integrations

Take a look at any of your monday.com workflows. Now ask yourself: How many manual actions does my team have to engage with? Are they repetitive? Do they create bottlenecks? The answer is probably 'a lot' and 'absolutely'.

Automations solve these challenges by replacing previously manual tasks and communications with code-free instructions for instant, automated actions that monday.com can now handle – within and across your boards.

Whether it's an email notification, status update – or even a trigger to start another workflow – monday.com automations help win the war on being time-poor by removing human hands from unnecessary actions. And that's just the start.

Want the inside line on Automations & Integrations?

Click here 

By combining automations with monday.com's library of 200+ third-party integrations, you not only unlock automated efficiencies across your business's [wider platform ecosystem](#) – you begin to centralise monday.com as your 'single source of truth' to house and connect all your operational data and activities. Anywhere in the world, with almost any platform.

The result? Seamless integration with day-to-day automation, for increased productivity and effortless team collaboration. Without the constant clicking.

Think 'if this, then that'...

monday.com's automations are designed to be code-free, which means the hardest thing for you to do...is tell it what to do. Here's how to think about automations when using them in your workflows:



People: Who's responsible for what? Instantly assign specific people to certain items, tasks or activities on a Board, as soon as they're created



Status changes: What happens next? Automatically create the next activity in your workflow based on status changes to previous or specific tasks



Notifications: Who needs to know, and when? Send customised messages to individuals and teams to inform them of anything they need to know, as soon as it happens



Creating & moving items: What needs to go where? Instantly create or move items to other groups, boards – or even archive them – when specific actions happen (or don't)



Due dates: Where are we? Notify people, sync tasks and update statuses when a specific time period is triggered. Keep your deadlines working for you, not the other way around

READYTECH'S SINGLE SOURCE OF TRUTH: A CASE STUDY

ReadyTech is a B2B SaaS company building mission-critical software for SMEs. They needed a standardised delivery framework to deliver complex client projects at scale.

With over 450 staff collaborating with 4000+ clients to deliver complex technology projects across the globe, ReadyTech was clearly well-versed in bringing innovative solutions to life.

What they lacked, however, was the ability to manage their delivery processes with the transparency, project status and insights required to make and communicate the right decisions – at speed and with ease.

The Challenge

As Kevin Louer, Customer Onboarding Manager at ReadyTech, explains: **“We were doing so much across so many different projects, it was hard to have any insight into where projects were and what their true status was...which then made it hard to report insights to C-level executives on the things they needed to know.”**

And while Kevin and the team had already deployed monday.com, it was clear they'd hit a ceiling: **“It was quite evident we needed someone with expertise to come in and assist us, because we were at a critical point in our own growth journey...we needed to scale effectively and efficiently, so [monday.com] needed to be set up in the right way.”**

The Solution

Partnering with Work Perfect, ReadyTech mapped their 'as is' process end-to-end, identifying inefficiencies and the workflow automations needed to solve them.

Work Perfect helped redesign their entire delivery framework – streamlining operations and simultaneously managing multiple projects for multiple customers – from onboarding to completion.

How it worked...

- ✔ Work Perfect documented ReadyTech's processes and business requirements, understanding what information was key to which stakeholders, and why
- ✔ Processes were redesigned and streamlined to connect data to deadlines and people to project priorities
- ✔ Automated workflows and status updates replaced manual workloads, reducing errors and accelerating efficiencies
- ✔ Templated boards and dashboards enabled 'quick start' capabilities and real-time reporting



“Take a step back. Find out what your objective or outcome is...work backwards from there and you’ll save yourself so much time in the actual build in monday.com.”

Kevin Louer, Customer Onboarding Manager, ReadyTech

The Results

Today, ReadyTech’s initial rollout success has been replicated across its entire business. Automations and integrations optimise processes, real-time reporting accelerates revenue recognition – and most importantly, clients engage with an effortless experience at every touchpoint. monday.com has become ReadyTech’s single source of truth for project delivery.

As Kevin concludes: **“My whole team spends the day in [monday.com], working with clients and feeding up to executives. Because we had a blueprint for success, it was a much quicker turnaround for other divisions to implement...We also didn’t have that client engagement piece previously...it’s been a real game-changer.”**



Performance in numbers

97

projects delivered

1,900

New project items created

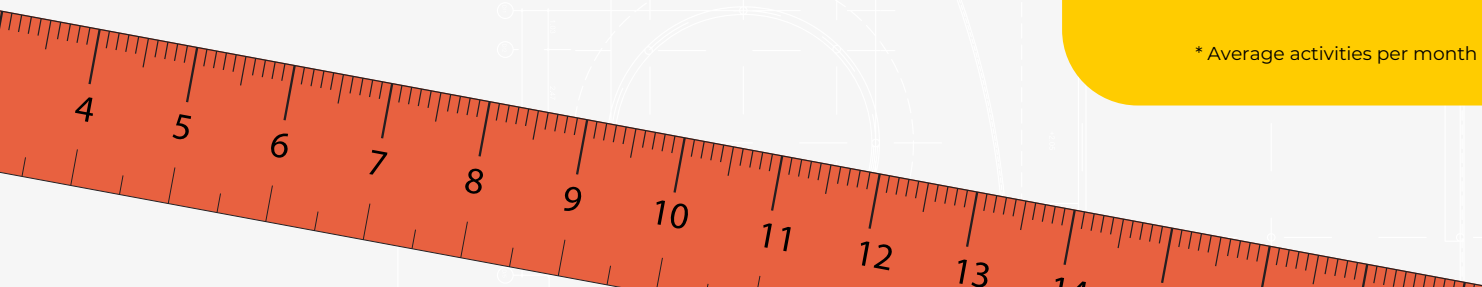
2,805

Tasks completed



Watch the full story

* Average activities per month



KEY TAKEAWAYS

monday.com is where powerful productivity meets proactive planning.

Identifying operational inefficiencies and mapping the processes and workflows to overcome them is critical to deploying any monday.com implementation successfully. Here are the five key components to keep in mind – regardless of where you are on your monday.com journey.

1

Define your operational objectives: Understand what you want to deliver strategically and why. Get clear on your outcomes and get buy-in from key stakeholders to secure your north star – before you start building

2

Champion change management: Whether it's an external expert or in-house specialist, partner with an experienced hand to help you navigate change and support your most important asset – your people

3

Map your current processes: Identify inefficiencies and pain points in your current workflow. Find the good, the bad and the ugly in your processes. Map them out and create a priority plan for how you'll address them

4

Build. Test. Train. Feedback: Train your team on your debut processes and test for inefficiencies – unlocking feedback to iterate with – before moving on. Instill confidence as a foundation to build upon, which will support future process rollouts

5

Communicate and celebrate: Transforming your operations is no easy feat. Find the wins in your new workflows and communicate them to your team and the wider business. Put your productivity performance on a pedestal and celebrate your impact.

BUT WAIT, THERE'S MORE...



With so many ways to make the most of your monday.com, we couldn't fit them all into this guide. So we didn't.

Instead, we created **The Ultimate Cheat Sheet** – a real-time library to support **The Ultimate Guide**, continuously updated by our team of implementation experts with all the practical process tips and best practices you could ever need.

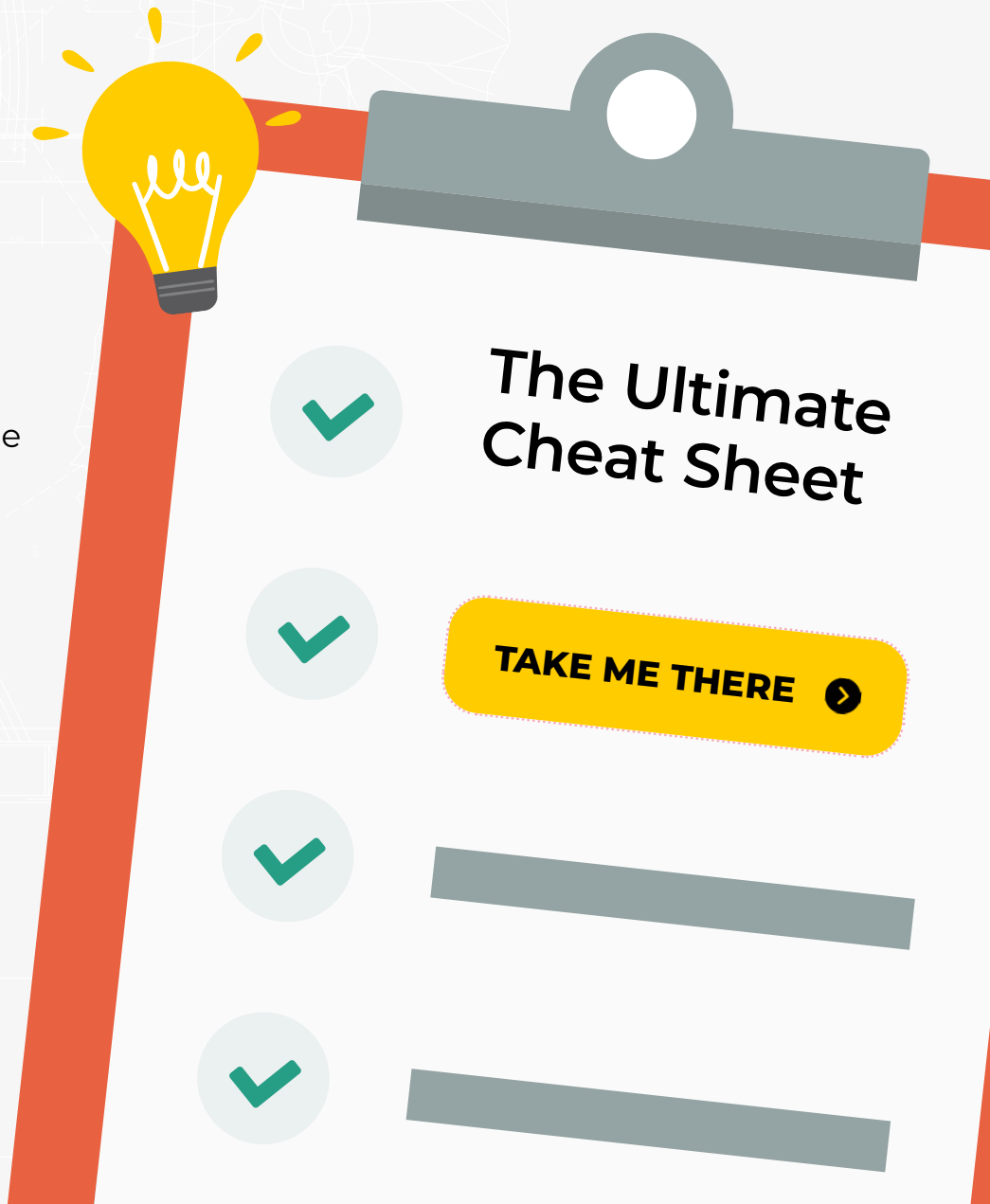
So what are you waiting for? Click the clipboard, bookmark the page and find more ways to work perfect with monday.com.

For more Enterprise-grade tips and insights to win with monday.com, join our community **Beyond the Boards**.

[Join our Community](#)

WORK PERFECT

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The Ultimate Cheat Sheet

TAKE ME THERE 