

Alchemer Workflow Asana Initiator

The Asana initiator is available for purchase as an add-on. If you are interested in purchasing, please [contact us](#) for additional information.

Overview

Alchemer's Asana initiator is purpose-built to enhance Workflow efficiency and facilitate feedback collection within your project management processes.

With this integration, Alchemer Workflow actions can automatically trigger when you complete milestones in Asana. This connection ensures that your projects stay on track and feedback is collected, without the need for repetitive manual actions.

Why Asana and Alchemer

Asana is a great complement to Alchemer Workflow, combining the strengths of a Workflow feedback engine with your project management system.

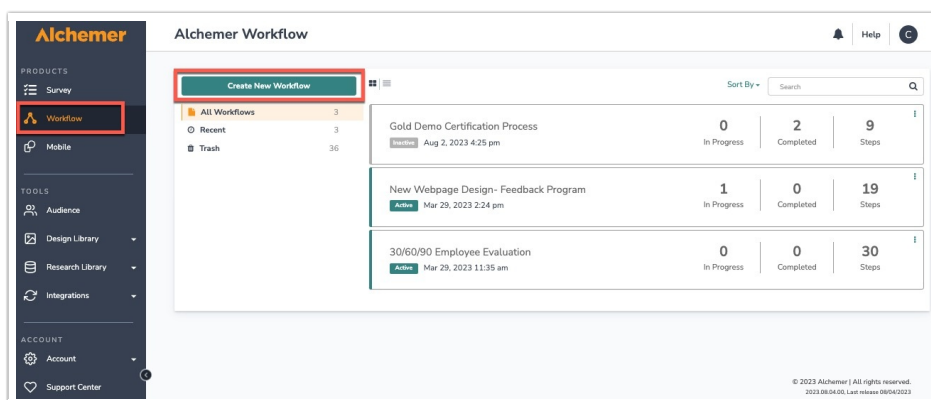
With Alchemer and Asana you and your team can:

- Initiate a Workflow when an Asana milestone is completed

Setup

Connecting your Alchemer account with your Asana account is a quick process and can be completed when you create a new Workflow and select Asana as your Workflow initiator.

1. Create a new Workflow.



2. Name your Workflow.

Create New Workflow

* What would you like to name this Workflow?

Customer Feedback Workflow

Cancel Start Building

3. After creating a new Workflow, select Asana as your Workflow initiator.

Select Initiator

Survey Listener
When a given survey is completed

Share Link
When a user clicks on a custom workflow link

Salesforce

Paylocity

Zendesk

Asana

Need Help? Next

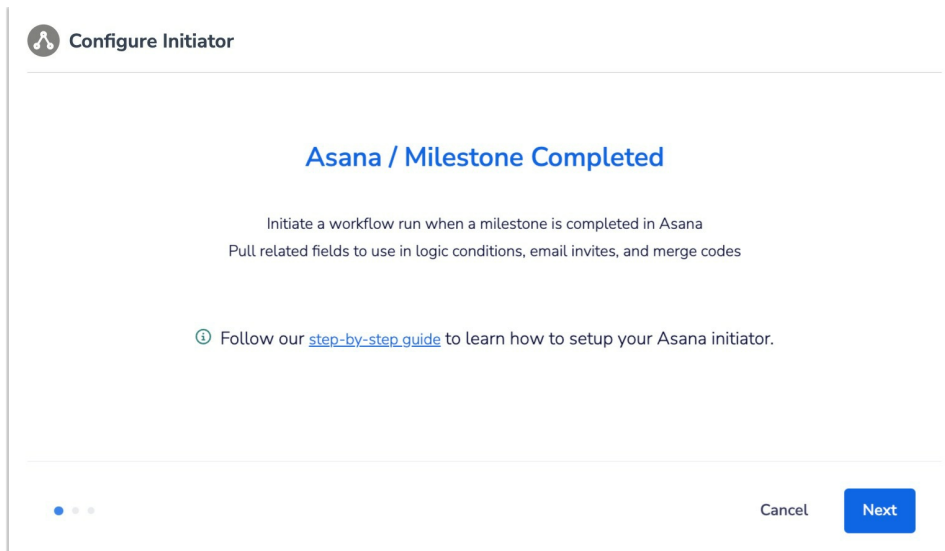
4. Choose the Milestone Complete event.

Configure Initiator

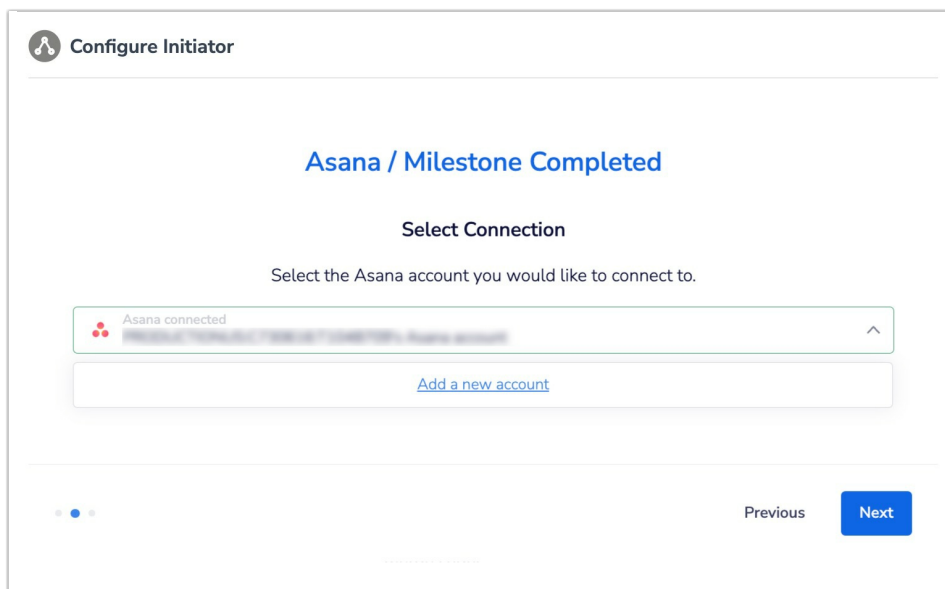
Milestone Complete
Starts the Alchemer Workflow when a milestone is completed in Asana

Previous: Select Initiator Cancel Next

5. Hit next after the Asana initiator overview page.



6. Click the “Add a new account” button and authenticate an Asana account or select an already authenticated account.



7. Name the new authentication and click the “Create” button.

The screenshot shows a dialog box titled "Create a new authentication" with a close button (X) in the top right corner. Below the title, there is a label "Your authentication name" followed by a text input field containing the text "Company ABC - Alchemer and Asana Integration". At the bottom right of the dialog, there are two buttons: a "Cancel" button and a blue "Create" button.

8. In the pop-up window that displays, click the “allow” button to connect Alchemer to your Asana account. This step will occur automatically if you are already logged into Asana.

The Alchemer and Asana integration uses Tray.io to connect to the two platforms, so the pop-up window will mention Tray.io specifically. You can read more about Tray.io and Asana [here](#).

9. Select your Asana Workspace. Most companies will only have one Workspace.

The screenshot shows a screen titled "Asana Workspace". Below the title, there is a label "Asana Workspace*" followed by a dropdown menu. Below the dropdown, there is a text prompt "Select your Asana Workspace." At the bottom of the screen, there are three dots on the left and two buttons: "Previous" and a blue "Next" button.

10. Next, choose the Asana Project for which you want to monitor milestone completions.

Asana Project


Asana Project*

Type to search ▼

Select the Project where you want to listen for milestone completion.

[Previous](#) [Finish](#)

11. Click the “Finish” button to complete the Asana initiator step. Then click “Save”.

 **Configure Initiator**

Asana Project

Asana Project*

Type to search ▼

Select the Project where you want to listen for milestone completion.

[Previous](#) [Finish](#)

[← Previous: Configure Initiator](#) [Save](#)

Configure Initiator

Asana Project

Asana Project*

Type to search

Select the Project where you want to listen for milestone completion.

Previous Finish

Save

Previous: Configure Initiator

Merge Codes

When the webhook fires, Asana will pass the following fields to Alchemer Workflow. After configuring this initiator, you can use these fields in merge codes, logic, and other Workflow features.

For more information on how use to these merge codes in your Workflow, [check out this article](#).

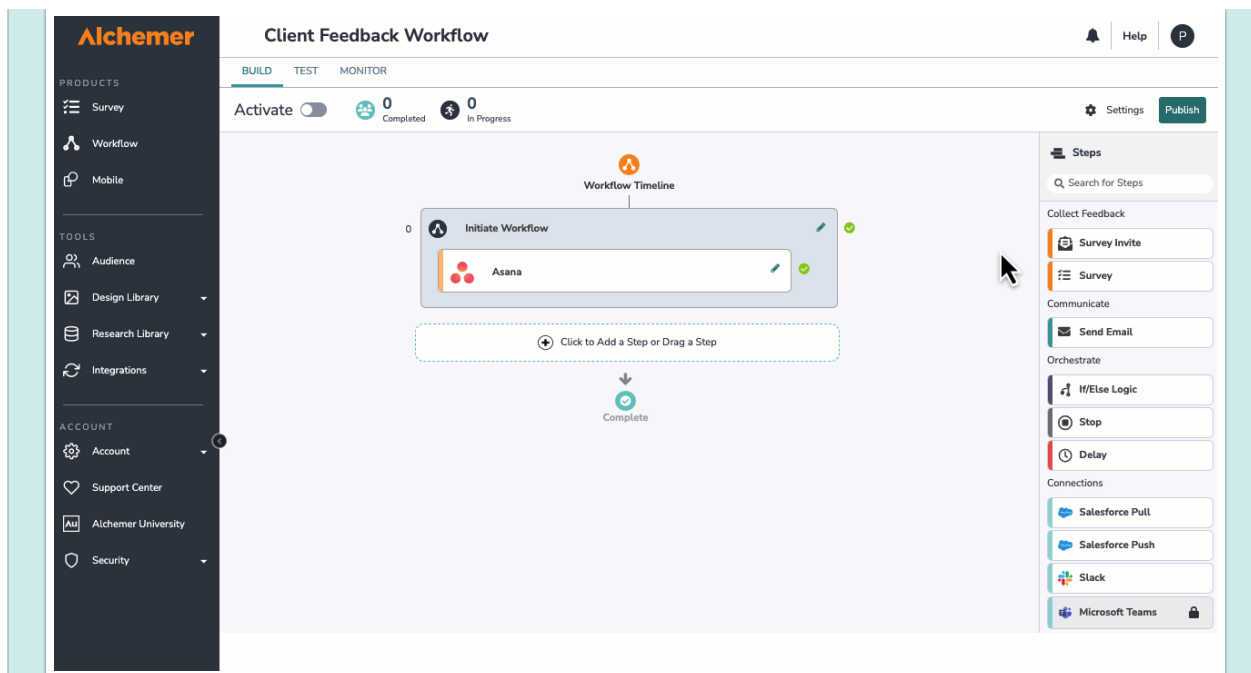
+ Fields for Asana initiator - Cart Abandoned

Using the Customer Email Merge Code

After adding and configuring an Asana Initiator, you can also utilize a list of Asana specific Merge Codes to pass information from Asana to Alchemer Workflow. These merge codes can be used to dynamically pull and display data from Asana into Workflow steps, like Send Email or Survey Invite.

In addition to the standard Asana fields available to choose from as merge codes, you can also select the 'Customer Email' field as a custom field. This merge code listens for a custom field labeled as 'Customer Email' in your selected Asana project.

You can use this merge code to pull in customer email addresses from Asana, and use that data in Workflows to send emails or surveys to specific customers.



What does this look like in practice? Let's say you want to create a customer feedback Workflow that automatically sends check-in surveys to your customers after you complete project milestones on client projects.

The "Customer Email" merge code can be used in Survey Invite steps to send emails to specific customer email addresses after you and your team complete a milestone on their project. This reduces manual work and ensures your feedback campaigns are timely, consistent, and personalized.

Use Case

Scenario

ABC Marketing Solutions, a mid-size marketing agency, produces a high volume of client work every week and is rapidly growing. They understand the importance of a project management system and use Asana to manage client projects and deliverables. The team at ABC Marketing Solutions also values customer feedback and uses Alchemer Survey to collect feedback from their clients.

ABC Marketing Solutions have access to comprehensive survey software, Alchemer Survey, and a project management system, but they want to improve their ability to consistently collect timely, relevant feedback throughout the project management process, for every client.

Problems:

In this scenario, ABC Marketing Solutions need to overcome the following challenges:

- **Inconsistent Feedback Collection:** Currently, client feedback is collected sporadically, making it challenging to gather timely insights at crucial project milestones.
- **Feedback Relevance:** ABC Marketing Solutions struggle to collect feedback that is relevant to

the current project phase. If the feedback isn't relevant, it is challenging to make meaningful improvements during the current client engagement.

- **Scalability:** As they grow, they need a solution that can accommodate an increasing number of clients and projects, without adding additional time-consuming tasks for their team.

Solution

ABC Marketing Solutions utilizes Alchemer Workflow's Asana initiator to start customer feedback Workflows whenever project milestones are completed for a client.

This solution:

Automates Feedback Collection

With the Asana initiator, they can automate the initiation of feedback Workflows whenever significant milestones are completed in Asana. This ensures that feedback surveys are sent consistently and promptly, without the need for manual triggers.

Provides Timely and Relevant Feedback

With automated triggers, the surveys they send to customers are always aligned with project milestones, ensuring that the feedback collected is relevant to the ongoing project phase, for that specific customer.

Additionally, they can utilize a list of Asana specific merge codes to personalize the surveys and emails sent through the Workflow.

Allows for Efficient Scaling

Once the Workflows are created and the Asana initiator is configured, very little needs to be done when new clients are brought on or projects are started. It's as easy as adding new milestones in Asana for that new client project.

This scalable process accommodates the agency's growth path, enabling them to handle an increasing number of clients and projects, without the need for hours of manual work.

FAQs

▶ What permissions do I need within Alchemer to set-up and use the Asana initiator?

▶ Can multiple Workflows initiate off the same Asana initiator?

▶ This initiator doesn't fit my use cases, or I want to provide feedback to the Alchemer Product Team!

Related Articles