Premier Lending

Monday.com Unleashed

Qais Hudhud | January 2025

AGENDA

Introduction to Monday.com

Why Monday.com?

The New Monday.com Process

Learn the basics of Monday’s interface.

Collaborating On Monday.com

Gain awareness of key features to boost your collaboration.

Best Practices and Customization

Set your self up for success on Monday.com.

Housekeeping

- All mics will be muted. Type in your questions for the Q&A session.
- Participate during the Q&A session by raising your hand.
- Be ready to follow along.
- Stay engaged - take notes, and engage us with any technical issues.
- Call is being recorded. A link will be shared with you after the call.

Why Monday.com?

“Efficiency is doing things right; effectiveness is doing the right things”

— Peter Drucker, Management Consultant & Author

77% of high-performing teams have well-defined performance goals
— Attributed to a study conducted by AIIR Consulting

“The single biggest problem in communication is the illusion that it has taken place”

— George Bernard Shaw, Playwright & Critic

Research shows that 90% of all problems in organizations stem from miscommunication
— Attributed to various sources (popular leadership and communication maxim)

Centralized Collaboration

A single hub for all tasks, projects, and updates.

Transparency

Everyone sees the same information - no hidden threads or lost emails.

Focus & Organization

Prioritize and manage tasks effectiently without distractions.

Accountability

Clear ownership of tasks with due dates, progress tracking and reporting.

Avoid Missing Details

Say goodbye to important items slipping through the cracks.

Scalability

Adaptable to the needs of growing teams and projects.

The Recipe To Success

1

Centralization

Keep all docs, links, and email chain in one place to avoid confusion and silos.

2

Overcommunication

Ensure that team members are constantly informed, and include full details.

3

Clarity

Provide clear goals, expectations, and feedback to ensure alignment.

The Connected Process

90 Day ROCKS

Aligned with corporate yearly goals.

Leaders break down ROCKS into actionable projects and tasks.

Tasks can be delegated to the designated department task board.

Centralized Tasks

Each department has its own task board for collaboration.

Full permission for all users on task level.

Dashboards

Bird’s eye view of department performance and progress.

Insights into who is doing what, ensuring alignment with objectives

Accountability

Essential for assigning tasks and tracking ownership at all levels.

See It In Action

Collaborating on Monday

Utilize the “My Work” Section

Centralized hub for individual task management - shows all tasks assigned to you across all boards.

Utilize Custom Views

Filter your tasks based on deadlines, priorities, or boards to stay focused - Personalize the view to suit your work style.

Use Forms To Create Tasks

Save forms on your browser or desktop to make it easier to stay on top of incoming tasks.

Keep Task Names Short, Actionable, and Clear

Put effort into making it as painless as possible for your team members to understand what is being asked for.

Assign And Mention Your Team

Make sure the owner is assigned, assign yourself or anyone else responsible for follow ups, and use the “@” in the updates.

See How It Works

Monday Best Practices

Standardize When To Use Monday.com

Create a system on how Monday will fit in your workflow and build a standard around it internally within your departments.

Favorite Frequently Visited Boards

Quickly access essential boards by adding them to your favorites list.

Speed Up Your Search By Using Shortcuts

Type in “Ctl + B” to pull up the board search functionality to find what you’re looking for.

Manage Your Notifications And Alerts

Customize both User-Level and Board-Level notifications to selectively pick where your attention needs to go.

Automate & Integrate

Free yourself by implementing basic automations that will take the load away from doing repetitive tasks.

Manage Your Alerts

Q&As

Please Raise Your Hand IF You Wish To Speak Up.

That’s All She Wrote!

Thank You For Your Time!