

# MONDAY.COM, WorkOS WITH XTIVIA

## OVERVIEW

monday.com is an exceptionally robust and capable project and process management software. However, like many great pieces of software that came before it, monday.com is easy to learn yet difficult to master. Automation, Integration, Apps, and more. How can you be sure you're making the most of this new investment in your organization?

By trusting XTIVIA with your monday.com implementation, you can ensure that you're getting the most out of your software, and in turn, solidifying your team's ability to **communicate, collaborate, and deliver**. We'll focus on the software so that you can focus on what you do best.

## WHY XTIVIA?



XTIVIA's team of **monday.com-certified experts** will see to it that your implementation goes smoothly. In addition, XTIVIA is a certified monday.com partner, so you can rest assured that the experts working on your implementation will always have the most **up-to-date and accurate information**.

Our past experiences working with monday.com clients give us insight into what works and what doesn't, and your organization can benefit from our established knowledge base. So, whether or not you've already started working with monday.com, we'll sit down with you for an initial consultation with our team to discover your level of comfort with the software, as well as **known and unknown pain points**.

## THE BASICS OF MONDAY.COM

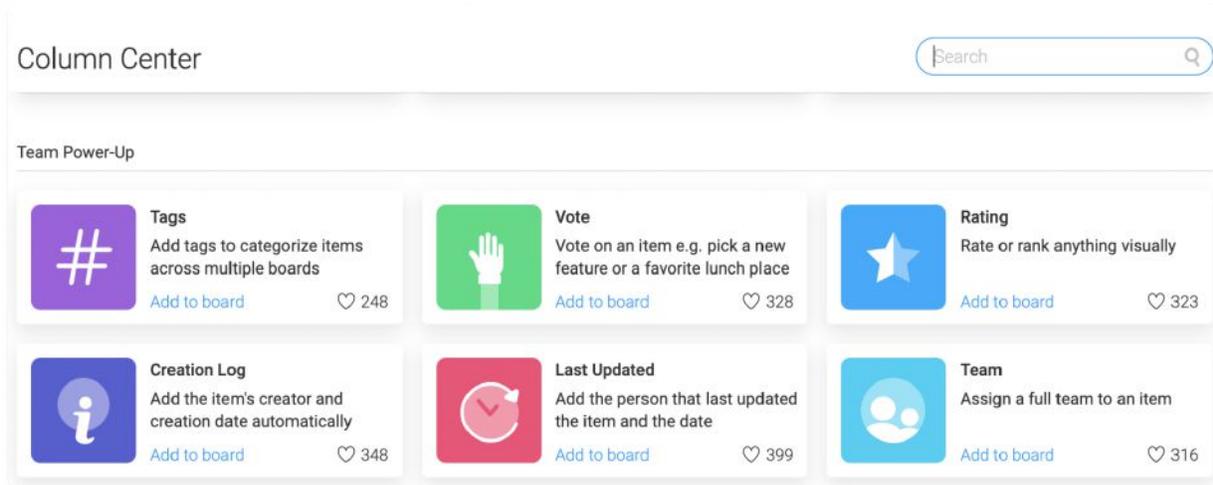
The basic unit of monday.com is called the **item** (or pulse.) Items can be anything that works for you, but we often see them as basic **tasks, line items, or expenses**. In short, items tell us what needs to be done. **Columns** open the door to interaction with each item and can be as few or numerous as is productive. Columns can cover numerical or text-based data and are often used for team members' **status updates, notes, and assignments**.

The screenshot shows a Monday.com board for 'Cupcake Factory'. The board contains a table with the following data:

Item	Order ID	Files	Person	Status	Tags	Link to Clients	Status	Price in Euro	Price in USD
Red Velvet Cupcake	464052676	[Icons]	[Avatar]	Working on it	#cupcakes #new!	Client 1	Done	€100	\$121
Coffee Cupcakes	464052674	[Icons]	[Avatar]	Working on it	#cupcakes #sour	Client 2	Not started	€200	\$242
Caramel Cupcakes	464052678	[Icons]	[Avatar]	Working on it	#salty #cupcakes	Client 3	Working on it		\$0
Blueberry Cupcakes	464053218	[Icons]	[Avatar]	Done	#fruity #cupcakes	-	Finalizing		\$0
								€300 sum	\$363 sum

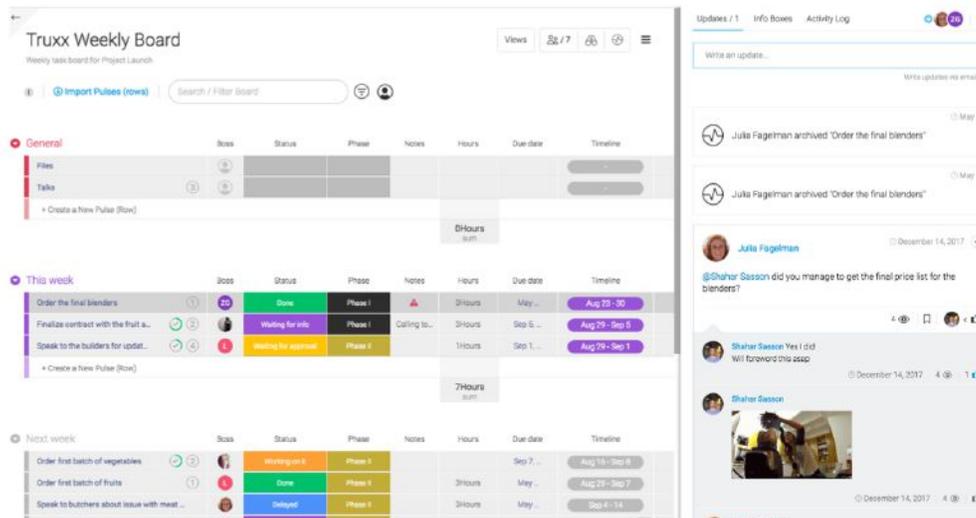
All items and their respective columns will live in **groups**, which live within **boards**, each of which can live across separate **workspaces**.

Even these simple features will often elevate your team’s productivity beyond where it was before you began using Monday, but XTIVIA can help you to push your boards even further. **File linking, progress & time tracking, and deadlines** can all be utilized and manipulated to increase productivity for your organization.

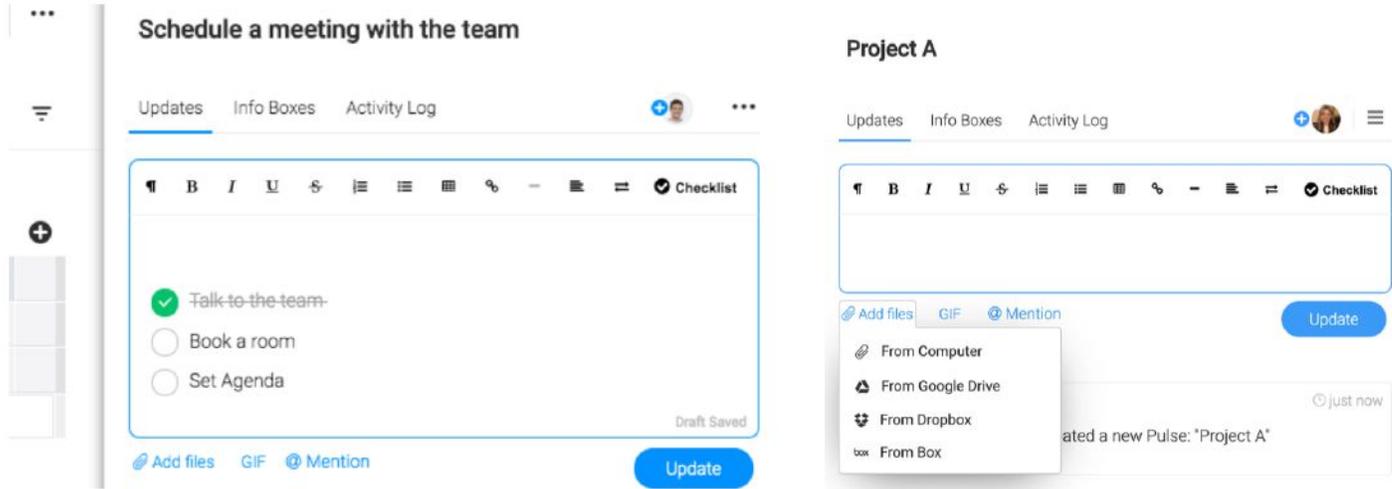


## COLLABORATION & COMMUNICATION

monday.com is all about collaboration, and collaboration is all about communication. The ultimate strength of the monday.com software is its ability to bring teams together, whether it's across the office or the world. Increase employee engagement and efficacy with **role assignment**, as well as **dynamic, taggable comments**. Gone are the days of ambiguous, contextless emails: each employee knows their assigned tasks, their relevant information, and their immediate collaborators.



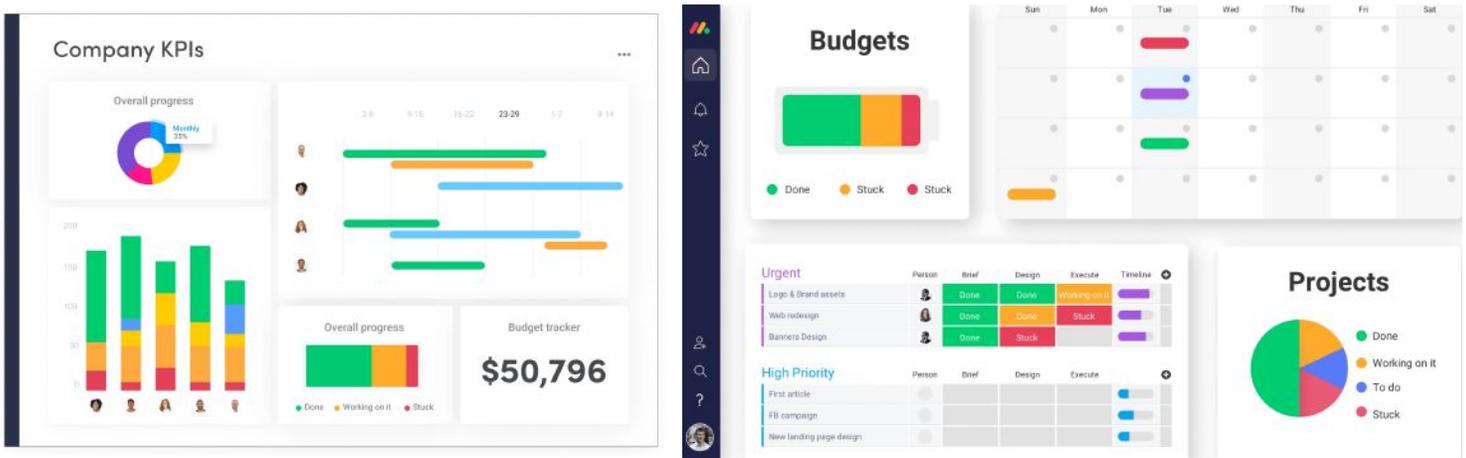
Dive deeper with XTIVIA into advanced collaborative features within monday.com, including **integrated checklists**, **comment attachments**, **teamwide assignments**, and more!



## IEWS, DASHBOARDS, & REPORTS

Customize how you see your boards with views, sorted in a way that makes sense. Whether by timeline view, Gantt or Kanban view, by person, or by status, you can endlessly manipulate how your team views the information within your boards, ensuring that the **right information** is being shown to **the right people at the right time**.

By now, we know monday.com increases the productivity of your teams, but how do we show that increase both externally and internally? Reports and dashboards help **keep track of the big picture** for your team and others in your organization. Dashboards refer to a pre-determined aggregate view of several boards and projects, which can give you and your team members **an idea of where you've been and where you're going**.



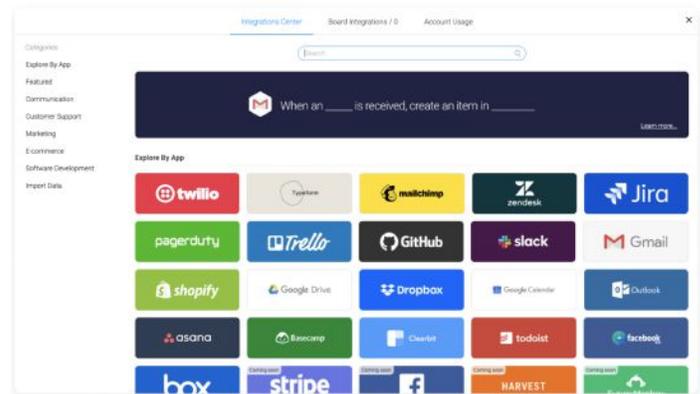
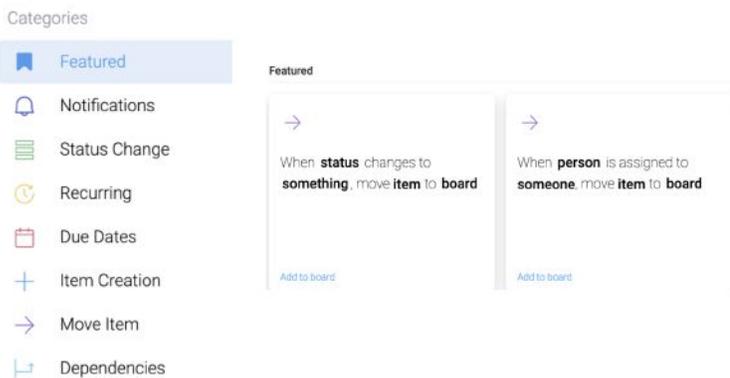
Let XTIVIA build a dashboard for your organization that's **tailored just for you**, using **specific knowledge of your needs** to go beyond what a simple template could provide.

Take advantage of advanced reporting techniques, including **capacity** and **performance insights**, to ensure your organization stays on track and keeps work distributed. We'll show you how to drill down into your reports, to go from **global to granular** in the blink of an eye.



## AUTOMATION & INTEGRATION

Now it's time to bring it all together. Once your processes are implemented into monday.com, **save even more time** by introducing automation and external application integration. Watch as **items automatically move** from one group to another upon completion, or **instantly notify your team members via email** when a project moves to the next step. There are **over one hundred app integrations** available to you, and XTIVIA can point you in the direction of the ones that will be of the most significant benefit.



**XTIVIA's partnership with monday.com is another one of the many ways we facilitate your business outcomes with technology.**