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: 

Start your free 30 day trial

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

## The Distance Podcast

Telling the stories of businesses that have endured at least 25 years

### Campfire

- **Victor Cooper**: 3:30pm
  - Upgrade that!
- **Cheryl Walters**: 3:30pm
  - done and done!
- **Victor Cooper**: 3:30pm
  - Hi Jason,
- **Annie Bryan**: 3:30pm
  - YAY!
- **Cheryl Walters**: 3:30pm
  - Boom!

### Message Board

- **New iTunes description copy**:
- **Change the name/branding**:
- **Question — There’s some**
- **Meatier Podcast Excerpts**: Pitch — Hey Annie, This
- **Listeners This Week**: Heartbeat — Having some
- **Thanks from Sweden**: FYI — “Hi! My name is

### To-dos

- **Newsletter updates**
  - Signup page
  - Link to iTunes
- **Episode 10: Carma Labs I**
- **Episode 11: Carma Labs II**
  - Edit by Cheryl W.
  - Title/description/tags/show notes by Annie B.
  - Illustration by Jamiel D.

### Schedule

- **Thu, Feb 22**
  - Upload Episode 11: Carma Labs II
- **Thu, Mar 15**
  - Call with iTunes from 7:00am - 7:30am
- **Tue, Apr 10**
  - Feature artwork due to iTunes

### Automatic Check-ins

- Asking 2 people every Monday at 9am
- **Do you have any ideas for a future show?**

### Docs & Files

- **Music Usage**
- **Intro/O… for Victor’s Interview**
- **Final Cover Art**
- **cover3…”
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

- Assign tasks, due dates, add attachments
- Track Statuses
- Organize Tasks into Lists
- Drag and Drop ordering
- Add to-dos to lists
- Subscribe to get updates
- Share with the public
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
  - Stop asking me
  - Stop notifying me
  - See someone's answers
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)
- Additional options: Email/Twitter/Live Classes

Need a hand with anything? We're standing by!
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.