System Admin Essentials: Designing an Ideal User Experience

April 27, 2022

Agenda (Pacific)

Time	Topic
8:00 a.m.	Welcome and agenda
8:05 a.m.	**Customer Spotlight: Liberty Mutual Insurance** *Steven Enos, Senior Operations Analyst, Liberty Mutual Insurance*
8:25 a.m.	**Designing an Ideal User Experience** *Mary Ann Erickson, Customer Success Manager, Adobe Workfront*
8:45 a.m.	Presenter Q&A
8:55 a.m.	Wrap-up and next steps

Liberty Mutual
Workfront User Experience

Steven Enos

Senior Operations Analyst, Copper Giants™

U.S. Marketing & UX, Global Retail Markets

Liberty Mutual Insurance

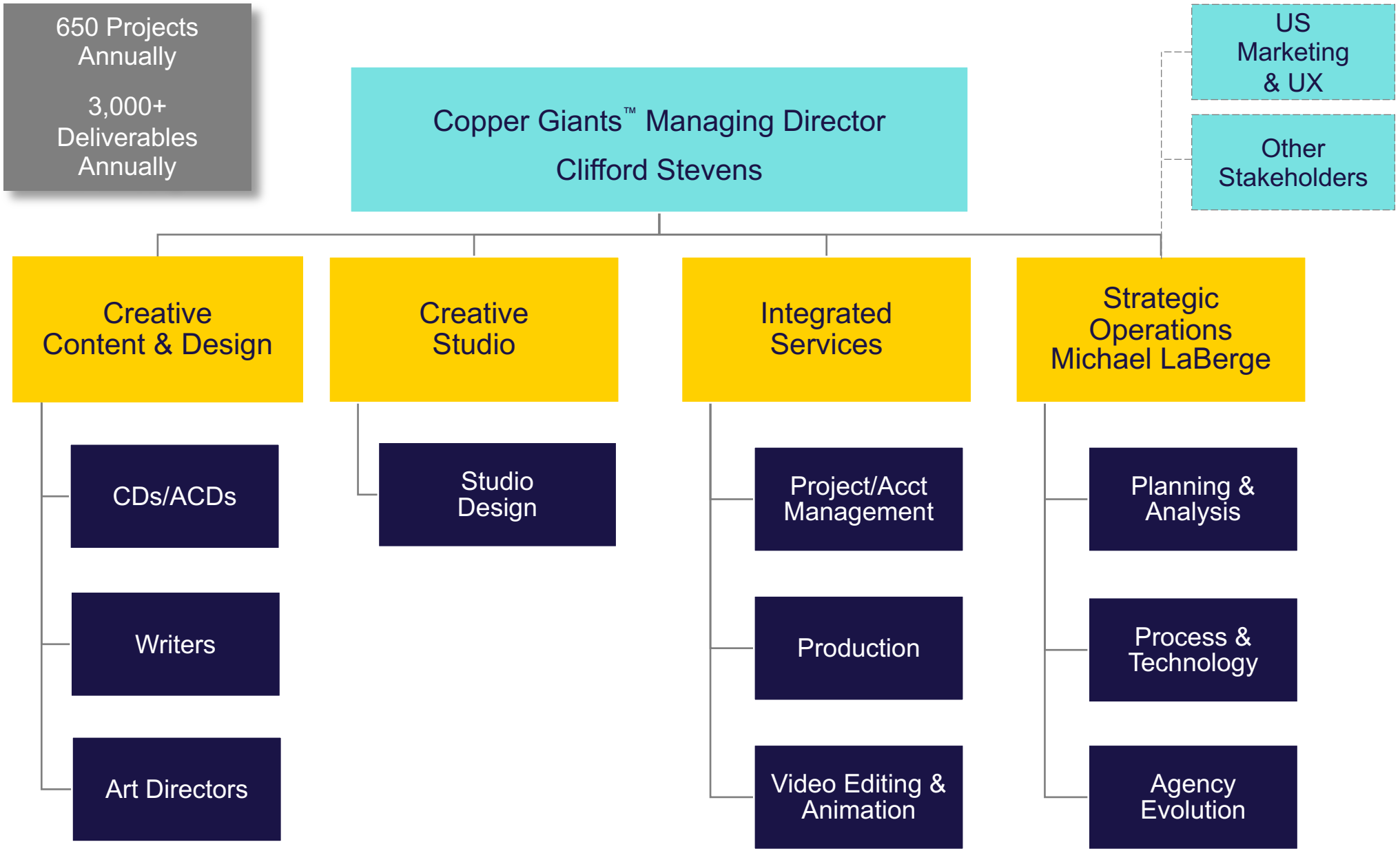
About Me..

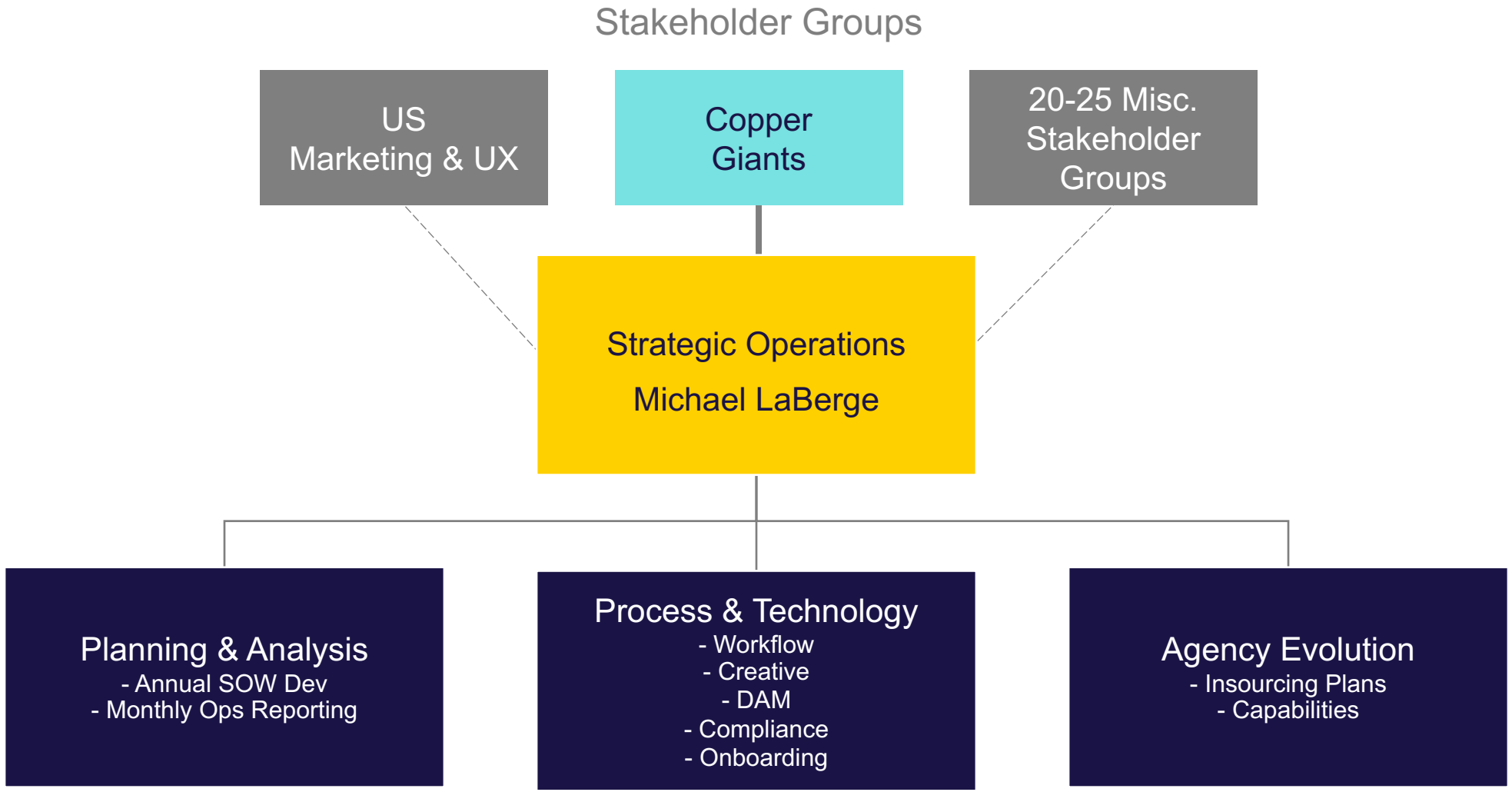
I have 2 daughters ages 9 and 13. Baxter is the most recent addition to our family. Filling in for the 2 black labs that have gone before him.

I enjoy being outside in the woods or on the water. My favorite place is Maine. I also enjoy woodworking and building.

650 Projects Annually

3,000+ Deliverables Annually




Stakeholder Groups
US
Marketing & UX
Copper
Giants
20-25 Misc.
Stakeholder
Groups
Strategic Operations
Michael LaBerge
Planning & Analysis
- Annual SOW Dev
- Monthly Ops Reporting
Process & Technology
- Workflow
- Creative
- DAM
- Compliance
- Onboarding
Agency Evolution
- Insourcing Plans
- Capabilities

MAJOR MILESTONES

2009

Decentralized Marketing Support

- Marketing & creative resources were folded into each business unit as a core function
- Creative team grew slightly to accommodate internal comms support
- Resource model was 50/50 (staff/freelance)

2012

Introduction of Creative Operations

- Migrated to a full end-to-end workflow management tool
- Built a home-grown DAM (SharePoint)
- Introduced operational reporting
- Converted freelance and contractors to full time staff due to increased workload – 70/30 (staff/freelance)

2015

Shift in Focus & Improved Partnerships

- Changed agency model from “deli counter” to partner
- Changed perceptions of the agency; “operationally sound”
- Additional production capabilities
- Insourced customer email design work
- Moved to ~100% customer facing work
- Supported creative needs for innovation efforts

2017

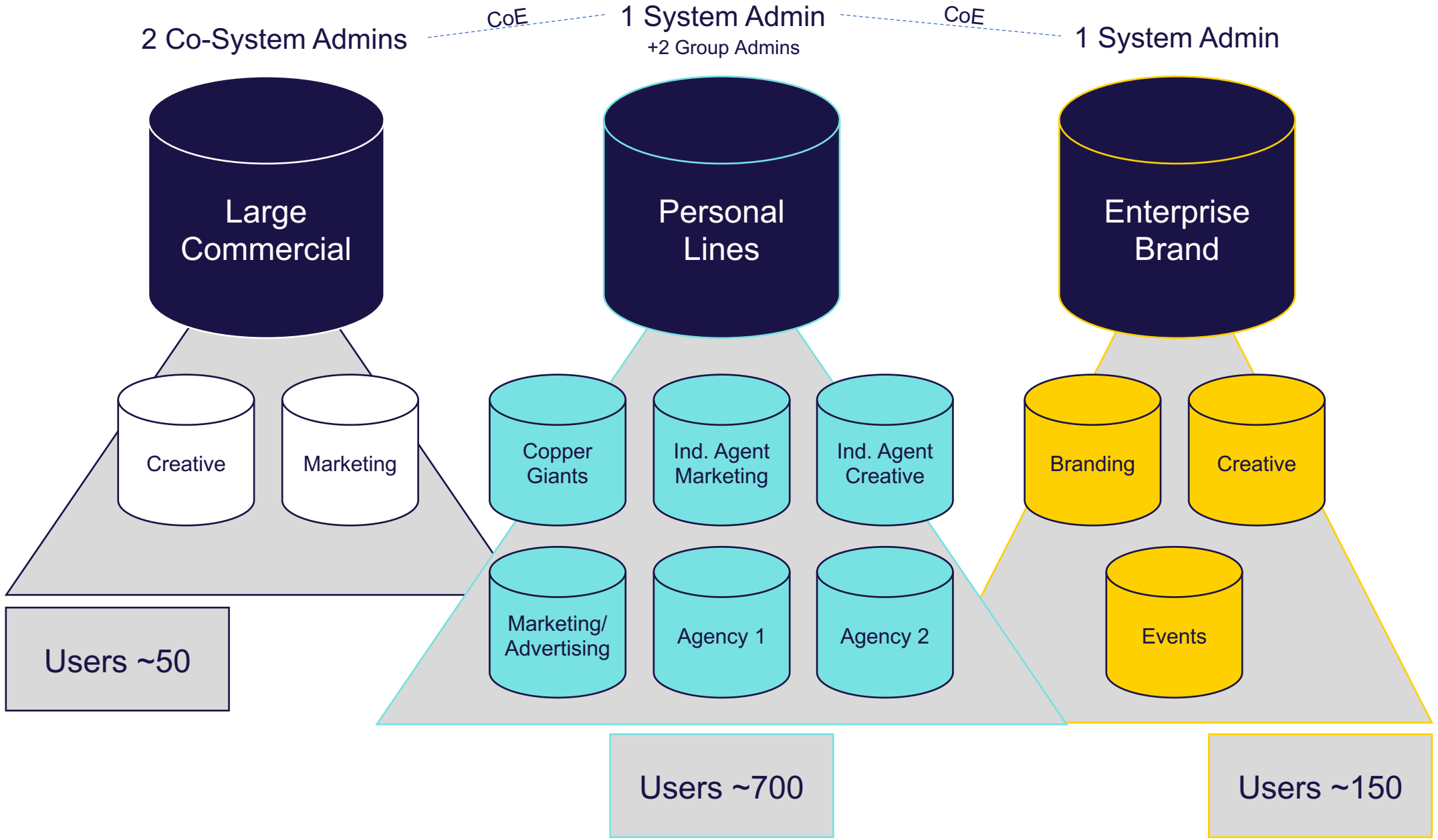
Growth in Capabilities

- Insourced parts of AOR SOW (all except broadcast & radio)
- Insourced all digital work
- Hired/Converted full time staff – 90/10 (staff/freelance)
- Increase in video and animation requests
- Started developing a new agency identity
- Rolled out digital proofing across Marketing, Legal & Product stakeholders (materials developed both internally & externally)

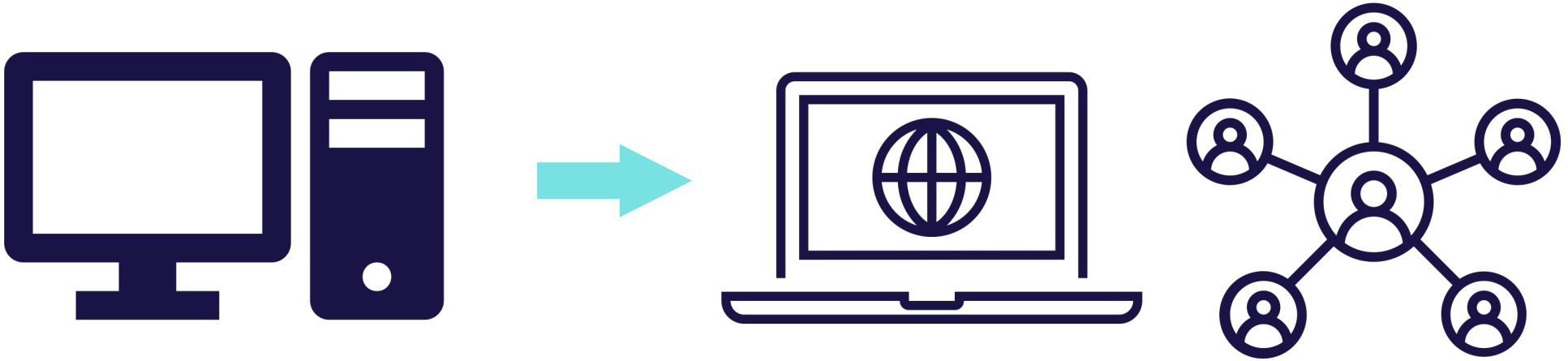
2019-2022

New Identity

- Rolled out core teams aligning resources to channels, ultimately increasing team collaboration
- Updated roles & responsibilities by creating robust job families and clear RACIs
- Enhanced prioritization capabilities by introducing stakeholder dashboards and project scoring
- Implemented an enterprise-wide, global central DAM for marketing and creative teams
- Insourced 1 national broadcast campaign, Truth Tellers (from AOR)


2 Co-System Admins
CoE
1 System Admin
+2 Group Admins
CoE
1 System Admin
Large Commercial
Personal Lines
Enterprise Brand
Creative
Marketing
Copper Giants
Ind. Agent Marketing
Ind. Agent Creative
Branding
Creative
Marketing/ Advertising
Agency 1
Agency 2
Events
Users ~50
Users ~700
Users ~150

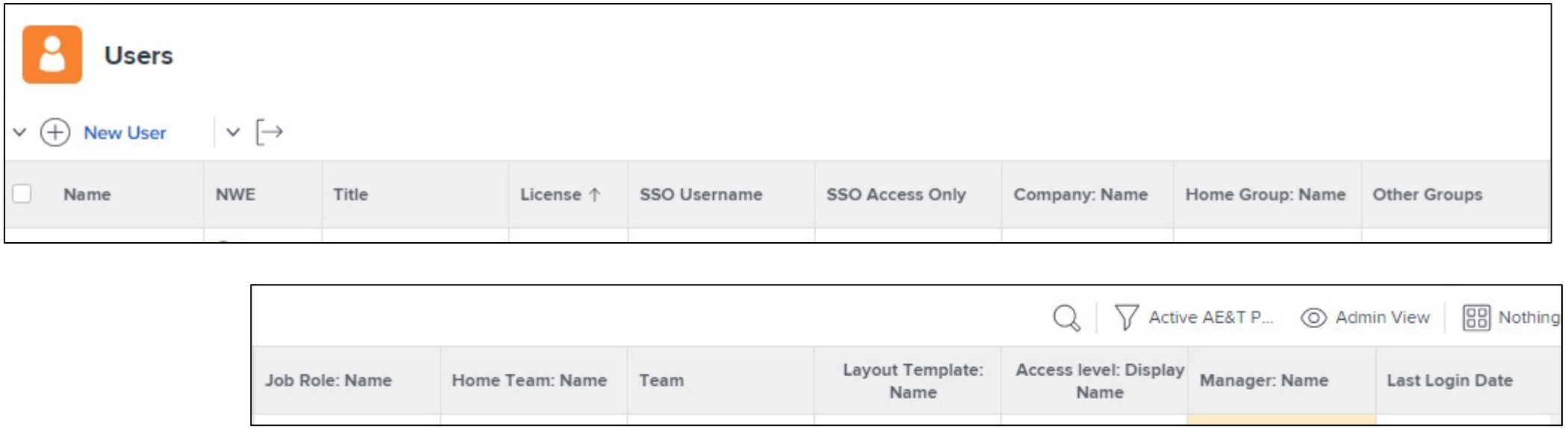
New Workfront Experience transition as catalyst for engagement



User organizational structure is the base

Learn about and organize your users accordingly.

- Groups, teams, etc.
- Build yourself an actionable user view for fast updates.

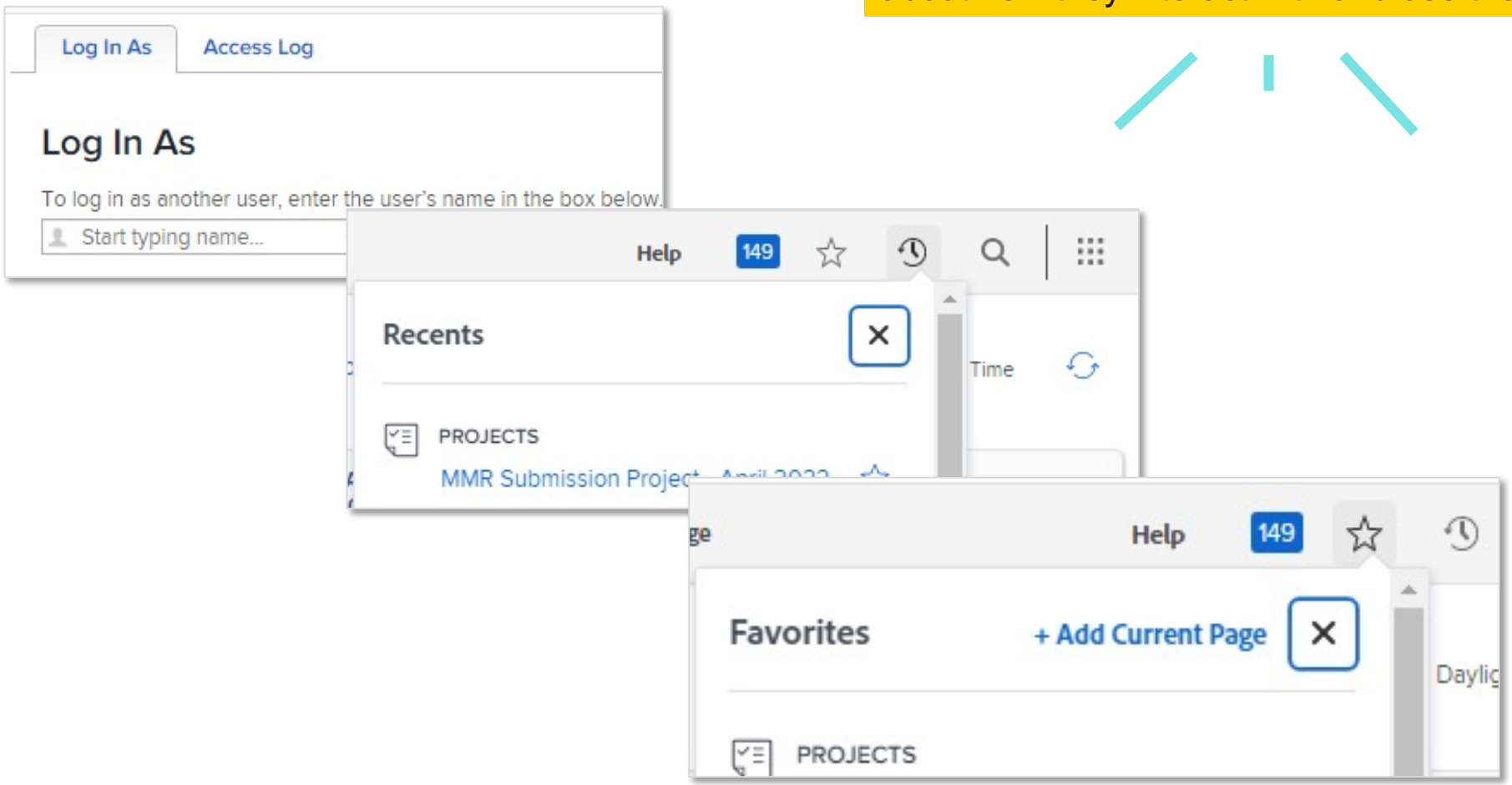


Feb 23: Understanding User Management in Workfront
https://webinars.on24.com/adobe_workfront/AdminEssentialsUserMgmt?partnerref=wfone

COPPER GIANTS

Know your audience!

Meet with teams and individuals to learn more about how they interact with and use the tool.



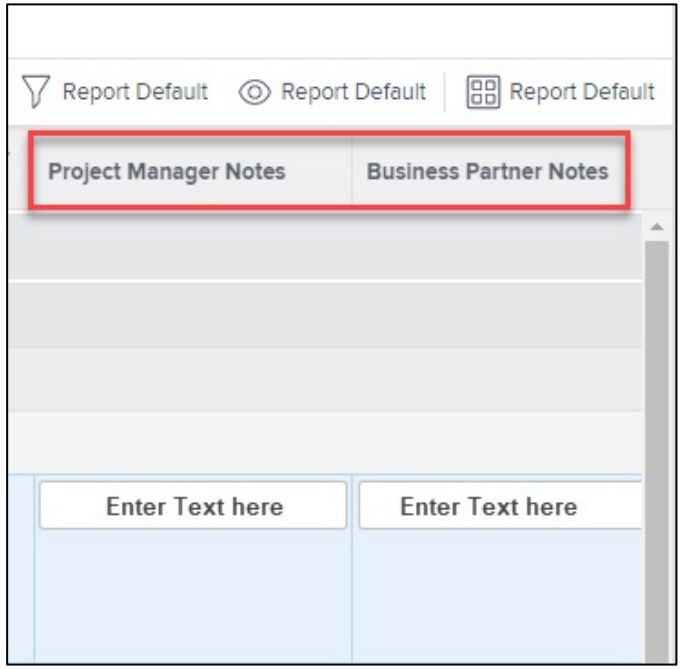
Audit and clean up dashboards that will be pinned on user layout templates

Filter by $$User.ID whenever possible.

Replace project ID with project:name if needed.

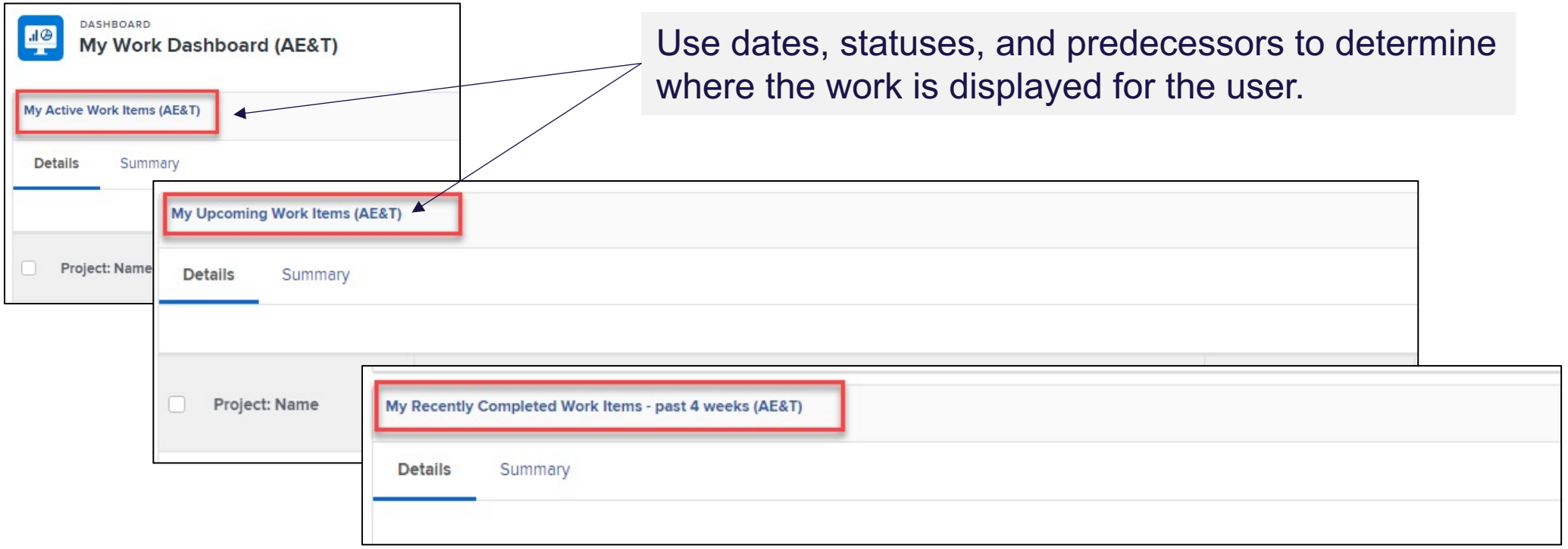
Utilize custom fields in reports/dashboards to capture client direction, updates and changes.

This helps to drive engagement with the dashboard and WF in general.



Audit and clean up dashboards that will be pinned on user layout templates

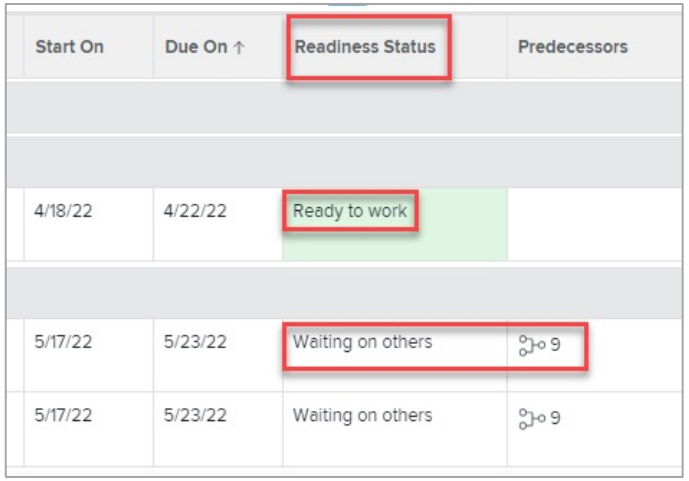
Be aware of how your audience thinks about their work when setting up a dashboard. As an example, what “stage” is the work at?

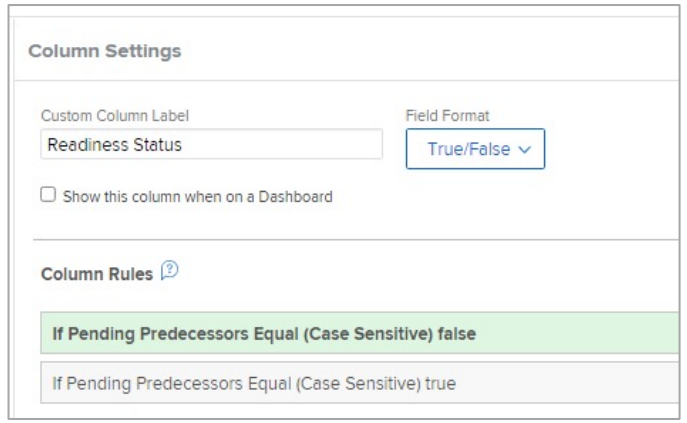


Use dates, statuses, and predecessors to determine where the work is displayed for the user.

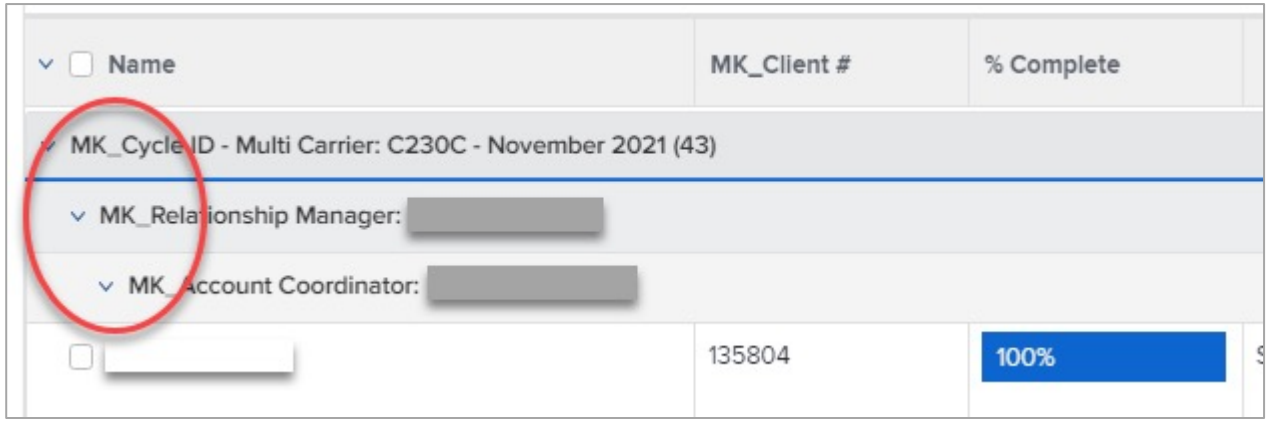
Audit and clean up dashboards that will be pinned on user layout templates

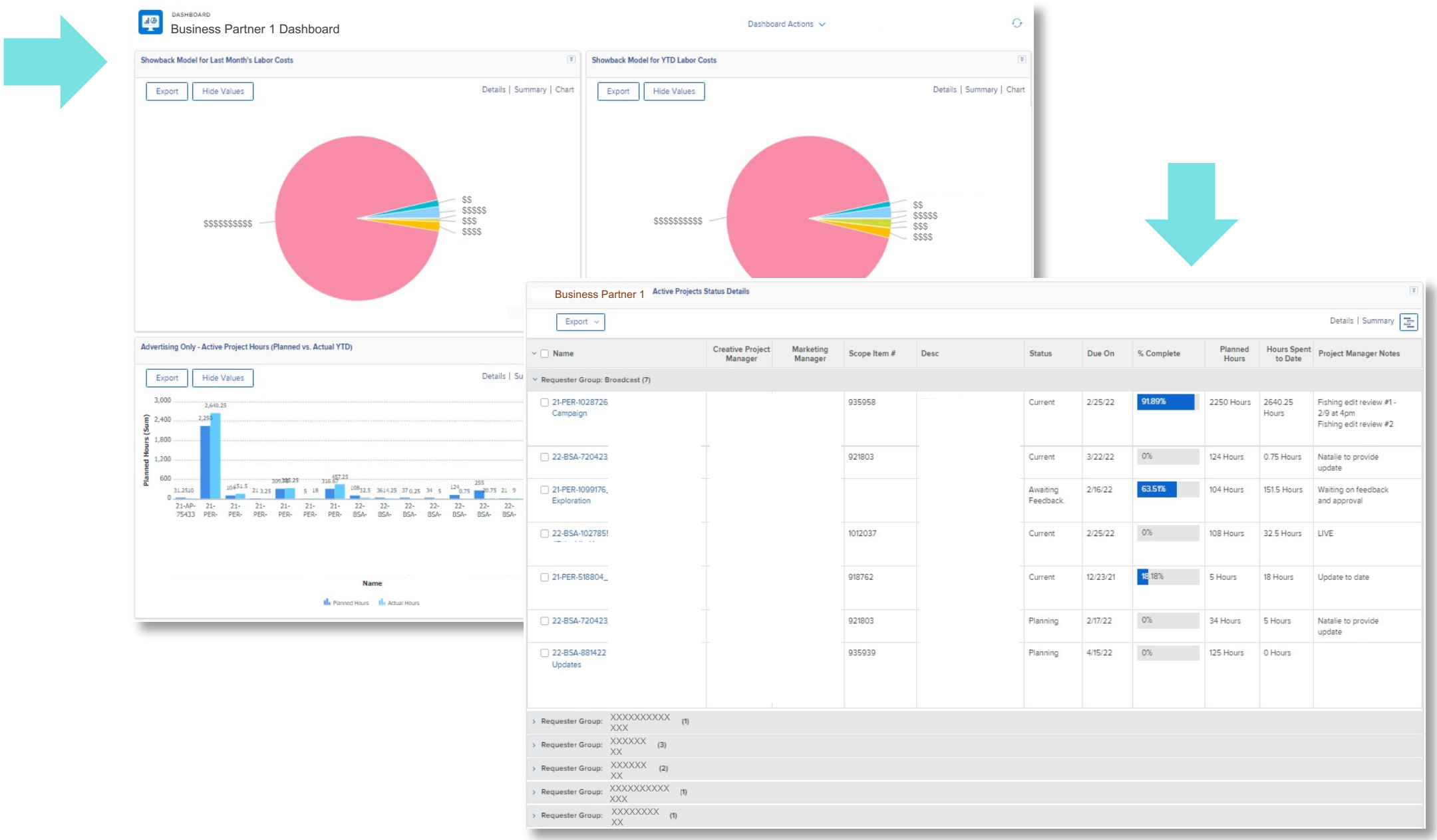
Column rules can help users better understand when work is ready.





Groupings are a very effective way to organize items for the user.




DASHBOARD
Business Partner 1 Dashboard
Dashboard Actions
Showback Model for Last Month's Labor Costs
Export
Hide Values
Details | Summary | Chart
$$$$$$$$$$
$$
$$$$
$$$
$$$$
Showback Model for YTD Labor Costs
Export
Hide Values
Details | Summary | Chart
$$$$$$$$$$
$$
$$$$
$$$
$$$$
Advertising Only - Active Project Hours (Planned vs. Actual YTD)
Export
Hide Values
Planned Hours (Sum)
Name
Planned Hours
Actual Hours
Business Partner 1
Active Projects Status Details
Export
Details | Summary
Name
Creative Project Manager
Marketing Manager
Scope Item #
Desc
Status
Due On
% Complete
Planned Hours
Hours Spent to Date
Project Manager Notes
Requester Group: Broadcast (7)
21-PER-1028726 Campaign
935958
Current
2/25/22
91.89%
2250 Hours
2640.25 Hours
Fishing edit review #1 - 2/9 at 4pm
Fishing edit review #2
22-BSA-720423
921803
Current
3/22/22
0%
124 Hours
0.75 Hours
Natalie to provide update
21-PER-1099176_ Exploration
Awaiting Feedback.
2/16/22
63.51%
104 Hours
151.5 Hours
Waiting on feedback and approval
22-BSA-102785
1012037
Current
2/25/22
0%
108 Hours
32.5 Hours
LIVE
21-PER-518804_
918762
Current
12/23/21
18.18%
5 Hours
18 Hours
Update to date
22-BSA-720423
921803
Planning
2/17/22
0%
34 Hours
5 Hours
Natalie to provide update
22-BSA-881422 Updates
935939
Planning
4/15/22
0%
125 Hours
0 Hours
Requester Group: XXXXXXXXXX XXX (1)
Requester Group: XXXXXX XX (3)
Requester Group: XXXXXX XX (2)
Requester Group: XXXXXXXXXX XXX (1)
Requester Group: XXXXXXXX XX (1)

Monthly look back

Quarterly look ahead

Last week through today

EXECUTIVE SUMMARY – LAST MONTH BY THE NUMBERS

NEW REQUESTS

AAA +AA% MoM

PROJECTS WORKED

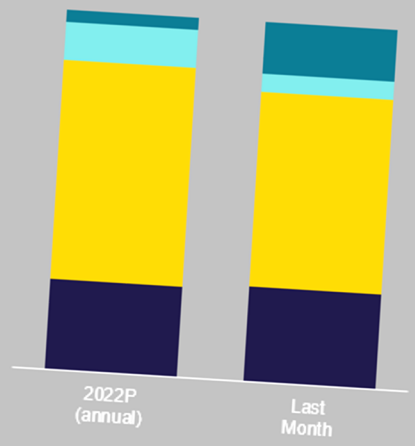
BBB +BB% MoM

DELIVERABLES

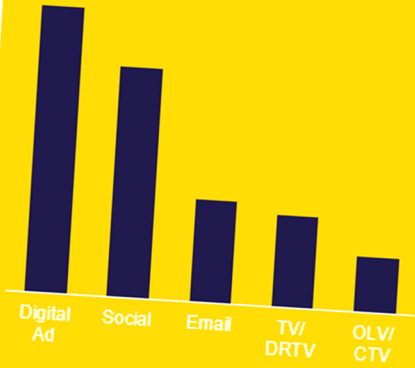
CCC +CC% MoM

INSOURCING SAVINGS YTD

SUPPORT ALLOCATION



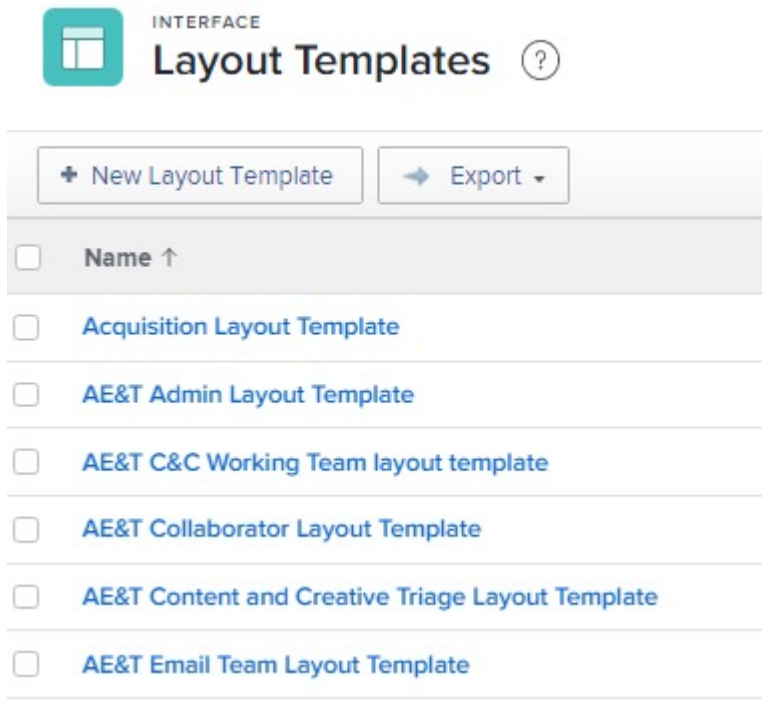
TOP DELIVERABLE TYPES (ACTUALS)



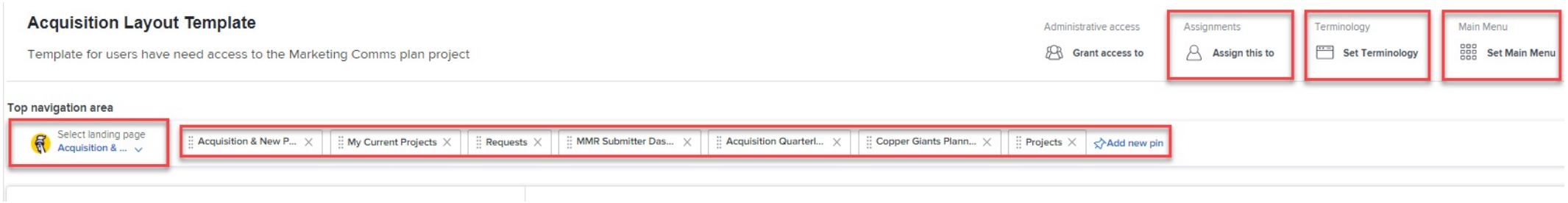
EXPENSES YTD

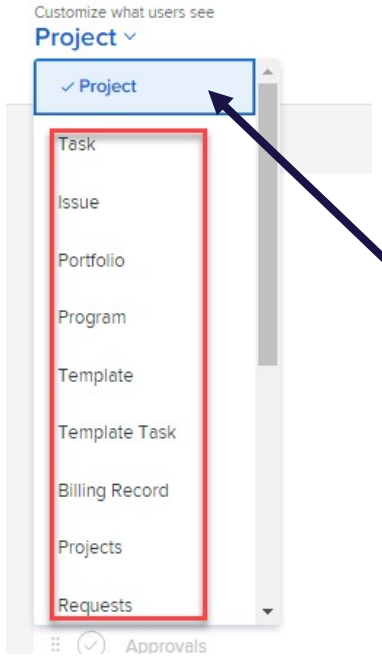
Layout templates are your bridge to the user

- Utilize layout templates to customize the user experience and drive specific dashboard engagement.
- Remember... Less is more, especially with new users.
- Once you have a simplified base layout template, use that to copy from as you create new ones. Much easier to add as you go.
- Use layout templates for easy sharing of dashboards to groups.



Build your bridge…



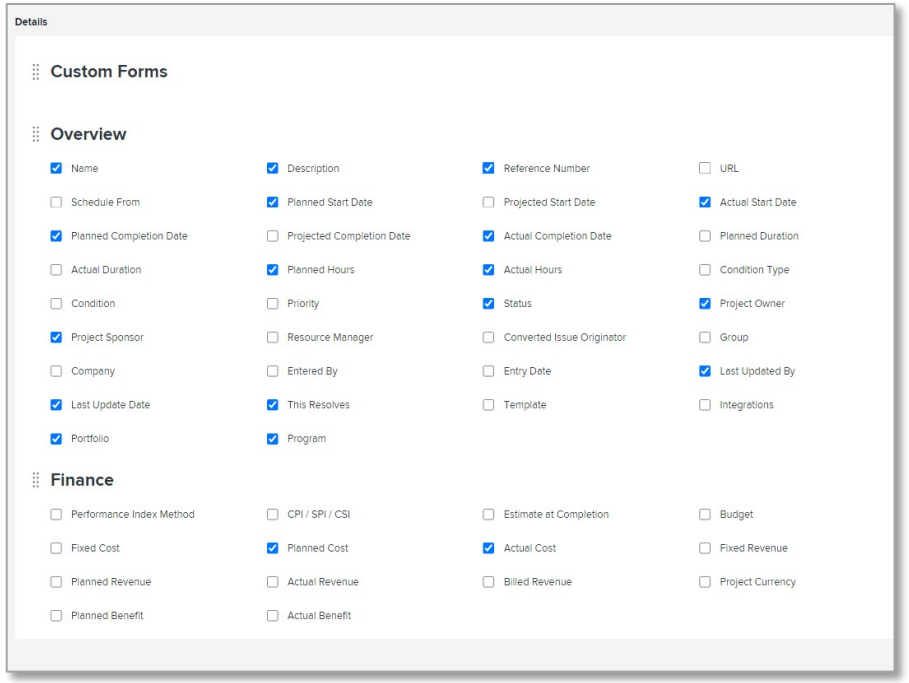


Pins are your number one tool for engagement. You want to include enough to be effective but not overwhelm the user.

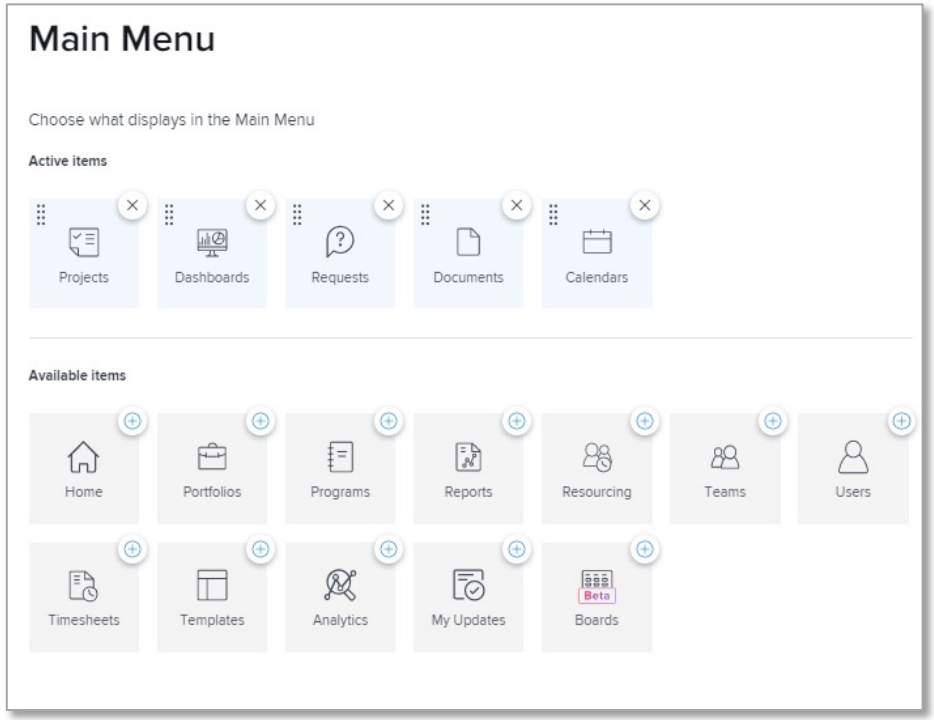
Make your stock pins count!

Customize what users see in all areas; project, task, list, etc.

Build your bridge…

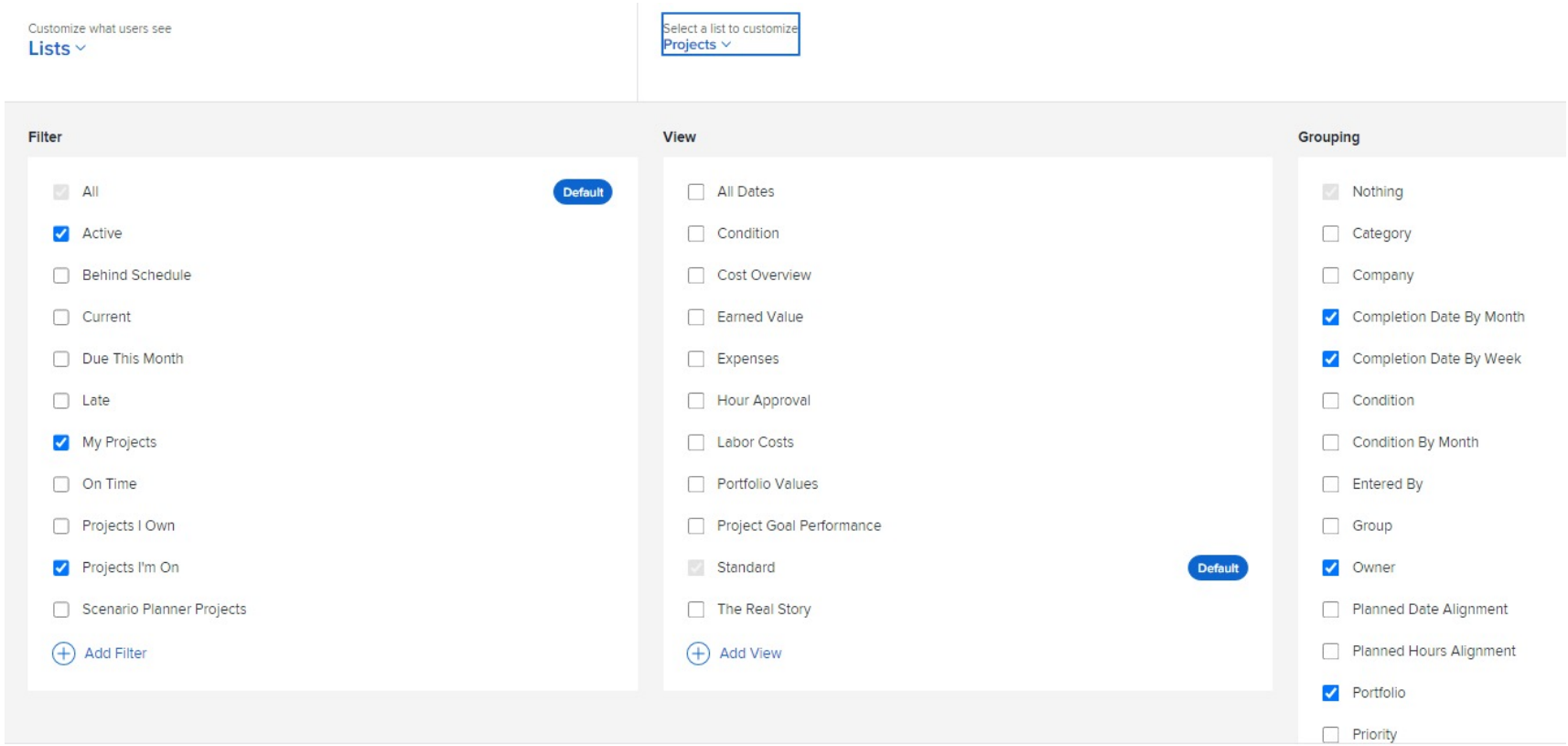


Less is more!



Build your bridge…

- Lists are an area to pay particular attention to.
- Cleaning up list choices across all areas (projects, tasks, etc.) leads to a cleaner, more consistent user experience.



Customize your bridge…

Do they like it? Find out!

1. Identify a vocal and knowledgeable pilot group for feedback.
2. Individual and group sessions can both be effective depending on the audience.
3. Once pilot group is aligned and can help champion—roll out by group/team structure.
4. Encourage feedback and be proactive with touch points.

Now what?

Look

Listen

Evolve

Thank you!

Steven Enos

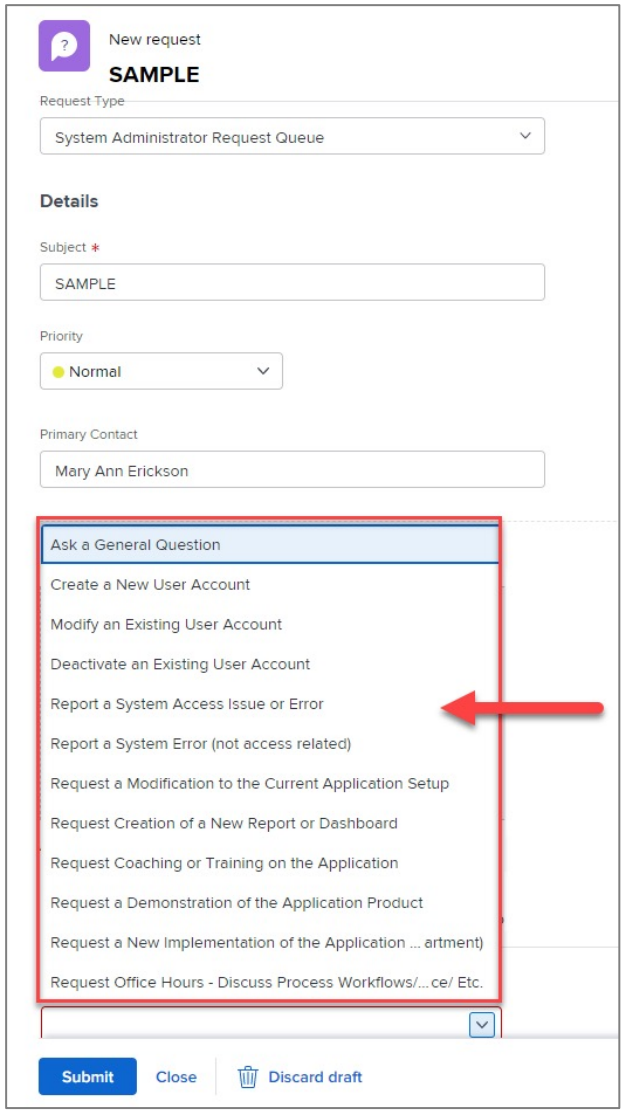
Senior Operations Analyst, Copper Giants™

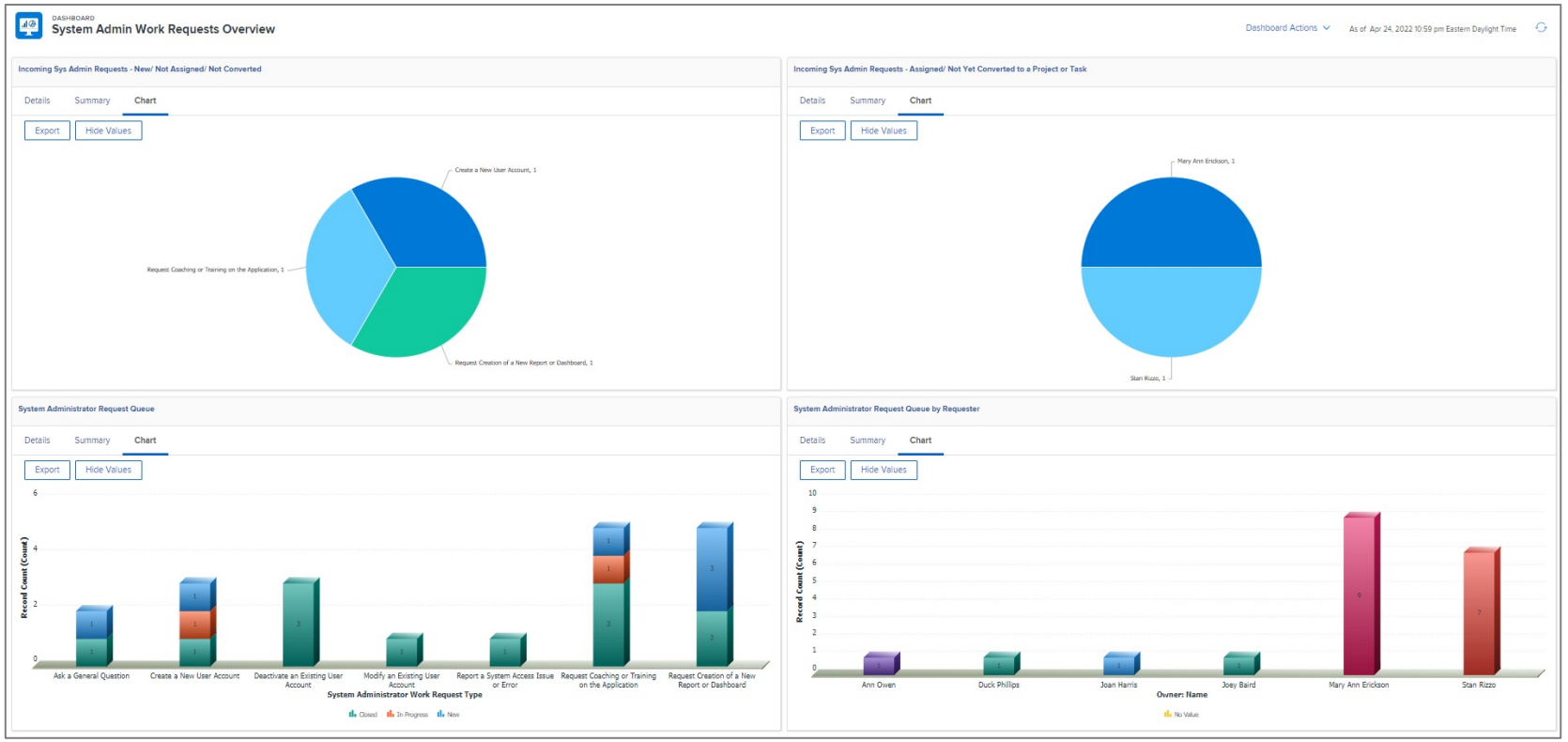
U.S. Marketing & UX, Global Retail Markets

Liberty Mutual Insurance

Adobe Workfront | Best Practices
Optimize the User Experience

In your work – the System Administrator





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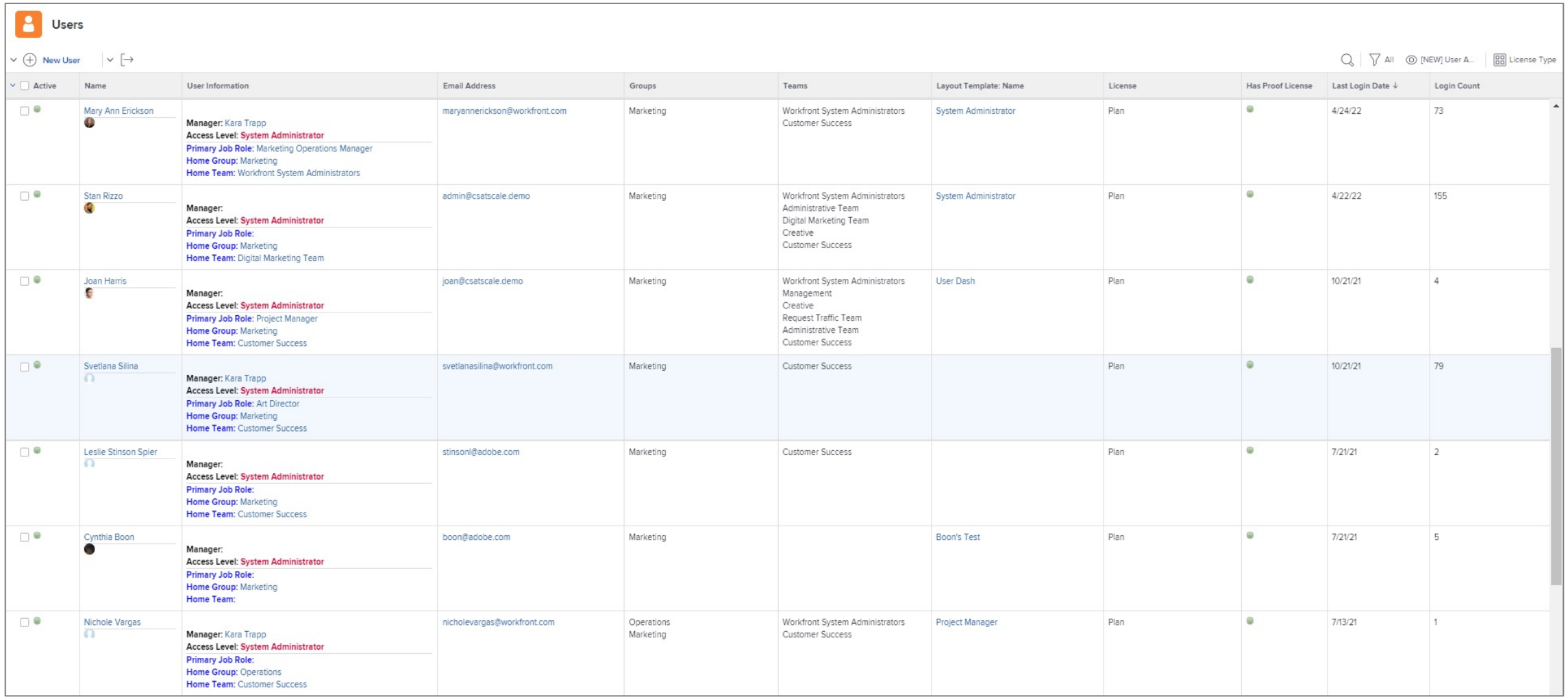
Object visibility – User activity awareness



Users

New User

All | [NEW] User A... | License Type

Active	Name	User Information	Email Address	Groups	Teams	Layout Template: Name	License	Has Proof License	Last Login Date ↓	Login Count
	Mary Ann Erickson	**Manager:** Kara Trapp **Access Level:** System Administrator **Primary Job Role:** Marketing Operations Manager **Home Group:** Marketing **Home Team:** Workfront System Administrators	maryannerickson@workfront.com	Marketing	Workfront System Administrators Customer Success	System Administrator	Plan		4/24/22	73
	Stan Rizzo	**Manager:** **Access Level:** System Administrator **Primary Job Role:** **Home Group:** Marketing **Home Team:** Digital Marketing Team	admin@csatscale.demo	Marketing	Workfront System Administrators Administrative Team Digital Marketing Team Creative Customer Success	System Administrator	Plan		4/22/22	155
	Joan Harris	**Manager:** **Access Level:** System Administrator **Primary Job Role:** Project Manager **Home Group:** Marketing **Home Team:** Customer Success	joan@csatscale.demo	Marketing	Workfront System Administrators Management Creative Request Traffic Team Administrative Team Customer Success	User Dash	Plan		10/21/21	4
	Svetlana Silina	**Manager:** Kara Trapp **Access Level:** System Administrator **Primary Job Role:** Art Director **Home Group:** Marketing **Home Team:** Customer Success	svetlanasilina@workfront.com	Marketing	Customer Success		Plan		10/21/21	79
	Leslie Stinson Spier	**Manager:** **Access Level:** System Administrator **Primary Job Role:** **Home Group:** Marketing **Home Team:** Customer Success	stinsonl@adobe.com	Marketing	Customer Success		Plan		7/21/21	2
	Cynthia Boon	**Manager:** **Access Level:** System Administrator **Primary Job Role:** **Home Group:** Marketing **Home Team:**	boon@adobe.com	Marketing		Boon's Test	Plan		7/21/21	5
	Nichole Vargas	**Manager:** Kara Trapp **Access Level:** System Administrator **Primary Job Role:** **Home Group:** Operations **Home Team:** Customer Success	nicholevargas@workfront.com	Operations Marketing	Workfront System Administrators Customer Success	Project Manager	Plan		7/13/21	1

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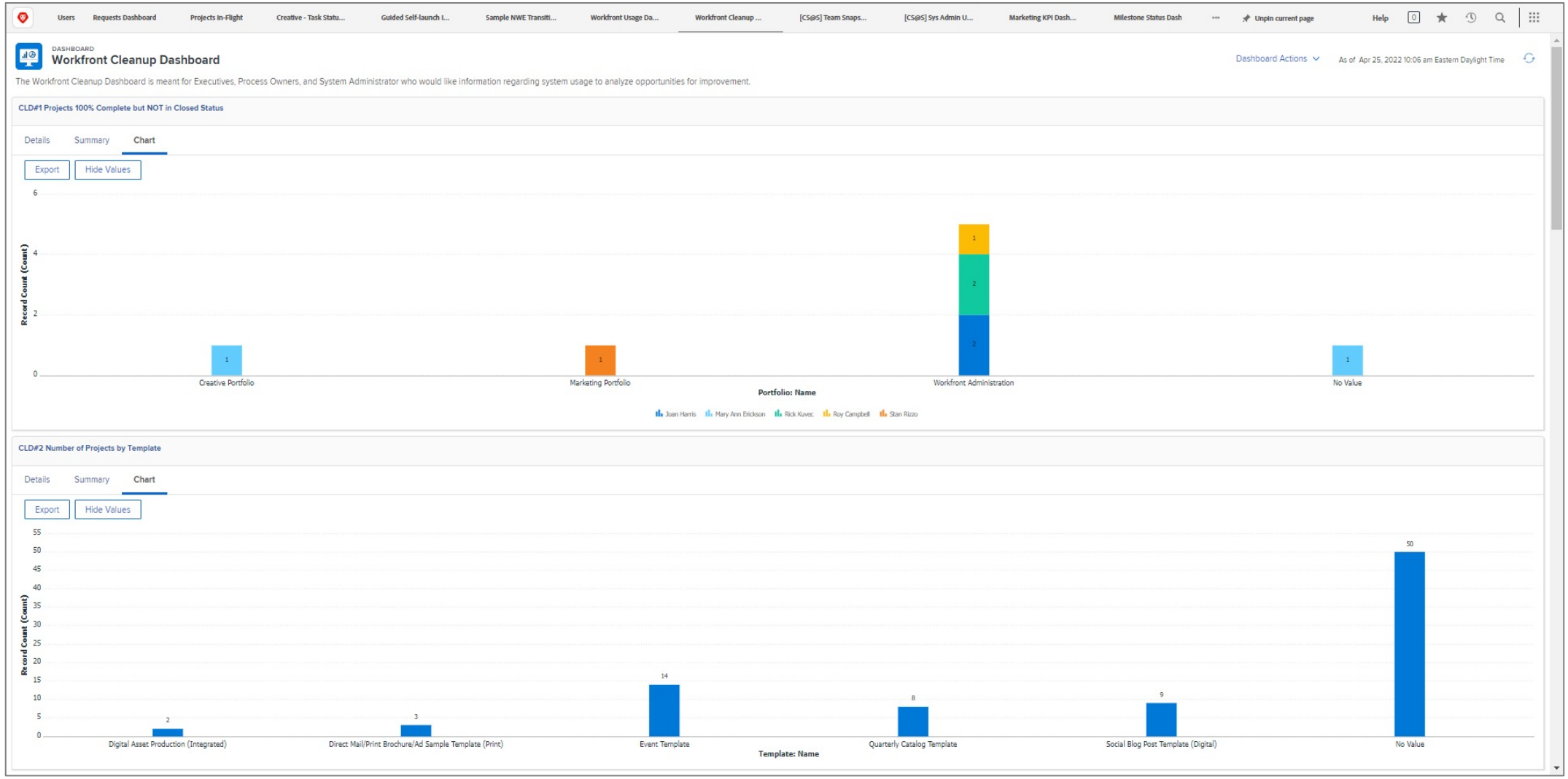
Manage and maintain your environment – keep it current, relevant, accurate



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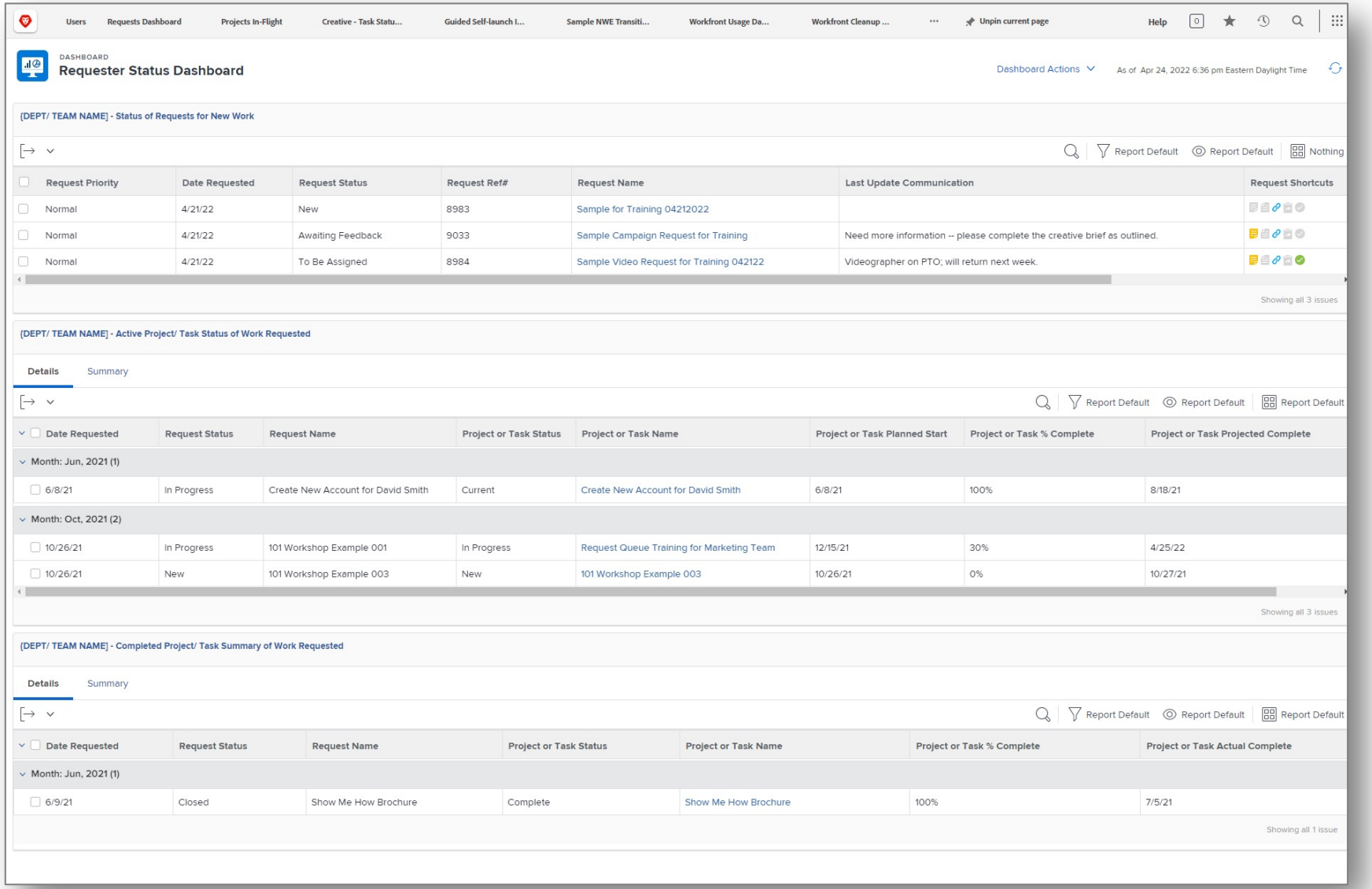
With your end users – requesters, team members, stakeholders, etc.



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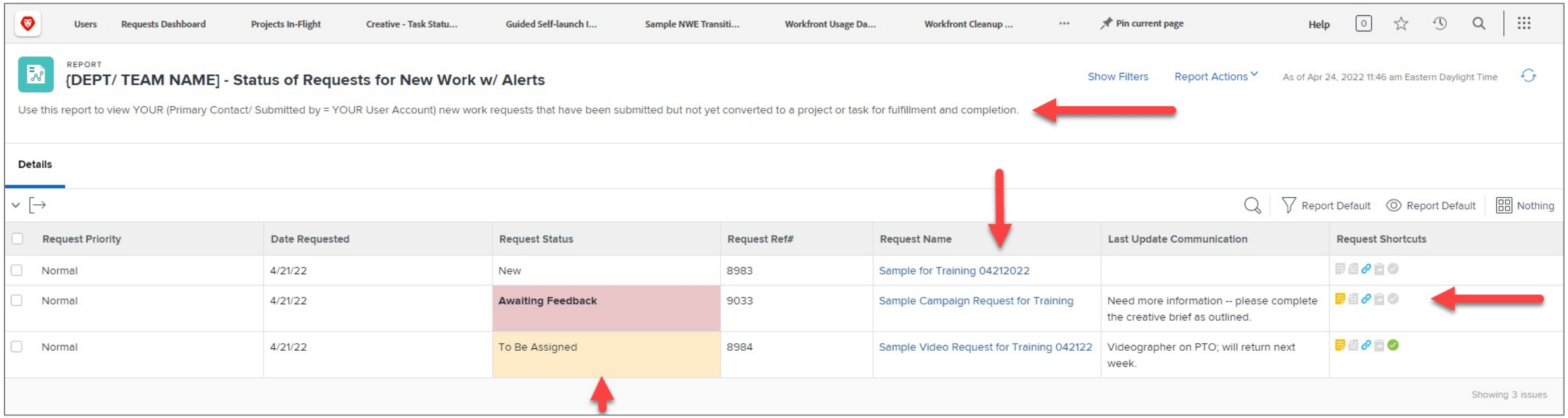
Requester – Original Submission



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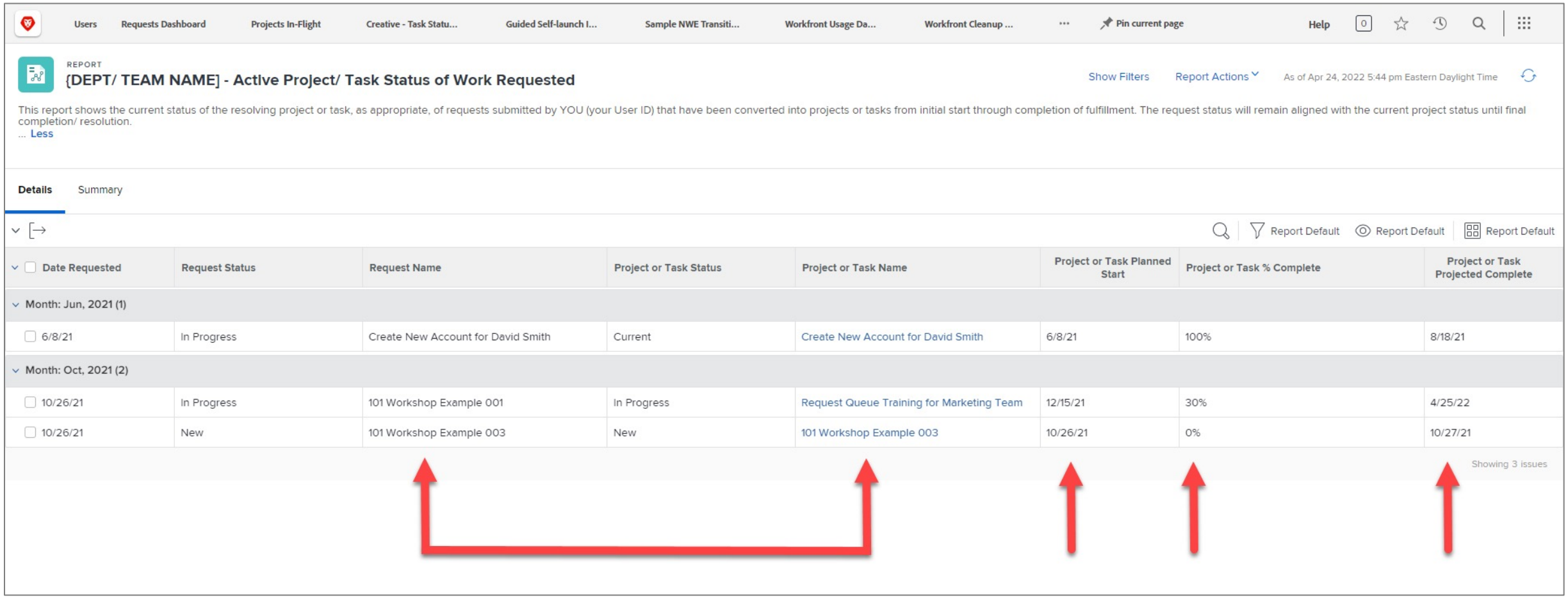
Requester – Work in Progress (Converted Requests)



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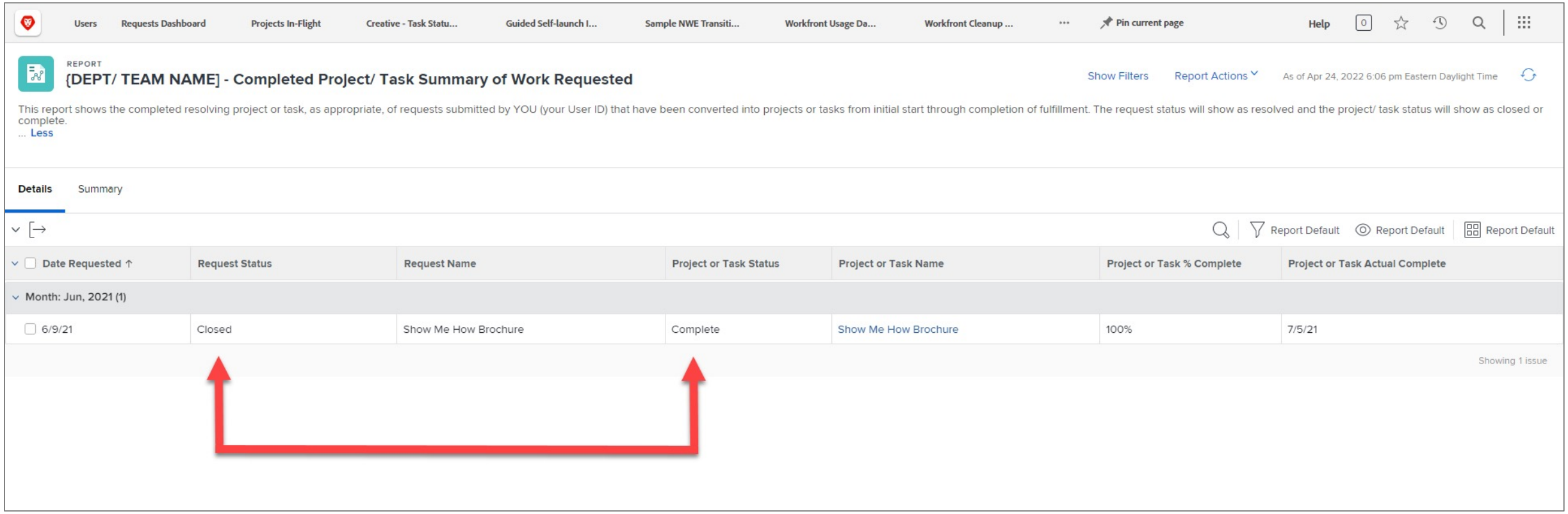
Requester – Completed Work (Requests)



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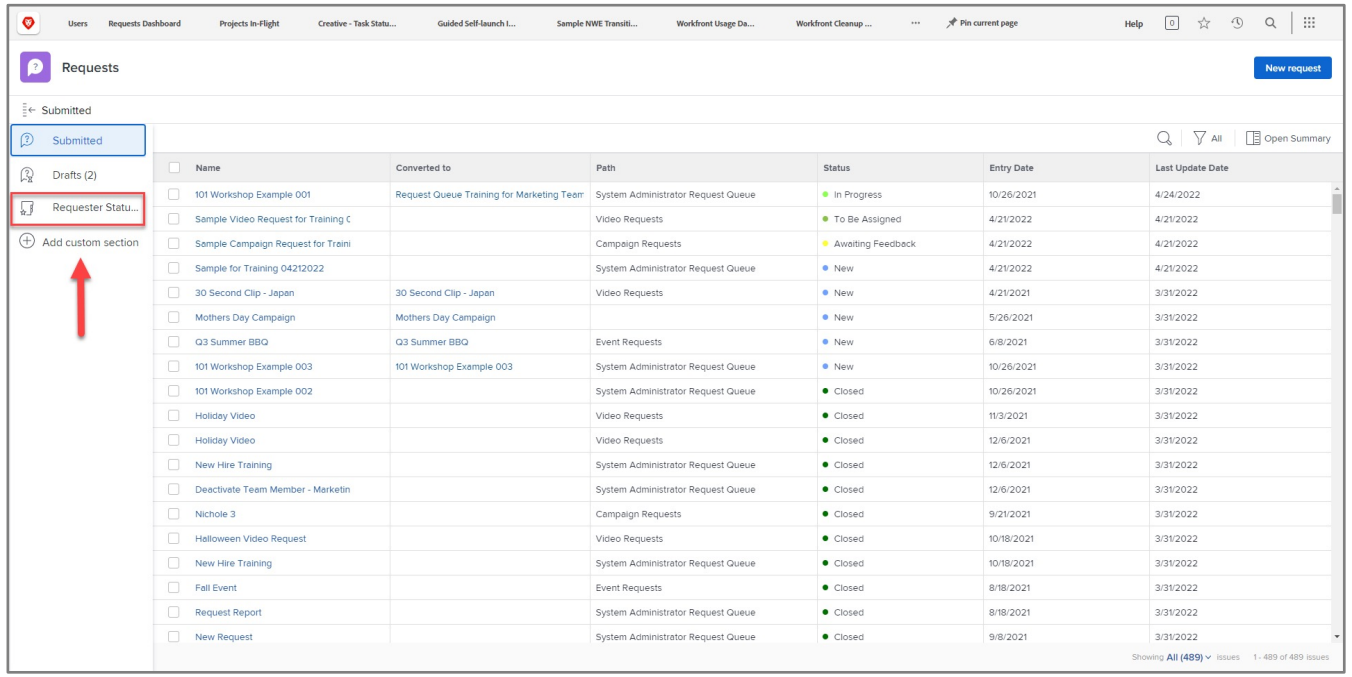
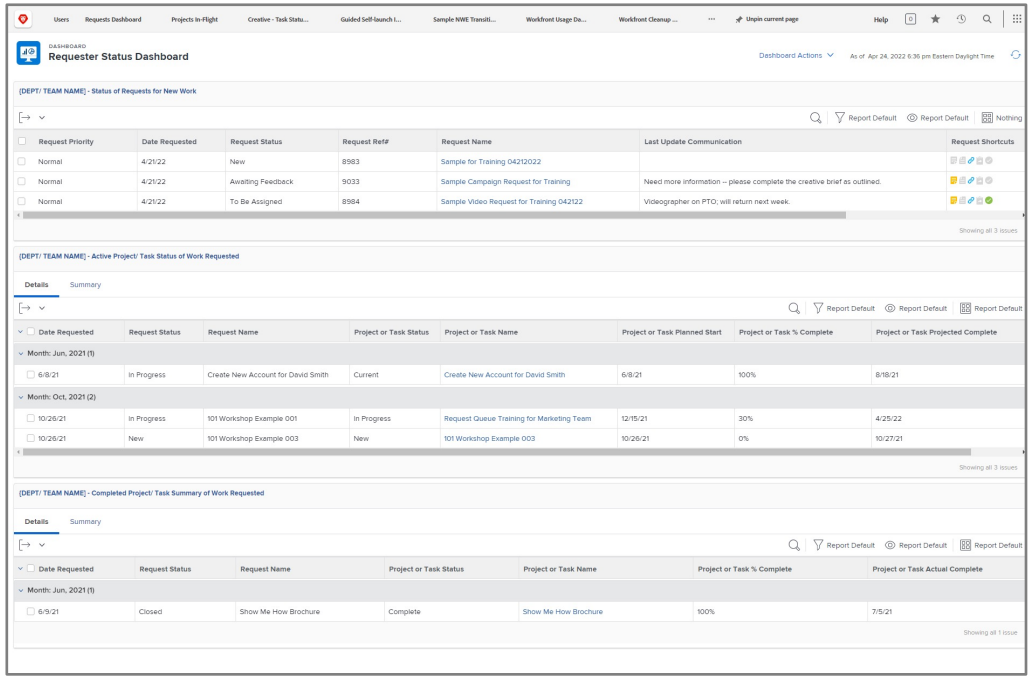
Out of the Box Request View vs. Requester Status Dashboard





Which experience would you prefer?

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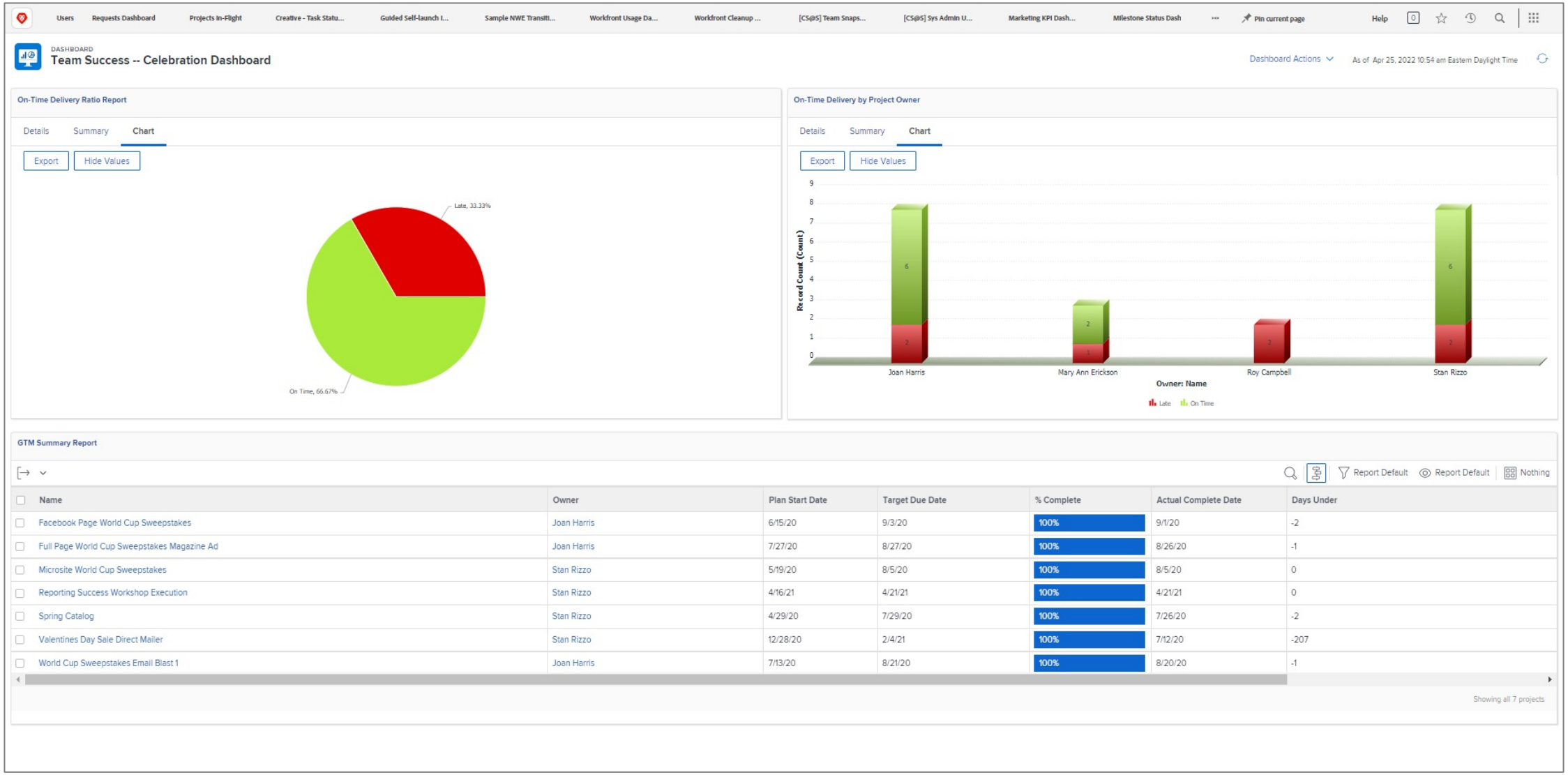
Across your organization – visibility, collaboration, celebration and fun



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Remember, as you travel your journey

A tribe is a group of people ***connected to one another****,* ***connected to a leader****, and* ***connected to an idea****. For millions of years, human beings have been part of one tribe or another. A group only needs two things to be a tribe; a* ***shared interest*** *and a* ***way to communicate****.*

~ Seth Godin

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Questions?

Upcoming Events

System Admin Essentials Webinars

- May 11: Leveraging the Group Admin
- June 8: Foundations of Operational Reporting

Office Hours + Small Group Workshops

- May 4: Ask the Expert: User Experience Office Hours
- May 5: Small Group Workshop: Request Queues
- May 12: Small Group Workshop: User Management
- Check in regularly as topics are added weekly!

Register at one.workfront.com/events

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Thank you!

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