



EXPERIENCE MAKERS THE SKILL EXCHANGE

Experience Makers Spotlight:
How Do YOU Use Workfront?

Linnie Ciepielowski
Marketing Process & Reporting Lead
Esri





Marketing Process & Reporting Lead at Esri, the industry leader in geographic information system (GIS) software products, and 2019 Lion Award winner (Change Leader).

My team administers Workfront and creates efficient marketing processes.

Prior to joining Esri, I implemented Workfront for the National Retail Federation in Washington, D.C., as their Creative Services Production Manager.

Who We Are



esri[®]

THE
SCIENCE
OF
WHERE™



- Who is Esri and what do we do?
- Global market leader in Geographic Information System (GIS) software, location intelligence, and mapping
- Utilized by 350,000 organizations, including half of Fortune 500 companies and 7,000+ colleges and universities
- With our partners, we provide support for customers in 100+ countries on six continents



Why We Use Workfront



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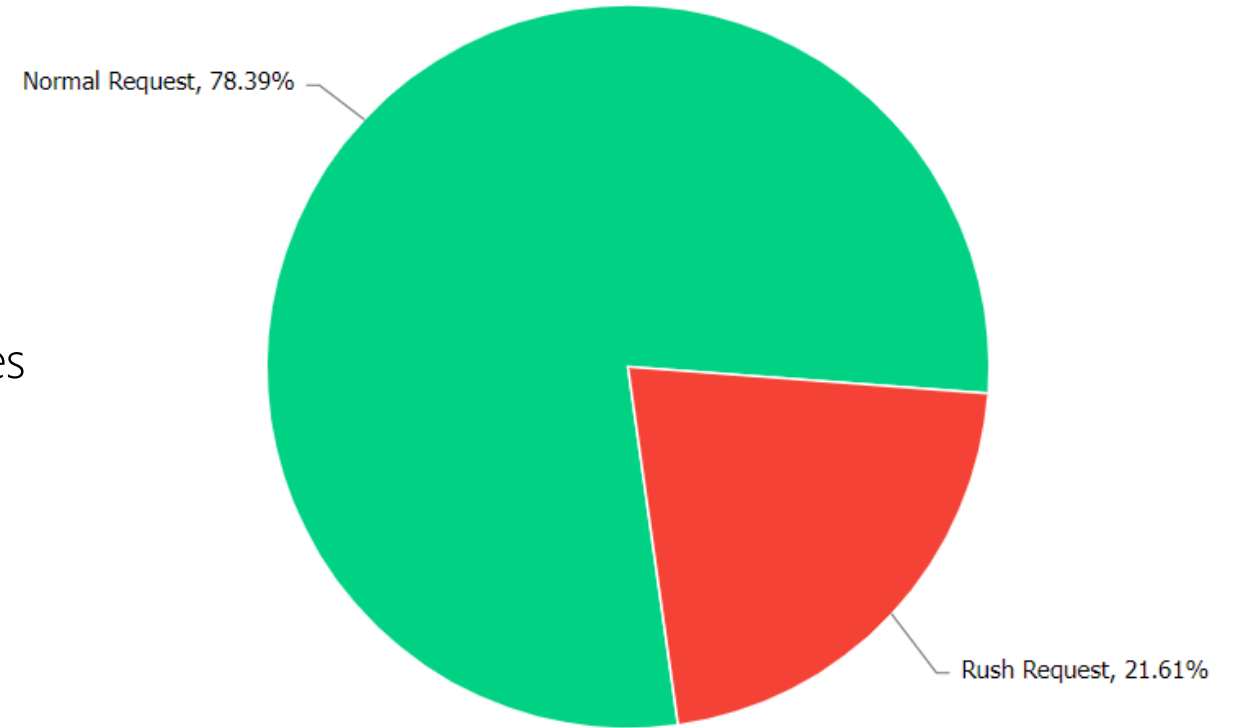


- **Unify Disparate Legacy Systems**

- 74 request forms across 8 different systems

- **Business Challenges to Address**

- Standardize, scale and measure Marketing processes
- Transparency across all projects and campaigns
- Accelerate Time to Market Velocity



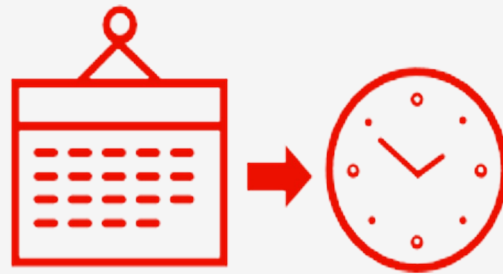
Benefits Gained & ROI

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74 request forms (8+ systems) consolidated into one system of record



Print Collateral Approval:
Reduced from 2 weeks to 1.5 hours with Workfront for Outlook



16 hours saved per week
by standardizing legal review of localized assets

 **16**
HOURS SAVED

Greater visibility and speed of execution

How We Use Workfront



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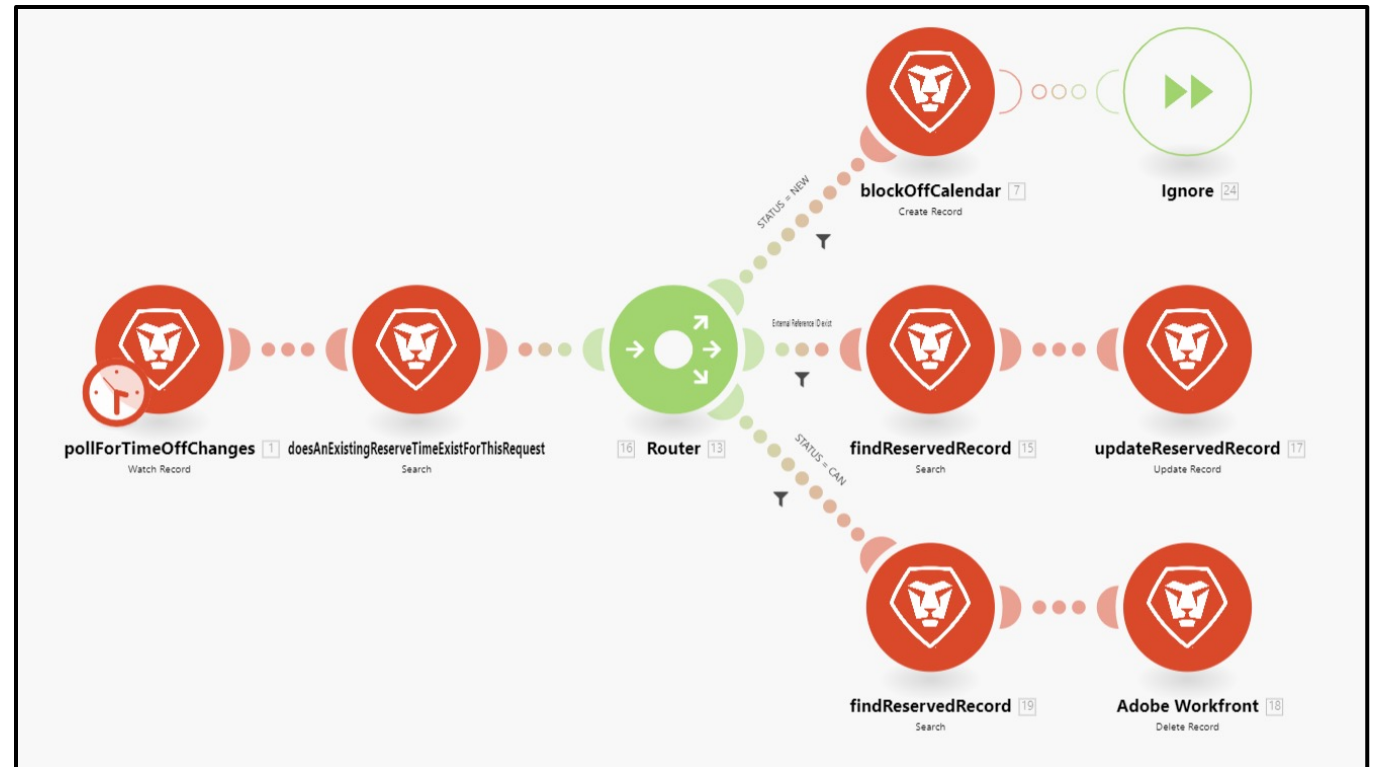


- **Marketing and Creative Production**

- Request-centric model
- Request > Workfront Proof > AEM

- **Workfront Fusion**

- Automate project setup
- Time off and project timelines



- **Reporting and Analytics**

- The User Experience
- Resource Management

- **KPIs and Formulas**

- **Time to Market Velocity**
WEEKDAYDIFF(Default
Baseline.Planned Start Date,Actual
Completion Date)
- **Completion Date Variance**
WEEKDAYDIFF(Default
Baseline.Planned Completion
Date,Actual Completion Date)

My Home Team Workload Balancer

Workload Balancer (?) | Today < > | 4 weeks v |

ASSIGNED WORK | W9 - FEB 2022

	27 Sun	28 Mon	01 Tue	02 Wed	03 Thu	04 Fri	05 Sat
> Jon Gerstenberger Workfront Administrator		9.12	5.75	5.83	5.82	5.67	
> Linnie Ciepielowski Workfront Administrator		9.15	7.85	18.1	16....	11.15	

Tips for New Workfront Users



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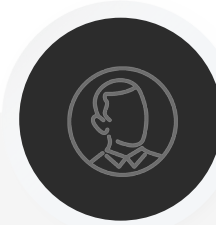




Custom fields should answer two questions

Do I have what I need to get the job done?

Am I capturing data that I need for reporting?



Change Management is key to adoption

Executive sponsorship is critical to success

Co-create processes to get buy-in



Process optimization is ongoing

Create mechanism for process feedback

Look for self-service/integration opportunities



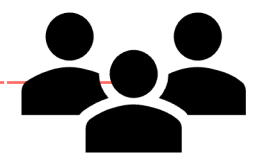


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Adobe Workfront: “Back to Basics”

Michelle Gracey
Manager, Application Services
Inland Empire Health Plan

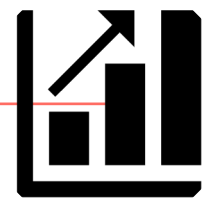




People



Technology



Continuous Improvement

Michelle Gracey
Manager, Application Services
Inland Empire Health Plan

Marketing

Strategy
Management

Portfolio
Planning

Project
Management



Regulatory & Compliance



Finance & Purchasing



Leading Remote Teams

Wrap Up



Q & A







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Where Did We Go Right? Rollout Strategy

Jeremy Newman
Workfront and Creative PM Lead
Capital One



Hi, I'm Jeremy!

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All about me...and Workfront + Capital One!

Uptown & The Bronx

1

2

3



Spent 17 years as a hands-on creative
Photography and retouching

Joined Capital One in 2017

Given six weeks to learn and rollout Workfront

Small satellite creative team + marketing partners

I did it ...made lots of mistakes - and learned a lot!

Over the next 18 months, found a ton of value for my team!

In 2020 we rolled out Workfront Brand-wide

300 person creative and strategy organization

We use Workfront for:

Single point of truth - efficiency! Reduce burnout

Intake and prioritization

Project management and continual process evolution

Proofing comment and approval

Currently: SME for Enterprise-wide Workfront rollout

Where Did We Go Right? Rollout Strategy

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Top down / bottom up buy-in

VP and Dir + level buy-in for helping drive engagement and process buy-in

Meeting users where they're at and providing outsized support to win hearts and minds

Building a best in class support structure

Two full-time roles to support process, reporting and training in the system

Partnering with Tech reps to help support risk and tech needs (E.g., SSO)

Communication, Communication, Communication!

It's impossible to over communicate

Created custom email inboxes, and a multi-channel messaging campaign to keep users/stakeholders informed

Custom, use case-based training

Limited the scope of Workfront's "bells and whistles" to help drive users to what they needed to engage with

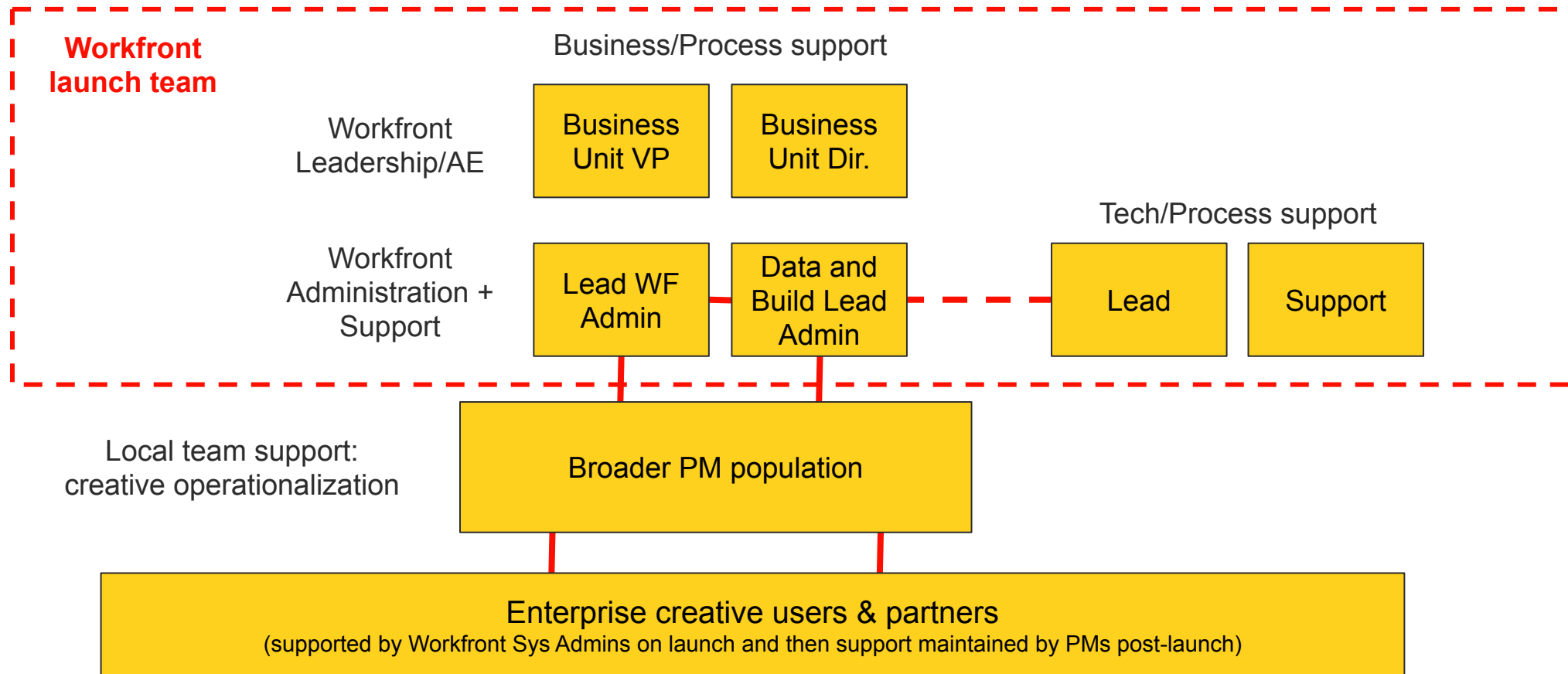
Designed to meet our users where they were at and give them JUST enough info to get up and running

Top down / bottom up buy in & support structure

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The **FIRST** thing we did was define our core launch team and support structure

- This drove escalation and support hierarchy



Communication, Communication, Communication!

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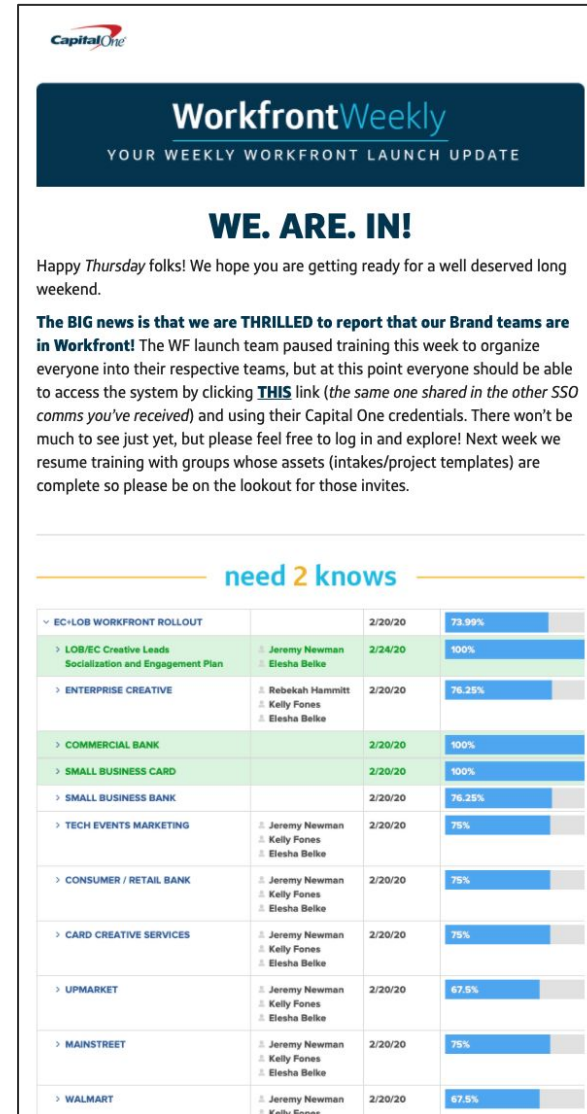
Always-on communication was a major part of our strategy.

With a change this big - **it's impossible to over communicate.**

Set up a Workfront Administration email

Workfront Slack channel to “boost our signal” and create an immediate access point to the launch team

Weekly newsletters to keep people up to date, educate and have a little fun



Workfront Weekly
YOUR WEEKLY WORKFRONT LAUNCH UPDATE

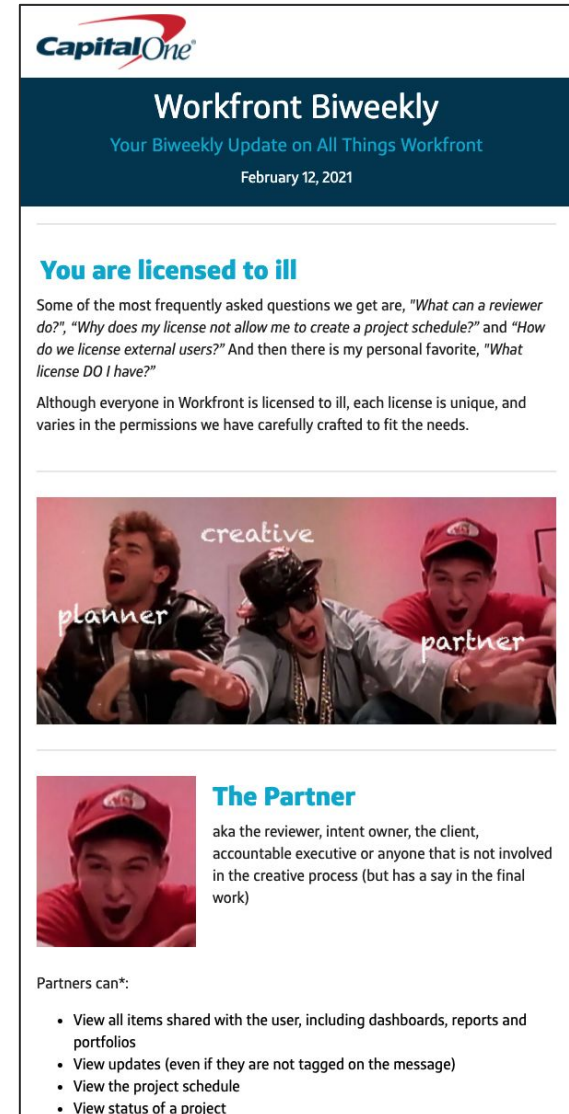
WE. ARE. IN!

Happy *Thursday* folks! We hope you are getting ready for a well deserved long weekend.

The BIG news is that we are THRILLED to report that our Brand teams are in Workfront! The WF launch team paused training this week to organize everyone into their respective teams, but at this point everyone should be able to access the system by clicking **THIS** link (*the same one shared in the other SSO comms you've received*) and using their Capital One credentials. There won't be much to see just yet, but please feel free to log in and explore! Next week we resume training with groups whose assets (intakes/project templates) are complete so please be on the lookout for those invites.

need 2 knows

Category	Lead(s)	Due Date	Progress
EC-LOB WORKFRONT ROLLOUT		2/20/20	73.99%
LOB/EC Creative Leads Socialization and Engagement Plan	Jeremy Newman Elesha Belke	2/24/20	100%
ENTERPRISE CREATIVE	Rebekah Hammitt Kelly Fones Elesha Belke	2/20/20	76.25%
COMMERCIAL BANK		2/20/20	100%
SMALL BUSINESS CARD		2/20/20	100%
SMALL BUSINESS BANK		2/20/20	76.25%
TECH EVENTS MARKETING	Jeremy Newman Kelly Fones Elesha Belke	2/20/20	75%
CONSUMER / RETAIL BANK	Jeremy Newman Kelly Fones Elesha Belke	2/20/20	75%
CARD CREATIVE SERVICES	Jeremy Newman Kelly Fones Elesha Belke	2/20/20	75%
UPMARKET	Jeremy Newman Kelly Fones Elesha Belke	2/20/20	67.5%
MAINSTREET	Jeremy Newman Kelly Fones Elesha Belke	2/20/20	75%
WALMART	Jeremy Newman Kelly Fones	2/20/20	67.5%




Workfront Biweekly
Your Biweekly Update on All Things Workfront
February 12, 2021

You are licensed to ill

Some of the most frequently asked questions we get are, "What can a reviewer do?", "Why does my license not allow me to create a project schedule?" and "How do we license external users?" And then there is my personal favorite, "What license DO I have?"

Although everyone in Workfront is licensed to ill, each license is unique, and varies in the permissions we have carefully crafted to fit the needs.



The Partner
aka the reviewer, intent owner, the client, accountable executive or anyone that is not involved in the creative process (but has a say in the final work)

Partners can*:

- View all items shared with the user, including dashboards, reports and portfolios
- View updates (even if they are not tagged on the message)
- View the project schedule
- View status of a project

Part of our training was clear expectations on system engagement

Plan License

Project managers responsibilities (Most of the lift is here)

- Local team SME - System issue escalation
- Campaign, project builds, task assignment, timing updates and communication
- Process / timeline adherence
- Facilitation of reporting, provide context to data
- Partner task closure (*can also be done by creative*)

Work License

Brand creative responsibilities (Where Project Management support exists)

- Daily review of home screen or dashboards
- Tell the system when work is started / completed
- Communicate in projects/proofs within the system
- Route proofs (where applicable)

Review License

Brand partner responsibilities

- Project intent / intake delivery
- Timely proof comment / proof decision making
- Project communication / project milestone review through active project reporting

Custom, Use Case-Based Training

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We crafted custom, use case specific training with custom training docs and videos

Project Managers (Planners) got the most training

Three, 90-minute in-person sessions

Creative team members (Workers)

Two, 90-minute, in-person sessions

Business partners (Reviewers)

One, 45-60-minute in-person session

Planner (Local SME) Training

Brand training resource: System overview + From an intake to a project

Brand training resource: manipulating a project

Brand training resource: proofing

Worker (main user) training

Brand training resource: creative interface overview + system responsibilities

Brand training resource: proofing

Reviewer (partner) training

Brand training resource: partner interface overview

*** Every group got PDFs of the training and walk through videos of training topics*

A TON of sys admin support time and requests...

Watch out

On launch, our sys admin team was fielding ad hoc requests and issues from our local subject matter experts (the PM team). This quickly became overwhelming and difficult to prioritize and manage.

Best practice suggestions

Build a Workfront system change intake and request queue to prioritize. (*Trust me, you WANT this!*)

This allows your sys admin team to keep track of all incoming requests, justify time spent and update stakeholders/partners

Create an “issues log”

- Shared document that that has all past/current issues we’re working through and workarounds until the issues are resolved
- This aids in self-service

Q & A



