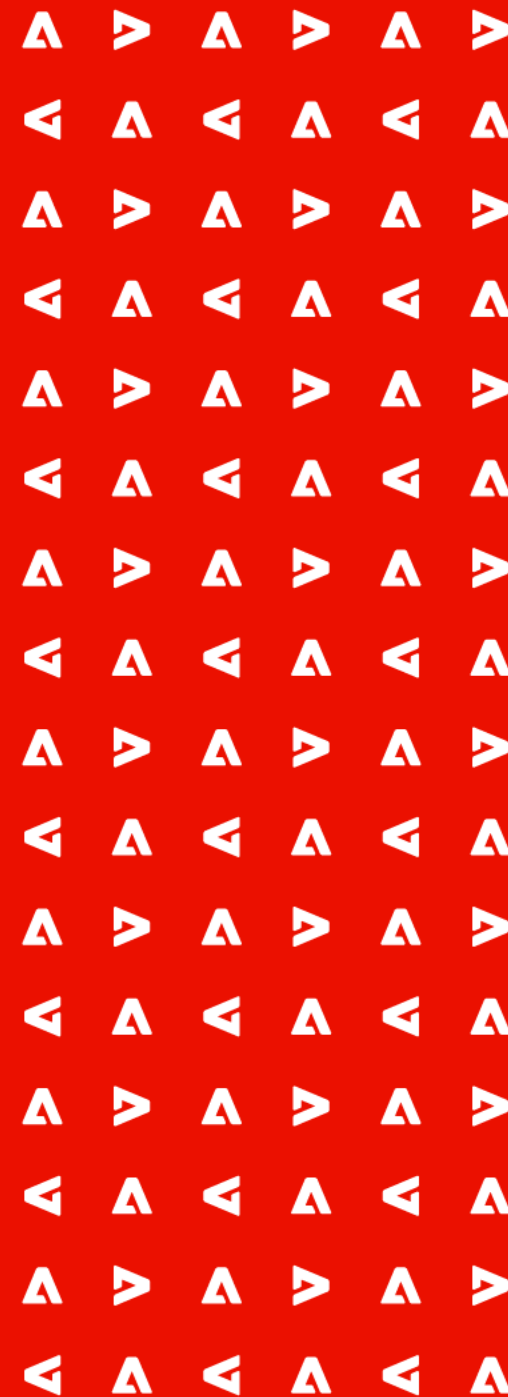




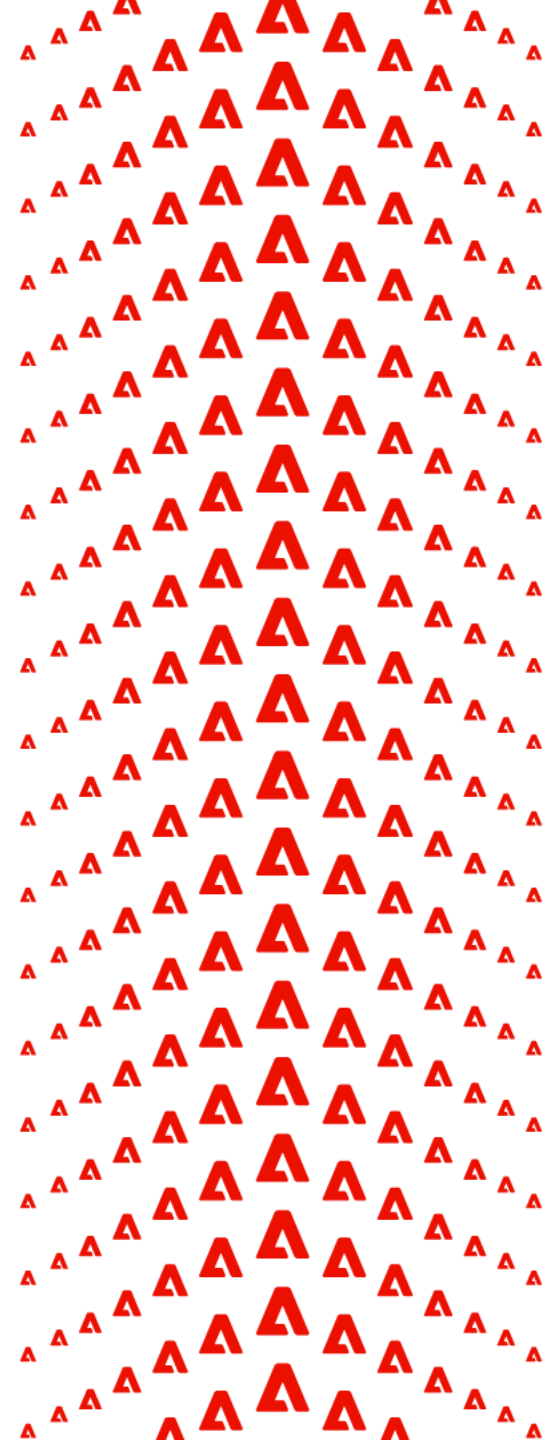
# System Admin Essentials: What IS Governance in Workfront?

March 30, 2022



# Agenda (Pacific)

Time	Topic
8:00 a.m.	Welcome and agenda
8:05 a.m.	<b>What IS Governance in Workfront?</b> <i>Tyler Holt, Consultant, Workfront Customer Success Services, Adobe Workfront</i>
8:25 a.m.	<b>Customer Spotlight: Mayo Clinic College of Medicine</b> <i>Luke Ramlow, Application Analyst, Education Technology Center, Mayo Clinic College of Medicine</i>
8:45 a.m.	Presenter Q&A
8:55 a.m.	Wrap-up and next steps



# Presenters



## **Tyler Holt**

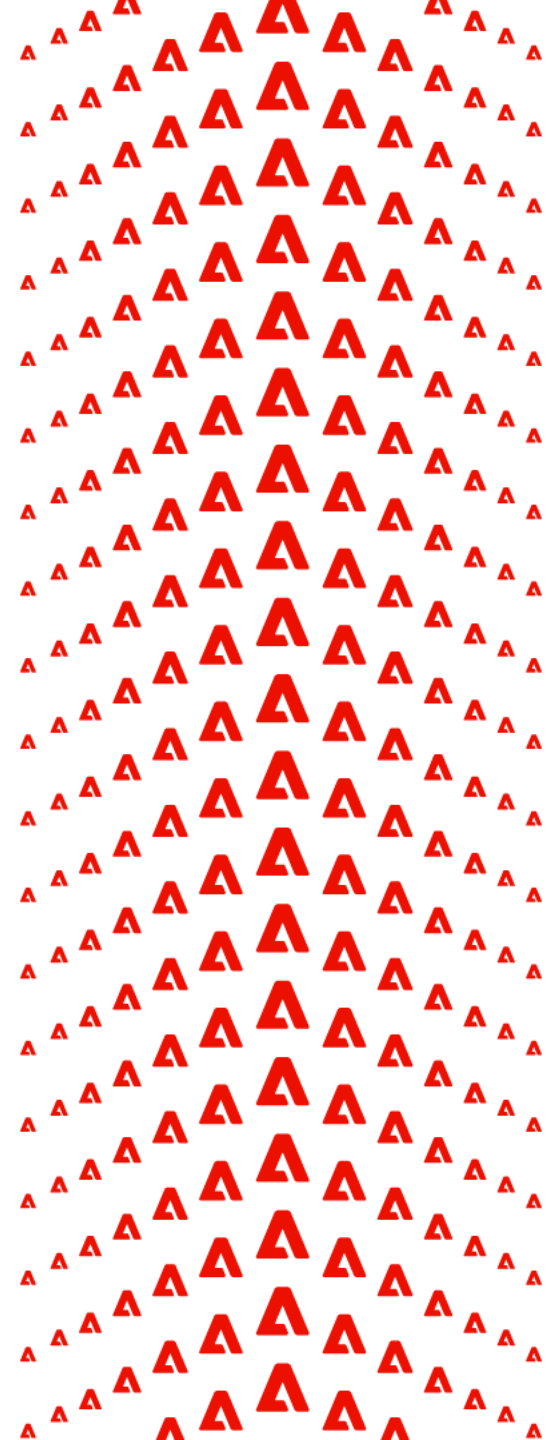
Consultant, Workfront Customer Success  
Services

Adobe Workfront



## **Luke Ramlow**

Application Analyst,  
Education Technology Center,  
Mayo Clinic College of Medicine



# About Me



This is my mini Golden Doodle, Beesly – bonus points if you know where the name is from

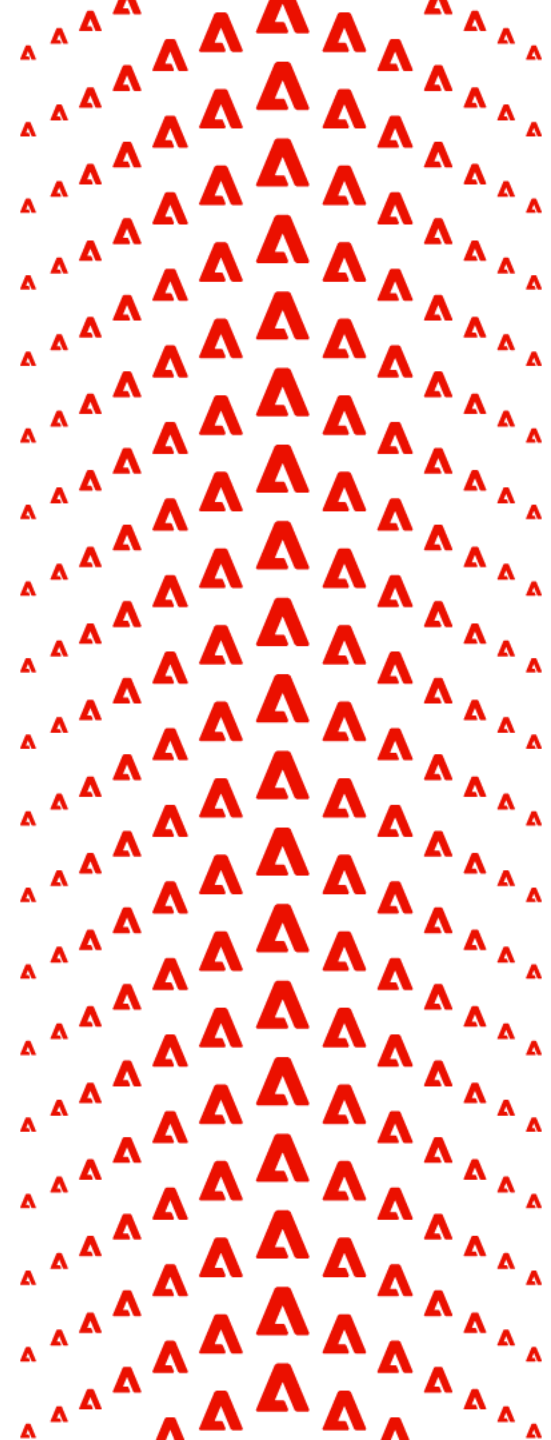
Utahan since birth, New Yorker at heart

A biographical bibliophile

Workfronteer for life

User/System Admin for 10+ years

5 as a customer, 5+ as a WF consultant



# Today we're going to talk about

What is governance and what are its key components?

Why do we need governance?

When should we start thinking about governance? When should we enact it?

Who is accountable for maintaining governance? For following governance?

Where do we document our governing practices and any new practices or deviations from those?





Defining **governing best practices** will help your organization scale effectively, while allowing both standardization and group autonomy

# Why do we need governance

## Process

A clear, documented change-control process to prevent negative impact to the business through inadvertent changes in Workfront that would impact system setup, current processes or integrations.

## Usage

Allow autonomy and elevated rights for certain users and/or group admins to make non-invasive changes that keep adoption high, the business running efficiently, and still allow for departmental nuances.

## Enterprise

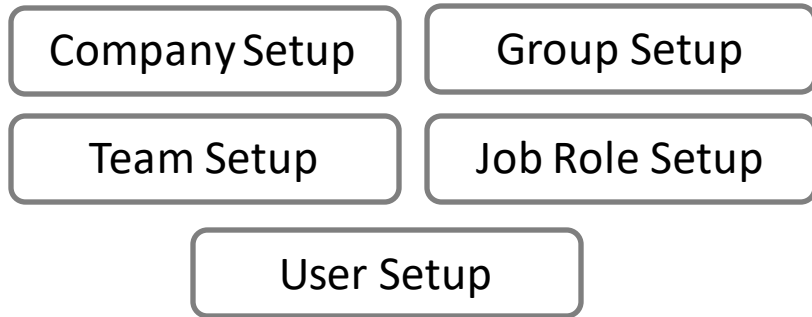
Set the tone organizationally for thought leadership; best practices; process compliance and optimization; data measurements; onboarding; and a clear path to support and enablement.

**One structure accountable for all impact to configuration and data integrity: creation, changes, and/or deletions within the system through due diligence or proper approvals.**

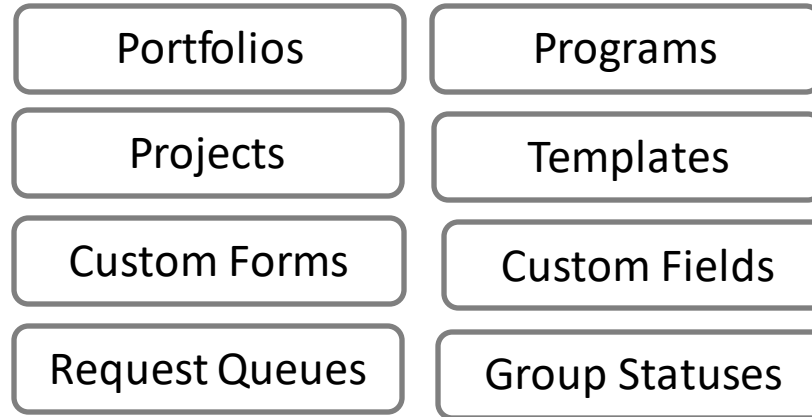


# From Concept to Architecture: Key Components

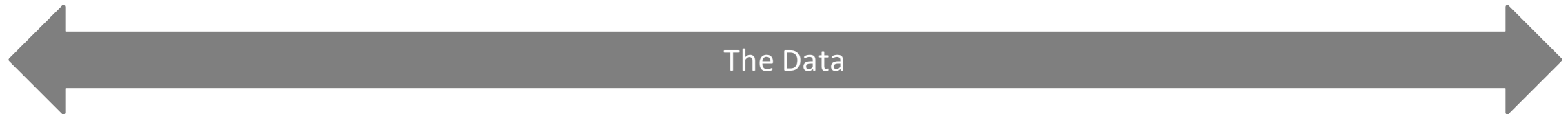
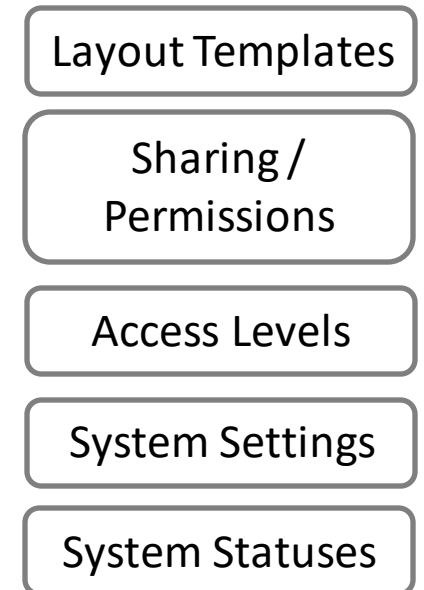
## The People



## The Process



## The Technology



# Comparison of System and Group Admin Rights

## System Admin Only

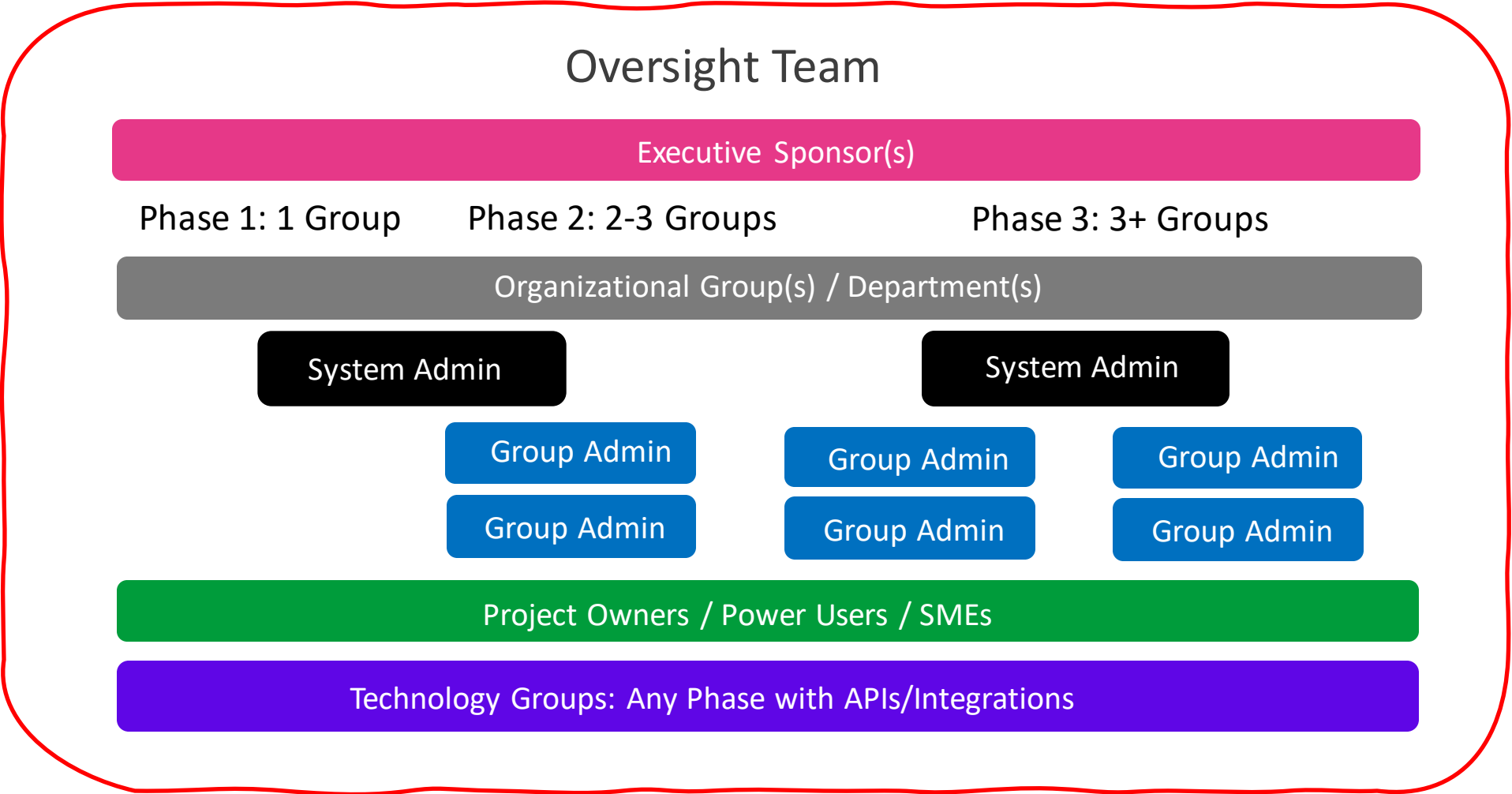
- Access Levels
- Audit Logs
- Group Admins
- Kick-Starts
- Integrations
- System Setup
- Priorities, Severities, Conditions, Risks
- Max Licenses / Group

## Group Admin - *if enabled\**

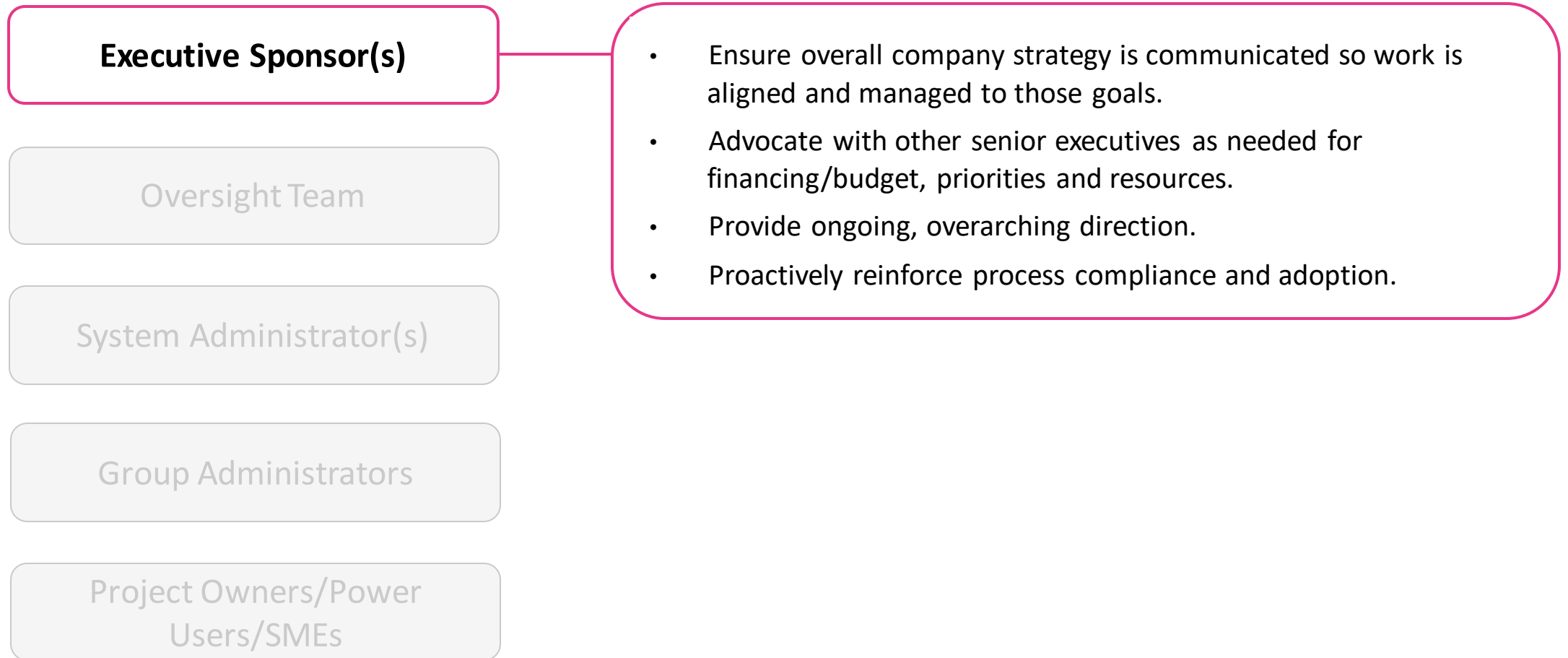
- |                     |                     |                        |
|---------------------|---------------------|------------------------|
| Project Preferences | Custom Forms*       | Custom Fields          |
| Group Statuses      | Manage Teams        | Companies              |
| Task-Issue Settings | Manage Users*       | Approvals              |
| Log In As           | Manage Roles*       | Timesheets – Hours*    |
| Layout Templates    | Milestone Paths*    | Reporting              |
| Notifications       | Exchange Rates*     | Reminder Notifications |
| Schedules           | View License Counts |                        |

\* Requires Permission in Access Level

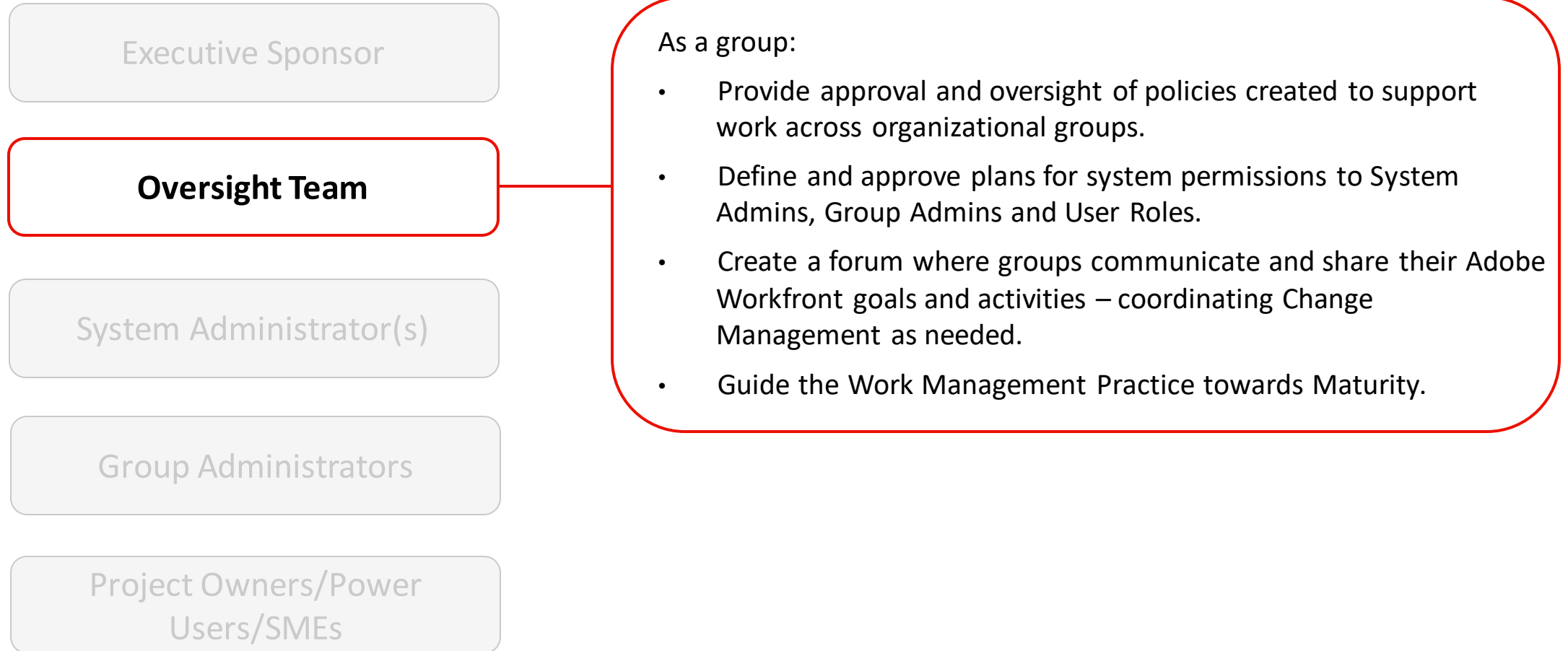
# Evolve structure based on your complexity and growth



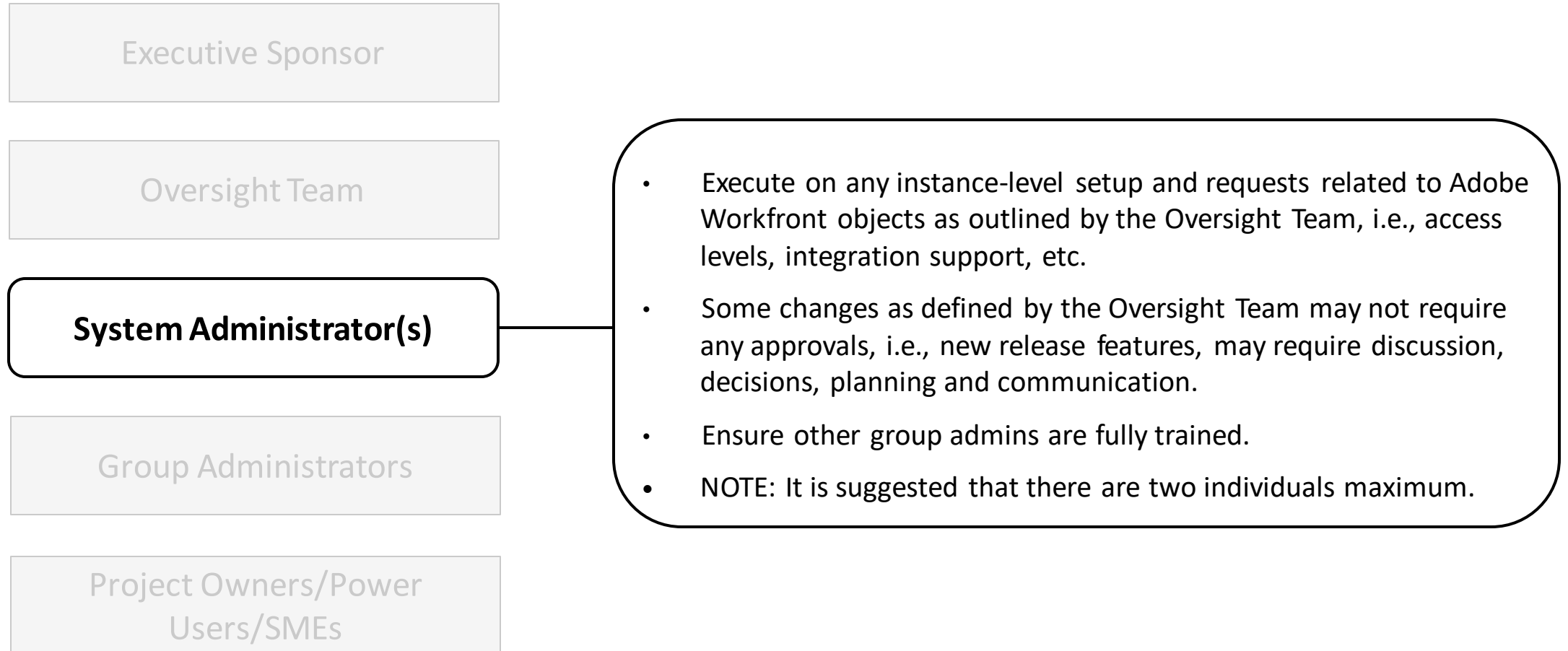
# Roles and responsibilities overview



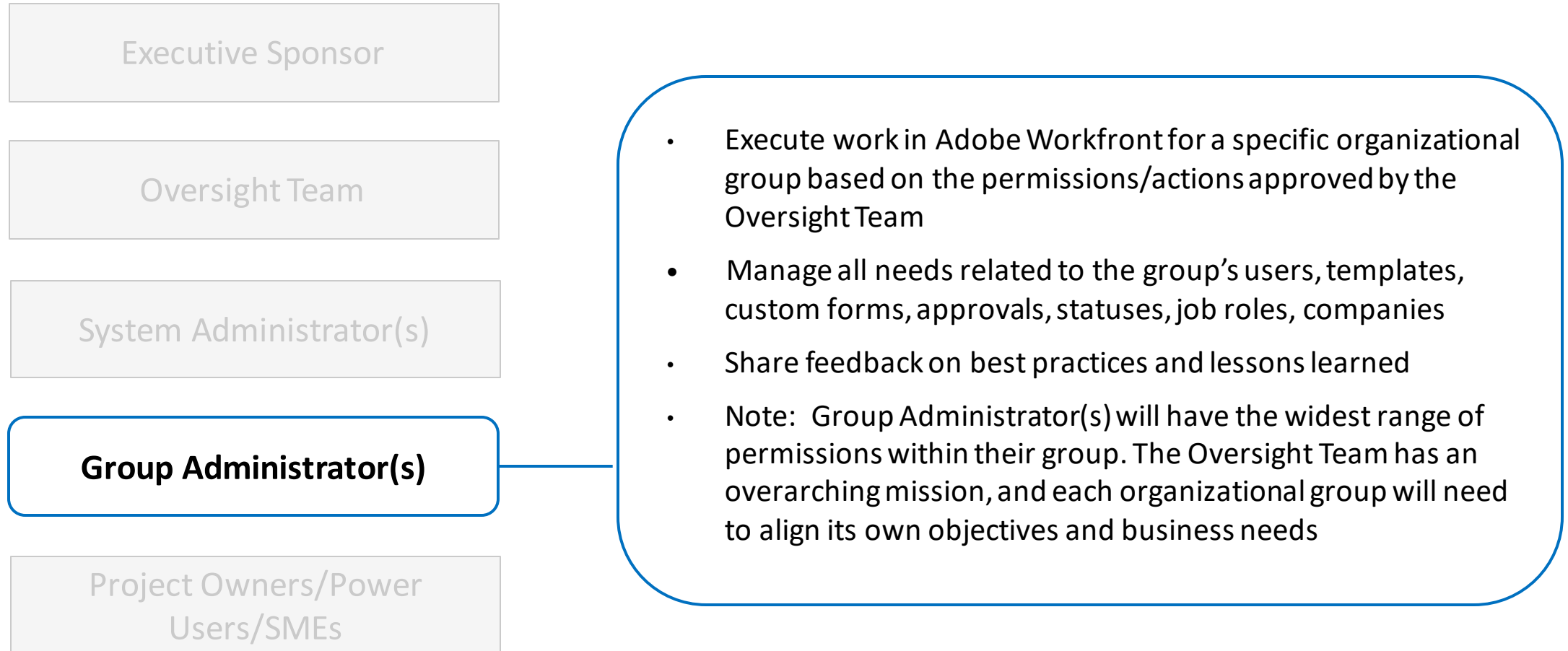
# Roles and responsibilities overview



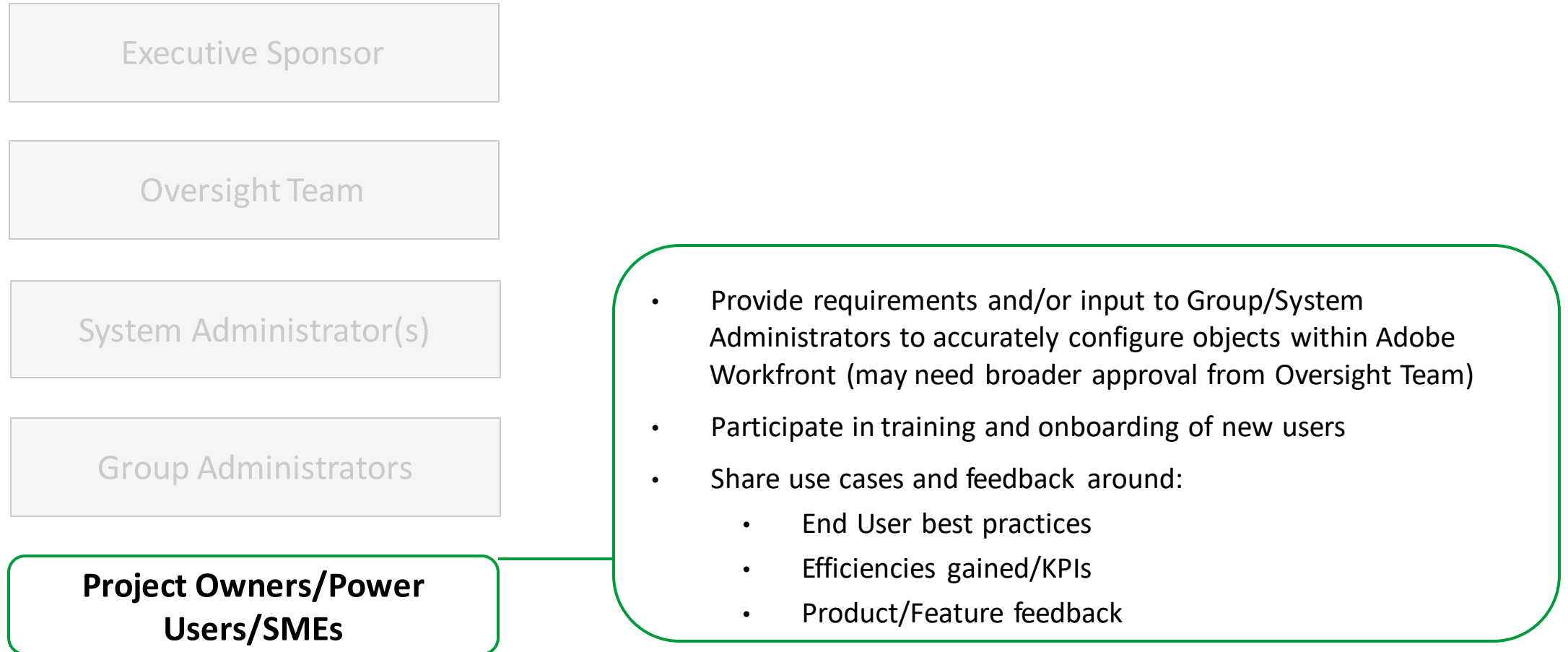
# Roles and responsibilities overview



# Roles and responsibilities overview



# Roles and responsibilities overview





# Decide how to engage

Engage participants who are willing to invest their time to collaborate towards meeting the established goals

Define ground rules:

- Membership
  - *Do you rotate involvement? Opt In, Opt Out?*
- Decision/Conflict Resolution
  - *Will you vote and majority decides?*
  - *Is there an executive veto?*
- Meeting Cadence
  - *Quarterly oversight meeting*
  - *Monthly group admin and user meetings*



# Request Queue - Intake

Request Queues are a best practice method for the Oversight Team to receive user feedback and change requests.

Categorizing inquiries, suggestions and change requests into a simple format, collecting qualitative and quantitative information from requesters, allows a standard approach for reviewing and addressing items, as well as clear reporting and communication.



Determine Approval Criteria for Request Process:

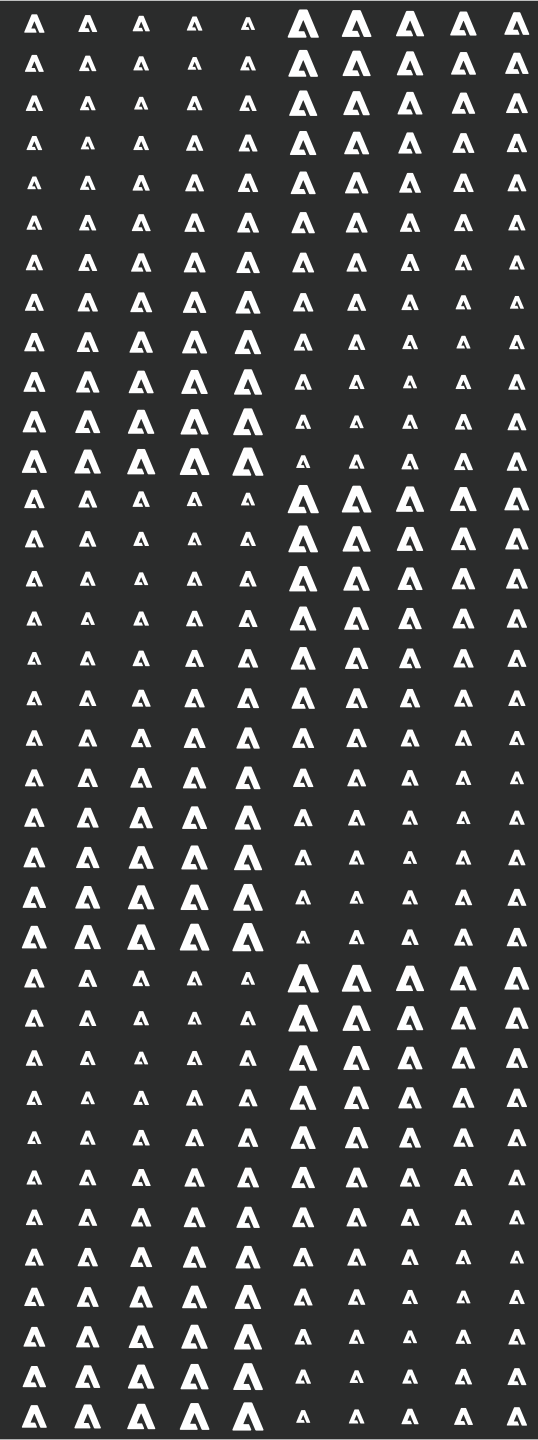
- ✓ Which changes/requests simply need to be documented
- ✓ Which need Admin approval / which need Oversight Team approval
- ✓ Which can be done instantly / which need to be planned
- ✓ Which required discussion with Power Users/SMEs / which with individual requesters







- ❑ Make decisions/recommendations
- ❑ Fulfill approved requests
- ❑ Communicate status with Requesters
- ❑ Update Documentation

# Sample Agenda

- 🔗 **Action items from previous meeting**
- 🔗 **New Oversight Team requests**
  - ✂ Review requests received
    - Ensure everyone has access to review incoming requests in advance by using an Oversight Team dashboard
  - ✂ Approve/decline open requests as a group
    - Ensure you communicate back to the requestor
- 🔗 **New onboarding activities**
- 🔗 **Upcoming release readiness**
  - ✂ End-user communication
  - ✂ Training methods (creation, communication, and delivery)
  - ✂ Configuration management activities
- 🔗 **Enterprise metrics**
- 🔗 **Planning for periodic system review/clean-up cadence**
- 🔗 **What to Improve/best practices/wins/highlights**

# Documentation Examples



<input type="checkbox"/> # ↑	▼ Task Name	Description	Owner	Initially Documente	Last Update Date	Approval Process
<input type="checkbox"/> 12	<a href="#">Project Approvals</a>	Admins and groups admins should discuss the creation of approvals as a group, as these are shown system-wide	 Tyler Holt-Admin	3/18/22	3/25/22	
<input type="checkbox"/> 13	<a href="#">Task Approvals</a>	Admins and groups admins should discuss the creation of approvals as a group, as these are shown system-wide	 Tyler Holt-Admin	3/18/22	3/25/22	
<input type="checkbox"/> 14	<a href="#">Issue Approvals</a>	Admins and groups admins should discuss the creation of approvals as a group, as these are shown system-wide	 Tyler Holt-Admin	3/18/22	3/25/22	
<input type="checkbox"/> 15	<a href="#">Milestone Paths</a>	System and Group Admin Access Only - These are to be kept to a minimum, showing the key phases across the most common collections of project types - If a group admin does not have access to all system milestone paths, but feels there may already be one that applies to their use case, please consult with the system admin; however, do not make changes to this without consulting the milestone path group admin/owner	 Raquel Green	3/18/22	3/25/22	Documentation in Workfront
<input type="checkbox"/> 16	<a href="#">Custom Forms</a>	The description field on all custom forms should have the following data: - Which groups it is shared with - The purpose of the form - If it is tied to integrations - The three-digit naming convention of the group at the end of the field name if it will not be used in custom forms universally	 Raquel Green	3/18/22	3/25/22	
<input type="checkbox"/> 17	<a href="#">Custom Fields</a>	The description field on all custom fields must have the following attributes: - If it is a organizationally reported field - if it is used in integrations - The group name that created the field - The purpose of the field - The three-digit naming convention of the group at the end of the field name if it will not be used in custom forms universally	 Raquel Green	3/18/22	3/25/22	
<input type="checkbox"/> 18	<a href="#">Portfolios - Marketing</a>	Portfolios represent each client		3/18/22	3/24/22	
<input type="checkbox"/> 19	<a href="#">Programs - Marketing</a>	Programs represent each job collection type: campaign, retainer, new business, internal, pro bono, etc.		3/18/22	3/24/22	
<input type="checkbox"/> 20	<a href="#">Projects - Marketing</a>	Projects represent the various jobs that make up collections in Programs, i.e. multi-deliverable campaign, new business pitches per client holding company, all internal marketing projects, etc.		3/18/22	3/24/22	

# Adobe Workfront Configuration & Process

Decide, Implement, Communicate, Evaluate

Object Types / Related	Oversight Team	System Admin	Group Admin	PM/User	Approval Needed
Update Feeds					Y
Email Notifications					
Email Reminders					
Reports					
Integration Logs					Y
Layout Templates					
Access Levels					
Status (Project, Task, Issues)					Y
Naming Conventions					
Release Testing - Admins					
Release Enablement - Users					Y

# Maintenance Schedule Example

Defining a cleanup schedule is a necessary part of the on-going maintenance of your instance.

**Suggested approach:** Adobe Workfront Group Admins will be responsible for suggesting cleanup solutions. Group Admins should share the clean-up activity with the System Admin prior to acting on cleanup. Sample provided below.

**NOTE:** Please reach out to an object owner before you deactivate any object.

Objects	Q1	Q2	Q3	Q4
Custom Fields/Forms	X			
Portfolios			X	
Program		X		
Project Templates				X
Groups		X		
Request Queues				
Teams				
Roles				
Layout Templates				
Timesheet Profiles				
Training Materials		X		

## So far we've covered...

What governance and its key components are

Why we need governance

When to start thinking about governance and how to evolve it

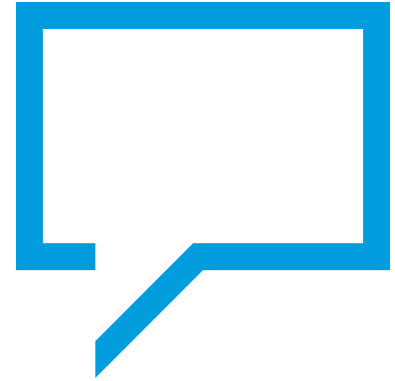
Who is accountable for maintaining and influencing governance

Ways to record our governing principles and maintain records of any new processes or deviations from those





# MAYO CLINIC EDUCATION INSTANCE GOVERNANCE



Luke Ramlow  
Application Analyst – Mayo Clinic

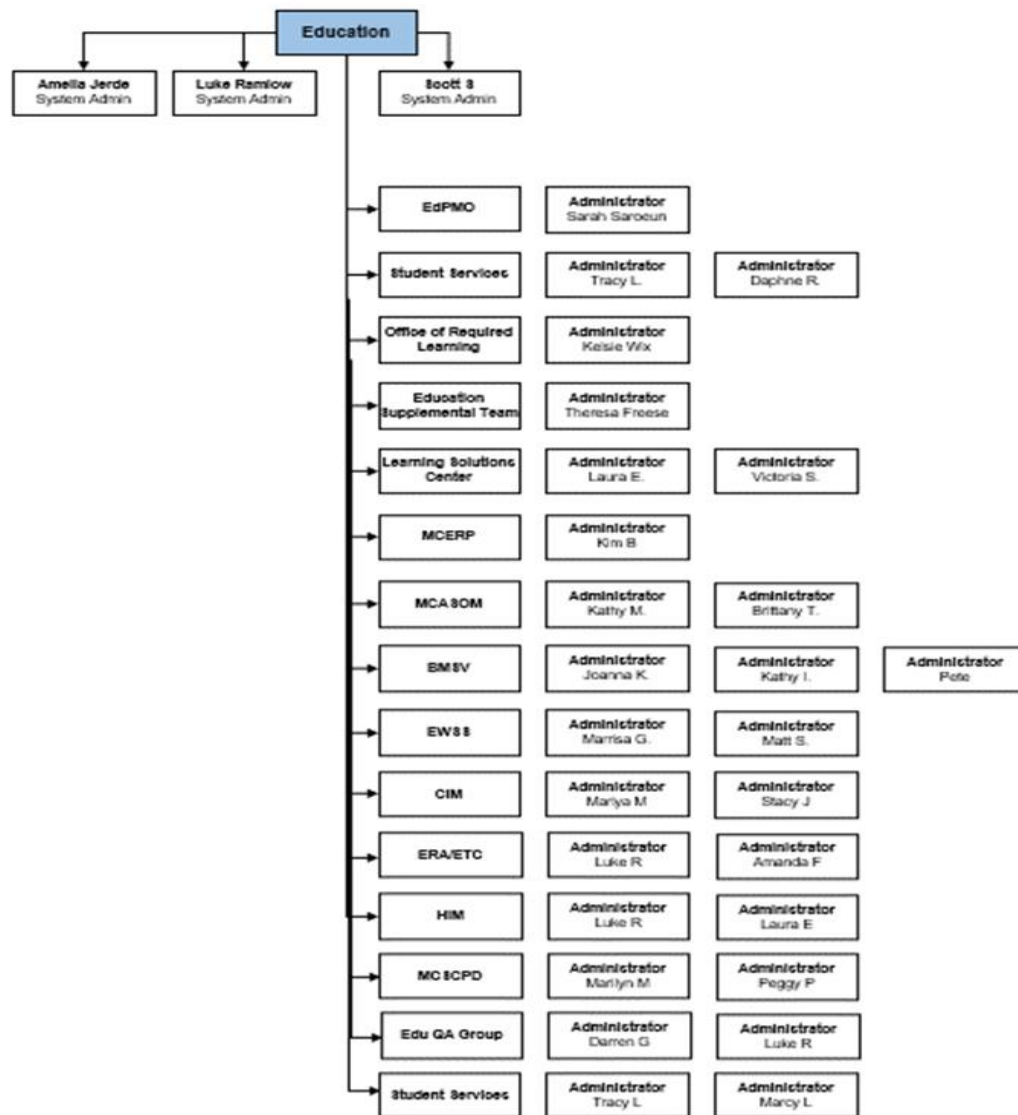
Workfront Governance Webinar  
3/30/2022

# ABOUT ME

- Luke Ramlow
- Application Analyst - Mayo Clinic Education
- In System Administrator role since Jan, 2021  
Part of the WF core implementation team – Nov 2019
- Played guitar for 31 year (also play the piano)

# HIGHLIGHTS

- Incremental development/deployment
- Majority of work and decisions done with System Admins/group admins (Core Team)
- Any conflicting issues between groups are escalated (Operations Team)
- Any issues that cannot be resolved at the Core/Operations team levels are escalated to the Steering Committee



Mayo Clinic Workfront Org Structure – Education

\*Separate company set up for security purposes

# BACK TO THE BEGINNING

- **Governance was the core implementation team:**
  - Workfront System Admin
  - Mayo Project Champion
  - Mayo Project Manager
  - Mayo Business Analyst
  - Mayo Super users
  - Mayo Subject Matter Experts in area implementing Workfront

# INTERMEDIATE STEP

- **Education Project Management Office:**
  - Oversee and approve new groups wanting to implement
  - Created an onboarding project template



Workfront Education Instance  
Readiness Assessment Consultation  
[Business Unit Name]

It is critical that the business unit experts and/or operational owners capture this documentation, as thoroughly as possible, for planning purposes. Questions may be directed to Scott Sahs, Director of Education Technology and Reporting & Analytics.

1. Please provide a brief summary of the problem and/or needs (in ≤500 words):  
[Text Box]
2. What are your primary goals and objectives (outcomes) that you expect to achieve (top 3 to 5)?  
[Text Box]
3. What obstacles or risks, if any, are there to overcome in developing and implementing this tool (top 3 to 5)?  
[Text Box]
4. Is your business unit ready to start out fresh with a new tool/system? (Transfer of historical data into Workfront is not included in the onboarding process-there may be options to store the data in partnership with the Reporting & Analytics Team):  
☐ Yes  
☐ No
5. Are your processes documented in workflows, procedures, and/or tasks? (Please attach).  
☐ Yes  
☐ No
6. What leadership committees have approved and endorsed your proposed request? (Please attach any supporting documentation).

TEMPLATE

Workfront Education - Onboarding New Areas MASTER Template ☆ ⋮

Template Tasks

Template Tasks

⊕ New Template Task [→ ▼]

Template Details

☐ # ↑ ▼ Task Name

Updates

☐ 1 ▼ INTAKE

Documents (22)

☐ 2 Validate Idea Intake Submission by Proponent(s)

Risks

☐ 3 Awareness-Information sharing to ETC Analyst

Expenses

☐ 4 Create a project folder for the new area (Shared Drive or SharePoint)

People

☐ 5 Share the Workfront Readiness Assessment with System Admin

Approvals

☐ 6 ▼ System Admin/ETC Analyst engages Proponent to complete Workfront Readiness Assessment

Billing Rates

☐ 7 Welcome E-mail WF Intake & Training Examples

Queue Details

☐ 8 Intake Process (Request Queue) Workflow Documentation Requested

Routing Rules

☐ 9 Templates that are utilized often today

Queue Topics

☐ 10 Custom Forms that are utilized often today

Topic Groups

☐ 11 Provide Reports / Metrics that you use today and want moving forward

Add custom section

☐ 12 List of Primary Work/Tasks Completed Today & Any Exceptions

☐ 13 Project and Task Classification - Duration Clarified

☐ 14 ▼ PREPARE

☐ 15 Determine realistic Start / Kick-Off Date for Area

☐ 16 Project Manager: Schedule Kick-Off Meeting

☐ 17 Lessons Learned from previous Implementations: Review with New Area

# CURRENT STATE GOVERNANCE

- **Core Team (Process Governance):**
  - **Purpose:** Identify issues/opportunities within WF, Address intake requests, Create/support Mayo WF community (i.e. yammer, etc.), determine what can be addressed at the operational level or what needs to be elevated, assign work for approved requests
  - **Meeting Frequency:** Bi-Weekly
  - **Impacted groups:** 20 Groups, 22 Subgroups
    - Membership
      - Group Administrators



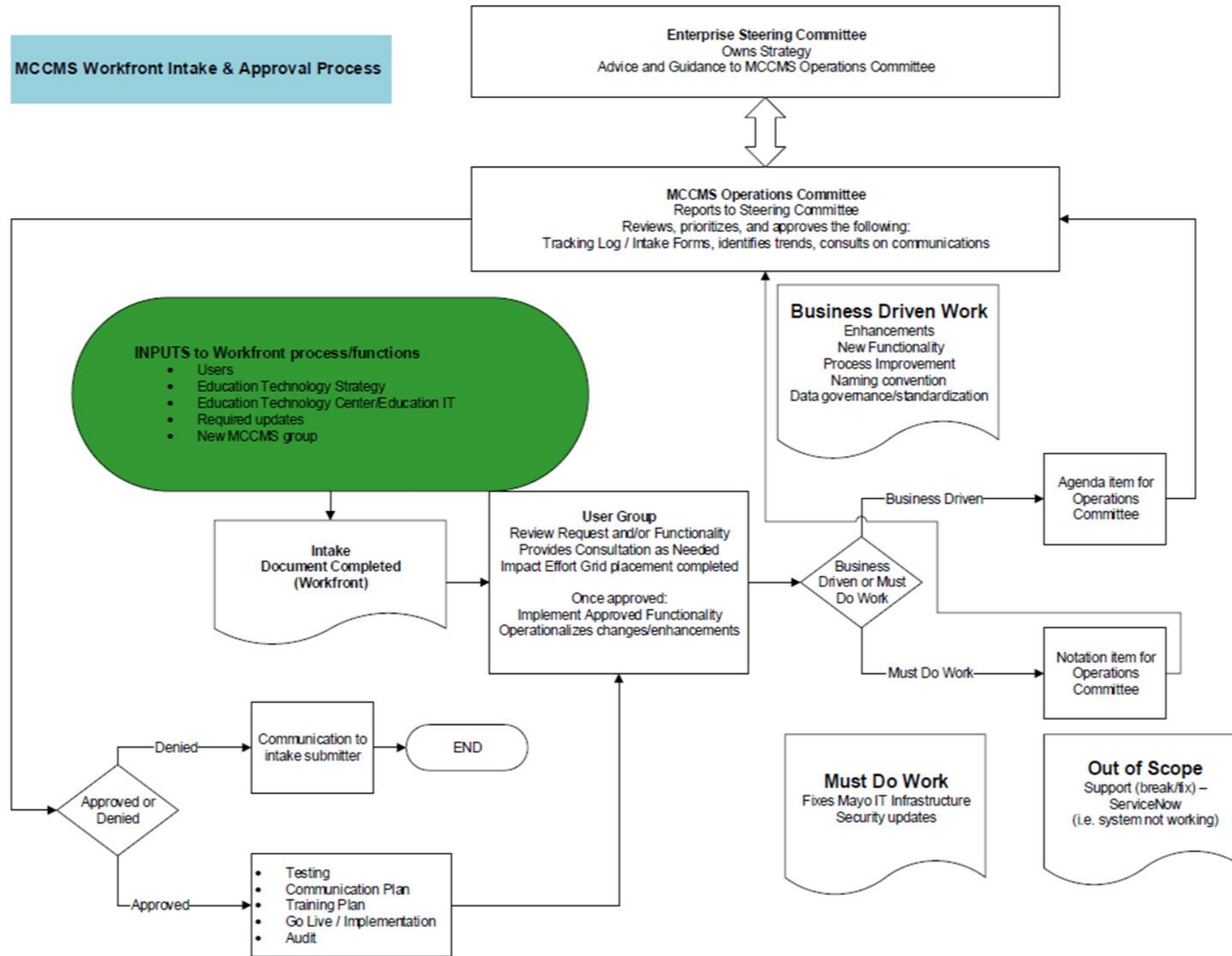
# CURRENT STATE GOVERNANCE

- **Operations Team (Usage Governance):**
  - **Purpose:** Approve and/or prioritize requests elevated from the core team, determine if a specific request should be elevated to the Steering governance committee, Assign work for approved requests
  - **Meeting Frequency:** 1x per month
  - **Membership:**
    - Managers/Supervisors of the group admins and groups using Workfront

# CURRENT STATE GOVERNANCE

- **Steering Committee (Enterprise Governance):**
- **Purpose:** Provide high level strategic direction and decisions that cannot be resolved at the core team and operations group levels. Also assign resources as necessary to projects and improvements for Workfront
- **Meets Ad Hoc:** No set Schedule
- **Membership:**
  - Manager/Director level of Department/Work Units that own Workfront

## MCCMS Workfront Intake & Approval Process



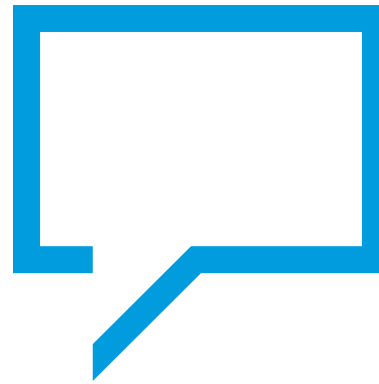
# BENEFITS

- Built in communication and feedback loop with the super users (core team)
  - Networking and collaboration between System admin and Group Admins
- Training and other opportunities to bring new group admins and group capabilities online faster

# FUTURE STATE GOVERNANCE

- Project taking place to merge three existing instances of Workfront at Mayo
- Governance structure will be reviewed and revamped to meet the requirements of all three groups merging

# QUESTIONS & DISCUSSION



Questions?





## Upcoming “Admin Essentials” Webinars

- Apr 27 – Designing an Ideal Workfront User Experience
- *Coming soon!* Foundational Reporting in Workfront



**Register:** [one.workfront.com/events](https://one.workfront.com/events)



# Experience Makers The Skill Exchange | Adobe Workfront

Wednesday, April 13, 2022

Pacific	Learn	Grow
9:00 - 9:15	<b>Welcome Keynote</b> Etienne Bosch, Group Manager, Adobe Workfront Product Management	
9:15 - 9:55	<b>Mastering Project Dates and Timelines</b> Chris Knittle, Manager of Training Delivery, Adobe Workfront	<b>10 Tips to Wow Your Workfront</b> Monique Evans, Systems Operations Manager, Stanley Black & Decker
9:55 - 10:35	<b>Understanding Objects in Workfront</b> Roy Rojas, Training Specialist, Adobe Workfront	<b>Calculated Fields Everyone Should Know (and How to Report on Them!)</b> Anthony Imgrund, Sr. Professional Services Consultant, Adobe Workfront
10:35 - 11:15	<b>Considerations for Conquering User Adoption</b> Tracy Wood, Principal Customer Success Manager	<b>Are You Using Proof to its Fullest Potential?</b> Caroline Ossmann, Product Manager, Adobe Workfront
11:15 - 11:55	<b>Experience Makers Spotlight: How Do YOU Use Workfront?</b> <ul style="list-style-type: none"><li>• Linnie Cipelowski, Marketing Process and Reporting Lead, Esri</li><li>• Michelle Gracey, MBA, Manager, Application Services, IEHP</li><li>• Jeremy Newman, Brand Workfront and Creative PM Lead, Capital One</li></ul>	<b>Experience Makers Spotlight: Evolving Work Management Maturity</b> <ul style="list-style-type: none"><li>• Ilona Yeremova, Marketing Tools, Operations and Analytics Team Lead, T-Mobile</li><li>• Shane LaBounty, Creative Operations Leader, Lumen</li><li>• Josh Maldonado, VP, Strategic Marketing Platform Leader, Synchrony</li></ul>
11:55 - 12:00	<b>Closing &amp; Gold Nugget Takeaway</b>	<b>Closing &amp; Gold Nugget Takeaway</b>

*Register today!*

# Additional Upcoming Events

## **“Ask the Experts” Small Group Workshops** ([one.workfront.com/events](https://one.workfront.com/events))

- Apr 7 – Request Queues: Mastering the Intake Process
- Apr 12 – Governance Office Hours (with Tyler Holt!)
- Apr 21 – Showing Value to Executives Through Reporting

## **Experience Makers Awards** ([adobeexperienceawards.com](https://adobeexperienceawards.com))

- Apr 15 – Submissions close! (16 categories)
- May 27 – Finalists announced
- Jun 22 & 23 – Virtual awards galas

# Workfront One is moving to Adobe Experience League!

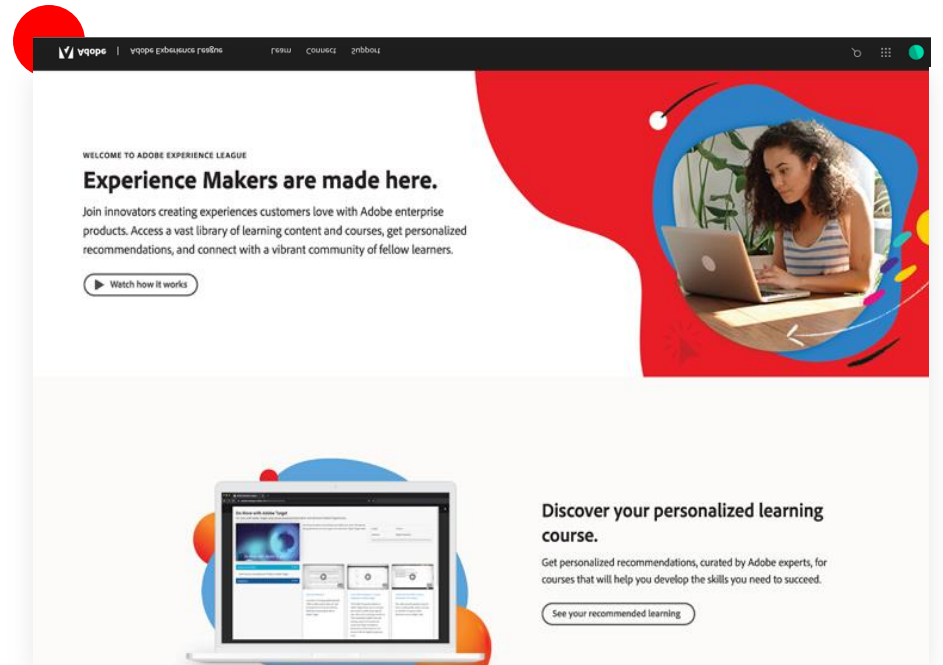
Get ready!

Soon all Adobe Workfront **documentation, community, support, training, and events** will be found on Adobe Experience League.

(Adobe Experience League is the equivalent of Workfront One!)



[experienceleague.adobe.com](https://experienceleague.adobe.com)



Thank you!

