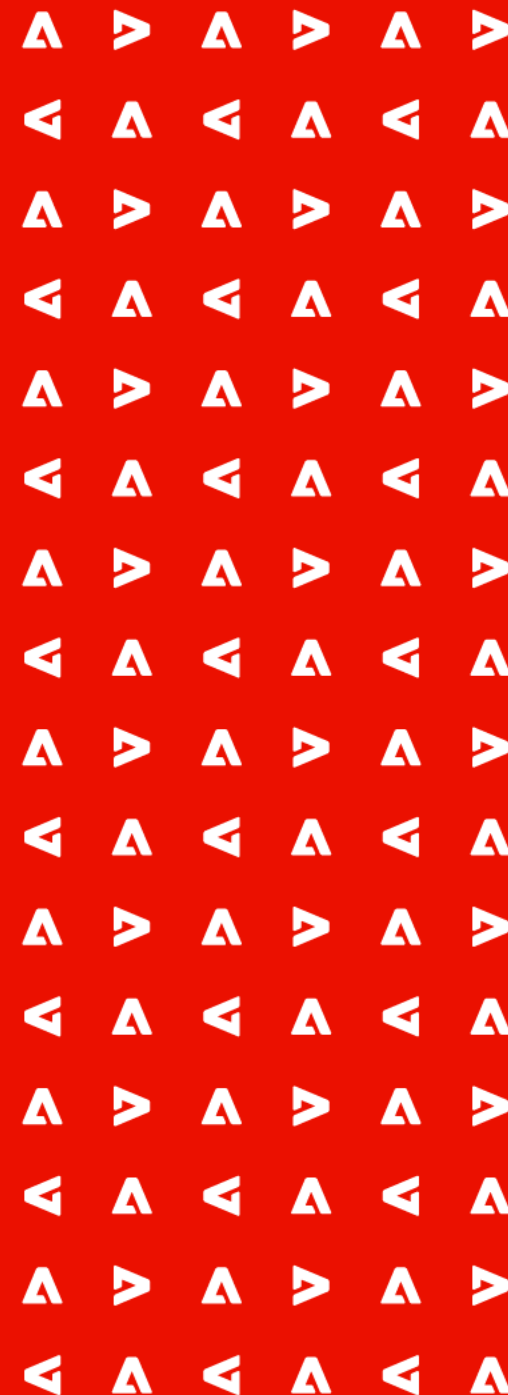







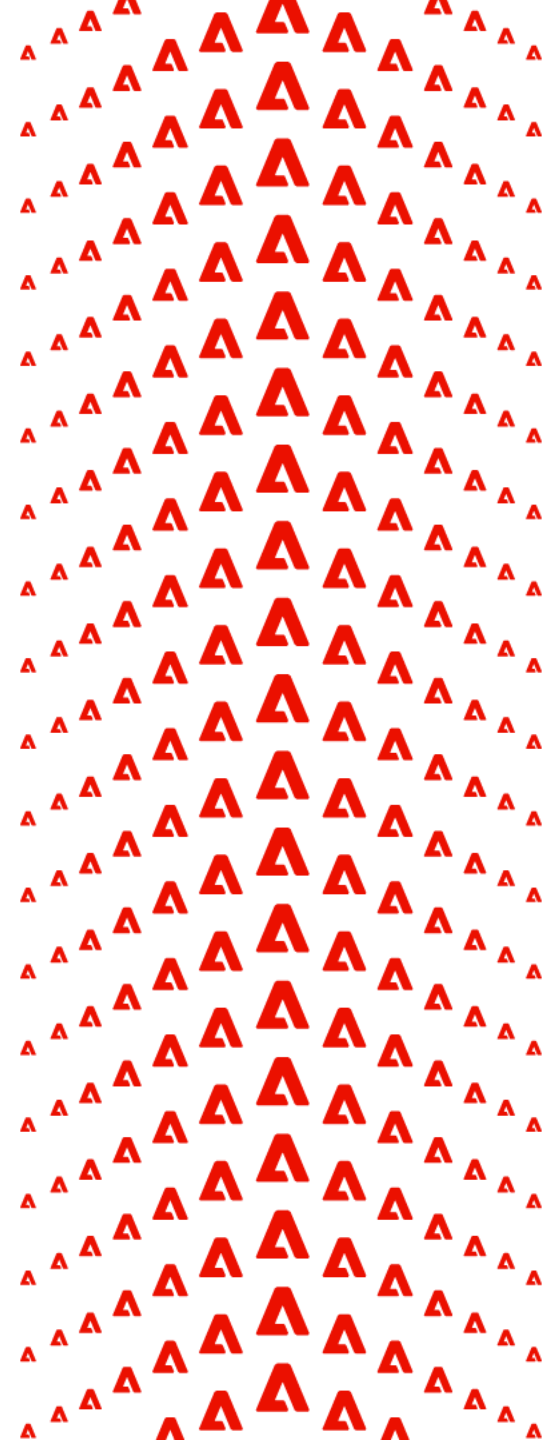
# System Admin Essentials: Successful End User Adoption

November 16, 2022



# Agenda (Pacific)

Time	Topic
8:00 a.m.	Welcome and agenda
<b>8:05 a.m.</b>	<b>Successful End User Adoption</b>
	 <b>Cynthia Boon</b> Customer Success Manager Adobe Workfront
	 <b>Leslie Spier</b> Customer Success Manager Adobe Workfront
	 <b>Karlton Harrison</b> VP, Data Platform Engineer Truist
8:45 a.m.	Presenter Q&A
8:55 a.m.	Wrap-up and next steps



# About Cynthia



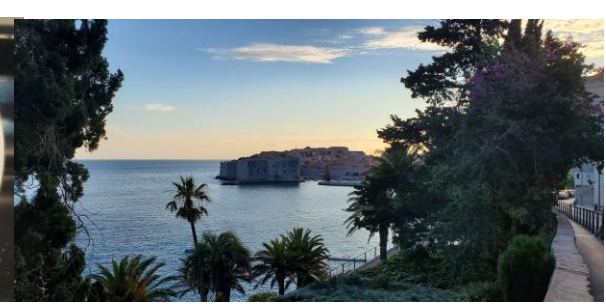
## Cynthia Boon

*Customer Success Manager, Adobe Workfront*

- Customer for 5 years, joined Workfront in January 2020
- Lived all over the country – currently in Fort Worth, Texas
- Twilite just turned 2 on Halloween
- Wild about nature
- Passion for all things nerdy
- Connect with me on LinkedIn

<https://www.linkedin.com/in/cynthiaboon/>

# About Leslie



## Leslie Spier

*Customer Success Manager, Adobe Workfront*

<https://www.linkedin.com/in/lesliestinson/>

- At Workfront for almost 2 years, customer for 4.5 years
- Colorado born & raised
- Lover of photography, sports, travel, coffee
- Fun facts:
  - I collect Starbucks mugs in my travels
  - I've celebrated 2 birthdays at LEAP

# About Karlton



## Karlton Harrison

*VP, Data Platform Engineer – Truist*

- Workfront Administrator for 6 years and counting
- Originally from Ohio but currently live in South Carolina
- Married 10 years with 3 children
- Avid movie watcher and video gamer
- Enjoy traveling, building things, sports, and relaxing on the beach
- Connect with me on [LinkedIn](#)

# Today's Objectives

- The Role of the Workfront Sys Admin
- Adoption & Sys Admins
  - How to identify the reasons for poor end-user adoption
  - Tips for documenting and communicating adoption expectations
  - Examples of great communications
  - Training best practices
  - Creating systems for scaling your instance
- What's in it for you?

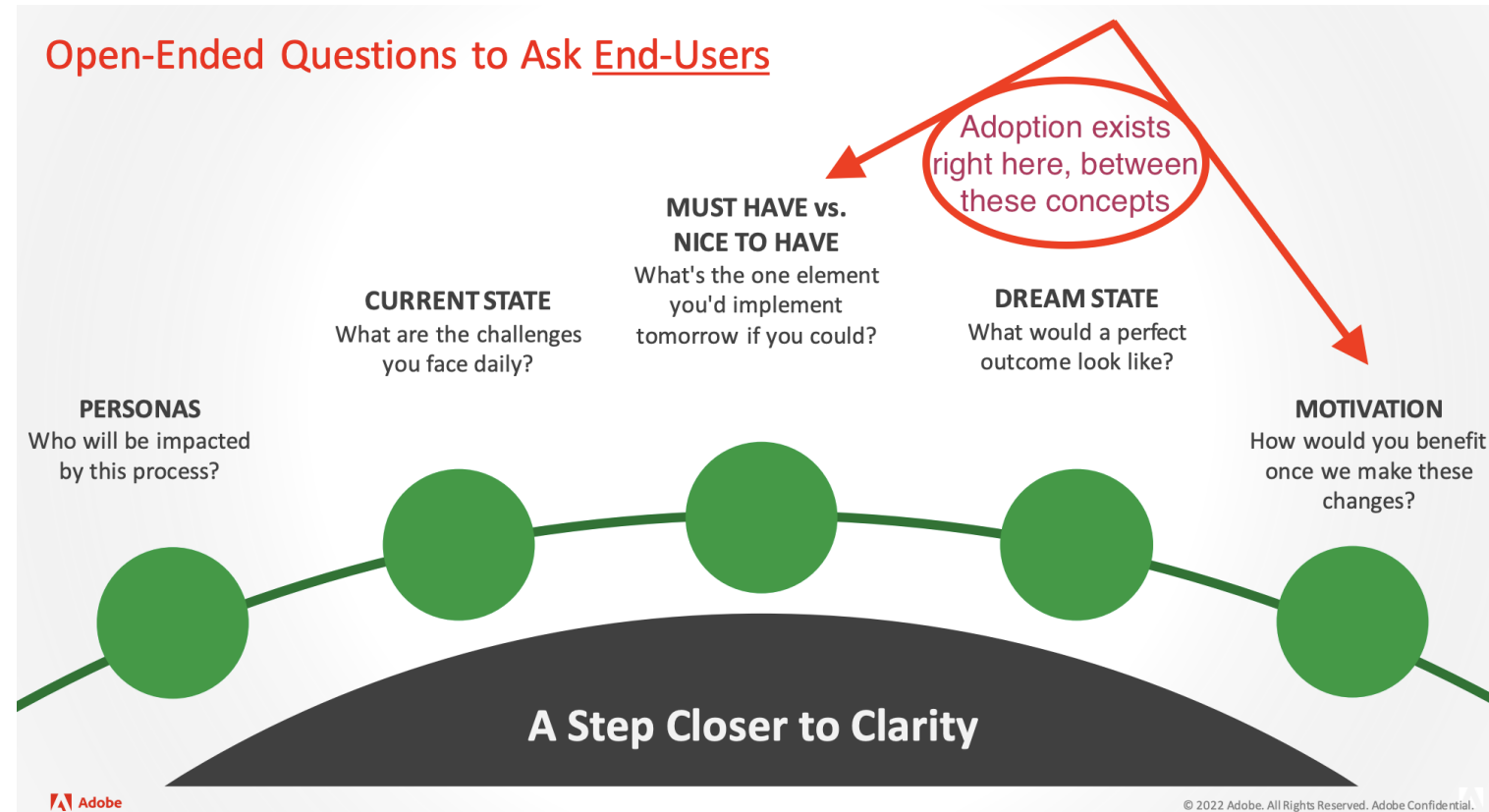


# What does "Adoption" look like?



# Reflections from the Process Design Webinar

- Defining Success
- Creating a Vision (literally a picture) of what that means to the org
- Who else contributes to that picture?
- Where does "Adoption" live in this process?
- How well do they know the process?  
How well do **you** know their process?  
How do you verify understanding?



More details: [System Admin Essentials Webinar: Workflow & Process Design \(Oct 19\)](#)



# How do you communicate that Defining Vision?

Think about your audience



**What's in it for them?** One source of truth? Collaboration? Visibility? Reporting? Tailor it to fit.

Communicate



Meet your users where they're at. Email, meetings, – repeat it early and often. Use multiple voices.

Iterate



Things change! Try to offer consistency. How do users get updates on changes? Check in with users – What's working, what's not?

# What's on the menu? YES!

## Momentum in Adoption is key

- Making users and teams wait for updates, demos, answers, enhancements might close that window
- Always be ready to discuss Workfront (Project Templates, Sample Processes)

## Are you Ready?

- Elevator Speech
- Licenses
- Demos
- Product Knowledge
- Build for future
- Keep an open mind and be creative



# Customer Service Approach to Adoption

## Support Model & Knowledge of Features

Objective is to enable teammates to track and report on their day-to-day processes

The primary way that Workfront usage increases and adoption grows is through word of mouth.

The reputation of the system administrator and the performance of the platform is critical to adoption.

Reputation is driven by *being prepared and being responsive*



# How to Be Prepared

## Know the Platform

- Do you use Workfront for yourself?
- Can you clearly explain how you use and how other teams use Workfront to meet their business needs?
- What is your Workfront Elevator Speech?
- How many use cases can you solve for in Workfront?
- Be ready for questions & inquiries
  - Intake, Project, Reports/Dashboards, Documents ready for new teams and users (Use Experience League)



# Preparing Your Users

## Open to the "art of possible"

- Technical Aspects
  - How do you get new users into Workfront?
  - SSO + AD
  - Fusion
  - Are you tracking License Usage?
  - Regularly reassign licenses as needed
  - Report on License costs/savings for recovered and reassigned licenses
- Holding internal Discovery Sessions
- Approaching every inquiry with a "Workfront might be able to do this" attitude
- Be familiar with Experience Leage site resources to share



# Real-World Examples

- Discovery Session Guide

- Solution manifest
- What objects are necessary for any use case?
- Track what you created
- Clearly define your use cases
- Repurpose for your stakeholders to use in their process
- Reports and dashboards

<input type="checkbox"/>	# ↑	Task Name
<input type="checkbox"/>	1	Work
<input type="checkbox"/>	2	Stories
<input type="checkbox"/>	3	Changes
<input type="checkbox"/>	4	Configuration
<input type="checkbox"/>	5	Group
<input type="checkbox"/>	6	Managers Group
<input type="checkbox"/>	7	Portfolio
<input type="checkbox"/>	8	Request Queues Program
<input type="checkbox"/>	9	Request Type
<input type="checkbox"/>	10	Request Custom Form
<input type="checkbox"/>	11	Team
<input type="checkbox"/>	12	Request Queue
<input type="checkbox"/>	13	Routing Rule
<input type="checkbox"/>	14	Queue Topic
<input type="checkbox"/>	15	Template/Workflow
<input type="checkbox"/>	16	Project Custom Form

# Real-World Examples

- Track Support Model in Workfront
- License Recovery

**New request**

Request Type

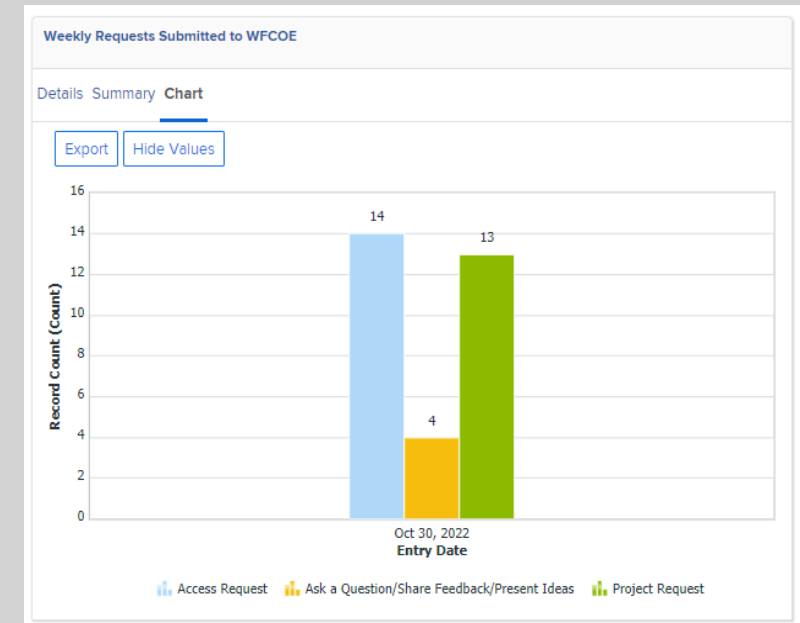
+ Workfront COE Support

+ Workfront COE Support ⓘ

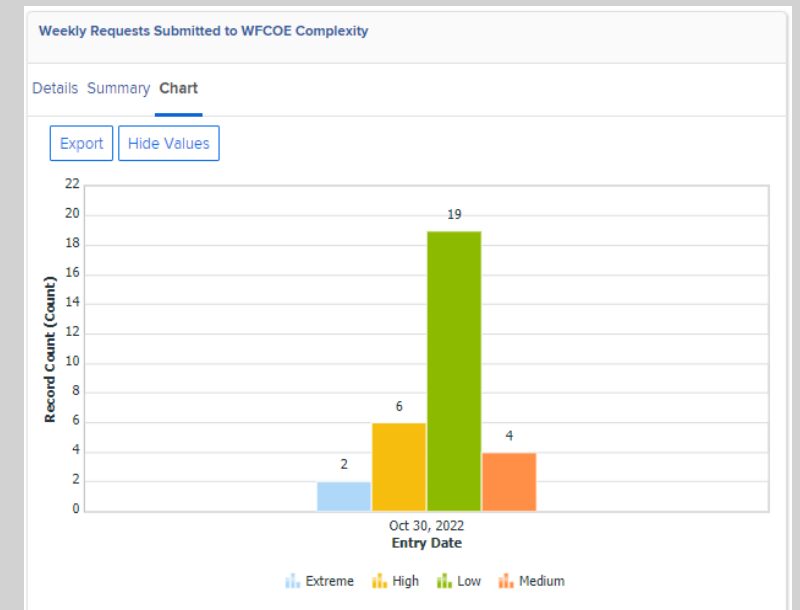
Access Request

Ask a Question/Share Feedback/Present Ideas

Project Request



License Recovery   [REDACTED]		
noteText	Reduce Access	Update User
The Workfront Center of Excellence is pursuing full utilization of Workfront licenses that are costly to the enterprise. We have identified that you occupy a Plan license, but have not accessed Workfront for [REDACTED] days (Last Login: [REDACTED] 22). We have reduced the license to a standard review license, which carries no cost. This allows us to re-purpose the Plan license. Please note that this adjustment can be reversed if needed. We appreciate your understanding and welcome any questions you may have.	Reduce Access	Update User



# Real-World Examples

- Capturing Surveys in Workfront

Q4 - 2022 Privacy and Client Data Survey

Section 1 - General Questions

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1. Does the application either collect, provide access to, process, transfer, and/or store personal data? [?](#)

[+Add](#)

Please refer to additional guidance and examples here [In the Privacy and Client Data Survey Supplemental Guidance.](#)

WFCOE My Access W... WFCOE Custom Data Request Queues WFCOE Work With Us + Trust Workfront Center of ... WFCOE Projects - So... WFCOE License Rec... Workfront Lunch an... Pin current page Help 281 ☆ ⌚ 🔍 ☰

**REPORT** Survey Example for Webinar Show Filters Report Actions As of Nov 10, 2022 3:24 pm Eastern Standard Time ↻

You have been Identified as a Delivery Manager, Technical POC, or Business POC for one or more applications in scope for the upcoming Privacy and Client Data Survey.

**Details**

☐ Survey

Survey	Application Name	Application ID	Description	Primary email address	Assignments	Planned Start Date	Planned Completion Date	Date Summary	Summary	Action
<input type="checkbox"/> WORKFRONT - APPID- [REDACTED]	WORKFRONT	[REDACTED]	[REDACTED]	[REDACTED]	Karlton Harrison [REDACTED]	10/18/22	11/10/22	Due Within Five Days	Attestation marked "Yes"	<a href="#">Make Update or Ask Question</a> <a href="#">Open Survey</a>

Showing 1 Issue



“Be curious,  
not judgmental.”

*-Ted Lasso*



Q&A





Opportunity is  
not like pie – it's  
not limited to  
just a few  
slices...



# Adobe Workfront Services

*Need a hand getting started? Adobe Workfront Services can help.*

## **Work Management Value Planning**

The workshop is designed to ensure the platform meets your goals and helps you achieve faster ROI by gathering your business requirements, assessing the impact of Workfront on your overall business, and presenting a roadmap to scale the value of Workfront over a set period of time.

## **Assembled Implementation**

This service includes an end-to-end pre-scoped implementation engagement, including the configuration and setup of your Workfront instance, execution of communication and enablement plans, and post-launch adoption.

## **Fusion and Integration Assistance**

This service helps connect your business-critical Adobe and 3<sup>rd</sup> party applications to Workfront whether you are an existing Fusion customer or just want to maximize what you can do with integrations.

## **Enriched Program Management**

This service can be added to your customer's Value Planning or Assembled Implementation for the addition of a Workfront program manager to the delivery team.

## **Discovery and Scope Assessment**

This service is a billable discovery and scope assessment exercise that is best leveraged for customers that purchase a bucket of hours and are likely without a centralized Work Management organization.

## **Data Migration**

This service can be added to your customer's Assembled Implementation and is focused on data migrations from a customer's current system into their new Workfront instance. This may include multiple systems or consolidation of Workfront instances.

## **Deskside Coaching**

This service can be added to your customer's Assembled Implementation and includes custom training and documentation to help fill knowledge gaps and increase user adoption.

## **Health Check & Readiness**

This service reviews the customer's implementation based on industry and Adobe best practices, preparing them for the newest capabilities in Workfront.

## **Staff Augmentation**

This service includes an embedded System Administrator (FTE) to help with user profile management, report and dashboard management, troubleshoot technical issues, and more..

# Upcoming Events

## Product Release Webinars

- On-Demand: What's new in the 22.4 Release

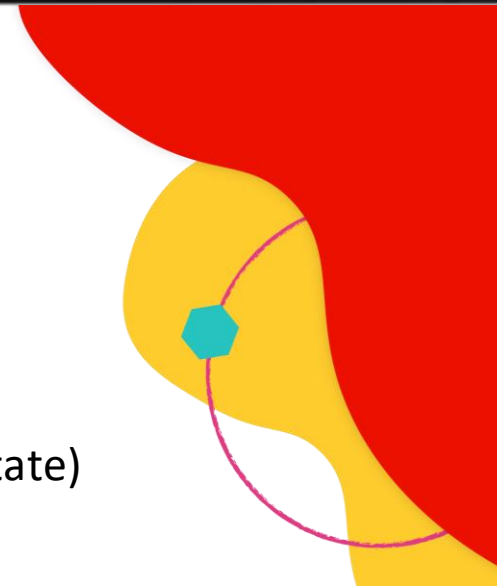
## System Admin Essentials Webinars

- Dec 7: Navigating Change Management (w/ Penn State)

## “Ask the Expert” Office Hours + Small Group Workshops

- ★ Dec 1: Ask the Experts – Follow-up on End-User Adoption
- Dec 5: CS Connections – Sharing Strategic Best Practices
- Jan 9: CS Connections – Sharing Strategic Best Practices

➔ Register at <https://experienceleague.adobe.com/events>



Thank you!





# Resources

- **Blog Post: Adoption Resources & Action Items**  
<https://experienceleaguecommunities.adobe.com/t5/workfront-archived-groups/workfront-adoption-blog/m-p/461222>
- **Best Practices: Onboarding & Adoption**  
<https://experienceleague.adobe.com/docs/workfront-learn/tutorials-workfront/best-practices/onboarding-adoption-bp.html?lang=en>
- **System Admin Essentials Webinar: Workflow & Process Design (Oct 19, 2022 – On-Demand)**  
<https://experienceleaguecommunities.adobe.com/t5/workfront-discussions/system-admin-essentials-webinar-workflow-amp-process-design-oct/td-p/551006>
- **System Admin Essentials Webinar: Navigating Change Management (Dec 7, 2022)**  
[https://webinars.on24.com/adobe\\_workfront/AdminEssentialsChange?partnerref=field](https://webinars.on24.com/adobe_workfront/AdminEssentialsChange?partnerref=field)
- **All Upcoming Webinars & Events**  
<https://experienceleague.adobe.com/events/>
- **Workfront Product Releases**  
<https://experienceleague.adobe.com/docs/workfront/using/product-announcements/product-releases/product-releases.html?lang=en>
- **Adobe System Status**  
<https://status.adobe.com/#/>