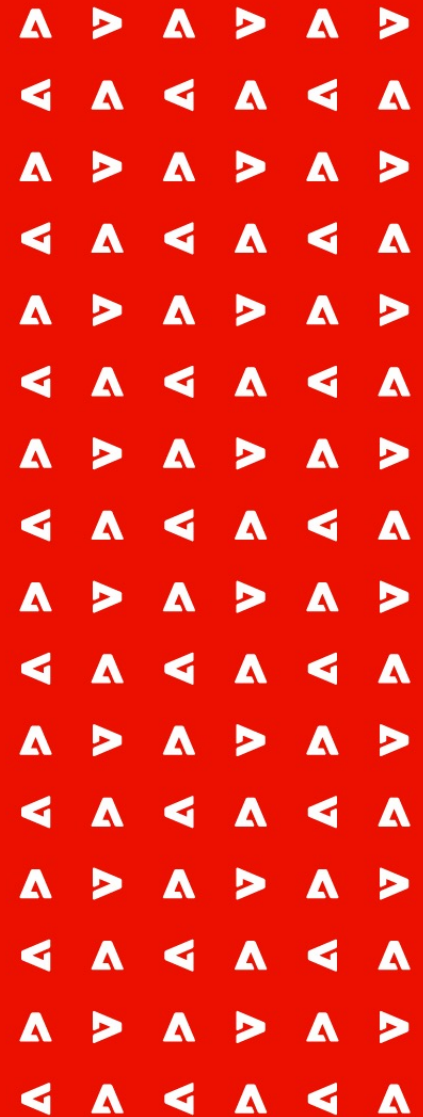




Adobe Workfront Virtual User Group

Transitioning to the New Workfront Experience
Tuesday, June 22, 2021



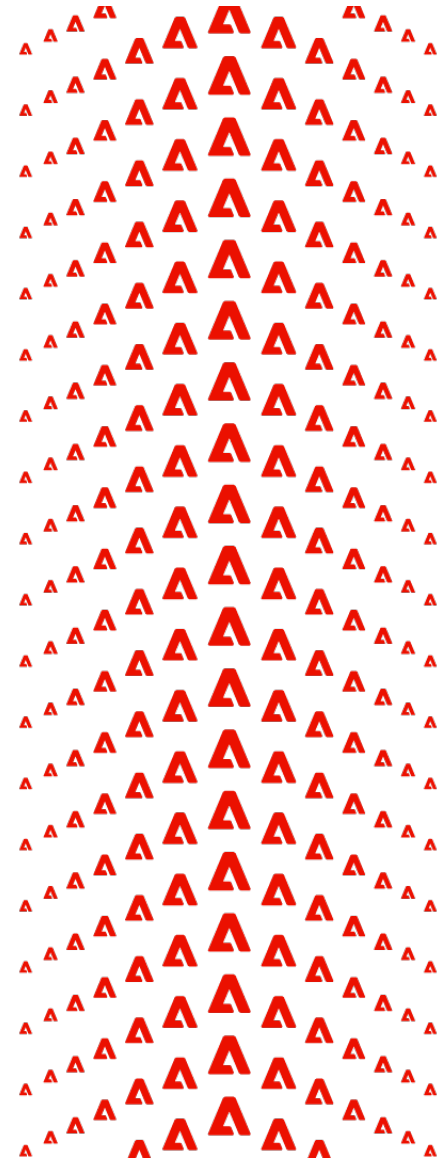
Today's host



Kyna Baker

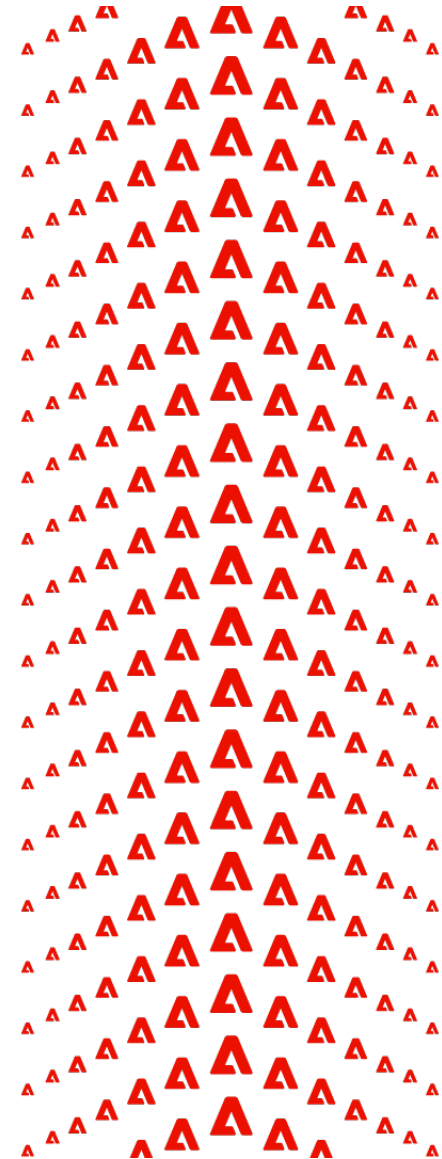
Sr. Customer Marketing Manager

Adobe Workfront



Agenda (Pacific)

Time	Topic
8:00 a.m.	Welcome and agenda
8:05 a.m.	Transitioning to the New Workfront Experience <i>Tracy Wood, Principal Customer Success Manager, Adobe Workfront</i>
8:25 a.m.	Small group discussion
8:45 a.m.	Customer spotlight: Inland Empire Health Plan <i>Dawn Cejudo, Workfront System Admin and Sr. Application Specialist</i>
9:05 a.m.	Large group discussion
9:25 a.m.	Wrap-up and next steps
9:30 a.m.	Meetup ends



What do most customers want to talk to each other about?

- Migration experiences from other customers
- Change management and communication (how to prepare users and build excitement)
- Resources
- Changes in the new experience vs classic
- Layout templates
- Transition best practices, tips and tricks, what worked well

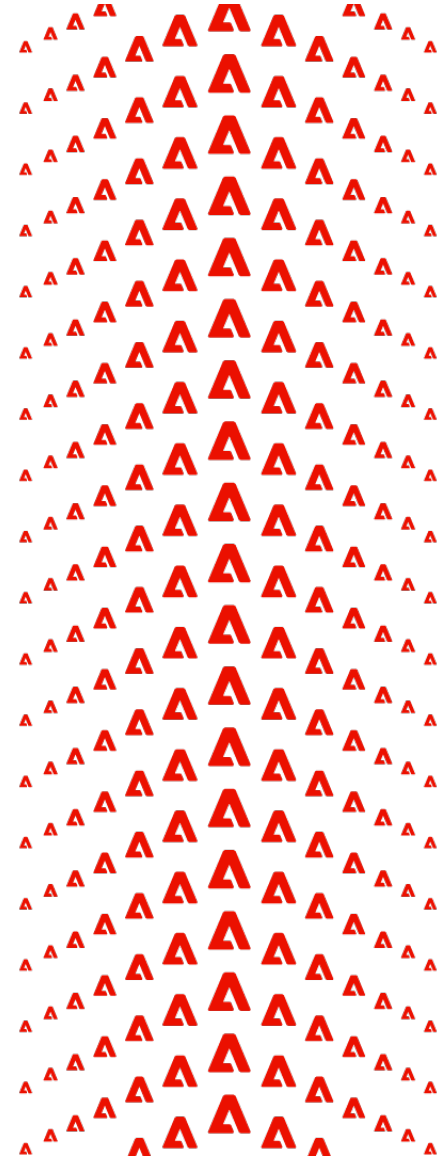
Guest speaker



Tracy Wood

Principal Customer Success Manager

Adobe Workfront



Changes in the new experience vs. classic

Parity with Classic functionality in NWE

Workfront 20.3 Release

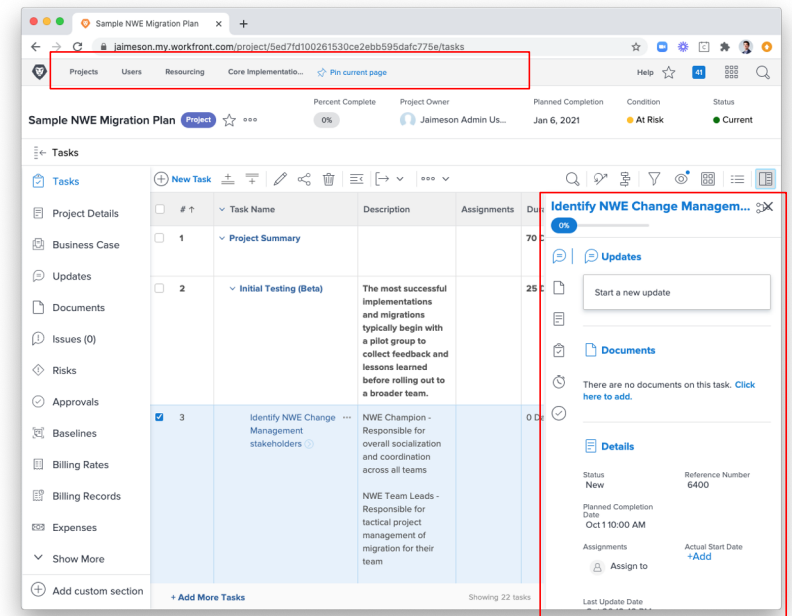
- Workfront Goals & Scenario Planner in NWE only
- Setup & Configuration enhancements

Workfront 20.4 Release

- Export custom form data as PDF in NWE only
- Workload Balancer enhancements (some) in NWE only
- Project Metrics

2021 & Beyond

- New Request experience
- Improved usability of key workflows
- Blueprints
- New reporting experience
- Proof more fully integrated into Workfront



New Workfront experience enhancements

2021.1 | Navigate with greater ease

Optimizing the navigation and intake experience

- Better navigation between objects
- Breadcrumb labels, truncation, and page titles
- Request queue enhancements

2021.2 | Engage with work faster

Usability

- Greater customizability (set a default Filter/View/Grouping via Layout Template)
- Optimize the viewing, creation, and editing experience
- Enhanced request submission and tracking
- Quicker access to projects (header filters)

Classic Deprecation Schedule



Final Release of any new Classic Functionality

Workfront 21.2 Release - Week of May 10, 2021



Q2
2021



Classic Customer Support/Bug Support Cut-Off

March 31, 2022



Q1
2022

Transition best practices

Identify a
transition
team

1

Create a
migration plan
and deadline

2

Communicate
early and
often

3

1. Identify a transition team

Understand the needs of your different audiences and involve them in the testing, configuration and training.

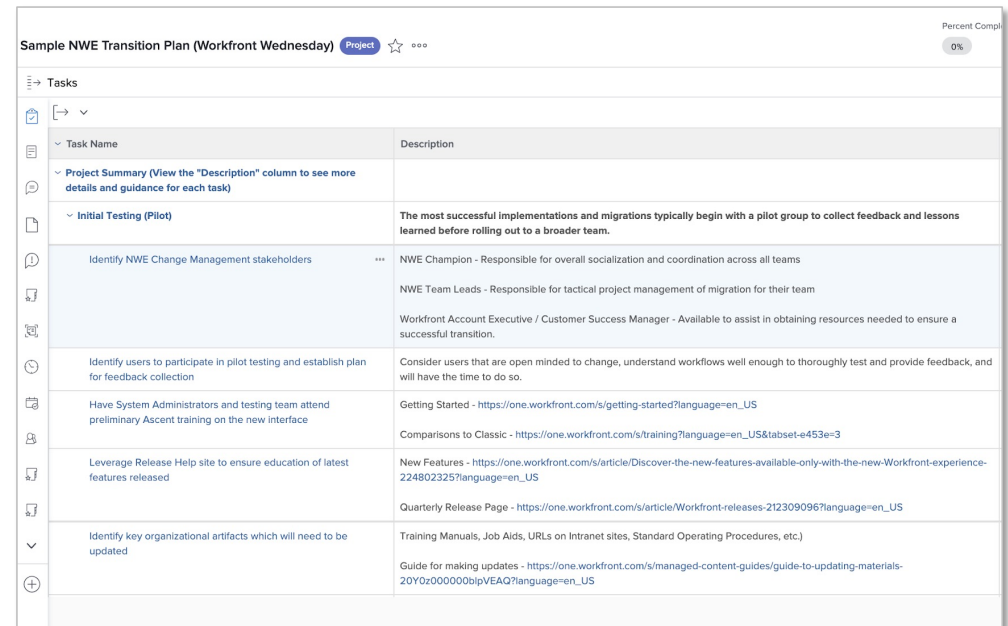
TIP: Establish a pilot team that can test the transition and provide feedback and lessons learned before rolling out to a larger audience.



2. Create a migration plan and a deadline

Download a sample transition plan project template from [Workfront One](#).

TIP: If you have multiple teams that will be making the transition to the new Workfront experience, copy the project and create a separate plan for each team.



Task Name	Description
Project Summary (View the "Description" column to see more details and guidance for each task)	
Initial Testing (Pilot)	The most successful implementations and migrations typically begin with a pilot group to collect feedback and lessons learned before rolling out to a broader team.
Identify NWE Change Management stakeholders	NWE Champion - Responsible for overall socialization and coordination across all teams NWE Team Leads - Responsible for tactical project management of migration for their team Workfront Account Executive / Customer Success Manager - Available to assist in obtaining resources needed to ensure a successful transition.
Identify users to participate in pilot testing and establish plan for feedback collection	Consider users that are open minded to change, understand workflows well enough to thoroughly test and provide feedback, and will have the time to do so.
Have System Administrators and testing team attend preliminary Ascent training on the new interface	Getting Started - https://one.workfront.com/s/getting-started?language=en_US Comparisons to Classic - https://one.workfront.com/s/training?language=en_US&tabset-e453e=3
Leverage Release Help site to ensure education of latest features released	New Features - https://one.workfront.com/s/article/Discover-the-new-features-available-only-with-the-new-Workfront-experience-224802325?language=en_US Quarterly Release Page - https://one.workfront.com/s/article/Workfront-releases-212309096?language=en_US
Identify key organizational artifacts which will need to be updated	Training Manuals, Job Aids, URLs on Intranet sites, Standard Operating Procedures, etc.) Guide for making updates - https://one.workfront.com/s/managed-content-guides/guide-to-updating-materials-20Y0z000000bipVEAQ?language=en_US

3. Communicate early and often

Frequent communication will instill confidence in your users that they will be supported during the change and helps to address any outstanding questions to alleviate fears. Make sure you reinforce the benefit and value to the end users.

TIP: The new Workfront experience Onboarding Guide offers several communication templates (pages 19-23) to inform your teams at each stage of the transition.

SAMPLE EMAIL TEMPLATES FOR COMMUNICATION

1. Educating your core teams

Purpose Introduce the new Workfront experience to your users. Announce the new experience is ready for a select group of users to try out.	EMAIL SUBJECT LINE The new Workfront experience is here
Audience Early adopter team	EMAIL CONTENT Hello, everyone! I'm excited to announce that Workfront, our partner in getting work done, has revamped its look and feel to provide all users with an improved modern work experience. Workfront spent months conducting hundreds of customer interviews and reading thousands of customer comments to find out how you, the user, wanted Workfront to work. The result is a more modern design, but with an underlying familiar feel that lets you know it's still Workfront. It's better designed to fit your daily needs so you can contribute to the projects and initiatives here at [company]. Starting today, the new Workfront experience is available for a group of early adopters at [company]. We'd like you to be a part of this pilot group, doing your daily work in the new Workfront experience and providing feedback/recommendations. [System administrator] will switch the early adopters over by [date]. So, if someone happens to look over your shoulder, let them know what you're doing. If you have time to answer questions or give them a quick tour of the new experience, that would be great. Let's start getting positive messages out there about the change. We'll hold an initial "get to know the new Workfront experience" session for the early adopters, so you can get up and running quickly. You also can tap into Workfront's online resources: <ul style="list-style-type: none">• The new Workfront experience page—Watch an informational message from Workfront's chief technology officer, join the Workfront Community in talking about the new Workfront experience, and keep up on recent news from Workfront's Product team.• Learn the new Workfront experience—Video tutorials and downloadable quick guides help get you up-to-speed on the changes in the new experience.• Product documentation—Dig into the details of the changes with step-by-step product support documentation. Over the next few weeks, we'll bring additional users and teams into the new Workfront experience to try things out, offer feedback, and prepare for the official company rollout later this year. I've been trying out the new design, and I've found [positive comment]. If you have questions about the new Workfront experience, please let me know. Thank you, [your email signer]
Sender Champion, System Administrator	

Migration experiences from three different customers

Customer #1

Informed ~250 users on
Thursday evening

Migrated to NWE Friday
morning at 9am

JUST ONE!
*The user requested
more training*

Customer #2

Created plan, communication for
their ~80 team

Used Workfront PPTX docs (with
a quick rebrand)

Users said NWE was
easier to use

60 days for full migration

Customer #3

Tiered groups, ~30 group
admins and 400+ users

Created global training that
Group Admins could tailor

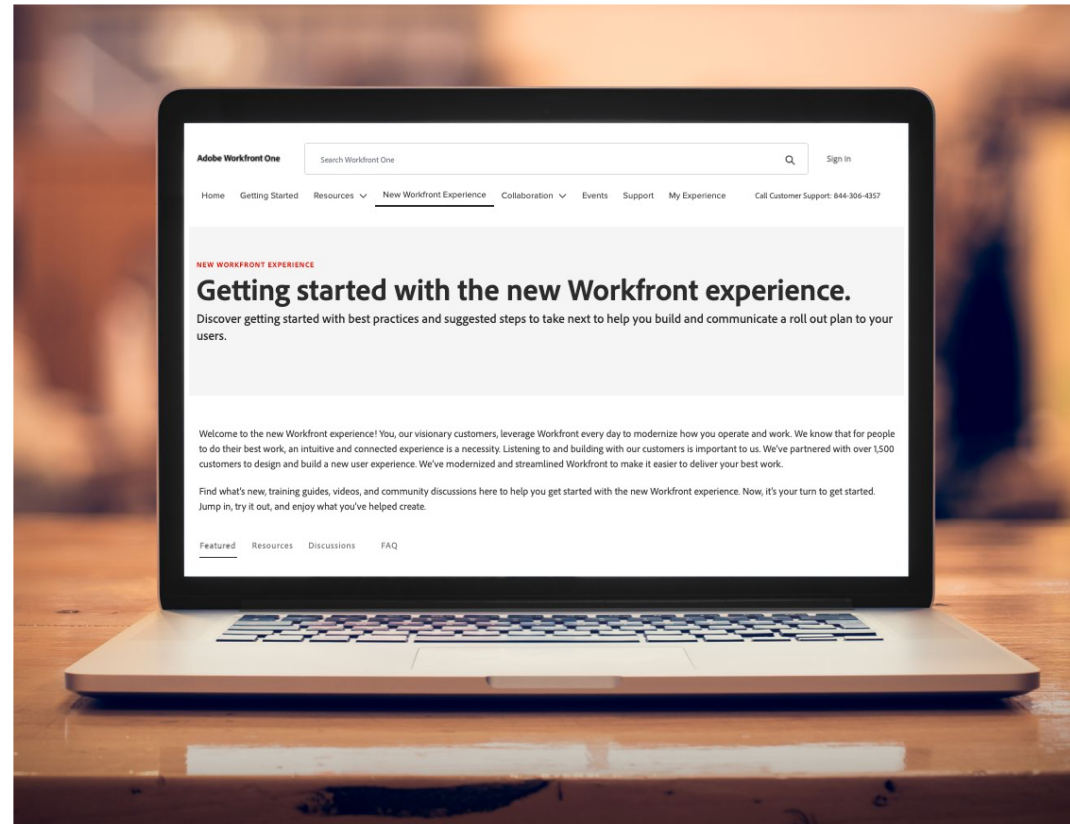
Used custom dashboards by
group to help monitor progress

3 months for 80% migration

Resources

The new Workfront experience page on Workfront One is a complete index of everything you might need, including:

- Answers to common questions
- Training guides
- Downloadable PowerPoint templates
- Communication examples
- Videos
- Sample project templates
- 1-month transition plan
- Interface comparisons
- Documentation
- Customer discussions
- And more!



Questions?

The New Experience

June 22nd, 2021

Dawn Cejudo

Workfront is known as our enterprise tool, which we have been using for over 8 years.

Our main responsibility is supporting the day-to-day operations for all our users utilizing Workfront. There are two Workfront Systems Administrators, and we keep ourselves very busy managing multiple queues, implementing departments, overseeing projects, creating reports and dashboards, continuous training, and always looking for opportunities to improve processes and call out best practices, along with our system admin functions. Currently IEHP has 2200 team members with 1150 planned users and approximately 1050 requesters.



Sr. Application Specialist
Workfront Administrator



Prepare for the New Experience

Review all WF tools

Get familiar with the changes in the
New Experience

Decision – who goes first?

Create what will work for your teams
and make it fun or competitive



Finance

Purchasing Department - The New Experience Training Project ☆

***this is the project plan that will help you with launching the training videos. Just select the URL view and then in the URL Column select the training link.**

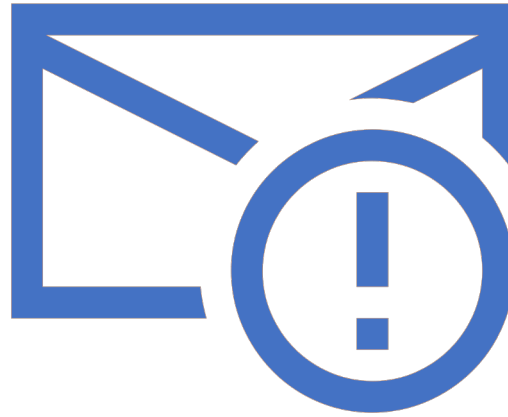
Percent Complete 0% Project Owner Michael Lim Planned Completion Sep 30, 2020 Condition On Target Status Planning

Tasks

#	Reference Number	Task Name	Description	URL	Assignments	Duration	Pln Hrs	Predecessors	Start On	Due On	% Complete
1	1758151	Roll Out to IEHP teams	Hi New Users, I wanted to help you gain the best knowledge of Workfront. We are here to assist you in any way. I would like for you to follow along with each TASK, and inside each Task, there is a description, link, and video time for training. Please let me know if you need any help.		Purchasing	1 Day	0 Hours		9/30/20	9/30/20	0%
2	1758153	Navigate the new look	Please review the new look documentation utilizing the URL below.	https://cdn.experience.workfront.com/Ti		1 Day	0 Hours		9/30/20	9/30/20	0%
3	1758155	Home and My Updates	Please review the info related to home and my updates page utilizing the URL link below. thank you	https://cdn.experience.workfront.com/Ti		1 Day	0 Hours		9/30/20	9/30/20	0%
4	1758157	Videos	Below are videos for you to watch.		Do Not Assign - Parent Task	1 Day	0.02 Hours		9/30/20	9/30/20	0%
5	1758159	Prepare for the New Workfront Experience	Video: 4:06	https://one.workfront.com/s/videos?language=en_US&wchannelid=magbcc		1 Day	0 Hours		9/30/20	9/30/20	0%
6	1758161	Project Landing Page	Objective: How to use the new features in the Project landing page with ease How to access your projects How to utilize the sidebar tools Video:3:07	https://one.workfront.com/s/videos?language=en_US&wchannelid=magbcc		1 Day	0 Hours		9/30/20	9/30/20	0%
7	1758163	Task Landing Page Overview	Objective: Where to find information on the task landing page in the New Workfront Experience Video: 3:38	https://one.workfront.com/s/videos?language=en_US&wchannelid=magbcc		1 Day	0 Hours		9/30/20	9/30/20	0%
8	1758165	Organizing Work in to do list	This video is 3:07 minutes and will cover the following information Objectives: Sort Work Assignments	https://one.workfront.com/s/videos?language=en_US&wchannelid=magbcc		1 Day	0 Hours		9/30/20	9/30/20	0%

+ Add More Tasks

Showing 22 tasks



Communication



Send Communication Email

Send Meeting Invite for 30 min Demo

Send Out Training Video Project

Celebrate Accomplishments



The New Workfront experience is amazing!

Subject: The New Workfront Experience is amazing!

Hello, everyone! You've probably heard by now—change is coming to Workfront.

Workfront has redesigned its look, making it more flexible, modern, and intuitive to use. It may look different, but all the functionality we rely on in Workfront is there. Our early adopters known as our subject matter expert team started using the new Workfront experience for their daily work back in June 2020. **(enter date)**

They have some great things to say about the new look and feel. A few team members love the sleek look, and the ease of navigation and others love the new Pin feature which helps the team member organize their projects and frequent areas all at the top tool bar.

We're looking forward to the rest of you being able to dig into the new Workfront experience. The workspaces keep you organized, the summary panel gives you task information with just a click, and the streamlined navigation gets you to your work faster.

So, what are the next steps?

First, we have already introduced the new Workfront Experience to our early adopter **(enter name)** who is also our dedicated subject matter expert for the **(department name)**.

Second, we have developed training and support materials so everyone will be ready to go before making the switch later this fall. We are urging our teams to review a few tasks that have been outlined in a project plan with videos that are approx. 2 – 4 minutes in length and has before and after comparisons to help show you the changes.

New Experience Roll Out for Team Members (2 documents)

Videos (13 videos)

Additional Nice to Know Info (3 videos)

Lastly, you'll use the link below to submit a Workfront request requesting to be enrolled in the New Experience.

<https://iehp.my.workfront.com/requests/new>

And finally, our deployment plan will get everyone at IEHP up and running on the new Workfront Experience by October 5, 2020. **(enter date)**

Thank you for your time and we are excited to see your team move to the New Experience.

Your Workfront Administrators,

Dawn/Cliff





Agenda



HOW TO LOG ON



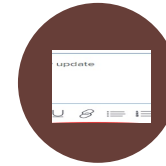
HOW TO NAVIGATE



FAVORITES - COVERING
HOW TO ADD
FAVORITES



PROGRAMS AND
PROJECTS



UPDATES



LOG HOURS



WORK LIST AND
SORTING BY DUE DATE,
ASSIGNMENT, AND
PRIORITY



Navigation of Toolbar



Classic View:



My Work Projects Reporting Analytics People Requests Timesheet Documents

Setup



541



New Experience View



Pin current page

*Favorites

Help



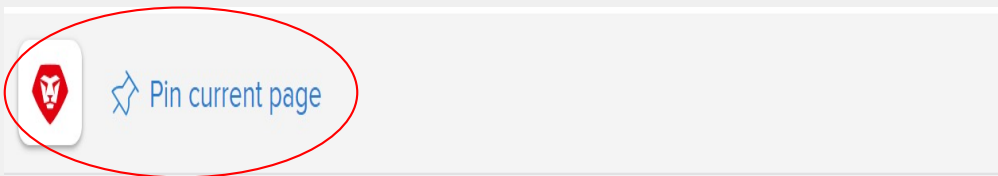
Waffle - New



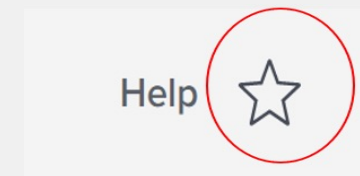


Homework - Navigation of Toolbar

New Experience View



*Favorites



Waffle - New

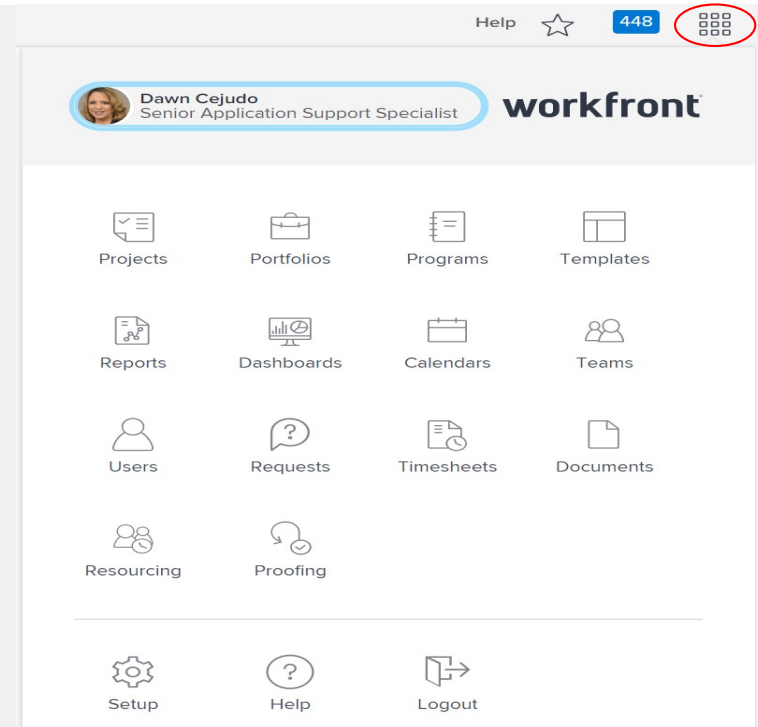
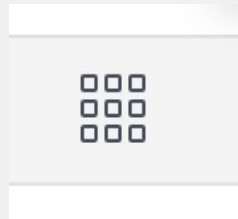


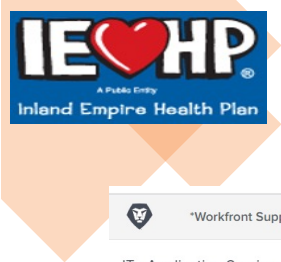
You get to customize your navigation toolbar

- Select the Waffle and find your project, queue, or reports
- Once page opens then select PIN this page
- This will bring your selection to the navigation tool bar.



Main Menu - Waffle





IT - Application Services / Workfront

Pharmacy - New Experience Roll Out - Quality & Compliance Project ☆ ...

Percent Complete

0%

Project Owner

 Stacy Lowe

Planned Completion

Sep 30, 2020

Condition

● On Target

Status

- Execution

← Project Details

Add custom form

▼ Overview

Description

Hello, everyone! You've probably heard by now—change is coming to Workfront.

Workfront has redesigned its look, making it more flexible, modern, and intuitive to use. It may look different, but all the functionality we rely on in Workfront is there. Our early adopters subject matter expert team started using the new Workfront experience for their daily work back in June 2020. They have some great things to say about the new look and feel. A few team members love the sleek...

⌵ Show More

Project condition

Condition Type
Progress Status

Condition
● On Target

Project dates

Schedule Mode
Completion Date

Planned Start Date
Sep 21, 2020 8:02 AM

Planned Completion Date
Sep 30, 2020 8:02 AM

Basic Information

Reference Number
1840511

Status
● Execution

URL
[+Add](#)

Priority
● High

Project association

Portfolio
IT - Application Services

Program
Workfront

Group
Information Technology

Company
IEHP

Working time

Planned Hours
1440 Hours

Actual Hours
0 Hours

Planned Duration

Actual Duration



1477483 - Workfront SME/User Group Project Project ★ ⋮

≡ ← Updates

- ✓ Tasks
- 📄 Project Details
- 📄 Business Case
- 💬 Updates
- 📄 Documents (20)
- 🗨 Issues (0)
- ⚠ Risks
- ✓ Approvals
- 📄 Baselines
- 📄 Billing Rates

📄 New Updates

🕒 Log Time (1 hrs)

Start a new update

B *I* U *S*

Notify: Add people or teams...

Status
Planning ▾

Update

Cancel

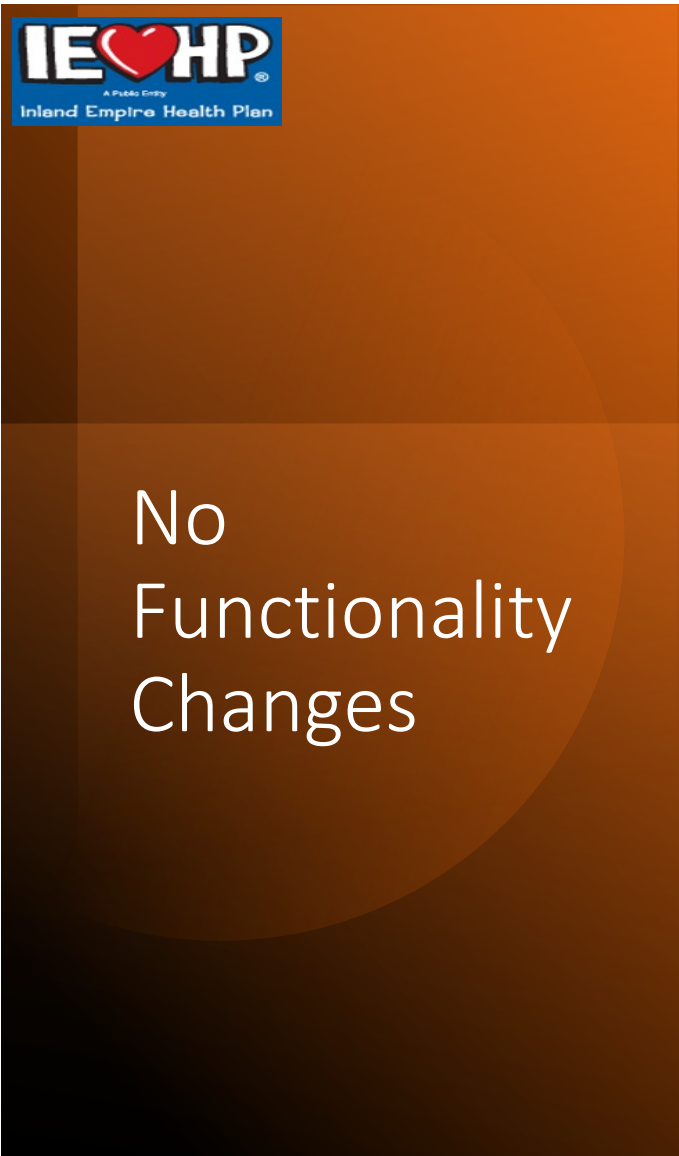


[User Group SME part 2 Sign in Sheet.pdf](#)

Dawn Cejudo

10/11/2019 At 10:04 AM · [Like](#) ⋮

to Shacole Dupree, Julie Phay, Monea Riley, Michelle Gracey



Open and Closed (Tasks & Issues) Service Delivery

Report of closed tasks and issues this week.


Details Summary **Chart**

[Export](#) [Hide Values](#)

Showing default report filters, views and geo

Category	Resolved Cases (Count)
Africa Customer	1
Africa Issues	1
Africa Services	1
China Customer	1
China Issues	1
China Services	58
Africa Customer	38
Africa Issues	1
Africa Services	8
Africa Customer	19
Africa Issues	2
Africa Services	146
Africa Customer	1
Africa Issues	1
Africa Services	11
Africa Customer	11

Tips

- Meet with your SME's first
- Use Favorites and pins to “bookmark” items—these are your best friends when it comes to finding things quickly.
- Make sure your browser zoom setting is at 100%
- Workfront Support – Dawn & Cliff = 
- Workfront Support Request





Classic View

IEHP A Public Entity

My Work Projects Reporting Analytics People **Requests** Timesheet Documents

+ New Request Requests I've Submitted All Requests Drafts

Select a Request Type

*Workfront Support Request

Use this Support Queue to submit a Request to the Workfront Administrators and or Support Teams.

*Workfront Support Request ?

-- Select --

*Password Assistance for all WF Products

Enroll in The New Experience

Forms

IEHP Graphic & Photo Central

Questions - Misc request

Reports/Dashboards

System Configuration


Training

Workfront Proof



Note: This is a celebratory moment! When a team member selects Workfront Support to request to be enrolled into the New Experience, this is really the last day they will see and use Classic.






"Workfront" IEHP's Work Management Solution

in IT Services ▾

[Overview](#)
[Activity](#)
[Content](#)
[People](#)
[Subspaces and Projects](#)
[Calendar](#)

[ACCESS THE WORKFRONT SITE](#)

To access IEHP's instance of Workfront Click on the Workfront icon below



If you would like to use **Supported Browsers** @ 100% Zoom

- Google Chrome®
- Mozilla Firefox®

just copy URL and insert it into the address bar of the **Support Browser**

If you'd like to learn more about Workfront or

[LATEST WORKFRONT NEWS](#)

The New Workfront Experience is here! *Oct 5th, 2020*

- You, our visionary Team Members, leverage Workfront every day to modernize how you operate and work.
- We know that for our Team Members to do their best work, an intuitive and connected experience is a necessity.
- Your Workfront Administrators at IEHP partnered with over 1,500 Workfront customers to design and build a new user experience.
- Workfront modernized and streamlined Workfront system to make it easier to deliver your best work. **"WORK BOLDLY!"**

IEHP Departments that are in **In-Progress** or Transitioned over to the New Workfront Experience

- Communication & Marketing - *Way to go Team!*
- QS - HCI - **In-Progress**
- RX Team - **In-Progress**
- Compliance - **In-Progress**
- Purchasing - **In Progress**
- Core Business Systems - **In-Progress**

Who's next? *Sign up here*



Review Access Levels

Review Layouts

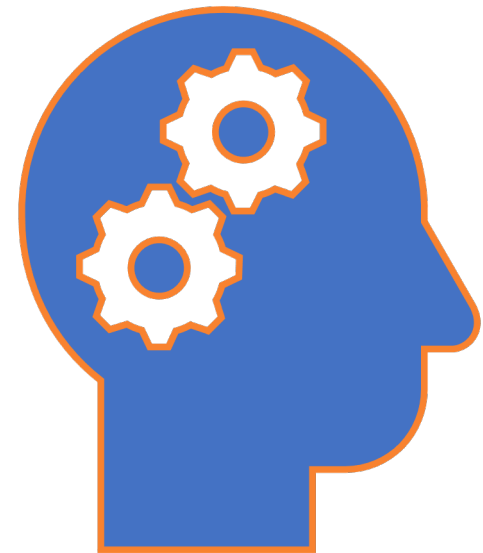
Create an Overall Project Plan

Add *“Enroll to the New Experience”* to your
WF Support Queue

Create Weekly Reports

Set up our intranet page (we added tools
provided from WF to our pages)

Lessons Learned





Thank you.

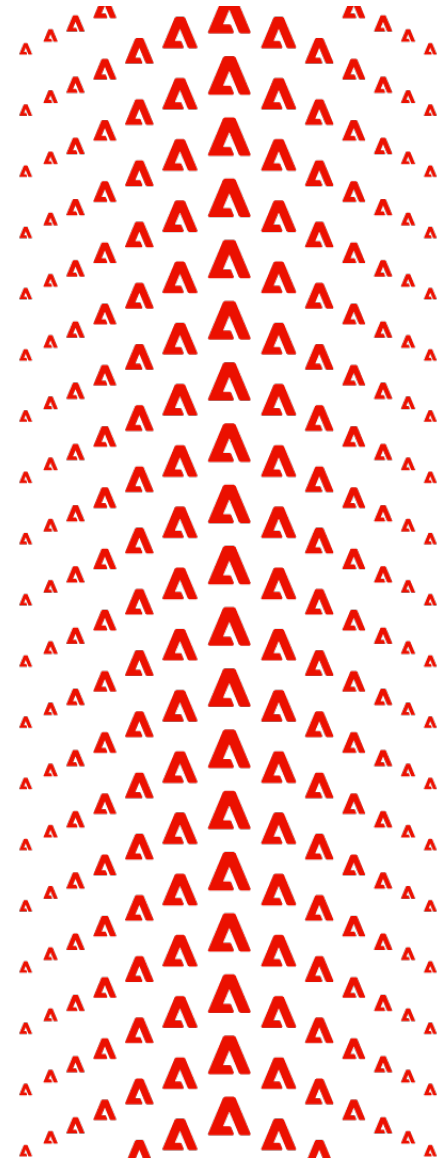
Dawn Cejudo – Cejudo-d@iehp.org

Workfront Administrators - 909.767.0017

Cliff De Jong – Dejong-c@iehp.org

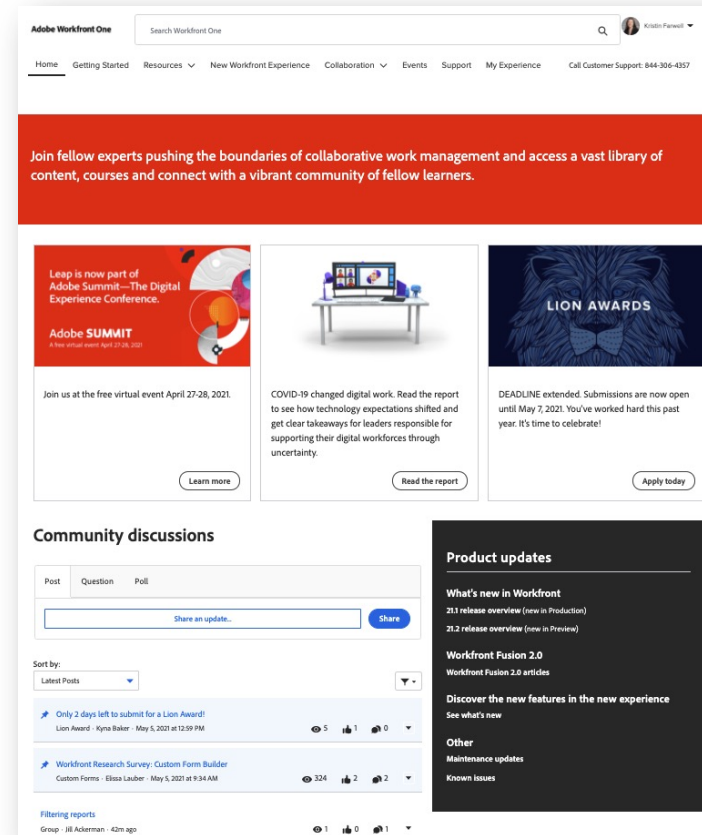
Workfront Administrators - 909.296.2924

Wrap-up and next steps



Continue the conversation on Adobe Workfront One

- Collaborate with others in a similar industry or department
- Harness the power of your peers to crowdsource inspiration and solutions
- Learn about upcoming events



Upcoming meetups

Full list: <http://one.workfront.com/events>

- July 27: Workfront System Maintenance

Coming soon!

- *July 20: Leveraging Custom Forms (TBD!)*
- *Aug 10: Dashboards and Data Visualizations*
- *Aug 17: Transitioning to the New Workfront Experience*
- *Aug 31: Extending Workfront with Adobe Integrations*



Thank you!

