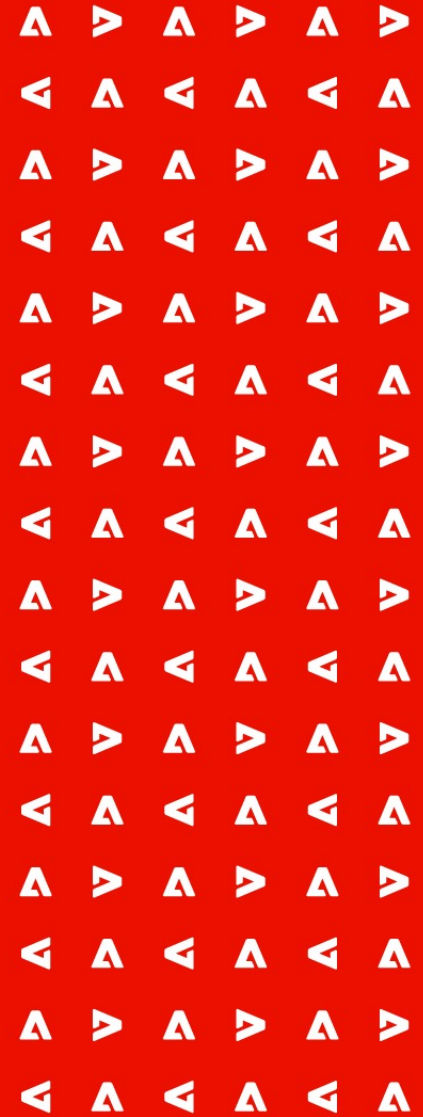




Adobe Workfront Virtual User Group

Automating Workflows with Workfront Fusion
Tuesday, September 14, 2021



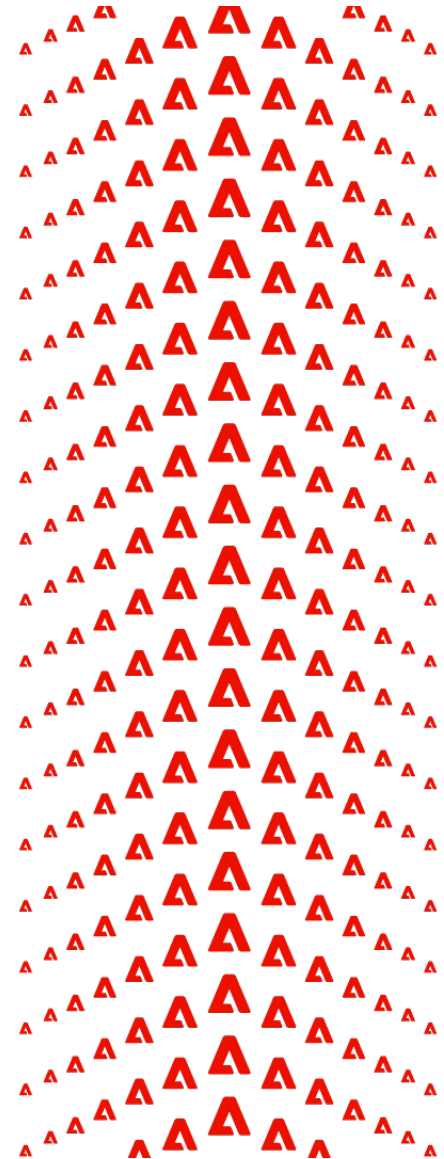
Today's host



Kristin Farwell

Sr. Manager, Customer Marketing

Adobe Workfront



This session is being recorded
and will be made available to
customers after the event.

Say hello!

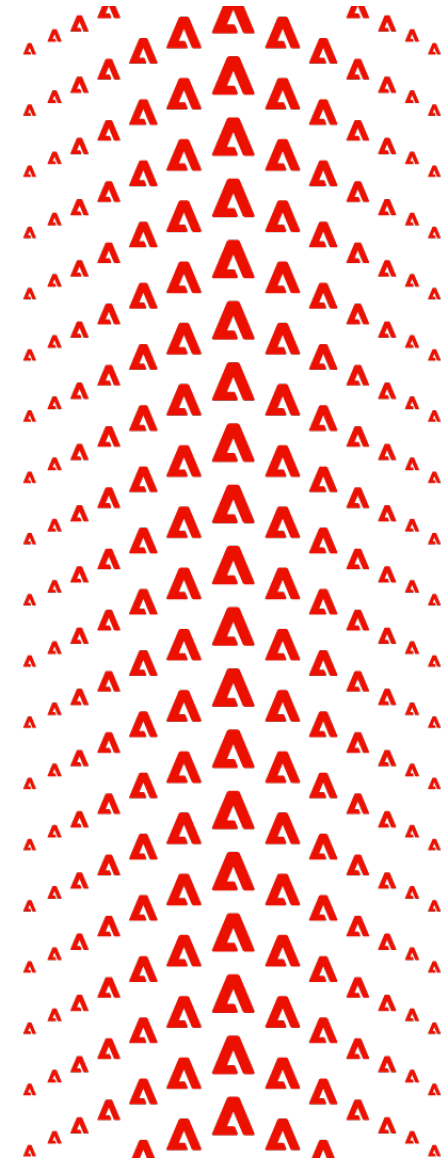
Type into chat:

- Your company, role and location
- What do you hope to take away from today?
- Morning beverage? Coffee? Tea? Soda? Nothing?



Agenda (Pacific)

Time	Topic
8:00 a.m.	Welcome and agenda
8:10 a.m.	Understanding Workfront Fusion <i>Sam Taylor, Senior Product Manager, Adobe Workfront</i>
8:20 a.m.	Customer Spotlight: Novo Nordisk <i>Bernie Klemmer, Director, Marketing Operations, Novo Nordisk</i>
8:45 a.m.	Customer Spotlight: Nationwide Insurance <i>Brandon Pritchard, Specialist, Bus. Consultant, Marketing Operations Process & Technology, Nationwide Insurance</i>
9:10 a.m.	Group discussion
9:25 a.m.	Wrap-up and next steps
9:30 a.m.	Meetup ends



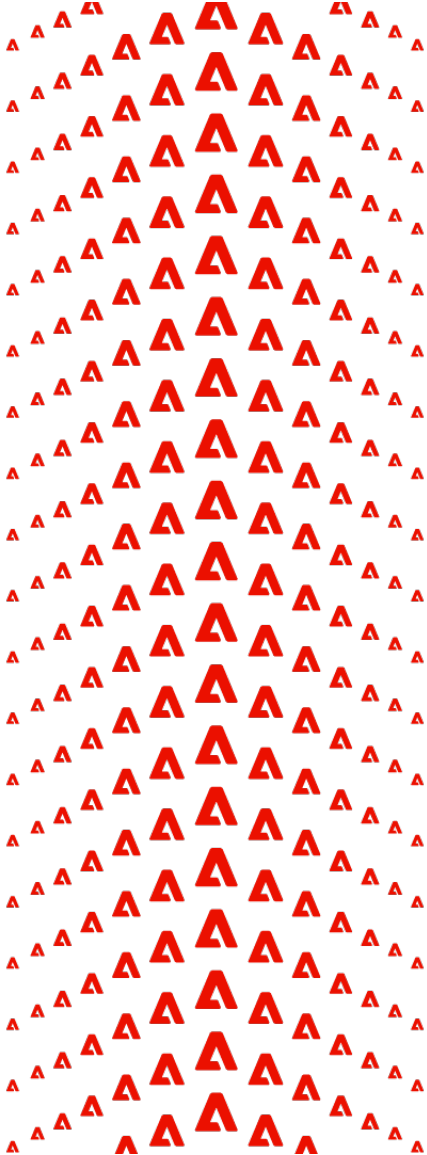
Presenter



Sam Taylor

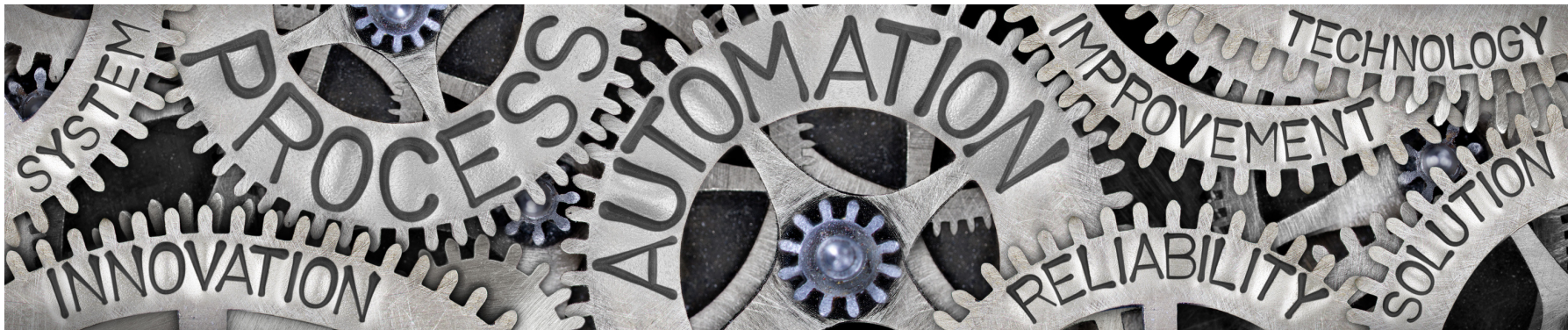
Senior Product Manager, Fusion

Adobe Workfront



What is a Work Automation Engine?

Enables the capability for process managers to automate virtually any portion of a unique work process.



Today's Session

Workfront Fusion for Work Automation

Automating Workfront itself to address unique business processes, scale actions, and eliminate toil

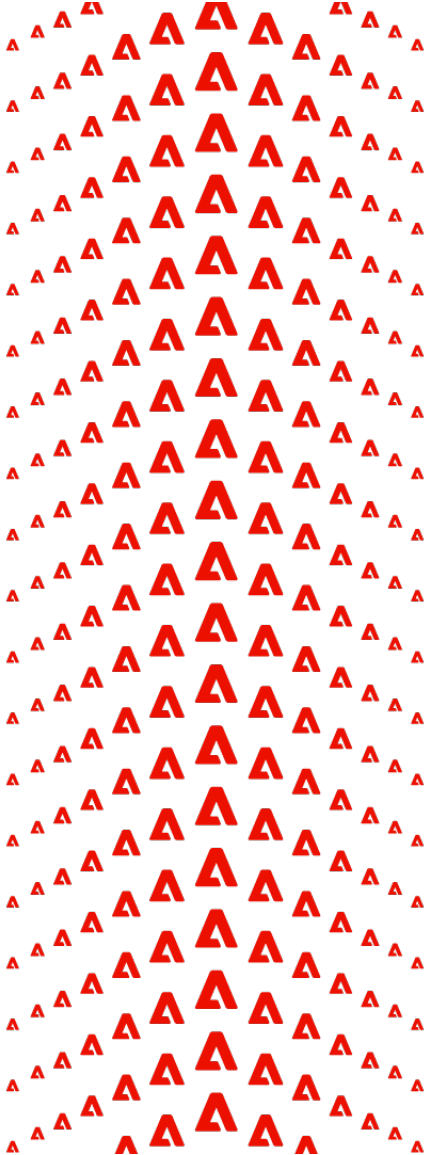
Workfront Fusion for Work Automation and Integration

Extend automations beyond Workfront to applications other than Workfront.

Presenter



Bernie Klemmer
Director, Marketing Operations
Novo Nordisk





Who we are

We are a global healthcare company, founded in 1923 and headquartered just outside Copenhagen, Denmark.

Our purpose is to drive change to defeat diabetes and other serious chronic diseases such as obesity, and rare blood and rare endocrine diseases.

We do so by pioneering scientific breakthroughs, expanding access to our medicines and working to prevent and ultimately cure the diseases we treat.

We employ more than 45,000 people in 80 offices around the world, and market our products in 169 countries.



Speaker Bio

- Director Marketing Operations- Promotional Materials Management team
- Oversees MLR processes, asset management and print production teams
- Led Veeva Vault PromoMats implementation in 2018
- Started at Novo Nordisk in 2011



Workfront will be used for managing our work in 2022

One place for managing work that is connected to the tools we use



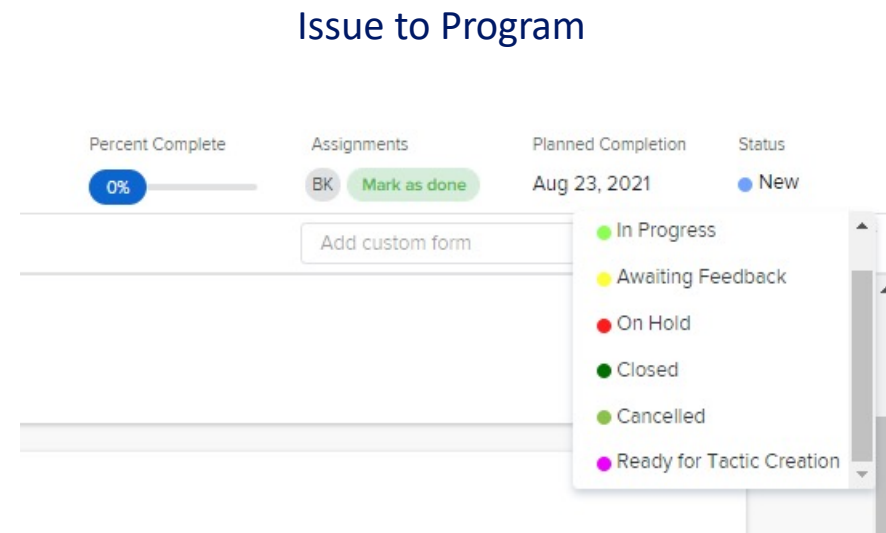
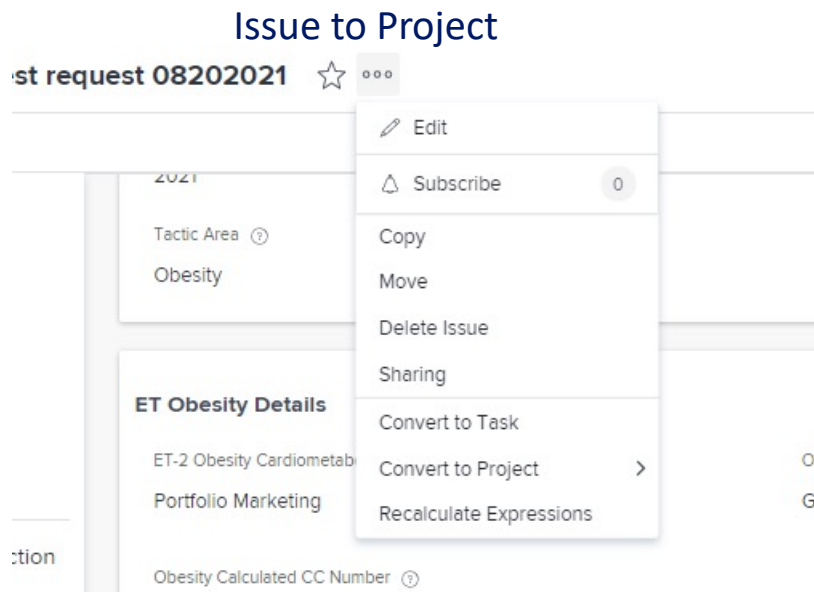
WorkFront Platform

- Workfront is a central platform to create, share, & manage content or complex processes.
- Workfront is integrated with the other tools and systems we use
- The goal is to simplify and automate our business processes to eliminate duplication of efforts and ensure data quality



Fusion scenarios used to automate work

- Convert Program from Issue
 - Business requirement - need to control the creation of new programs within a portfolio
 - Solution – use fusion to automatically create a new program based on a request form that is triggered by an issue status change



Fusion scenarios used to automate work

- Planning and forecasting promotional review
 - Business requirement - need to improve planning and forecasting volume of promotional content and manage review resources
 - Solution – based on project level information, automatically create jobs in our review system, project resource demands months in the future, upload documents approved via Proof into review system, and pass review related data back into WF, all on demand and as scheduled

Veeva Placeholder

Veeva Placeholder ⓘ

View Data

View Data

Trigger/Create

Refresh Data - Get Latest

Clear All Fields - Reset

Veeva Document Number

Veeva Document Lifecycle Status ⓘ

Approved for Distribution

Veeva Link Placeholder ⓘ

Upload Asset To Veeva

Asset To Veeva ⓘ

Completed

Unsent

Send

Refresh

Completed

Veeva Asset Filename ⓘ

Date Asset Sent ⓘ

Jan 8, 2021

Veeva Document Actual Status ⓘ

Approved for Distribution

Fusion scenarios used to automate work

- Finance and budgeting workflows
 - Business requirement - need to simplify business process around tracking budgets and increase transparency to this data for budget owners
 - Solution – auto generate unique “order numbers” in WF to use on purchasing documents, update custom fields/ custom forms at the task, project, and/or program level with SAP data to reflect planned and actual costs, roll-up these custom fields to reflect totals at the project and program level

IO Summary

Order Number	Order Name from SAP	Purchase Order Number from SAP	
Cost Center from SAP	Cost Center Name from SAP	Cost Element from SAP	Cost Element Name from SAP
Planned YTD from SAP	Actual YTD from SAP	Remaining YTD from SAP	Plan Full Year from SAP
Remaining Full Year from SAP			

Fusion scenarios used to automate work

- Campaign Execution Custom Field Autofill
 - Business requirement – eliminate the need to enter the same information in multiple places
 - Solution – update custom forms with specific information (dates and status) based on the completion of specific tasks

Tasks

<input type="checkbox"/>	2	Review BRD, make assignments, and make project Current	▲ Nina Schirmer	0.5 Days	1 Hour		9/7/21	9/8/21	100%	9/7/21
<input type="checkbox"/>	3	Confirm BRD Acceptance	▲ Vinay Kumar	0.5 Days	4 Hours	📈+2	9/8/21	9/8/21	100%	9/9/21

Project Details

Asset Received Date

+Add

BRD Accepted Date

Sep 9, 2021

Development Completion Date

+Add

Non-Campaign Request Fulfillment Date

+Add

SRF Accepted Date

+Add

Testing Start Date

+Add

Testing Completion Date

+Add

Presenter

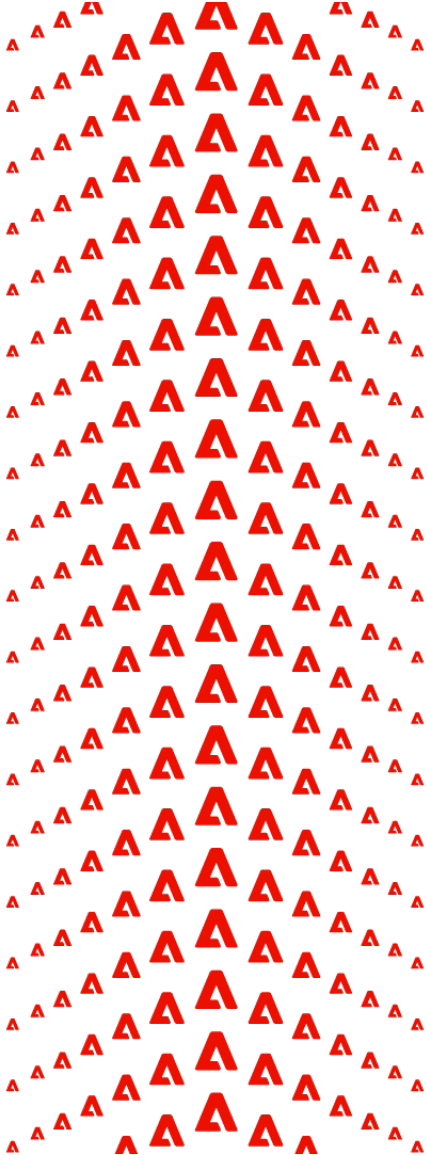


Brandon Pritchard

Specialist, Business Consultant

Marketing Operations

Nationwide Insurance

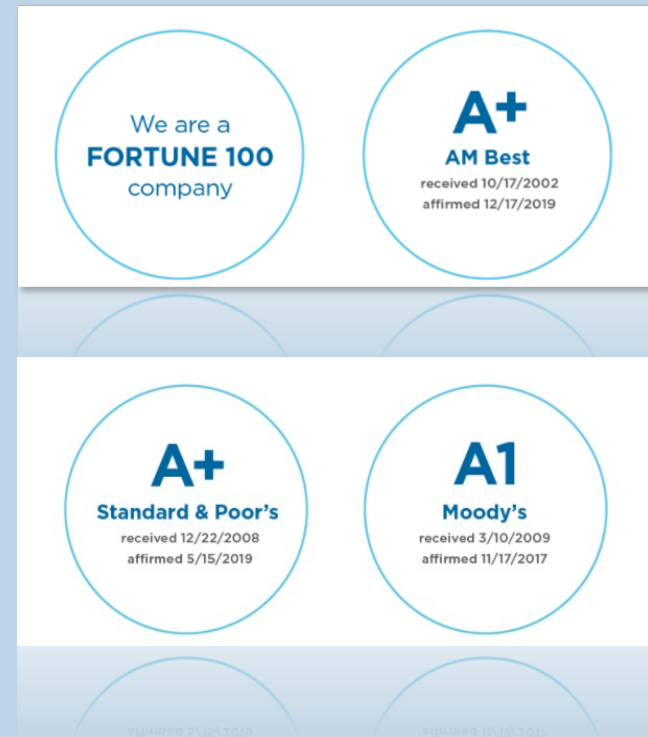


Fusion Automations at Nationwide



Who is Nationwide Mutual Insurance?

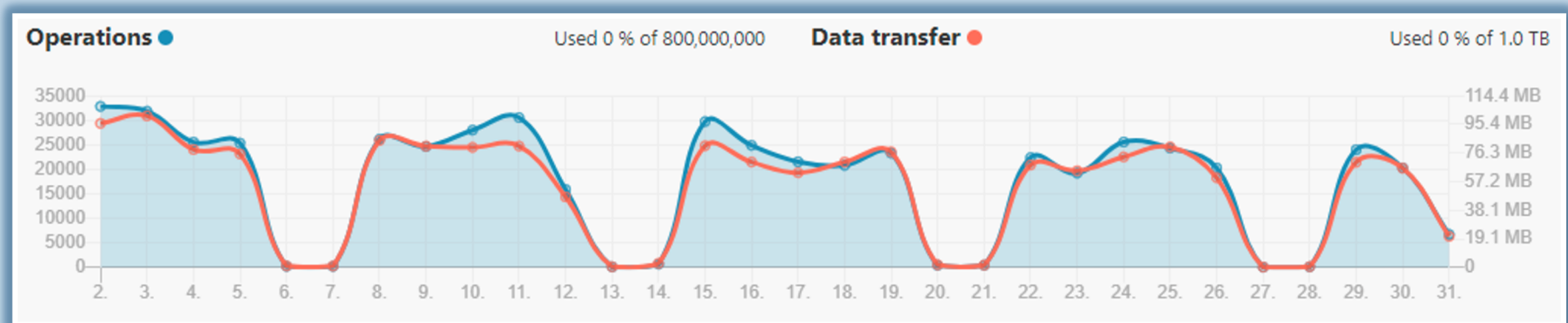
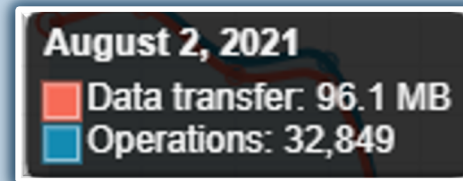
- **Founded in 1926**
- **We insure; home, auto, pet, life, farm, recreational, commercial, retirement, etc...**
- **At Nationwide, we exist to protect people, businesses and futures with extraordinary care.**
- **Our Vision is to be the most trusted, most caring and most customer-focused protection company.**
- **Our success comes through the purpose of our culture, the deep engagement of our associates, and the passion they bring to their work.**



Nationwide + Fusion

- Purchased WF in May 2018 – first projects entered in Nov 2018
- Started using Fusion in Oct 2020
- 3 Active Scenarios

- ~ 90 – 100 MB of Data Transferred Daily
- ~ 33,000 Operations Running Daily



Issue Automation Use Case

1. Our Agile teams convert Issues directly into Tasks/Stories and do not use Parent Projects other than the Request Queue. This makes reporting problematic because we collect project data for most reports and the Agile teams collect task data.

Requirements:

- Convert Issue to Project
- Attach Template (tasks and forms)
- Make the Issue assignee the Project owner and assign them to the Task
- Update Project status to “Current”

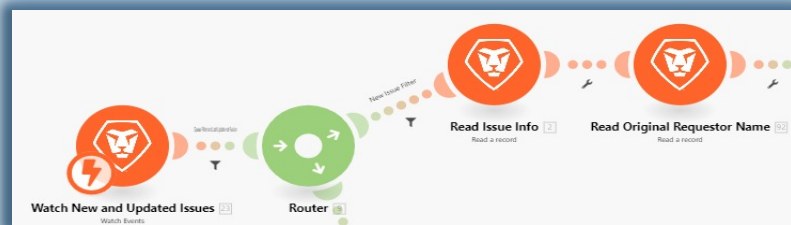
2. (POC) Our Queues are currently set up as individual Groups or Organizational units. This requires the Requestors to submit individual requests to each unit rather than one request for all the work at once.

Requirements:

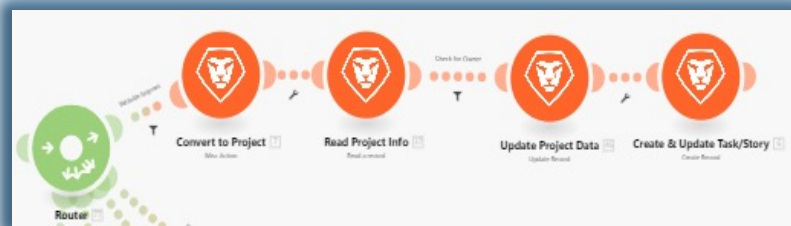
- Copy Issue and documents and move them to the respective group’s queue
- Update original Issue with the new Issue IDs and close original Issue
- Update new Issues with original Issue ID, link, and name of the original Requestor
- Update requestor dashboard with new Issues and remove original Issue



Issue to Project w/ Tasks Automation

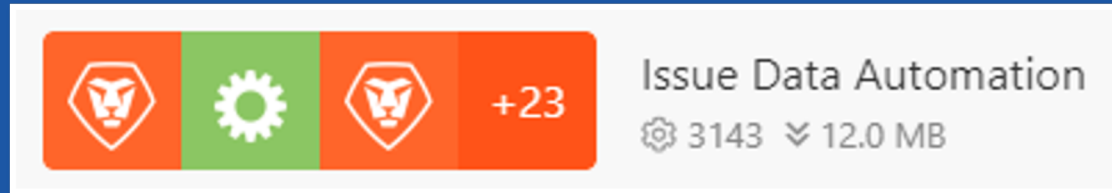


- Instant Watch Events (Issues) Module set to immediately
- Filter for specific Queues
- Router for New vs. Old Issues
- Read a Record Module for Issue data
- Read a Record Module for original requestor's name (not relevant for this path)



- Router for Agile team
- Misc. Action Module to convert the Issue into a Project
- Read a Record Module for Project data
- Filter to check for Owner
- Update Record Module to update Project fields and change the Status
- Create Record Module to add the Task/Story and attach the appropriate Forms





Issue Data Automation
3143 12.0 MB

DEMO 1



Project & Task Automation Use Case

1. Our Project Owners expressed a very “click heavy” experience to set up new Projects. This included copying and pasting data as well as assigning themselves to their own tasks.

Requirements:

- Assign Tasks to the Project Owner if the job roles match
- Update “Designer” field on the custom form with the Designer assigned on the Designer task
- Update Task Name with the Project Name for iMedia, WEBREQ and Web Build tasks
- Update “C&D Work Type” field to match the Queue that the Issue was submitted in
- Update “Project Description” field with the “Description of Request” text

Approximate Savings:

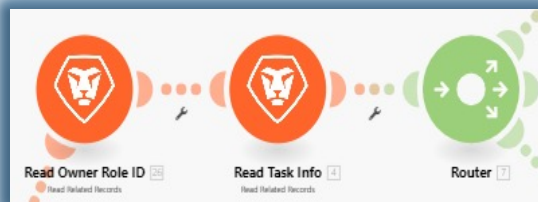
10,000 projects annually x 1 minute per project = ~166 hours and ~\$8k - \$12k in savings



Project & Task Automation



- Instant Watch Events (Projects) Module set to immediately
- Read a Record Module for Project data
- Read a Record Module for Owner Role
- Router for separate action paths



- Read Related Records Module for Owner Role
- Read Related Records for Task data
- Router for separate action paths



- Filter for Assigned To IDs that do not exist
- Update Record Module to assign tasks to Owner
- Read a Record Module for assignment ID
- Update a Record Module to input Designer's name into the Designer field
- Router for specific Role ID
- Filter for specific Template IDs
- Update Record Module to input Task name
- Filter for a specific Team
- Update Record Module to input planned hours

* "Ignore" Error Handling Modules are a fail safe in case the Modules fail.



Proof Automation Use Case

1. Our compliance department needed to ensure all Proof communications that were sent or received by our regulated users were being captured.

Requirements:

- Add “bot” recipient to workflow with appropriate role and email alerts to ensure all comments and decisions are captured
- Email a notification if the bot recipient is removed by mistake

Approximate Savings:

Our internal IT and Compliance departments estimated \$30k - \$40k to build an inhouse solution

2. Our Proof Owners expressed a very “click heavy” experience when setting up a new Proof. This included multiple subscription settings and updating custom proof data.

Requirements:

- Update proof custom form with Project name
- Enable Subscriptions for all recipients
- Set Subscriber role to “Reviewer and Approver”
- Disable Subscription Alerts for all recipients
- Set Email Link Required to “No Emails”

Approximate Savings:

11,000 Proofs created annually x 1 minute per proof = ~180 hours and ~\$10k - \$12k in savings



Proof Automation
26123 26.2 MB

DEMO 2



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is on your side



workfront[™]

Recommendations

- Understand the API explorer (<https://one.workfront.com/s/api-explorer>)
- Utilize the Notes feature
- Name modules and filters appropriately
- Use filters for testing
- Filter out last updated by Fusion ID
- Test, test and then test again
- Run a pilot for a week or two
- Maybe just test it one more time



Q&A

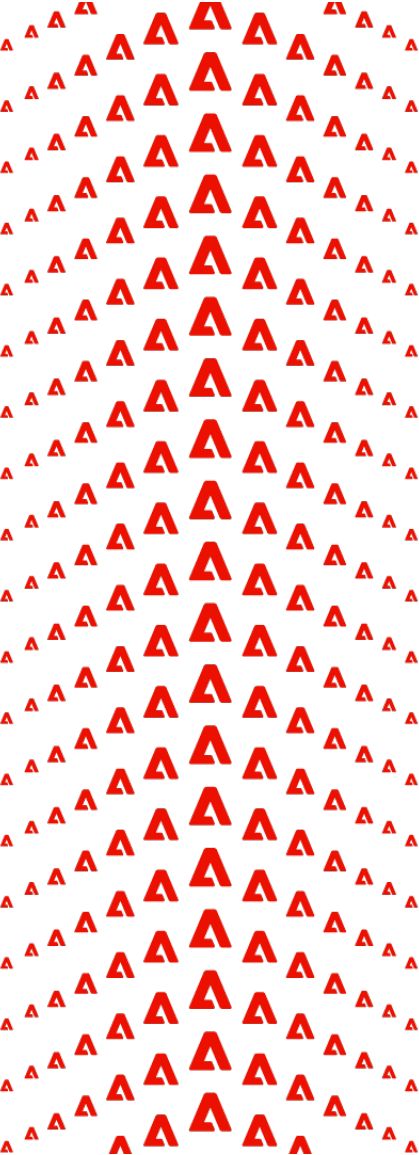


Nationwide[®]
is on your side



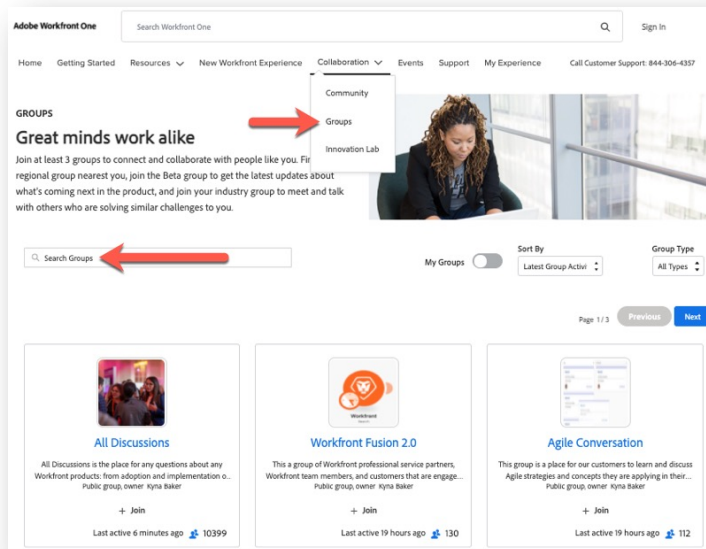
workfront[™]

Wrap-up and next steps



Additional Information on Fusion

Workfront One: Fusion 2.0 Group (one.workfront.com)



Fusion Datasheet & Pricing



Upcoming meetups

Full list and on-demand recordings:
<http://one.workfront.com/events>

Coming soon!

- *TBD – Integrating Systems with Workfront Fusion*
- *Oct 26 – Transitioning to the new Workfront experience*
- *Nov 16 – System Admin Panel: Reporting & Dashboards*

What other topics would you like to see?



Thank you!

