

Virtual User Group: Leveraging the Group Admin Role

Tuesday, May 4, 2021





Jaimeson Wenerstrum

Strategic Customer Success Manager Workfront



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





HOUSEKEEPING



Use the **Audio** and **Video** icons to control your settings.

To view attendees and chat, use the **Participants** and **Chat** icons.



Select Gallery View or Speaker View to customize your experience



HELLO my name is

Type into chat:

- Company, Role and Location
- What do you hope to take away from today?
- Star Wars or Star Trek?

Agenda

(Eastern U.S. time zone)

11:00 a.m. Welcome and Agenda

11:05 a.m. Enhanced Functionality for Group Levels

Lilit Mkrtchyan, Product Manager, Workfront

11:30 a.m. Customer Spotlight: JLL

Andrey Popov, Technical Lead

11:50 a.m. Customer Spotlight: Charles Schwab

Toneia Lane, Marketing Manager, Retirement Plan Services

12:10 p.m. Group discussion

12:25 p.m. Wrap-up Next Steps

12:30 p.m. Event Ends



Are you currently leveraging the Group Admin role at your organization?



Lilit Mkrtchyan

Product Manager Workfront



Enhanced Group Administration



Challenges managing work in an enterprise

- Slow/inaccurate decision-making process

Bad visibility

No source of truth



- Ineffective collaboration

Slow communication

Difficulty tracking adherence to strategic goals

What to do?



Enterprise controls for growth



To enable Business Units within an enterprise to successfully **operate in the same instance** of Workfront.

Enhanced Group Administration:



Centralized implementation

represented in one account with real-life org structure, allowing data sharing and reporting capabilities



Flexibility managing business units

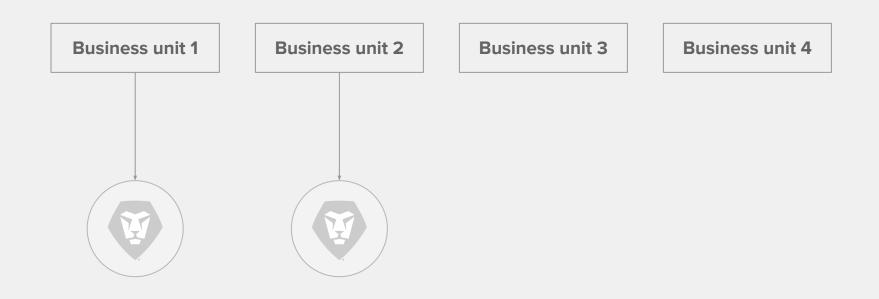
Processes/preferences
 customizable at system level or
 any organisational level based
 on the company needs



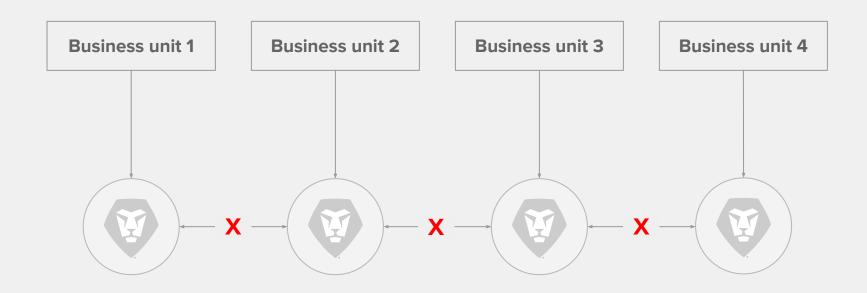
Minimized governance meetings

Business unit-specific
 configuration, based on each
 department's needs.

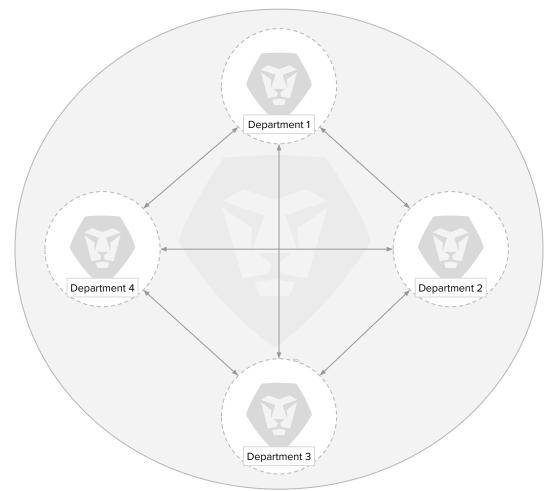
Enterprise



Enterprise



One account to rule them all



How?



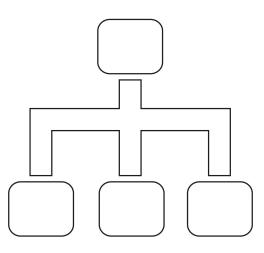




Empower Group Admins

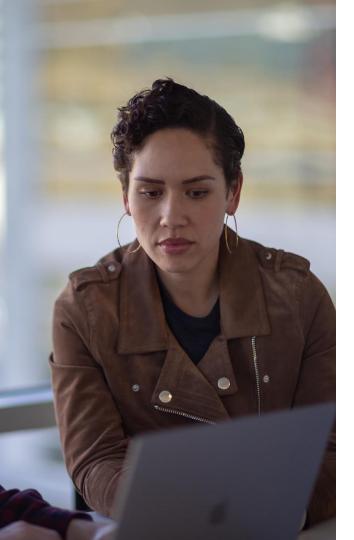
Reflect the real-life org hierarchy

- Up to 15 levels of hierarchy
- Up to 20,000 groups



Configure as you work,

not the way around



Control the level of independence

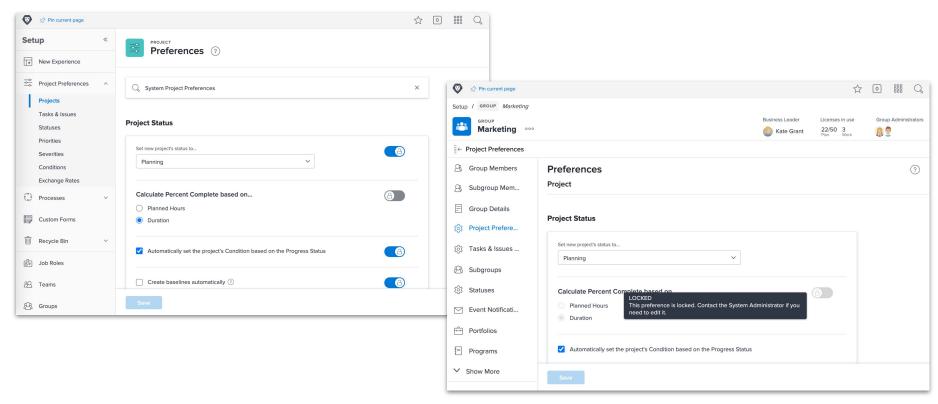


- Want to ensure all departments work with certain preferences?
 - Lock preferences for groups.

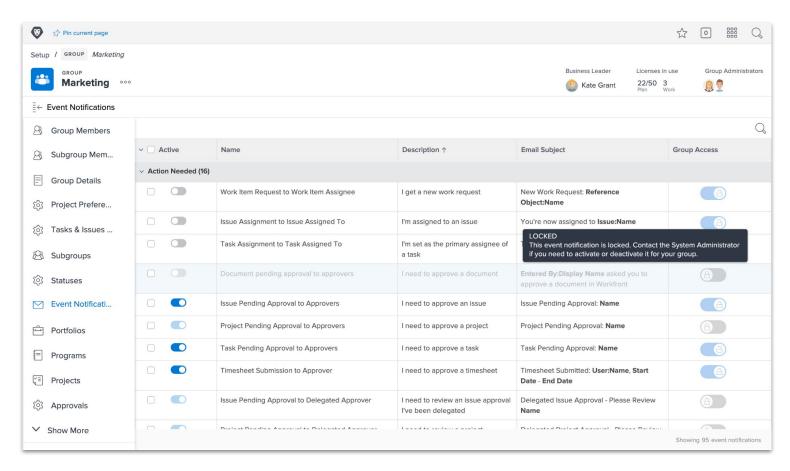


- Want your departments to have the independence to manage their own preferences?
 - Unlock preferences for groups.

Group-level Project, Task and Issue preferences

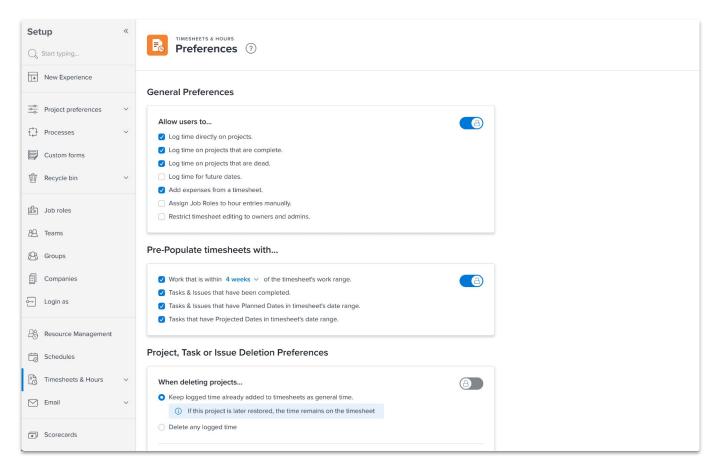


Group-level Event Notifications





Group-Specific Timesheets and Hours Preferences





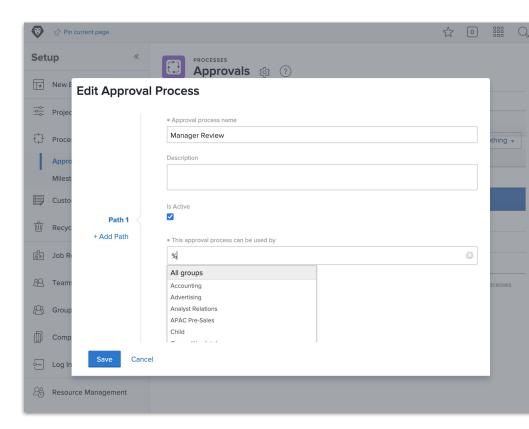
Group-Specific Approval Processes

Global approval processes

- available for all groups' projects
- based on system statuses

Group-specific approval processes

- available only for the selected groups
- based on custom group statuses



Subgroup Enhancements

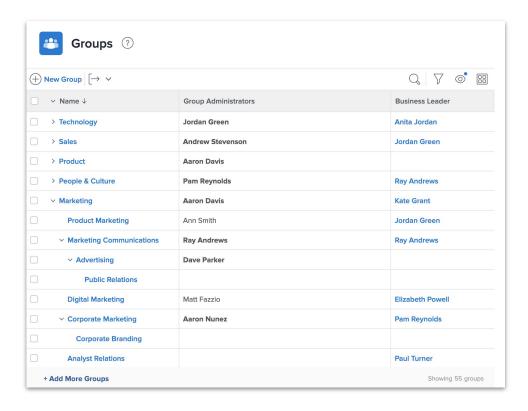
Current:

key capabilities available only on top-level groups

Goal:

key capabilities available on all groups regardless of the hierarchy level

Subgroup Enhancements



Assign an optional **Group**Administrator on subgroups



Group data ownership and differentiation



Portfolios



Companies



Programs



Teams



Projects



Templates

Group data ownership and differentiation





Companies <



Programs ✓



Teams ✓



Projects <



Templates coming soon...



Company Management for groups

Group Administrators can:

- Identify the companies their group is doing business with
- Manage their groups' companies without receiving access to other companies





Team Management for groups

Group Administrators can:

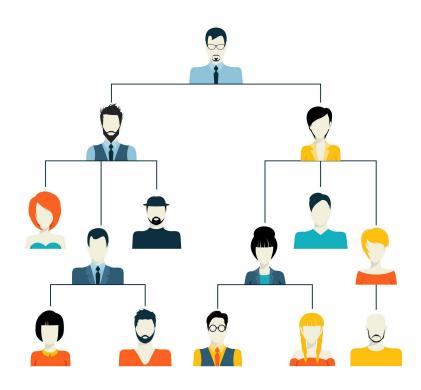
- Identify the teams formed within their groups
- Manage the teams associated with their groups without being a team member or owner



Who is behind the business decisions in each department?

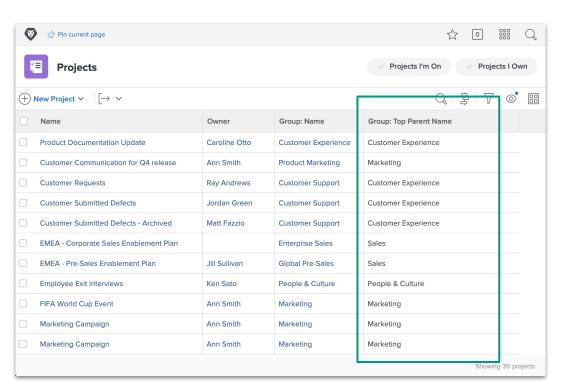
Introducing:

Business Leader



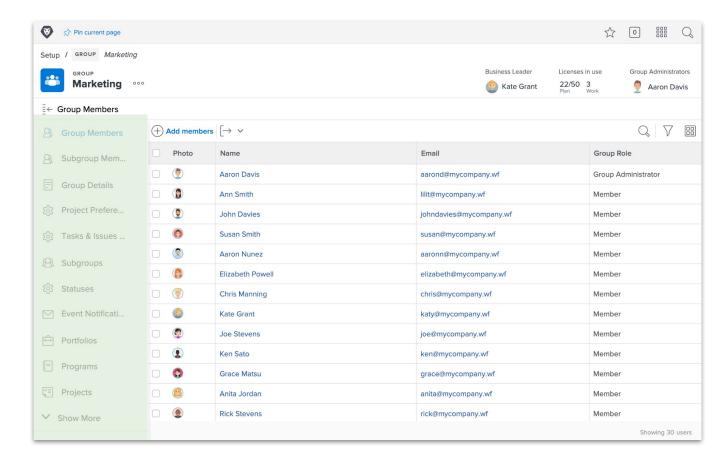
Report on data from the entire business unit

- **Top Parent Name** in views
- Top Parent ID in filters and groupings



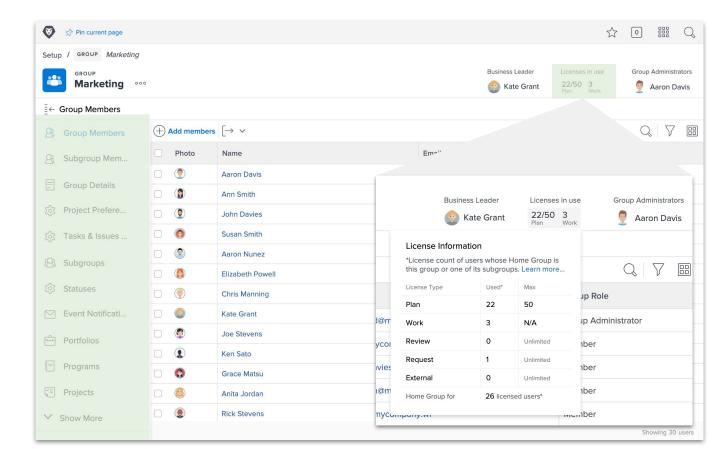


Group page



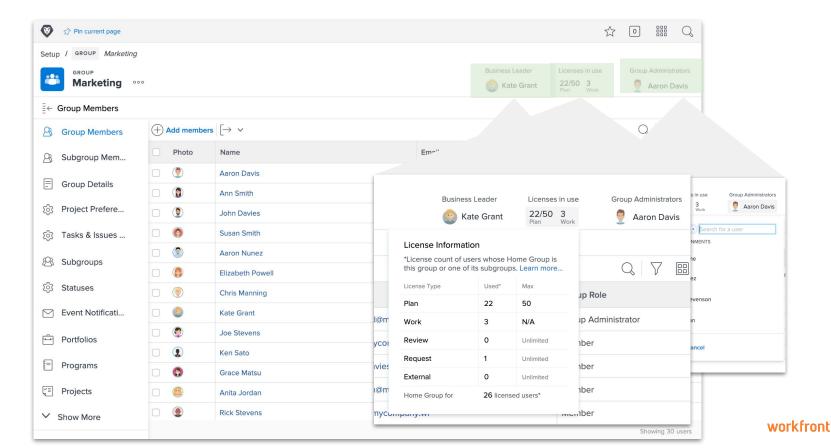


Group page

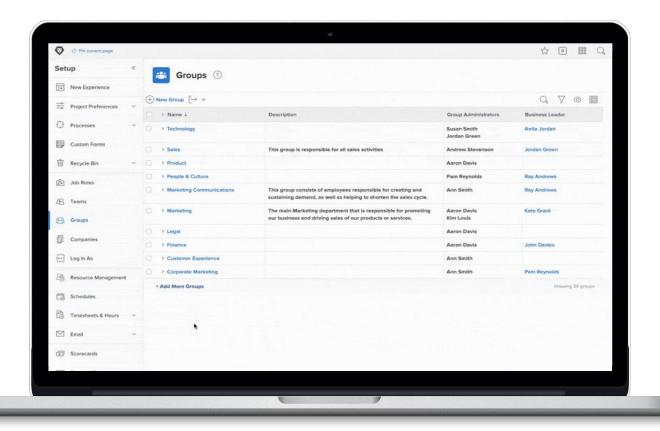




Group page



Restructure your groups



Group Administrator

A new superpower

Delegate

As a system administrator, delegate departmental management to group administrators



Delegate

- Group Administrators in charge of the group's workflows and processes
- Limited involvement of system administrators in the management of the group
- No dependency from other groups' needs
- Minimized need for governance meetings



Newly-added and planned Group capabilities

- Processes and preefeerrences:
 - Project, Task and Issue Preferences (phased rollout)
 - Event Notifications configurations (phased rollout)
 - Timesheets and Hours Preferences configurations (planned)
 - Group-spcific approval processes
- Data differentiation by groups
 - Group association on Portfolios, Programs, Companies, Teams, Templates
- Group Administrator empowerment
 - Group Admin's ability to manage group's companies and teams
 - Group Admin's ability to assign timesheet profiles
 - Group Administrators assigned on subgroups
 - Business Leader assignment on groups
 - Expanded group hierarchy of up to 15 level

Newly-added and planned Group capabilities

- Group Administrator empowerment

- Group Admin's ability to manage group's companies and teams
- Group Admin's ability to assign timesheet profiles
- Group Administrators assigned on subgroups
- Business Leader assignment on groups

- Better representation of organizational hierarchy

- Expanded group hierarchy of up to 15 level
- Improved group reorganization by making existing groups as subgroups

Usability improvements

- Dedicated Group page with all group-related data and conofiguration controls
- New widget for assigning groups showing the hierarchy, description and stakeholders

Actions allowed for different types of administrators

Find the overview of actions available for system vs. group vs. subgroup administrators in Adobe Workfront One.

	Workfront administrators	Group administrators	Subgroup administrators
Enroll users in the new Adobe Workfront experience	✓	✓	✓
Create and edit a user's profile	✓	√ *	√ *
Configure group-specific templates	Planned	Planned	Planned
Configure project preferences	✓	√ **	Planned
Configure task and issue preferences	✓	√ **	Planned
Create and manage statuses	✓	✓	Planned
Create and manage approvals	✓	√	✓
Restore items from Recycle Bin	✓	✓	✓
Create and manage teams	✓	√	✓
Create and manage companies	✓	✓	✓
Create and manage groups	✓	✓	✓
Log in as another user	✓	✓	✓
Create and manage schedules	✓	✓	✓
Create and manage timesheet profiles	1	J	./

Questions?





Andrey Popov
Technical Lead
JLL



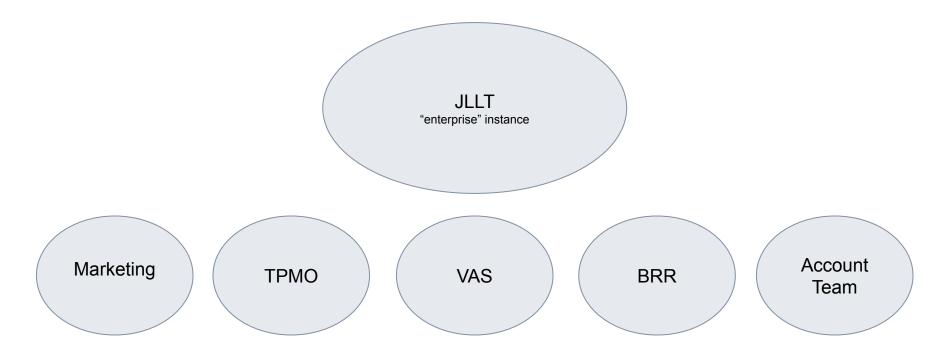
Global commercial real estate company with over 90,000 employees

~2,500 users across 6 instances Workfront used for

- Program / Project Management
- Time Tracking
- Portfolio Reporting
- Financial CapEx & OpEx Management
- Workflows
- Intake Queues



Instance Overview

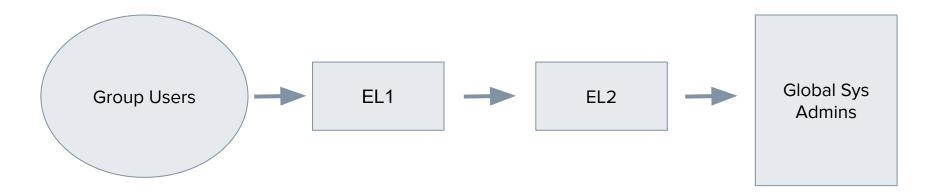


JLL Technology Instance

- Group Administrators required for new groups
 - Training required
- Responsible for system settings, communication, change management
- Technical Excellence Governance



JLL Technology Instance



Group Admin Benefits

- Reduced Global Admin involvement
- Independence between groups
- Fusion automations
- Strong partnership with Workfront Product teams



Future Initiatives

Continued GA Training

Group and subgroup structure

Increase functionality use within Groups



Toneia Lane

Marketing Manager, Retirement Plan Services Charles Schwab



Workfront
Group Admin at
Charles Schwab



Own your tomorrow.

Customer since March '14 with original roll-out in Creative Center Single instance, single company, many users and groups

A bit about Workfront at Schwab

Platform ownership and administration in Marketing

Distributed group administration for enterprise

Integrations with Workato, Jira, WORM-archival

Users by the Numbers

Users & Groups

3.8k active users

78 parent / 230 total groups

Licenses

82% Plan

17% Work/Review

3% Request

Logins

3.2k year

2.5k quarter

1.8K month

Admins

62 Group Admins

2 Sys Admins

Admin Roles

Distributed Responsibility Group Admin System Admin

Distributed Responsibility Agreement

System Administrators

"The Marketing Operations team manages Workfront Governance via core group collaboration, system settings, troubleshooting escalated issues, weekly admin office hours, vendor management, and administrator onboarding, vendor management, and business resources for platform projects."

Group Administrators

"...groups will designate an administrator in their organization, responsible for: all facets of process development, maintenance, and support; data management and archival; end user management, support, and training.

The Group Administrator(s) are responsible for ensuring proper permissions are in place for all of the group's users and objects."

System Admin Responsibilities

- Support requests that I can't complete

 Help with questions during weekly office hours
- Keep us informed during monthly Workfront governance meetings
- Communications Compliance / maintain risk procedures

My Group Admin Responsibilities

Develop workflows

Custom fields & forms

Request queues

Project templates

Milestone paths

Approval processes

User experience

Establish job roles, teams, and sub-groups

Develop custom dashboards

Create role-specific layout templates, custom views and filters

Collaboration

Work with other admins on cross-group integration

Elicit feedback from leadership to develop reports

Partner with users to determine enhancement opportunities

Support

Create materials and provide training, office hours during new process roll-out

End-user support

Make updates as needed

Thank you!



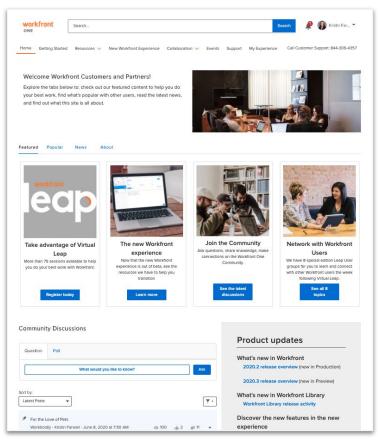
Own your tomorrow.



Wrap-up and Next Steps

Continue the Conversation on 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 Virtual User Groups

one.workfront.com/events

- May 11: Request Queues and Intake Forms
- May 18: Resource Management
- Jun 8: Training & Onboarding Users

Coming soon!

- Reporting & Dashboards: Planned v. Actuals
- Transitioning to the New Workfront Experience
- Extending Workfront with Integrations
- · Data Visualization and Storytelling



Thank you.

