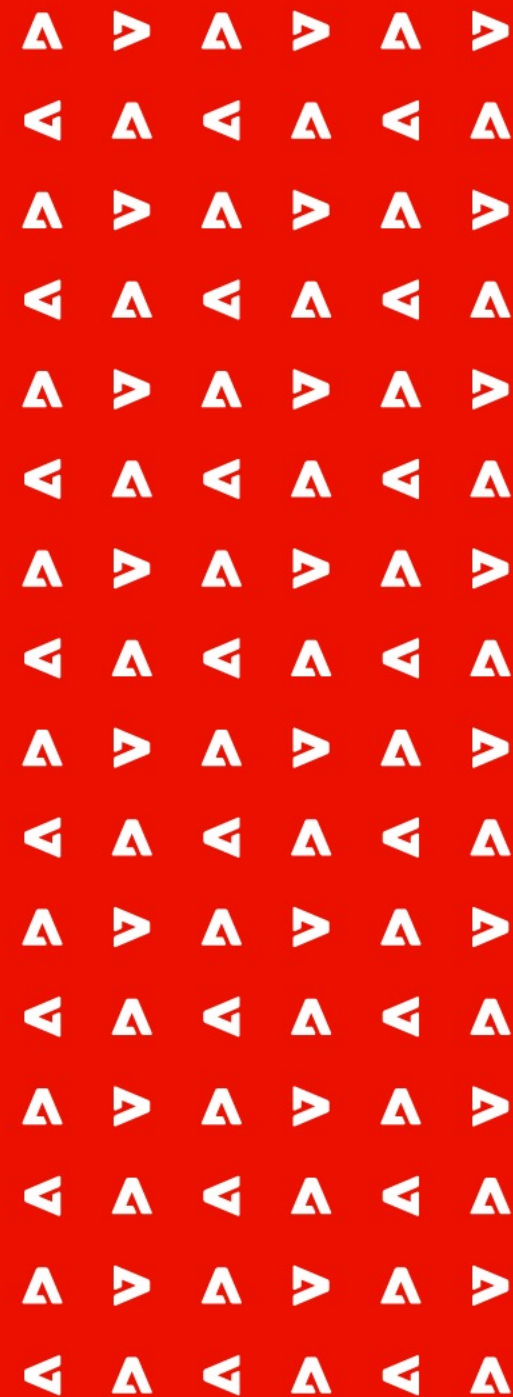




Adobe Workfront Virtual User Group

Resource Management
Tuesday, May 18, 2021



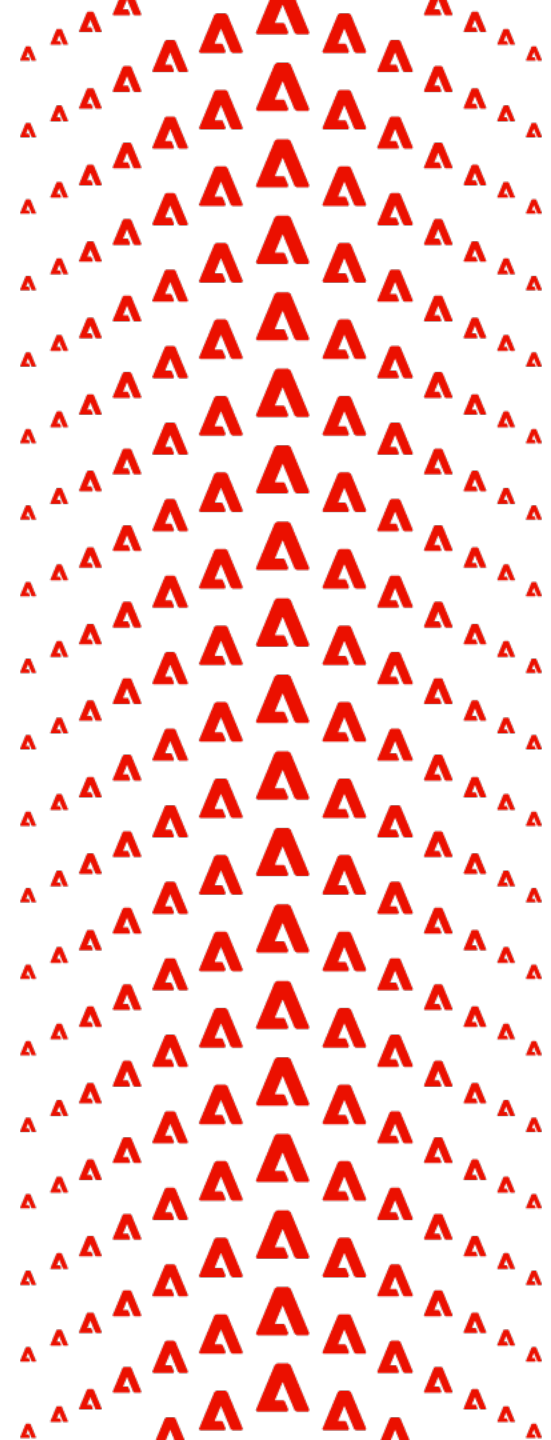
Today's host



Kristin Farwell

Sr. Manager, Customer Marketing

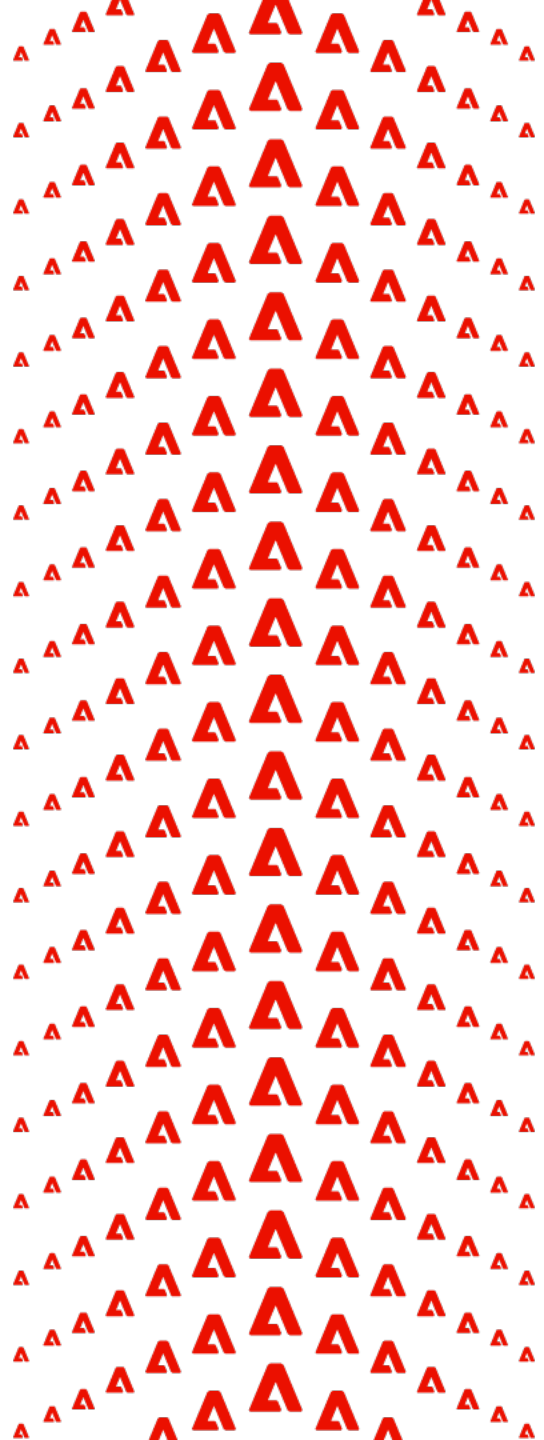
Adobe Workfront



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

Agenda (Pacific)

Time	Topic
8:00 a.m.	Welcome and agenda
8:05 a.m.	Customer spotlight: Melaleuca <i>Samantha Isin, Project Management Specialist</i>
8:25 a.m.	Small group discussion
8:45 a.m.	Customer spotlight: VaynerMedia <i>Aaron Behr, SVP, Project Management</i>
9:05 a.m.	Large group discussion
9:25 a.m.	Wrap-up and next steps
9:30 a.m.	Meetup ends



Share your best report recipes with us from **now until June 14, 2021** and we might include them in the first ever **Adobe Workfront Customer Reporting Cookbook!**



Who closed out the tasks on this project
Detailed instructions

Columns: No text mode is required! Here are the out-of-the-box names for the columns I used

Then I used Custom Column Label in Advanced Options to rename them for my users.

Groupings: For this report, I did not use any groupings.

Charts: I did not use a chart for this report.

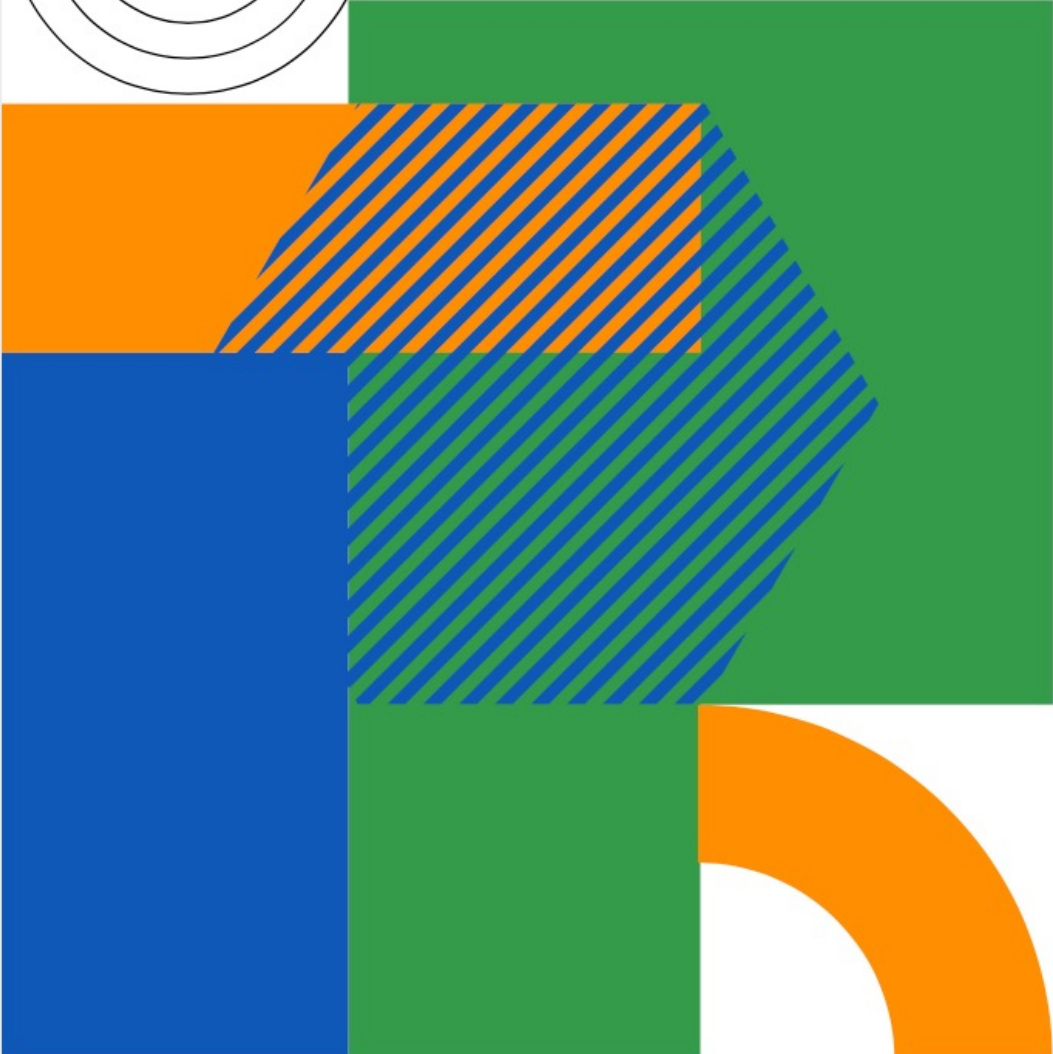
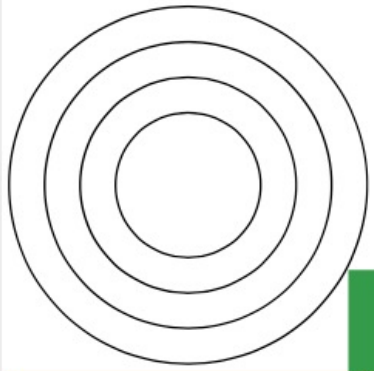
Filters: No text mode is required! Here are the filters I used:

Features: If you think there might be issues with the audit team's access or for back up might want to "Run this report with the Access Rights of..." a system admin. But it isn't recommended changing in your report settings, under "When the report loads on a show," increase the number of items to 200 to help your Project Owners and Audit make sure they see everything.

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See next page for final product.

Report recipes | Who closed out the tasks on this project 2



Resource Management

THE MILLION DOLLAR PUZZLE

Samantha Isin

PROJECT MANAGEMENT SPECIALIST
MELALEUCA INC.

Use Case: International & Domestic Creative Teams

Plan & Worker Licenses: 86

Review Licenses: 233

Working Teams: 18

Projects & Requests Completed in 2020: 7,232



The Problem

WORKLOAD UNDERSTANDING DERIVED FROM UNRELIABLE AND RIGID RESOURCES

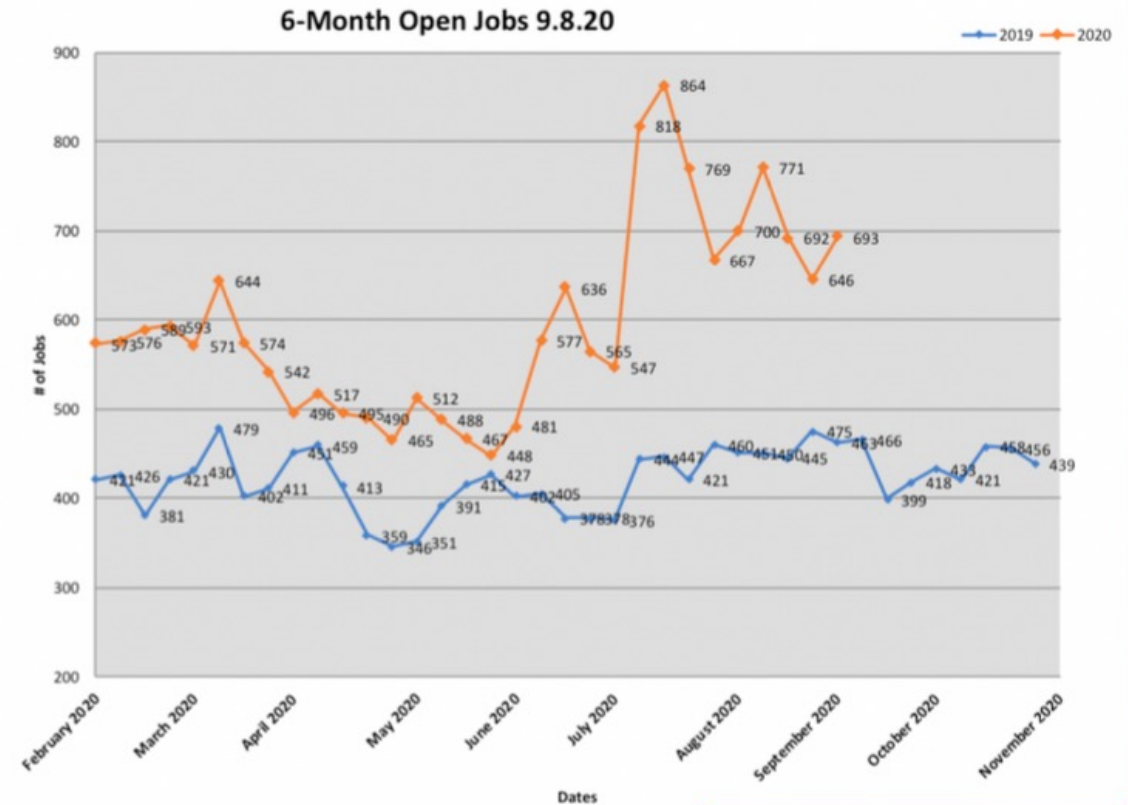
Excel spreadsheets, project counts, and user input on workload was the only way workload was being measured.

RESOURCES WERE SET, NOT FLEXIBLE

Even with the rigid and unreliable data, adjustments were rarely made to how many resources were being allocated and where.

THE "SOLUTION"? MORE HORSEPOWER

Rather than becoming better work managers, the solution for Melaleuca was 'just hire more people' when project counts were high and attitudes were low.



The Ask

"I WANT TO SEE WHAT WE'RE WORKING ON AND
HOW MUCH TIME IT'S TAKING US"



The obvious solution: Resource Management Tools in Workfront

Why it didn't work:

- Not groupable by category
- Not divisible by role
- Projects are too small to manage individually
- Tools take too long to load
- Unable to produce custom charts



The Solution

CUSTOM REPORTING + A LITTLE BIT OF
EVERYTHING ELSE

17 Different Reports

- Resource Estimate Reports
- Project Reports
- Hour Reports

2 Different Dashboards

1 Google Sheet

5 Custom Fields

4 Different Frames (Past, Current, Future, Intended)





DASHBOARD

Hour Allocations Control | Current Month

Dashboard Actions ▾

As of May 17, 2021 6:06 pm Mountain Daylight Time



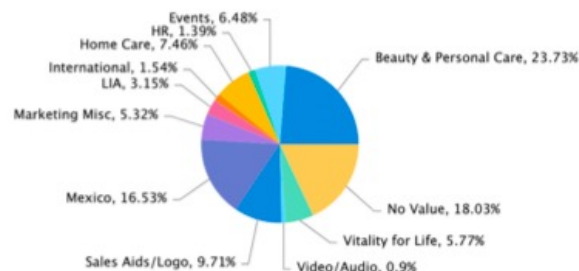
Hour Allocations Control | Previous Month

Actual Hour Allocation | Current Month

Export

Hide Values

Details | Summary | Chart



ACTUAL STATE

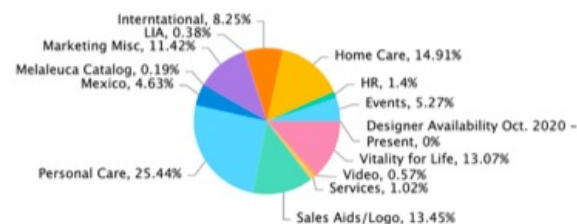
Breakdown of the actual percentage of our time being spent by category for all the hour which have been logged on the current month so far. *Hour Report*

Maximum Bucket Allocation | Current Projects

Export

Hide Values

Details | Summary | Chart



INTENDED STATE

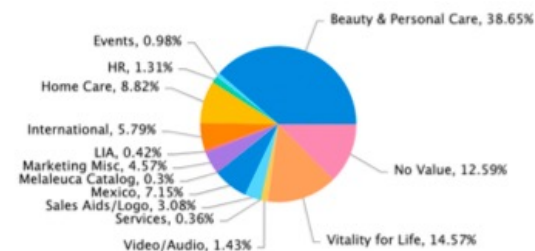
Breakdown of the intended percentage we would allocate to each category for that particular month. *Project Report*

Planned Hour Allocation | The Next 30 Days

Export

Hide Values

Details | Summary | Chart






FUTURE STATE

Breakdown of the percentage of hours each category will require for the next 30 days starting from the present day. *Resource Allocation Report*

THE INTENDED STATE


This was a difficult report to achieve because nowhere in Workfront could I indicate just how much time I would like to allocate to specific categories. Thus, I created hour allocation projects and filled them with the data I needed.

 **PROGRAM**
Hour Allocations  

Percent Complete

93%

Program Manager

 Samantha Isin

Planned Completion


Jan 28, 2023


Active Projects Condition


0%
On Time


0%
Going to be Late


100%
Late


 Projects



 Projects



 Program Details






 Updates

 Documents

 Add custom section

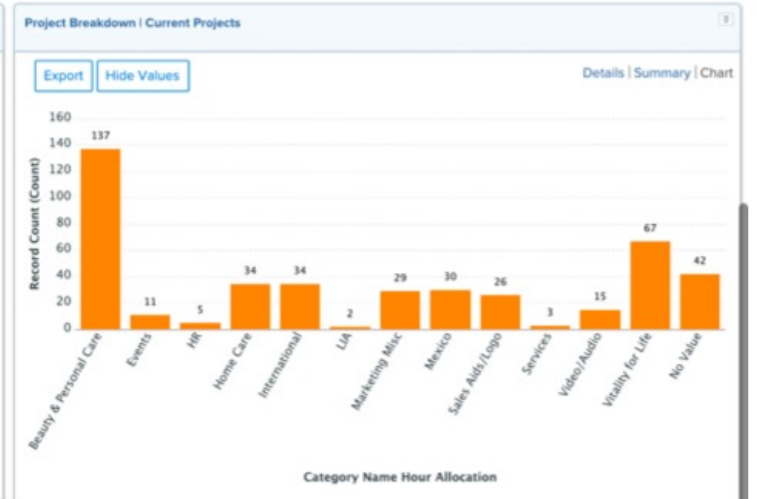
 New Project 

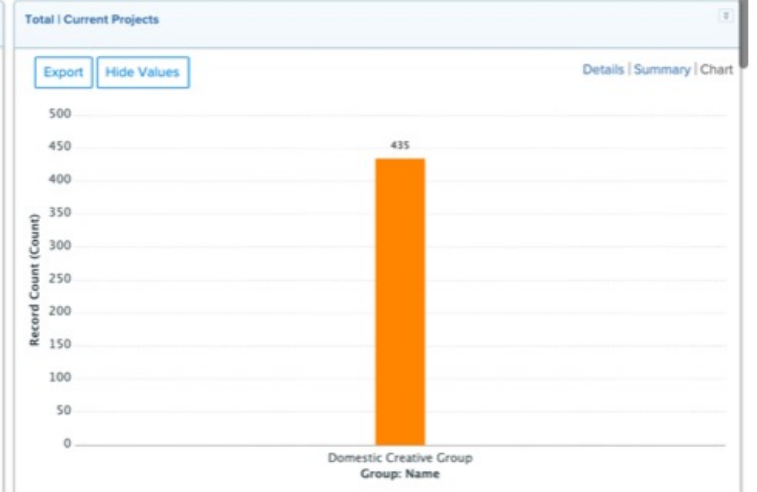
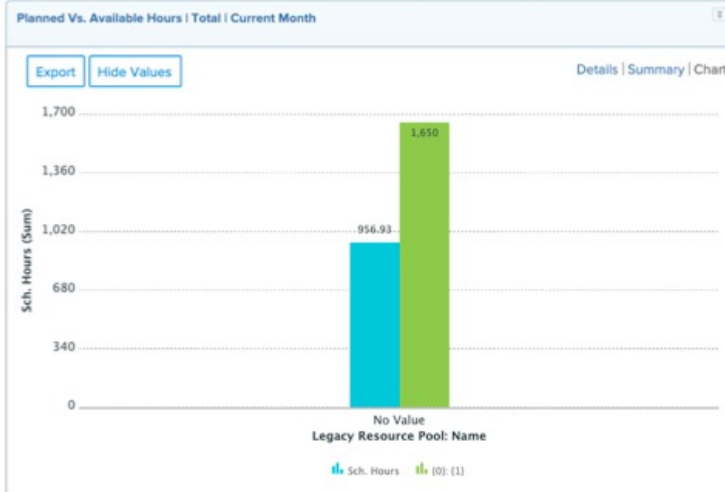
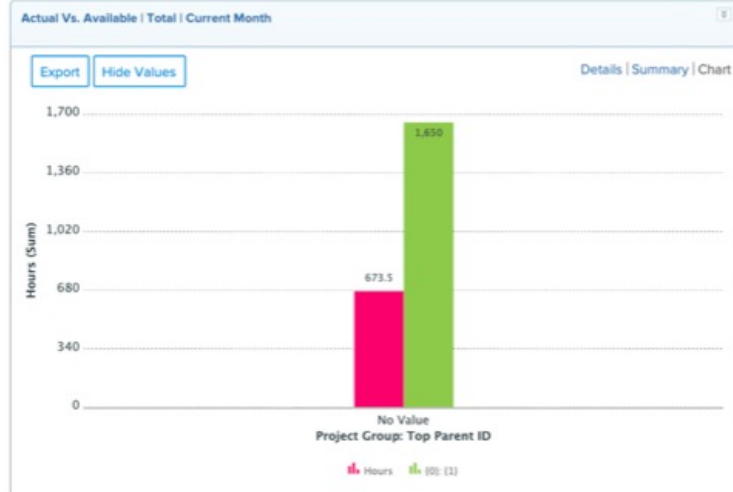
   All  Standard + St...  Nothing

<input type="checkbox"/> Name	Owner	Category	Desc	Start On	Due On	% Complete	Status
<input type="checkbox"/> Personal Care	Samantha Isin	Beauty & Personal Care	Sei Bella Pure Alloy Sun Valley Renew Baby	10/7/20	1/28/23	100%	Current
<input type="checkbox"/> Services	Samantha Isin	Services	Services	10/7/20	1/28/23	100%	Current
<input type="checkbox"/> HR	Samantha Isin	HR	HR	10/7/20	1/28/23	100%	Current
<input type="checkbox"/> Melaleuca Catalog	Samantha Isin	Melaleuca Catalog	Hours billed only to the creative team	10/7/20	1/28/23	100%	Current
<input type="checkbox"/> LIA	Samantha Isin	LIA	Hours billed only to the creative team	10/7/20	1/28/23	100%	Current
<input type="checkbox"/> Sales Aids/Logo	Samantha Isin	Sales Aids/Logo	Sales Aids Logo Events	10/7/20	1/28/23	100%	Current
<input type="checkbox"/> Interntational	Samantha Isin	International	International	10/7/20	1/28/23	100%	Current
<input type="checkbox"/> Video	Samantha Isin	Video/Audio	Hours billed only to the creative team	10/7/20	1/28/23	100%	Current
<input type="checkbox"/> Mexico	Samantha Isin	Mexico	Mexico	10/7/20	1/28/23	100%	Current

BREAKDOWN



TOTAL



ACTUAL STATE

FUTURE STATE

CURRENT PROJECT STATE

A GREATER UNDERSTANDING OF OUR AVAILABILITY

We wanted to know how much time we were really spending on our billable work. Thus our actual hours were summed and grouped by month, then compared to our availability for that given month.

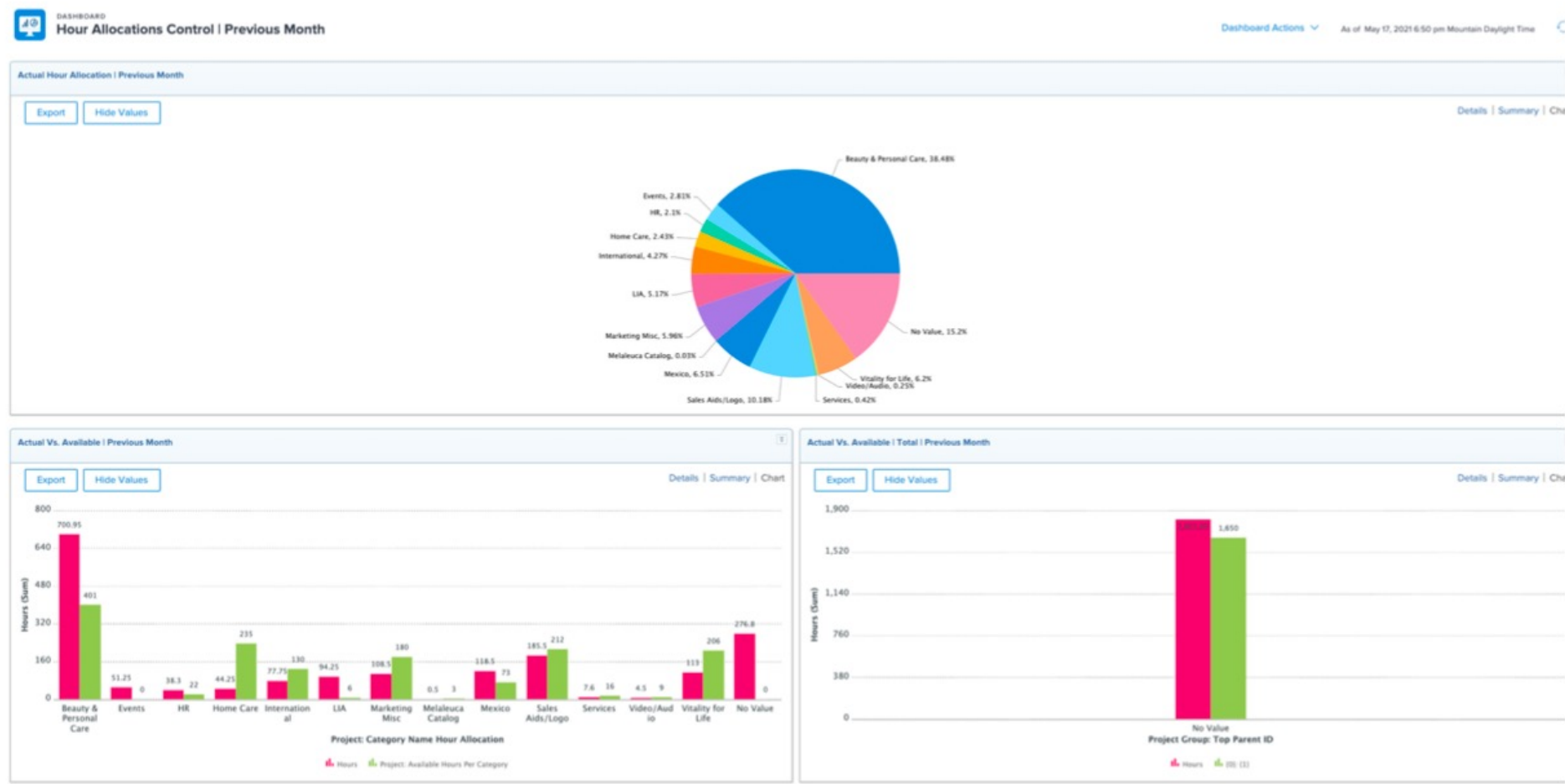
Calculating the availability was difficult to do retroactively, and the charts I worked with are available in the Google Sheet link at the top. However, going forward all I have to do is look at the number on the far right of total designer availability.

Does anyone know how to factor PTO into a calculated field?



PAST STATE

This is a quick view into the data from the previous month that allows stakeholders to understand how the month went in terms of hour allocations



In Summary

THE DATA IS KING

This project has revealed that the tools we have will work, but we must have accurate data. It has also revealed a different story than the one we were hearing based on our rigid data.

FLEXIBILITY IS A POSSIBILITY

Executive stakeholders are open to the possibility of reprioritizing based on what is possible since they now see what is possible.

UTILIZING RESOURCES BETTER SAVES US FROM NEEDING TO ADD MORE

Now, stakeholders realize that we don't need to necessarily hire more people, we need to use the people we have better.



Challenges Ahead

TRAINING PEOPLE ON LOGGING ACCURATE HOURS

- Weekly email reminder
- End of the month reminders for those below the monthly standard
- Executive endorsement
- Time analysis >> Managers

TRAINING PEOPLE ON GIVING ACCURATE DATES

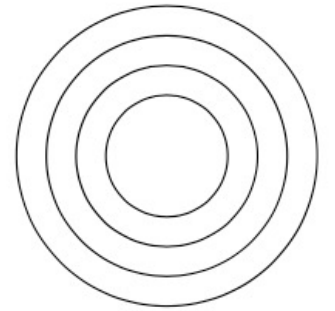
- Adjusting our request intake process
- Emphasizing dates in stand up meetings
- Enforcing new date policies
- Using Fusion to clean up what we can

TRAINING PEOPLE ON BEING FLEXIBLE

- Emphasizing the 'open tab' policy
- Demonstrating the desire to meet deadlines to brand managers
- Focusing on priorities set by all the stakeholders



Thank you.



“Birds of a feather” group discussion

Let’s take a few minutes to dive deeper into this topic with your Workfront peers.

Here are some conversation ideas:

- How do you manage your resources today?
- What’s working, where have you had challenges?
- Is there something you’d like to know about how other customers manage their resources?



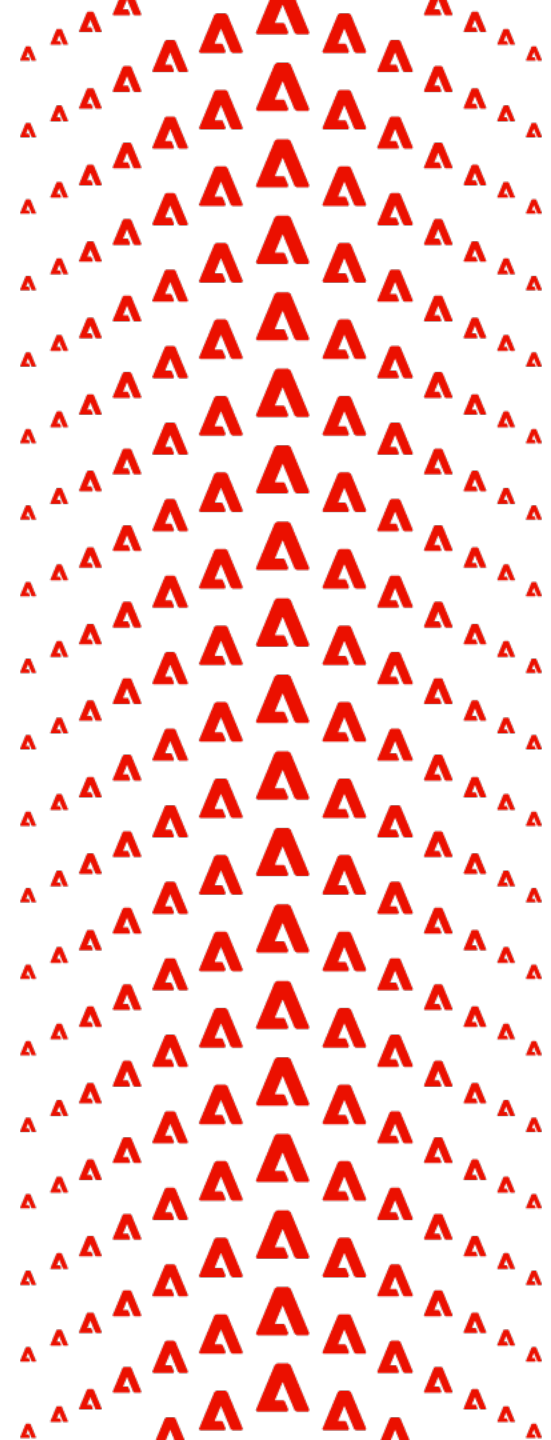
Guest Speaker



Aaron Behr

SVP, Project Management

VaynerMedia



Overview

- How VaynerMedia uses Adobe Workfront to accelerate decision-making and empower people
- Recommendations on setting up effective Resource Management practice using Workfront platform

Some Foundational Considerations

- VaynerMedia is an Agency with Strategy, Creative, Production & Media
 - We look at budgeted, planned & actual hours
 - We have been in WF for 2 years
 - We are using it Globally, in one instance, for all entities
 - We are 100% in New Experience

Three Key Values That Drive Speed at VM

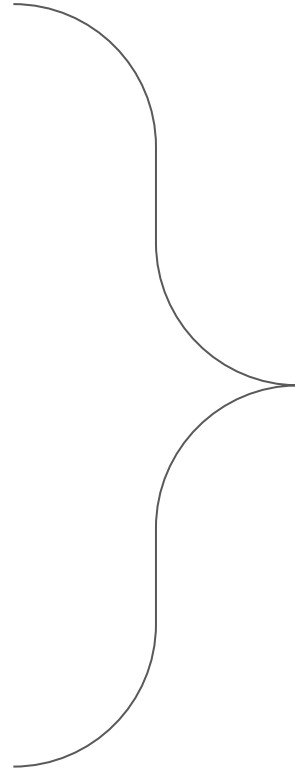
- Transparency



- Collaboration



- Empowerment



Speed

Adobe Workfront

- Transparency



- Collaboration



- Empowerment

- *Real-Time Project & Team Information*

- *PM, Resourcing & FinOps Together*

- *More informed decisions*



Speed

Leverage Workfront's Integrated Tools & Data

1. *All Planned Hours in Project Schedules*
2. *Teams Set up by Portfolio*
3. *Resource Ops and PM set as Resource Managers*



- *Real-Time Project & Team Information*

Project Plans: Data from the bottom up

- All projects get schedules and Planned Hours by phase or task
- Roles, people (if known) and planned hours are added when projects are set up, and are updated as projects evolve

The screenshot shows a project management dashboard. At the top, there's a navigation bar with tabs: PM Financials Over..., Workfront Usage D..., Project Manageme..., DSAR Requests, CCPA - Data Privac..., Producer Request ..., My Tasks, and a 'Pin current page' link. Below this, a breadcrumb trail reads 'More > BRAND Very Cool Makeup C... / PROGRAM Very Cool Makeup T...'. The main header area features a 'PROGRAM' icon, the title 'Very Cool Makeup TikTok', a star icon, and a 'Percent Complete' indicator showing '28%'. To the right, it identifies the 'Program Manager' as 'Vanessa Z'. A left sidebar contains a menu with 'Projects' (selected), 'Program Details', 'Updates', 'Documents', and 'Add custom section'. The main content area is currently empty, with a mouse cursor visible.

Project Planned Hours Roll Up Automatically

- All Planned Hours from all projects roll up into the global Workload Balancer

Resource Management

Workload Balancer

Feedback

Today

<

>

2 weeks

Day

Week

112

Planner

Workload Balan...

Utilization

Resource Pools

Add custom section

UNASSIGNED WORK

>

W6 - FEB 2021

W7

ASSIGNED WORK

>

Aaron Behr

SVP, Project Management

6.23

4.67

4.67

4.67

0.92

0.9

0.9

0.9

0.9

>

AC

Amy C

Senior Copywriter

6.6

9.32

9.32

9.32

9.32

21.32

21.32

21.32

21.32

>

ES

Elle S

Senior Account Executive

10.9

10.9

10.9

10.9

5.28

5.28

7.08

7.08

7.07

>

JD

Jake D

Creative Director

9.58

10.05

10.05

10.05

6.93

16.03

16.03

16.02

16.02

>

KH

Kerry H

Senior Art Director

6.6

9.32

9.32

9.32

9.32

21.32

21.32

21.32

21.32

>

LS

Lisa S

Creator - 1

11.53

11.53

11.53

11.53

11.53

10.87

10.87

10.87

10.87

>

VZ

Vanessa Z

Senior Project Manager

14.38

12.72

12.72

12.72

12.72

12

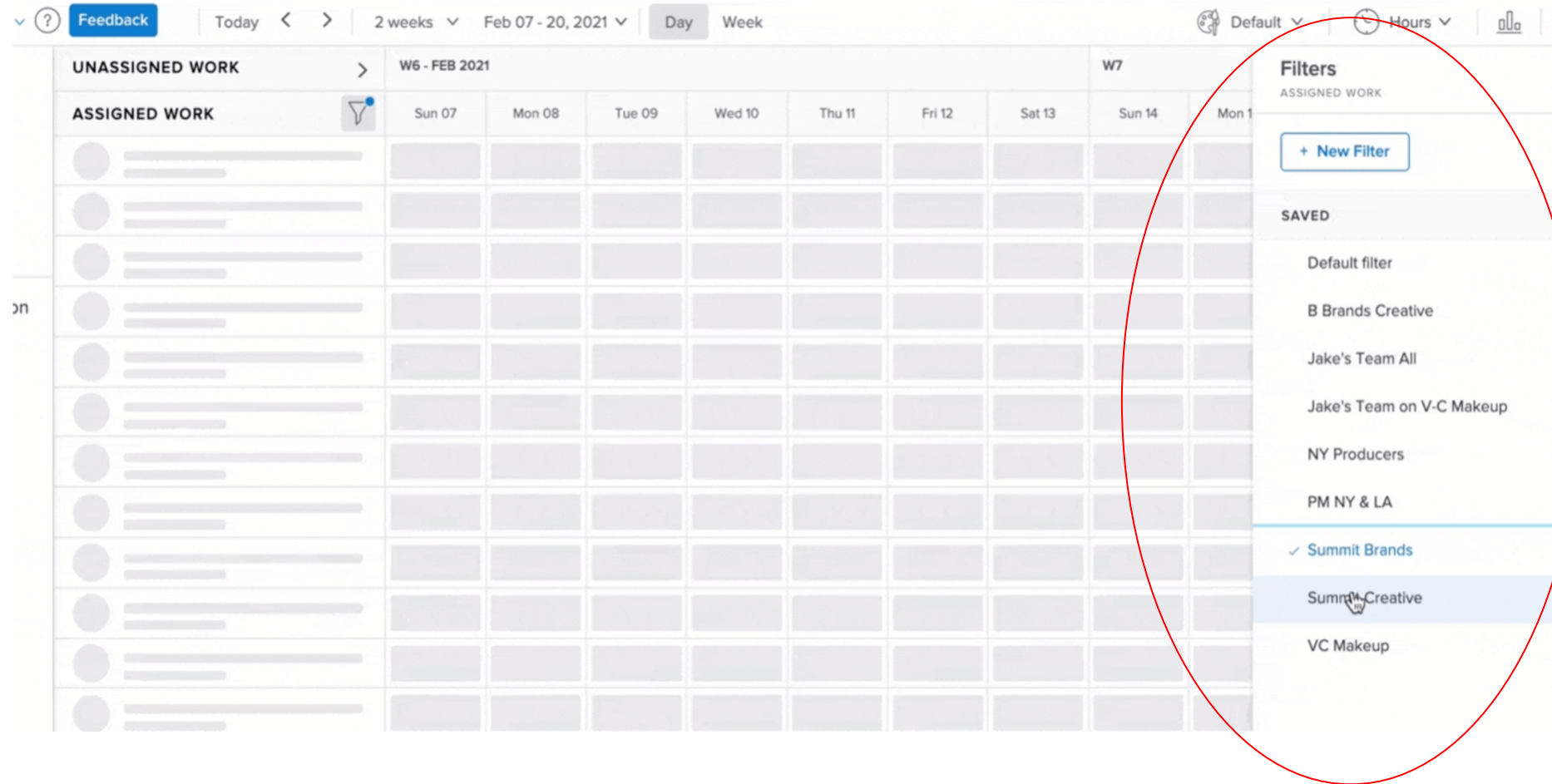
12

11.98

11.98

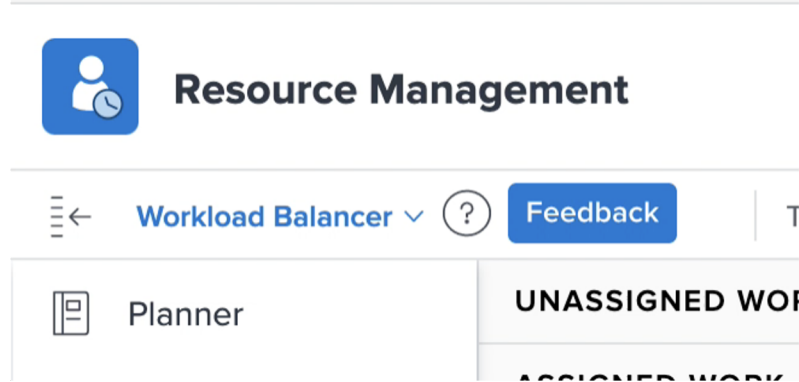
Use Team, Portfolio, Role & Dept Filters

- RMs & PMs have the same data & views in Workload Balancer
- Use a variety of filters to cut the data, depending on the need:
- Click into specific people to see what they're working on, and what may be able to shift

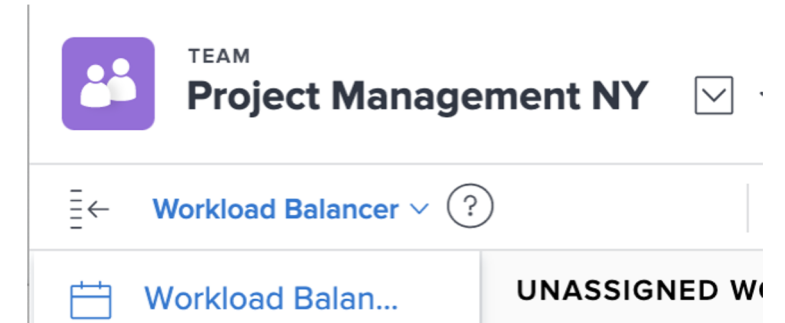


WB Data from Project, Team or Resourcing

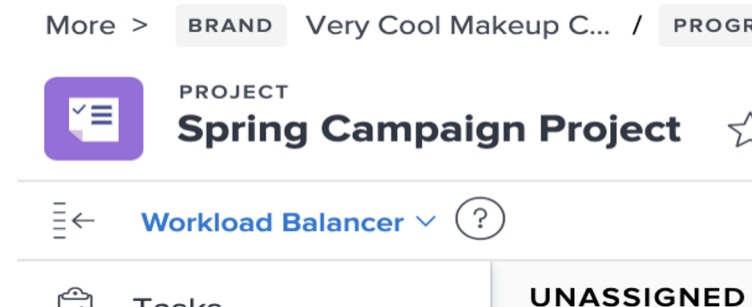
All data is consistent across the system, but accessible where it's contextually relevant



- In Resource Management: the holistic, global view



- From Teams: specific team w/o having to use a filter



- In Projects: shows people just assigned to the Project

What if we Can't find Resources

Shared data =
better collaboration

- Re-prioritize other projects
- Push project date (either this one, or a lower priority project)
- Look for freelancers
- Reject the project (J/K...we never do that)

Who gets to make the decision?

Depends on impact & complexity

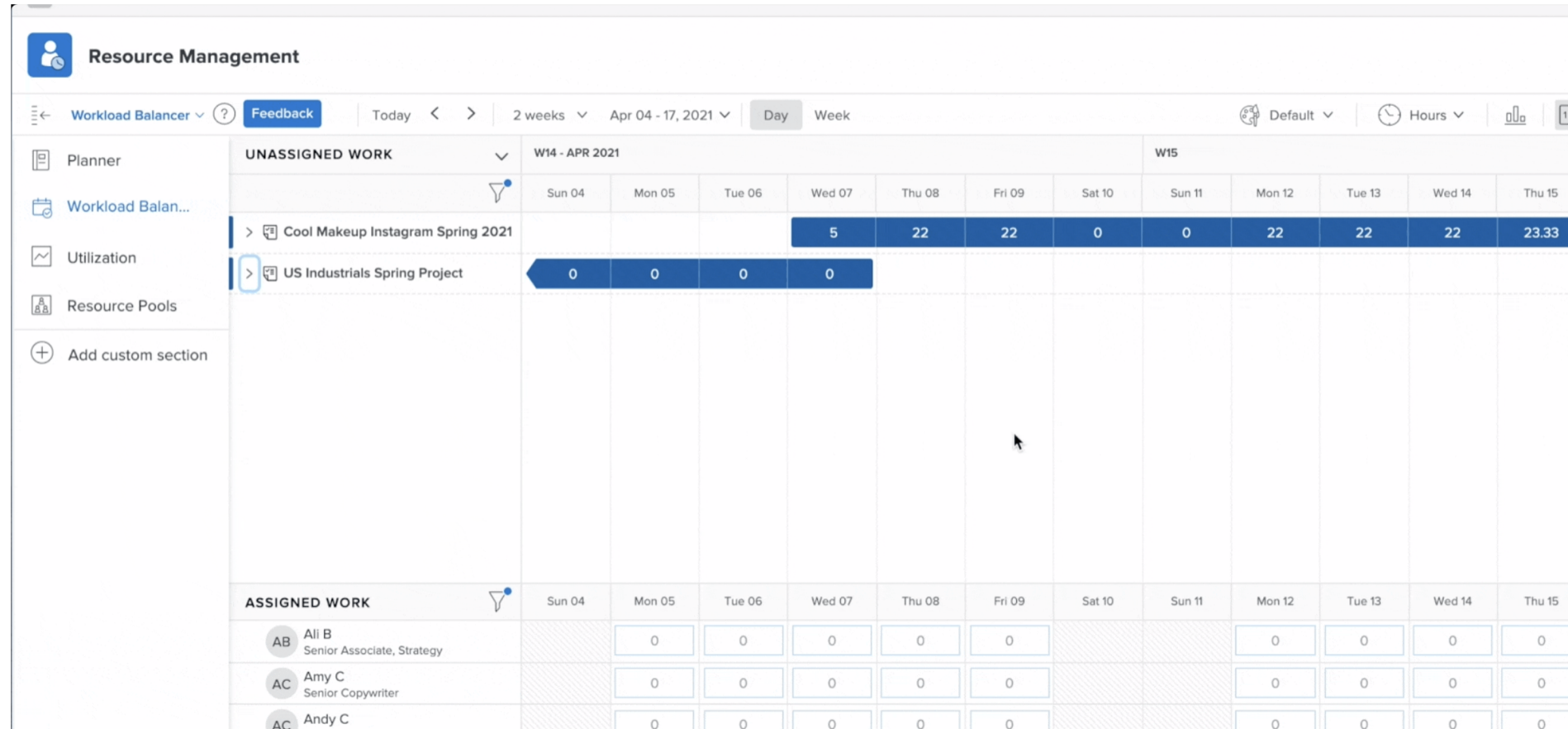


If we Push or Reprioritize

Integrated tool
automatically updates
data everywhere

Everything stays up to date

- Real time project updates automatically show up in WB
- Real time WB updates automatically show up in projects



Key Takeaways

1

Quality data

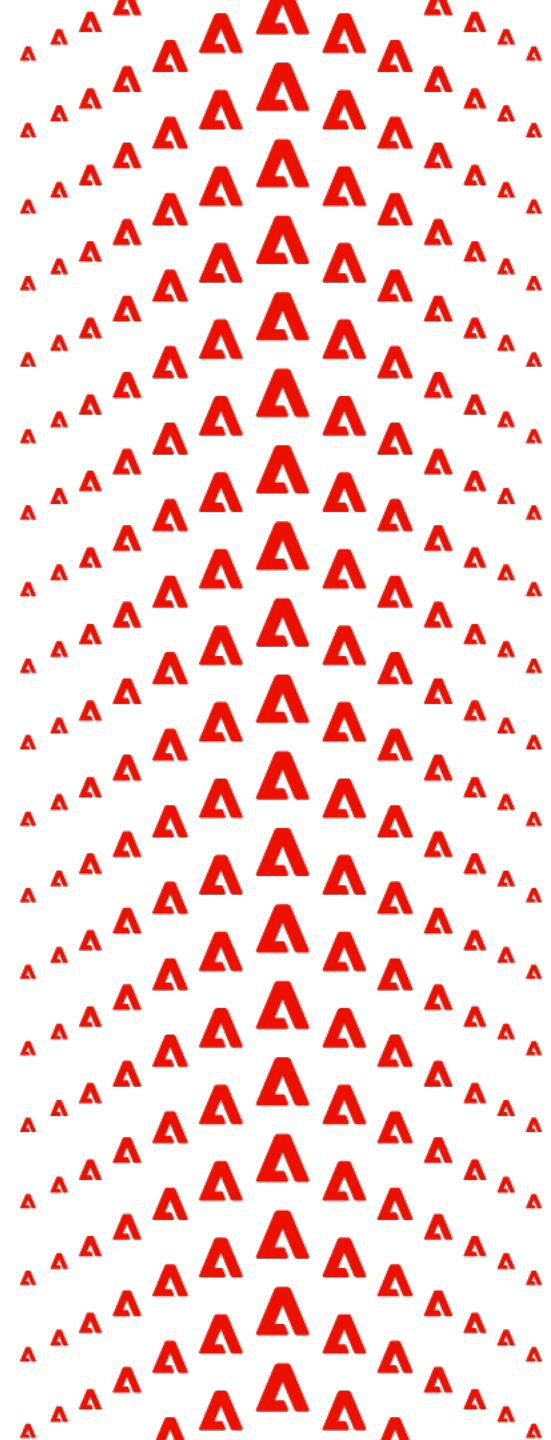
2

Objective
conversations

3

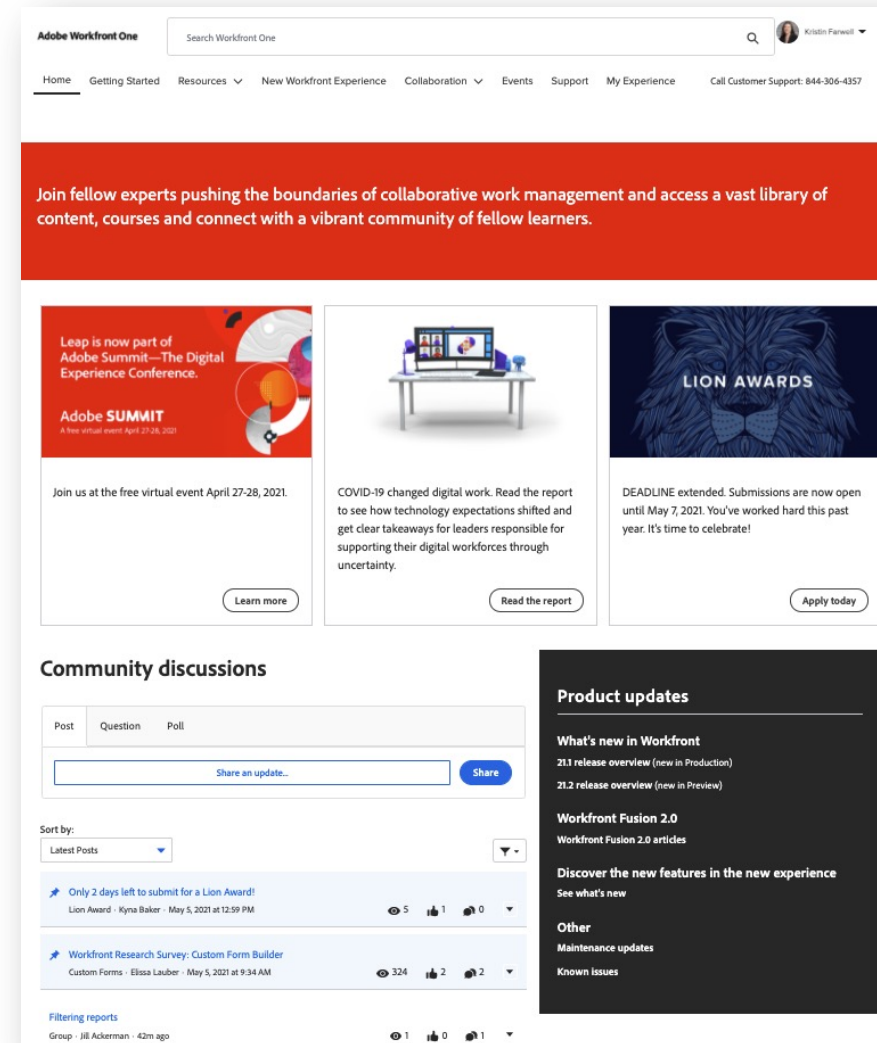
Empowered teams

Wrap-up and next steps



Continue the conversation on Adobe Workfront One

- Later today we'll share the recording of today's session and a link to a follow-up discussion on Workfront One. **Keep this great conversation going!**
- Workfront One is the single best place to:
 - 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 meet-ups

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

- Jun 8: Training & Onboarding Users
- Jun 15: Reporting: Measuring Success of Planned vs. Actuals

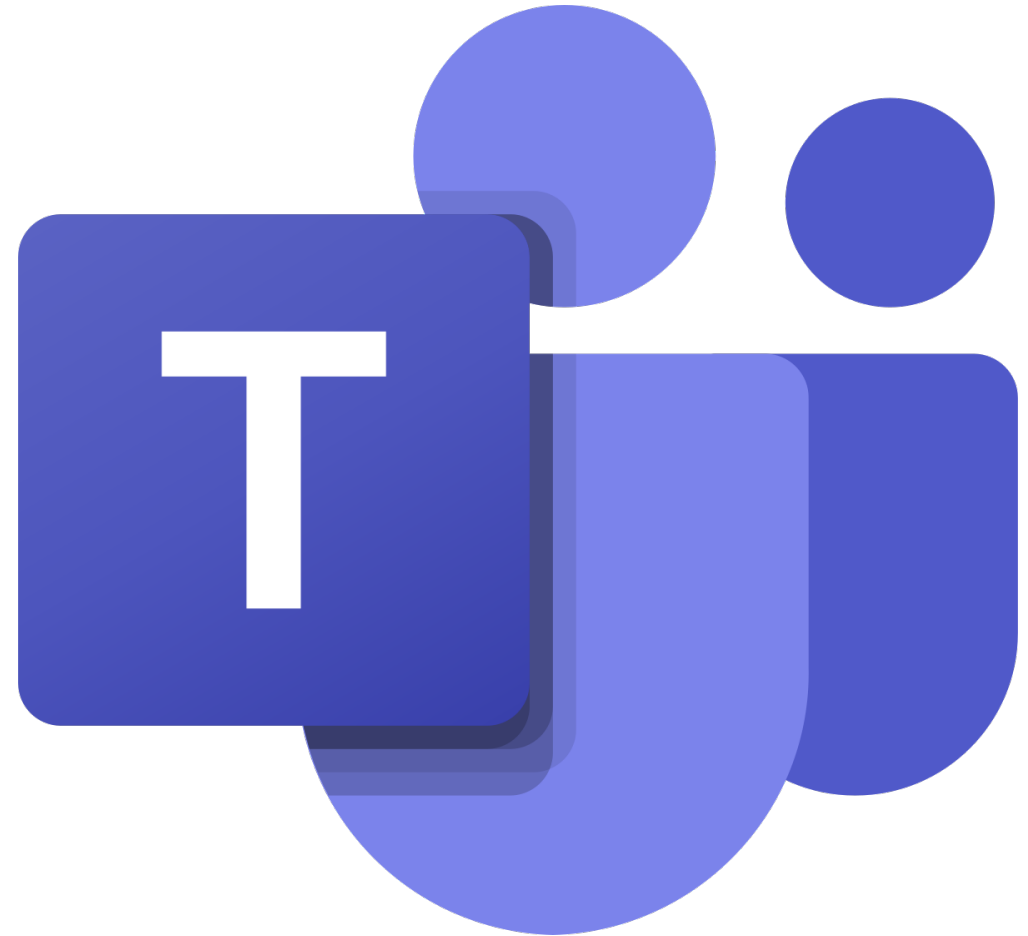
Coming soon!

- *Jun 22: Transitioning to the New Workfront Experience*
- *TBD: Extending Workfront with Integrations*
- *TBD: Dashboards, Data Visualization and Storytelling*



Coming soon! User Group meetings are moving to Microsoft Teams

- Workfront User Groups will be moving to Microsoft Teams in late **June 2021**.
- Don't worry! We'll have the same functionality and format of presentations, interactive chat, discussion and breakout groups.
- If you don't currently use Microsoft Teams, be sure to talk to your IT Department about installation and setup ASAP.
- Stay tuned!



Thank you!

