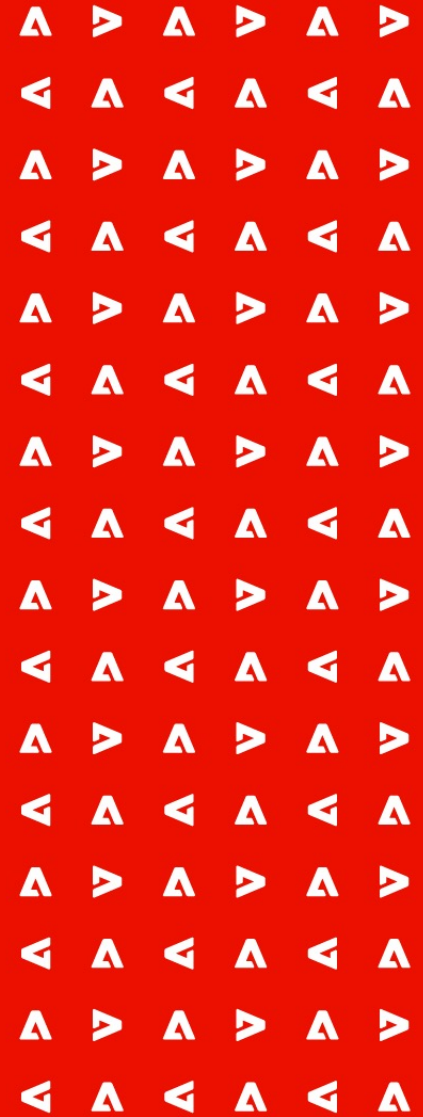




Adobe Workfront Virtual User Group

Measuring Success of Planned vs. Actuals
Tuesday, June 15, 2021



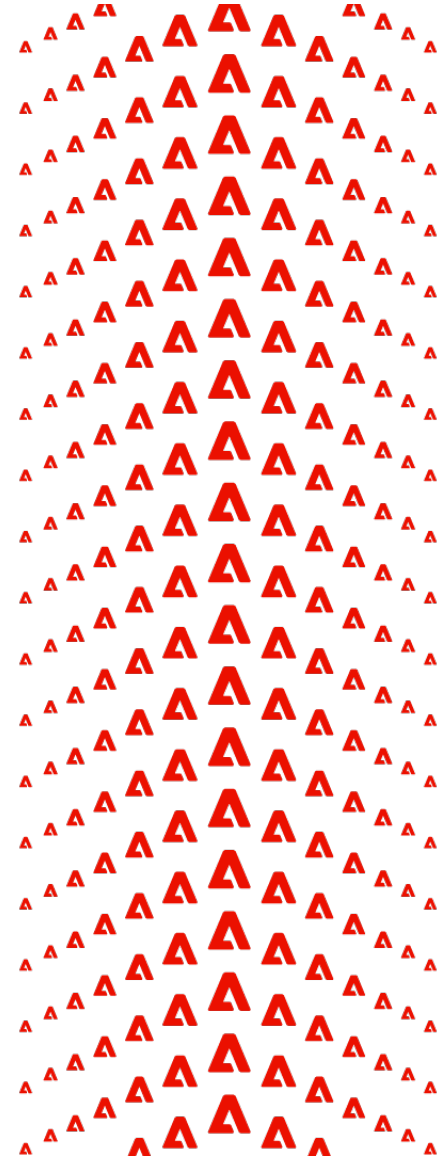
Today's host



Leigh Burger

Principal Customer Success Manager

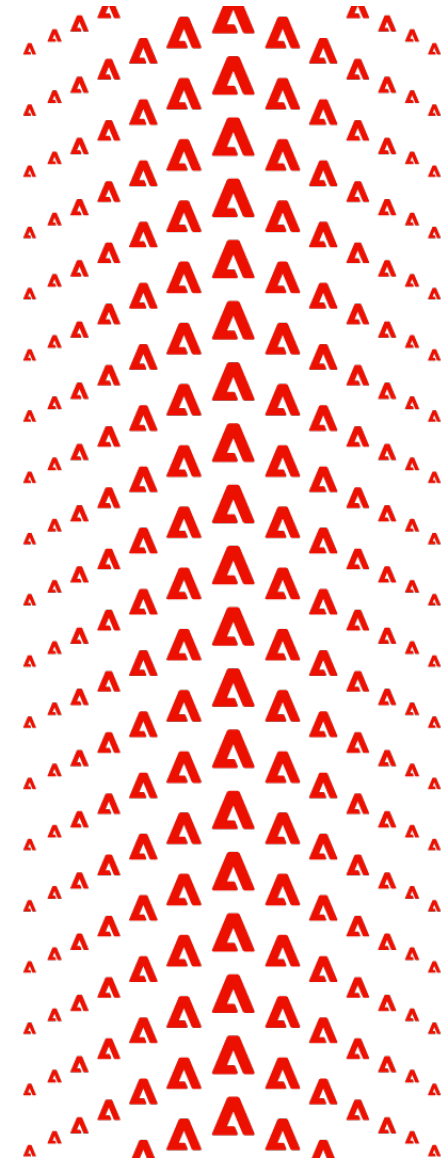
Adobe Workfront



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.	Measuring Success of Planned vs. Actuals <i>Chuck Middleton, Senior Learning Program Manager, Workfront</i>
8:25 a.m.	Small group discussion
8:45 a.m.	Customer spotlight: Inland Empire Health Plan <i>Cliff De Jong, Workfront Administrator and Application Support Specialist</i>
9:05 a.m.	Large group discussion
9:25 a.m.	Wrap-up and next steps
9:30 a.m.	Meetup ends



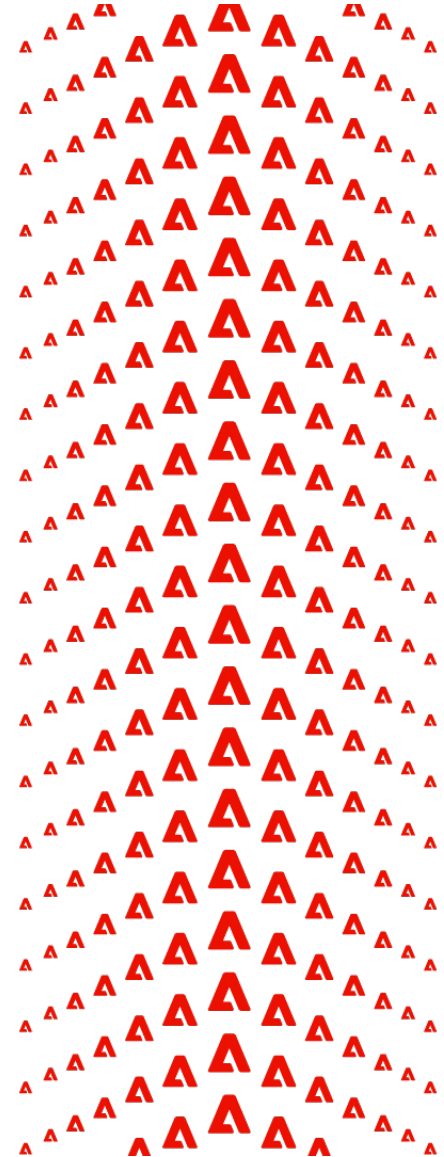
Guest speaker



Chuck Middleton

Senior Learning Program Manager

Adobe Workfront



The main reason we compare our **planned** timelines to our **actual** timelines is so we can get better at planning.

Velocity

Planned Duration = Planned Completion Date – Planned Start Date

Actual Duration = Actual Completion Date – Actual Start Date

Velocity = Actual Duration divided by Planned Duration

If Planned Duration is 3 days and Actual Duration is 6 days,
Velocity is 2, meaning the project took twice as long as planned.

Adjusted Velocity

How long did it take to complete 5 particular projects...

compared to...

how long we ultimately expected it to take?

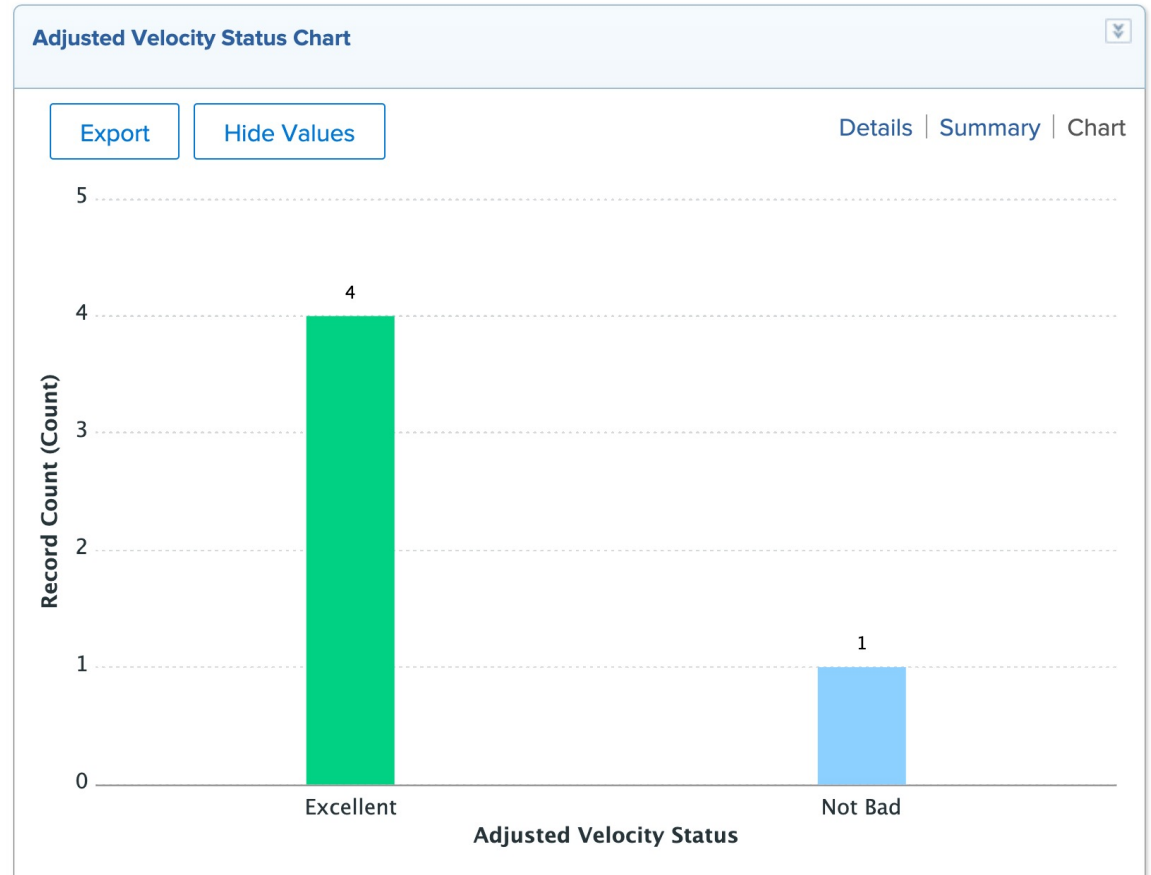
Grading scale:

Excellent: less than 20% longer than expected

Not Bad: 20 to 59% longer than expected

Poor: 60 to 100% longer than expected

Terrible: over twice as long as expected



Work-to-Commit Ratio

First Duration = first Planned Completion Date – first Planned Start Date (from the original baseline)

Actual Duration = Actual Completion Date – Actual Start Date

Work-to-Commit Ratio = Actual Duration divided by First Duration

The screenshot displays the Adobe Project Preferences interface. On the left, a sidebar under 'Setup' lists various configuration options, with 'Project Preferences' expanded. The main area, titled 'PROJECT Preferences', contains several settings:

- Project Status:** A dropdown menu is set to 'Planning'.
- Calculate Percent Complete based on...:** Radio buttons are present for 'Planned Hours' and 'Duration', with 'Duration' selected.
- Automatically set the project's Condition based on the Progress Status:** This checkbox is currently unchecked.
- Create baselines automatically:** This checkbox is checked.

Work-to-Commit Ratio

How long did it take to complete 5 particular projects...

compared to...

how long we promised it would take?

Grading scale:

Excellent: less than 20% longer than expected


Not Bad: 20 to 59% longer than expected

Poor: 60 to 100% longer than expected

Terrible: over twice as long as expected



Velocity Status List Report

Velocity Status List Report															
Export 															
<input type="checkbox"/>	Name		Planned Start Date	Actual Start Date	Planned Completion Date	First Commit Date	Actual Completion Date	Work-to-Commit Ratio	Work-to-Commit Ratio Status	Adjusted Velocity	Adjusted Velocity Status	Actual Duration	First Duration	Planned Duration	Baseline Duration
<input type="checkbox"/>	Velocity Test Project 1		1/23/21	2/20/21	3/20/21	3/5/21	3/28/21	2.7	Terrible	1.3	Not Bad	27 Days	9 Days	21 Days	14.88 Days
<input type="checkbox"/>	Velocity Test Project 2		1/23/21	2/23/21	3/10/21	3/7/21	3/13/21	1.3	Not Bad	1.1	Excellent	11.72 Days	9 Days	11 Days	9 Days
<input type="checkbox"/>	Velocity Test Project 3		1/23/21	2/23/21	3/15/21	3/9/21	3/15/21	1.2	Excellent	1	Excellent	13.72 Days	11 Days	14 Days	11 Days
<input type="checkbox"/>	Velocity Test Project 4		1/23/21	2/23/21	3/31/21	3/21/21	4/5/21	1.5	Not Bad	1.1	Excellent	28.72 Days	19 Days	26 Days	19 Days
<input type="checkbox"/>	Velocity Test Project 5		1/23/21	2/23/21	4/25/21	4/3/21	5/1/21	1.7	Poor	1.1	Excellent	46.72 Days	28 Days	43 Days	28 Days

Showing all 5 projects

Download the resource: Measuring Success of Planned vs Actuals (PDF)

First Commit Date

This is how we're going to capture the date we promised the customer.

Here is the format and calculation:

First Commit Date

Format: Date

Calculation:

```
IF(ISBLANK(First Commit Date),Default Baseline.Planned  
Completion Date,First Commit Date)
```

An IF statement has three parts, each separated by a comma. It starts with a condition. If the condition is true it does the second part. If the condition is false it does the third part.

```
IF(ISBLANK(First Commit Date),Default Baseline.Planned Completion Date,First Commit Date)
```

The first time this calculation executes the value of First Commit Date will be blank, so it will fill it with the Planned Completion Date of the default baseline. The next time this project is edited or the calculation otherwise recalculates this will find First Commit Date to be NOT blank so it won't replace the value, instead it will just put First Commit Date back in there. The only way to reset this to a new value is to remove the custom form from the project, then add it back again.

Find training on Workfront One

The screenshot shows the Adobe Workfront One website. At the top left is the logo 'Adobe Workfront One'. To its right is a search bar labeled 'Search Workfront One' and a 'Sign In' link. Below the logo is a navigation bar with links: Home, Getting Started, Resources (with a dropdown arrow), New Workfront Experience, Collaboration (with a dropdown arrow), Events, Support, My Experience, and Call Customer Support: 844-306-4357. The 'Resources' dropdown menu is open, listing: Blogs, Documentation, Product Releases, Topics, Training (highlighted with an orange box), Guides, Videos (highlighted with an orange box), and API Documentation. Below the navigation is a hero section with the text 'Success. ... at a time.' and 'No matter where you ... nt journey, we have the resources you need to be successful.' Below this is a section titled 'Your foundation starts with ...' followed by a paragraph: 'Your foundation starts with ... familiar with Workfront, cc ... and attend boot camps. ... grams. Work through the curated list of learning paths applicable to your specific job role or product. As you get more ... with one of our 50+ learning paths on various subjects. And don't forget to subscribe to videos, download training guides, ...' Below the hero section is a horizontal menu with 'Learning Programs', 'Learning Paths', and 'Additional Resources'. The main content area is titled 'The new Workfront experience' and features three cards: 1. 'Basic report creation' (4 hours) with a description: 'Reports provide insight, motivate action, and justify work efforts. Learn to create amazing and insightful custom reports and dashboards to unlock the data you're tracking in Workfront.' and a 'Go to program' button. 2. 'Core team training' (10+ hours) with a description: 'Practice makes perfect, and it's no different with Workfront. Get the comprehensive training you need as a planner or administrator to quickly implement Workfront at your organization.' and a 'Go to program' button. 3. 'Custom data' (1+ hour) with a description: 'Get a broader vision of the work being done in your organization by building your own custom forms and fields in the new Workfront experience.' and a 'Go to program' button.

Questions?



“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:

- Do you use the baseline report that Chuck mentioned?
- How do you compare planned vs. actuals today?



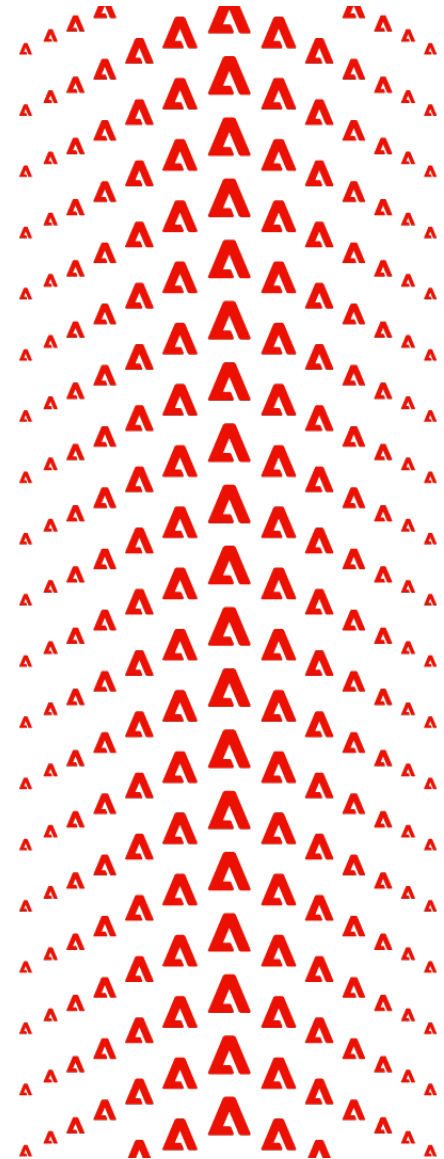
Guest speaker



Cliff De Jong

Workfront Administrator and
Application Support Specialist

Inland Empire Health Plan



Planned vs Actuals

Problem: We needed a way to capture the days between Planned vs Actual Dates of a Project

- Actual Start Date
- Planned Start Date
- Planned Completion Date
- Actual Completion Date

Text Mode used in a Report

Solution: We used Text Mode in a report column that provides us with business days of work.

Open Projects

displayname=Actual Start Date to Planned Completion Date

textmode=true

valueexpression=CONCAT (WEEKDAYDIFF ({actualStartDate},{plannedCompletionDate}), " days")

valueformat=customNumberAsString

Completed Projects

displayname=Planned Start Date to Actual Completion Date

textmode=true

valueexpression=CONCAT (WEEKDAYDIFF ({plannedStartDate},{actualCompletionDate}), " days")

valueformat=customNumberAsString

Open Project Actual Start Date to Planned Completion Date

Planned Start Date	Actual Start Date	Planned Completion Date	Status	Duration	Act St Date to Pln Comp Date	% Complete
4/16/21	4/15/21	7/30/21	Execution	73 Days	75 days	32.42%
4/5/21	4/1/21	7/1/21	Execution	63 Days	66 days	100%
9/28/20	3/24/21	8/6/21	Execution	219 Days	97 days	78.05%
9/22/20	10/18/19	12/31/21	Request Queue	327.5 Days	575 days	75%
10/15/19	7/24/18	6/18/21	Execution	421.38 Days	758 days	98.92%
4/15/19	11/1/19	7/1/21	Execution	556.12 Days	434 days	97.79%

Showing 6 projects

Open Project Duration – Actual Start Date to Plan Completion Date

Planned Start Date	Actual Start Date	Planned Completion Date	Status	Duration	Act St Date to Pln Comp Date	Over Under	% Complete
4/16/21	4/15/21	7/30/21	Execution	73	75	-2	32.42%
4/5/21	4/1/21	7/1/21	Execution	63	66	-3	100.00%
9/28/20	3/24/21	8/6/21	Execution	219	97	122	78.05%
9/22/20	10/18/19	12/31/21	Request Queue	327	575	-248	75.00%
10/15/19	7/24/18	6/18/21	Execution	421	758	-337	98.92%
4/15/19	11/1/19	7/1/21	Execution	556	434	122	97.79%

Completed Project Planned Start Date to Actuals Completed Date

Planned Start Date	Actual Start Date	Planned Completion Date	Actual Completion Date	Status	Duration	Pln St Date to Act Comp Date	% Complete
9/21/20	3/11/21	6/14/21	6/14/21	Complete	174 Days	190 days	100%
1/23/18	2/7/18	4/10/18	4/9/18	Complete	68.75 Days	54 days	100%
10/2/17	10/3/17	11/30/17	11/17/17	Complete	51.25 Days	34 days	100%
6/29/17	6/29/17	10/26/18	10/26/18	Complete	416 Days	346 days	100%

Showing 4 projects

Completed Project Duration – Plan Start Date to Actual Completion Date

Planned Start Date	Actual Start Date	Planned Completion Date	Actual Completion Date	Status	Duration	Pln St Date to Act Comp Date	Over Under	% Complete
9/21/20	3/11/21	6/14/21	6/14/21	Complete	174	190	-16	100.00%
1/23/18	2/7/18	4/10/18	4/9/18	Complete	68	54	14	100.00%
10/2/17	10/3/17	11/30/17	11/17/17	Complete	51	34	17	100.00%
6/29/17	6/29/17	10/26/18	10/26/18	Complete	416	346	70	100.00%

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

The screenshot shows the Adobe Workfront One community homepage. At the top, there is a search bar and a navigation menu with links for Home, Getting Started, Resources, New Workfront Experience, Collaboration, Events, Support, My Experience, and Call Customer Support. A red banner below the navigation contains the text: "Join fellow experts pushing the boundaries of collaborative work management and access a vast library of content, courses and connect with a vibrant community of fellow learners." Below the banner are three featured cards: 1. "Leap is now part of Adobe Summit—The Digital Experience Conference. Adobe SUMMIT A free virtual event April 27-28, 2021." with a "Learn more" button. 2. "COVID-19 changed digital work. Read the report to see how technology expectations shifted and get clear takeaways for leaders responsible for supporting their digital workforces through uncertainty." with a "Read the report" button. 3. "LION AWARDS DEADLINE extended. Submissions are now open until May 7, 2021. You've worked hard this past year. It's time to celebrate!" with an "Apply today" button. Below these cards is a "Community discussions" section with a "Share an update..." input field and a "Share" button. It lists two posts: "Only 2 days left to submit for a Lion Award!" and "Workfront Research Survey: Custom Form Builder". To the right is a "Product updates" section with links for "What's new in Workfront", "Workfront Fusion 2.0", and "Discover the new features in the new experience".

Upcoming meet-ups

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

- Jun 22: Transitioning to the New Workfront Experience
- July 27: Workfront System Maintenance

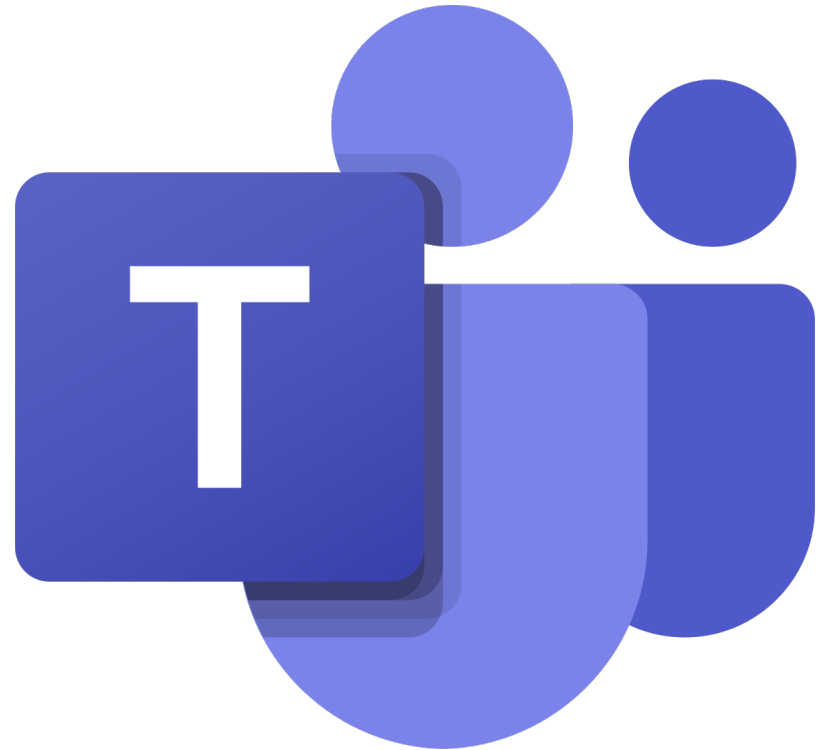
Coming soon!

- *July 20: Leveraging custom forms*
- *Aug 10: Dashboards and Data Visualizations*
- *Aug 17: Transitioning to the New Workfront Experience*
- *Aug 31: Extending Workfront with Adobe Integrations*



Coming soon! User Group meetings are moving to Microsoft Teams

- **ALL FUTURE** Workfront User Groups will be taking place on Microsoft Teams.
- 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!

