



# Virtual User Group: Reporting to Executives

Tuesday, December 8, 2020

Today's Host



## Kristin Farwell

Sr. Manager, Customer Advocacy Programs  
Workfront

# Agenda

11:00 a.m. Welcome and Agenda

11:05 a.m. Executive Dashboards  
*Christopher Jewell, Nordstrom*

11:35 a.m. Group Discussion

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

12:30 p.m. Event Ends





Customers who  
complete a review will  
get some coveted  
**Workfront SWAG!**

The logo for Workfront SWAG is an orange hexagon containing a white stylized lion's head.

## Can you spare 15 minutes today to complete a review?

Your unbiased feedback helps us continually improve, and allows peers to make informed decisions on their next work management platform.

Submit a Review at: <https://it.gtnr.io/QUf96gg7i>

Presenter



## Christopher Jewell

Director of Project Management, Marketing  
Nordstrom

# EXECUTIVE DASHBOARDS

DECEMBER 2020

## Agenda

- Introduction / Background
- Challenges + Solutions
  - Status Reports
  - Operational Health / Exec Dashboard

# INTRODUCTION AND BACKGROUND

- Christopher Jewell
- Nordstrom : Director – Project Management
  - 8 years various roles/teams
  - Support the Marketing PMO Team
  - PMO = Program Managers + Project Managers
- Managing all Marketing driven efforts
  - Site, App, Mobile, Email, Paid & Organic Channels, Visual, Events, Loyalty, Credit, Gift Card, Print, PR
- Using Workfront since 2015
  - PMO + Creative first teams to use > Expanded last several years > continues
- HAD dedicated Resource as Admin > NOW Me (30% time)
  - Another Admin for trouble shooting, new users, etc.
  - 3 PM's with more access to help update forms, templates, etc.

# SOLVING FOR

## CHALLENGES

- High Volume (av 600 - 450 per month)
- Many Change Requests
- Strategy Delays & Changes
- Less people to support work
- Work from Home

## STEPS TAKEN

- Identified the what > how measure
- Pulled from reports / dashboard already created
- Partnered with Customer Success Manager & utilized Remote Consulting
- Iterated with my team + VP's
- Taxonomy / Portfolios + Programs / Tier Structure

## SOLUTIONS

- Utilize Workfront:
  - Status on Portfolios - weekly
  - Executive Dashboard – monthly
  - Operational Health Dashboard - monthly



# WEEKLY STATUS REPORTS



Project Status Reporting - All At Risk / In Trouble projects

Show Filters Report Actions As of Nov 20, 2020 3:11 pm Pacific Standard Time

Details

Export Filter Report Default View Report Default Grouping Nothing

Project Name	Condition	Status ↑	Summary	Project Manager	% Complete	Planned Complete Date
<input type="checkbox"/> 11.20.20 SAM   HOLIDAY   CYBER WEEK	At Risk	Scope	11.19.20 / At Risk - Scope	Marin Hummel	97.27%	12/1/20

PMO | Status Reporting: Portfolio Status Links

Dashboard Actions As of Nov 20, 2020 3:13 pm Pacific Standard Time

All Projects 'At Risk' / 'In Trouble' Report: <https://nordstrom.my.workfront.com/report/Sact957000eab955f79fe74b1fb4619detail>

For more information on Status Reports: ... More

Status Reporting: JWN

Export

Name

PMO | Status Reporting: Corporate Social Responsibility Portfolio

Showing all 1 dashboard

Status Reporting: Full Price > Brand

Export

Name

PMO | Status Reporting: Trunk Club Portfolio

PMO | Status Reporting: Brand Marketing Portfolio

PMO | Status Reporting: Services Portfolio

PMO | Status Reporting: Restaurants Portfolio

Showing all 4 dashboards

Status Reporting: Off Price > Brand

Export

Name

PMO | Status Reporting: Brand Marketing Off Price Portfolio

PMO | Status Reporting: Seasonal Campaigns Off Price Portfolio

Showing all 2 dashboards

Status Reporting: Off Price > Retention Marketing

- 'Send Report' functionality
- Access: reviewer
- Team: send report to
- Every Thursday 10am
- Communication (email, wiki)

# PORTFOLIOS DASHBOARD

PMO | Status Reporting: Holiday Portfolio Dashboard Actions As of Nov 24, 2020 12:38 pm Pacific Standard Time

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**Projects 'At Risk' / 'In Trouble': Holiday Portfolio**

Export

Project Name	Condition	Status ↑	Summary	Project Manager	% Complete	Planned Complete Date
11:20:20 8AM   HOLIDAY   CYBER WEEK	At Risk	Scope	[REDACTED]	Marin Hummel	97.76%	12/1/20

Shows all 1 project

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**Accomplishments and Key Dates: Holiday Portfolio**

Export

Portfolio Accomplishments Portfolio Key Dates and Milestones

Holiday / Cyber stand ups have begun! Agenda topics and meeting notes can be found here: <https://confluence.sordstrom.com/display/MKTOPS/Holiday+2020+Stand-Up+Meetings>  
 Strategy shift for Cyber Deals to have all product available at the start on 11:20 instead of being pulsed throughout the event. Marketing comms will remain pulsed. Teams working to react and deliver revised work.  
 11:20:20 - Marketing / Digital Merch Standup for Cyber Readiness  
 11:20:20 - Cyber Deals Launch  
 11:23:20 - Marketing / Digital Merch Standup for Cyber Readiness  
 11:25:20 - Marketing / Digital Merch Standup for Cyber Readiness  
 11:27:20 - Marketing / Digital Merch Standup for Cyber Readiness

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**Program Project Count & Condition: Holiday Portfolio**

Export Hide Values Details Summary Chart

Program Name	At Risk	On Target
Cyber Week	1	2
Festive Experiences	0	4
Holiday Gifting	0	13
Holiday Services	0	3

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**Change Orders (Active + Past Two Weeks): Holiday Portfolio**

Export Hide Values Details Summary Chart

Change Order - Request Reason	Record Count (Count)
Bonus List	1
Data Modification	1
Image Size	2
Inventory Adjustment	3
Inventory Update	1
Link / Targeting Modification	2
Rebrand / Logo / Copy	2
Marketing Adjustment	2
Performance / Site	2
Reporting Update / Metrics	2
Scope Adjustment	9
Strategy Shift	6
Website Redesign	15
Website Update	1

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**In-Flight Project 'On Track' List: Holiday Portfolio**

Export Details Summary Chart

Planned Completion Date	Project Name	MKTG Project Tier	Project Manager	Condition	Status	Archived Status Reporting Notes	% Complete
Program: Name: Holiday Gifting (12)							
3/23/21	Holiday FY20 - Scaled Event End-to-End Plan - PROD	Tier 1	Ryan Short	On Target	Active		89.58%
11/22/20	11:04:20 8AM PT   HOLIDAY   DAILY DROPS   DP	Tier 1	Marin Hummel	On Target	Active		99.36%
11/20/20	11:20:20 8AM   HOLIDAY   HOLIDAY DIGITAL REFRESH	Tier 1	Marin Hummel	On Target	Active		99.83%
11/20/20	11:20:20 @8am   HOLIDAY   Holiday Digital Refresh (N.CA)   CAMP	Tier 1	Tram Duong	On Target	Active		83.14%

## Projects 'At Risk' or 'In Trouble' with Status Notes

- Awareness
- Recover Steps & Support needed to get back on track

## Portfolio / Program Accomplishments + Key Dates

## 'Active' Project Count by Program & Condition

- Program Projects supporting Portfolio

## 'Active' + 2 weeks back Change Orders & reason

- What's driving the changes

## 'Active' Project List with Archived Status Notes

- All Projects list
- Archival Status actions

# OPERATIONAL HEALTH DASHBOARD

## SOLVING FOR

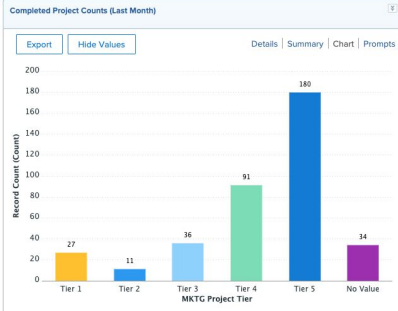
Raise awareness on impacts from:

- Missed deadlines
- High amount of changes
- Unclear strategy

## SOLUTION

- Dashboard + Score Card (outside Workfront)
- Present 'whole story' using data in monthly leadership meeting
- Go after the right areas to improve operational health

# OPERATIONAL HEALTH DASHBOARD



## Project Totals (YOY & Last Month)

- Volume



## Project Totals by Tier (2019 & 2020)

- Complexity



## Change Orders (YOY & This Year)

- Change impact (project totals down but changes up)



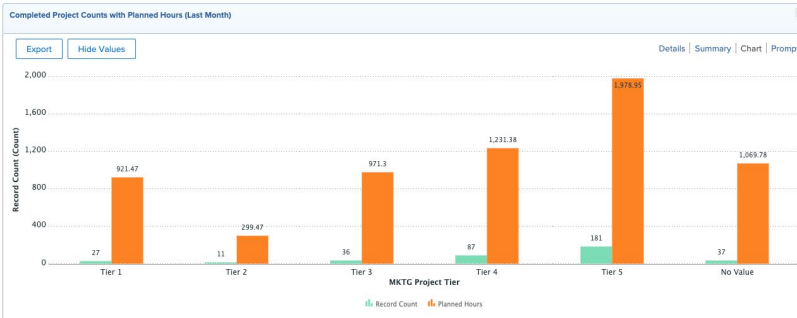
## Change Order reason (pre – post live)

- Change impact reasons



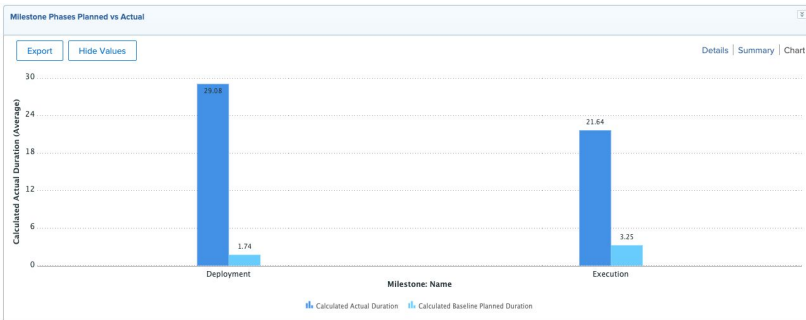
## Average Project Duration (YOY)

- Project totals down but have less time to execute



## Project Count + Planned Hours

- Another view of complexity



## Milestones Planned vs Actual (Last Month)

- Where missed each month
- Where we've been able to make up lost time without affecting live date

Cancelled Project Count (Last Month)

Export Details Summary Chart

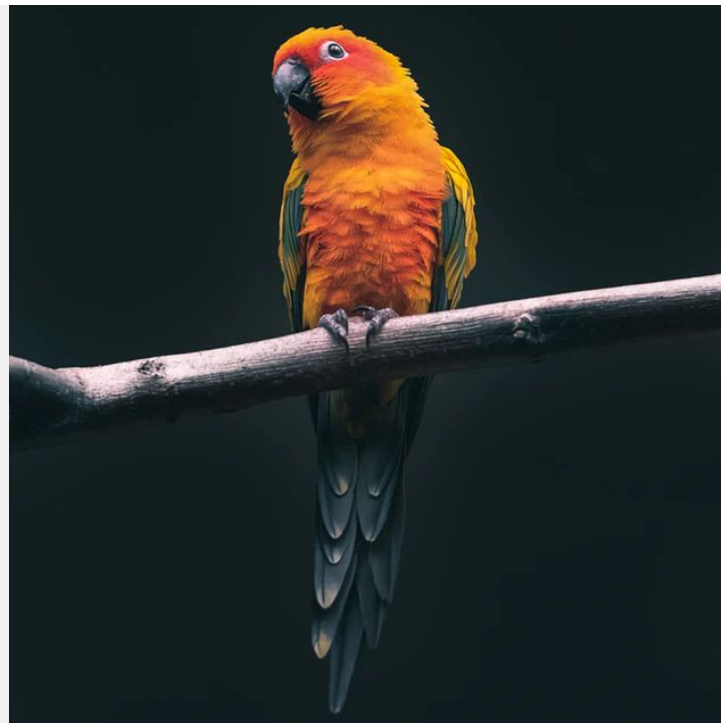
NAME	COUNT	% COMPLETE	PLANNED HOURS
MKTG Project Tier: Tier 1	4	Sum: 31.14%	Sum: 294.72 Hours
Percent Complete: 0	2	Sum: 0%	Sum: 111.75 Hours
Percent Complete: 1.72	1	Sum: 1.72%	Sum: 71.03 Hours
Percent Complete: 29.42	1	Sum: 29.42%	Sum: 111.93 Hours
MKTG Project Tier: Tier 3	2	Sum: 100%	Sum: 136.95 Hours
Percent Complete: 0	1	Sum: 0%	Sum: 117.35 Hours
Percent Complete: 100	1	Sum: 100%	Sum: 19.6 Hours

## Cancelled Projects (Last Month)

- % Complete
- Impacts to wasted work

# “Birds of a Feather” Group Discussions

- Go around the room and share:
  - What sort of information do you report up to your executive leadership?
  - Are you able to share what you need via Workfront?
  - Is there something you need to share, but aren't sure the best way?





## 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

The screenshot shows the Workfront ONE website 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: 844-306-4357. A welcome message reads: "Welcome Workfront Customers and Partners! Explore the tabs below to check out our featured content to help you do your best work, find what's popular with other users, read the latest news, and find out what this site is all about." Below this is a large image of a group of people in a meeting. The main content area is divided into four featured sections: "Take advantage of Virtual Leap" (with a "Register today" button), "The new Workfront experience" (with a "Learn more" button), "Join the Community" (with a "See the latest discussions" button), and "Network with Workfront Users" (with a "See all 8 topics" button). At the bottom, there is a "Community Discussions" section with a "Question" tab selected, a search bar, and a "Sort by" dropdown set to "Latest Posts". A post titled "For the Love of Pets" by Workboldy - Kristin Farwell is visible. On the right side, there is a "Product updates" section with links for "2020.2 release overview" and "2020.3 release overview", and a "What's new in Workfront Library" section with a link to "Workfront Library release activity".

# Upcoming Virtual User Groups

[one.workfront.com/events](https://one.workfront.com/events)

- Jan 19: System Admin Best Practices - Enablement
- Jan 26: Transitioning to the New Workfront Experience

*Coming soon!*

- *Advanced: Leveraging Integrations for Work and Process Automation*
- *Creative Agencies & Marketing: Workfront Proof*



**Thank you.**

**workfront**<sup>®</sup>