

Virtual User Group: Transitioning to the new Workfront experience

Tuesday, February 2, 2021

Today's Host



Bret Friedrich

Principal Customer Success Manager
Workfront

Agenda

- 11:00 a.m. Welcome and Agenda
- 11:05 a.m. Transitioning to the new Workfront experience
Kate McGuinness, Workfront
- 11:25 a.m. Group Discussion
- 11:45 a.m. Customer Spotlight: State Street Global Advisors
Brittney Lewis, AVP, Marketing Operations
- 12:05 p.m. Group Discussion
- 12:25 p.m. Wrap-up Next Steps
- 12:30 p.m. Event Ends



Presenter



Kate McGuinness

Principal Customer Success Manager
Workfront



What is your level of
knowledge around the
**new Workfront
experience?**

What do most customers want to talk to each other about?

- Migration experiences from other customers
- User Adoption & Change Management = Build Excitement!
- Changes in NWE vs Classic
- Layout Templates
- Transition Best Practices, Tips & Tricks and Resources

Why Transition *now* to the New Workfront Experience

If you transition...

- 1 User-driven, modern design
- 2 New functionality
- 3 Streamlined interactions

If you delay the transition...

- 1 Lack of new functionality
- 2 Voice of customer
- 3 Eventual end-of-life for Classic

Classic Deprecation Schedule



**Final Release of any new
Classic Functionality**

*Estimated April/May 2021—release date TBD



**Q2
2021**



**Classic Customer Support/Bug
Support Cut-Off**

March 31, 2022



**Q1
2022**

Changes in NWE vs Classic

Parity with Classic functionality in NWE

20.3

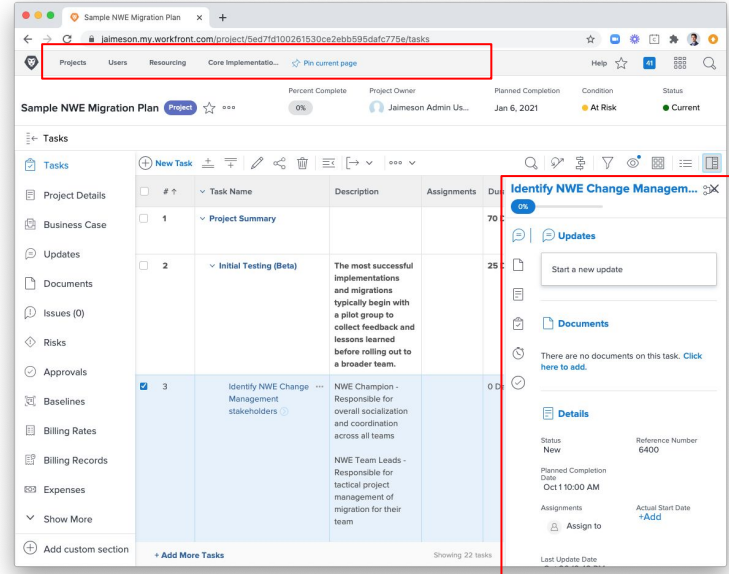
- Workfront Goals & Scenario Planner in NWE only
- Setup & Configuration enhancements

20.4

- Export custom form data as PDF in NWE only
- Workload Balancer enhancements (some) in NWE only

2021 & Beyond

- Proof more fully integrated into Workfront
- UI enhancements



Transition Best Practices

Identify a transition team

Understand the needs of your different audiences and involve them in the testing, configuration and training.

TIP: Establish a pilot team that can test the transition and provide feedback and lessons learned before rolling out to a larger audience.

[3 Key Initiatives to ensure a Successful Rollout of the new Workfront Experience](#)

published by Chris Talmont, Workfront Customer Solutions Architect



Transition Champions



Transition Team Leads



Workfront Users

Transition Best Practices

Create a migration plan and deadline

Download the project template from [Workfront One](#)

TIP: If you have multiple teams that will be making the transition to the new Workfront experience, copy the project and create a separate plan for each team.

Task Name	Description
Initial Testing (Pilot)	The most successful implementations and migrations typically begin with a pilot group to collect feedback and lessons learned before rolling out to a broader team.
Identify NWE Change Management stakeholders	NWE Champion - Responsible for overall socialization and coordination across all teams NWE Team Leads - Responsible for tactical project management of migration for their team Workfront Account Executive / Customer Success Manager - Available to assist in obtaining resources needed to ensure a successful transition.
Identify users to participate in pilot testing and establish plan for feedback collection	Consider users that are open minded to change, understand workflows well enough to thoroughly test and provide feedback, and will have the time to do so.
Have System Administrators and testing team attend preliminary Ascent training on the new interface	Getting Started - https://one.workfront.com/s/getting-started?language=en_US Comparisons to Classic - https://one.workfront.com/s/training?language=en_US&tabset-e453e-3
Leverage Release Help site to ensure education of latest features released	New Features - https://one.workfront.com/s/article/Discover-the-new-features-available-only-with-the-new-Workfront-experience-224802325?language=en_US Quarterly Release Page - https://one.workfront.com/s/article/Workfront-releases-212309096?language=en_US
Identify key organizational artifacts which will need to be updated	Training Manuals, Job Aids, URLs on Intranet sites, Standard Operating Procedures, etc.) Guide for making updates - https://one.workfront.com/s/managed-content-guides/guide-to-updating-materials-20Y0z0000000pVEAQ?language=en_US

Transition Best Practices

Communicate!

Communicating early and often instills confidence that they will be supported during the change and helps to address any outstanding questions to alleviate fears.

Make sure you reinforce the **benefit** and **value** to the end users.

Use the [New Workfront experience Onboarding Guide](#) which offers several [communication templates](#) (pages 19-23) to inform your teams at each stage of the transition. Use these to make sure everyone is well informed!

SAMPLE EMAIL TEMPLATES FOR COMMUNICATION

1. Educating your core teams

<p>Purpose Introduce the new Workfront experience to your users. Announce the new experience is ready for a select group of users to try out.</p>	<p>EMAIL SUBJECT LINE The new Workfront experience is here</p>
<p>Audience Early adopter team</p>	<p>EMAIL CONTENT Hello, everyone!</p> <p>I'm excited to announce that Workfront, our partner in getting work done, has revamped its look and feel to provide all users with an improved modern work experience.</p> <p>Workfront spent months conducting hundreds of customer interviews and reading thousands of customer comments to find out how you, the user, wanted Workfront to work. The result is a more modern design, but with an underlying familiar feel that lets you know it's still Workfront. It's better designed to fit your daily needs so you can contribute to the projects and initiatives here at [company].</p> <p>Starting today, the new Workfront experience is available for a group of early adopters at [company]. We'd like you to be a part of this pilot group, doing your daily work in the new Workfront experience and providing feedback/recommendations.</p> <p>[System administrator] will switch the early adopters over by [date]. So, if someone happens to look over your shoulder, let them know what you're doing. If you have time to answer questions or give them a quick tour of the new experience, that would be great. Let's start getting positive messages out there about the change.</p> <p>We'll hold an initial "get to know the new Workfront experience" session for the early adopters, so you can get up and running quickly. You also can tap into Workfront's online resources:</p> <ul style="list-style-type: none">• The new Workfront experience page—Watch an informational message from Workfront's chief technology officer, join the Workfront Community in talking about the new Workfront experience, and keep up on recent news from Workfront's Product team.• Learn the new Workfront experience—Video tutorials and downloadable quick guides help get you up-to-speed on the changes in the new experience.• Product documentation—Dig into the details of the changes with step-by-step product support documentation. <p>Over the next few weeks, we'll bring additional users and teams into the new Workfront experience to try things out, offer feedback, and prepare for the official company rollout later this year.</p> <p>I've been trying out the new design, and I've found [positive comment].</p> <p>If you have questions about the new Workfront experience, please let me know.</p> <p>Thank you,</p> <p>[your email signer]</p>
<p>Sender Champion, System Administrator</p>	

Migration Experiences

Customer #1

Informed ~250 users on
Thursday evening

Migrated to NWE Friday
morning at 9am

1 (one!)

user requested more
training

Customer #2

Created plan, communication
for their ~80 team

Used Workfront PPTX docs
(with a quick rebrand)

Users said NWE was
easier to use

60 days for full migration

Customer #3

Tiered groups, ~30 group
admins and 400+ users

Created global training that
Group Admins could tailor

Used custom dashboards by
group to help monitor progress

3 months for 80% migration

Training & Enablement Materials

- **Powerpoint Training Guides:** [Collaborator](#), [Planner](#) and [Worker](#)
- **[New Workfront Experience: Onboarding Guide](#)**
 - Pg 7 - high level UI overview
 - Pg 18 - sample communication plan to end users about migration plan
- **Migration Tracking.** Text mode to track [NWE Migration progress](#) on Workfront One
- **Index of resources.** [New Workfront Experience](#) on Workfront One

Common Feedback

System admin time to configure, update training materials, enact the plan

Change management and end user adoption - **fear of the unknown**

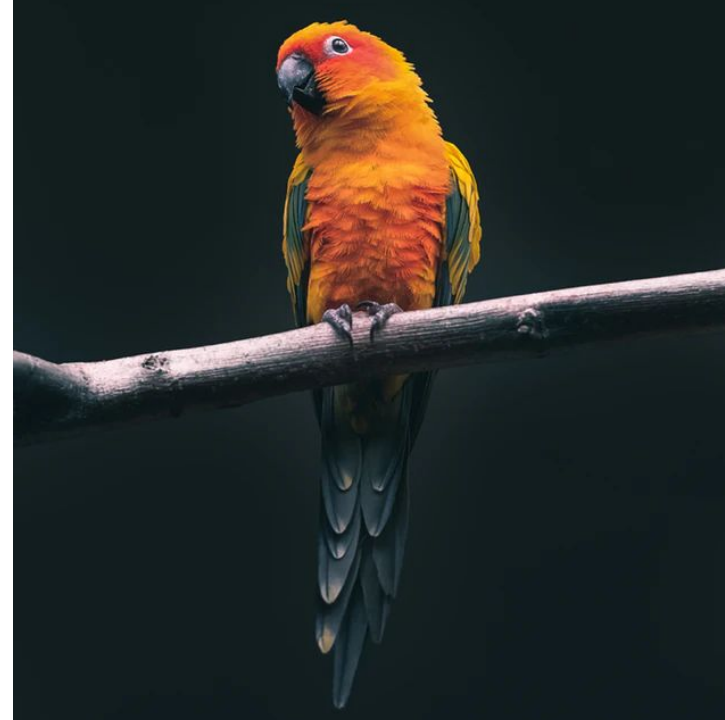
Layout Template configuration, training, deployment

Questions?

“Birds of a Feather” Group Discussions

Go around the room and share:

- If you’ve already transitioned (or are in-transition), what’s working well? What should others know?
- For those who have not yet transitioned, what is your biggest hesitation?



Presenter



Brittney Lewis

AVP, Marketing Operations

Workfront System Administrator

State Street Global Advisors

Client Case Study: The New Workfront Experience

Brittney Lewis

System Administrator at State Street Global Advisors

Introduction



Brittney Lewis

AVP, Marketing Operations

System Administrator of Workfront since March of 2019.

Has held many roles at State Street Global Advisors over the last 7 years, including an internship.

Our Journey with the New Workfront Experience

Our Approach

Phased/Rolling

Timing

- Discussed with team leaders in November of 2019
- Drafted plan, kicked-off January of 2020

Execution

- Personalized Training Session with User Group
- Weekly follow ups for 3-4 weeks post training
- Gathered feedback and used for next user group

Project Plan

Create a project plan in Workfront – it's a lifesaver!

New Workfront Experience Implementation Plan Project ☆ ⋮

Percent Complete: 81.97% | Project Owner: Brittney Lewis | Planned Completion: Mar 31, 2020 | Condition: In Trouble | Status: Current


Tasks

# ↑	Task Name	Assignments	Status	Duration	Predecessors	Planned Start Date	Actual Start Date	Planned Completion Date	Actual Completion Date	% Complete
1	Discuss Plan of Action with PMLT	Brittney Lewis	Complete	1 Hour		11/5/19	11/5/19	11/5/19	11/5/19	100%
2	Introduce/Train "New Workfront Experience" to PMs in 1.7 Knowledge Share Meeting	Brittney Lewis	Complete	1 Hour	1	11/5/19	1/7/20	11/5/19	1/7/20	100%
3	Enroll Select PMs into New Workfront Experience	Brittney Lewis	Complete	3.25 Days		11/5/19	1/7/20	11/8/19	2/2/20	100%
4	Enroll User Group	Brittney Lewis	Complete	1 Hour		11/5/19	1/7/20	11/5/19	1/7/20	100%
5	Check-In 1 with User Group	Brittney Lewis	Complete	1 Day	2	11/5/19	1/16/20	11/6/19	1/22/20	100%
6	Check-In 2 with User Group	Brittney Lewis	Complete	1 Day	5	11/6/19	1/22/20	11/7/19	1/29/20	100%
7	Final Check-in with User Group	Brittney Lewis	Complete	1 Day	6	11/7/19	1/29/20	11/8/19	2/2/20	100%
8	Enroll All Production Managers into New Workfront Experience	Brittney Lewis	Complete	3 Days		11/5/19	2/2/20	11/7/19	4/24/20	100%


User Feedback

Ask specific questions to your users and track their responses!

Hi all - Happy New Year!
How is your experience in the new Workfront look & feel?
What do you like? What don't you like? Any questions?


 **Brittney Lewis**
1/4/2021 At 10:40 AM · Like ...

+ a few others.

 **[Redacted]**
1/4/2021 At 10:56 AM · Unlike (1) ...


Hey Britt - I think its pretty easy to navigate - no real feedback from me here -- thank you for all your hard work on this!

Moe

 **[Redacted]**
1/4/2021 At 11:20 AM · Unlike (1) ...

Hi Britt - I agree with Moe, easy to use and straightforward. I am experiencing some slowness today but I assume it is related to the larger on-going server issues.


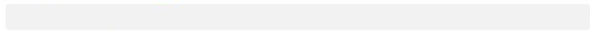
Thank you,
Michelle

 **[Redacted]**
1/4/2021 At 11:23 AM · Unlike (1) ...

Hi Britt - I third that! Much easier to use, and I love the 'pin this page' feature!
Thanks, Emma



[Reply](#)

Additional Feedback

 5/27/2020 At 11:14 AM · Like ...



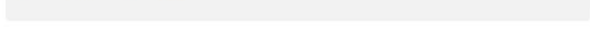
Hi Britt, I agree with Sujith, I think you provided enough good information up front.

There was one item that I thought was difficult to find. In the Project Details tab, it was difficult to find the edit button within the Design Codes section. I think I found it from looking at your document but the the user experience can be improved if this was moved closer to where you make the update. Or even when you click the filepath, it can changes to edit mode.

 Brittney Lewis
5/29/2020 At 9:12 AM · Like ...


Thank you both!

Taryn - you bring up a good point, this is hard to find and there is a trick that I actually stumbled upon - if you double-click on the field it becomes editable :) I will call this out with the remaining team memebers and include all of you in that meeting. As far as moving the edit button unfortunately there is nothing we can do there, but Workfront is always enhancing their layouts so this could change.

 5/29/2020 At 9:30 AM · Like ...


Oh that is a good tip thanks!

[Reply](#)

Other Feedback

“Overall, it has been a reasonably smooth transition for me. Will let you know if anything comes up” - **super user, planner license**

“Smooth for me too, I like the side rail, much easier” - **moderate user, reviewer license**

“The thing that I love most about the new Workfront is the ability to pin pages. This has been discussed, but it is super helpful when you have to return to a specific project many times throughout the day and it is conveniently pinned as opposed to having to search for it.” - **super user, admin license**

“It’s going well! I haven’t had any issues so far and it’s been pretty easy to adapt to the new look and feel” - **moderate user, reviewer license**

“I love the icon drop down and portfolios are much easier to create!” - **super user, admin license**

Tips & Take-Aways

- Plan ahead & use Workfront to your advantage
- Ask specific questions to your users
 - What do you like about the new Workfront Experience?
 - What don't you like?
 - What is your new favorite feature?
 - What could be improved?
- Document all feedback
- Record your training sessions and post the most interactive one
- Provide take-aways as much as possible

Questions?



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

workfront ONE

Search...

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Network with Workfront Users
We have 8 special edition Leap User groups for you to learn and connect with other Workfront users the week following Virtual Leap.
[See all 8 topics](#)

Community Discussions

Question Poll

What would you like to know? [Ask](#)

Sort by:
Latest Posts

For the Love of Pets
Workboldy - Kristin Farwell - June 8, 2020 at 7:50 AM

Product updates

What's new in Workfront
[2020.2 release overview](#) (new in Production)
[2020.3 release overview](#) (new in Preview)

What's new in Workfront Library
[Workfront Library release activity](#)

Discover the new features in the new experience

Upcoming Virtual User Groups

one.workfront.com/events

- Feb 9: Advanced: Integrations and Process Automation

Coming soon!

- *TBD: Reporting & Dashboards*
- *TBD: Resource Management*
- *TBD: System Admin Best Practices: Training & Onboarding Users*
- *TBD: Marketing & Creative Agencies: Workfront Proof*





**CALL FOR
VOLUNTEERS!**

Workfront User Groups are successful because of customers like you!

Would you be interested to share your experience with one of the following topics? You don't have to be an expert!

- Reporting & Dashboards
- Resource Management
- Onboarding and Adoption
- Before / After
- Change Management
- Implementation Dos and Don'ts
- Unique Use Case
- Other

Thank you.

