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Virtual User Group:
Leveraging Integrations for Work and Process Automation

Tuesday, February 9, 2021

@Workfront   #workfrontug

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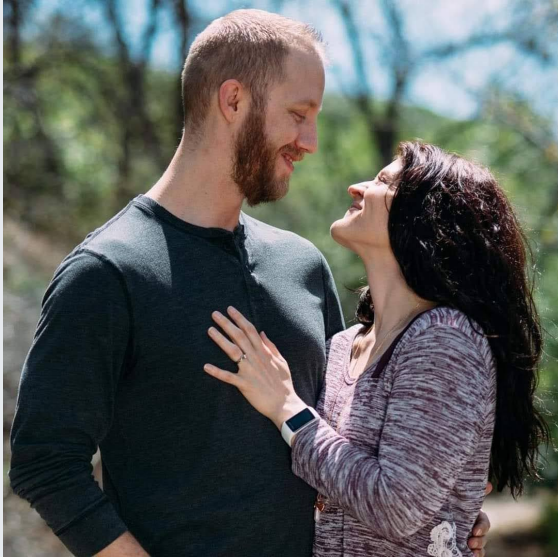
Erica Escalante

Customer Success Manager

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Agenda

11:00 a.m.   Welcome and Agenda (5 min)

11:05 a.m.   Work Automation Maturity Model (20 min)
Sam Taylor, Product Manager, Workfront

11:25 a.m.   Group Discussion (20 min)

11:45 a.m.   Customer Spotlight (20 min)
Nathan Hanamaikai, Purple

12:05 p.m.   Group Discussion (20 min)

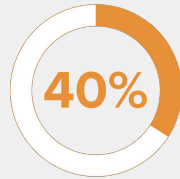12:25 p.m.   Wrap-up Next Steps (5 min)

12:30 p.m.   Event Ends

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Enterprises are struggling to find ways to improve efficiencies, get products to market faster while still being innovative. It's no wonder when we see:

50%

of a knowledge worker's time spent on processes not related to work.

40%

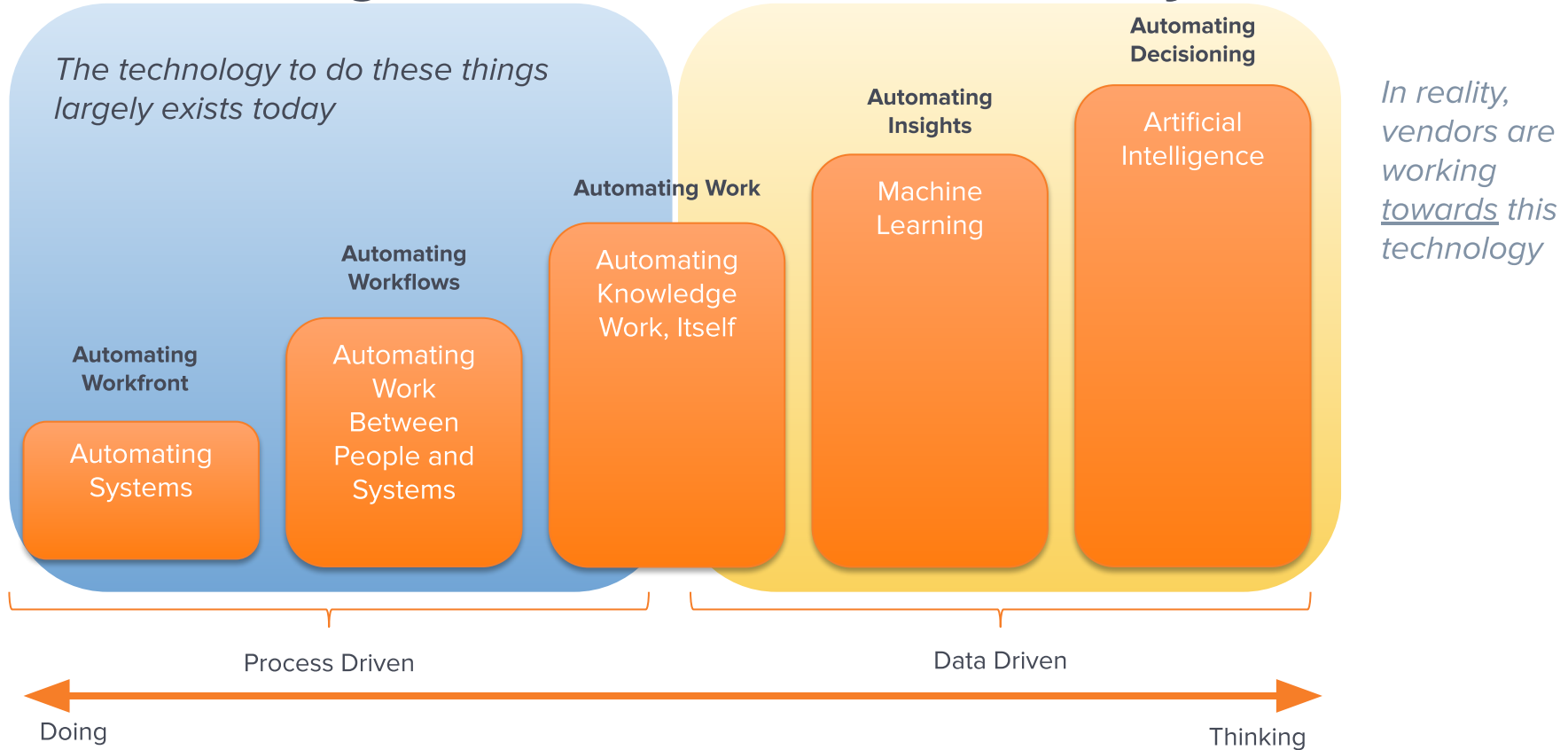of employees spend at least a quarter of their week doing repetitive tasks.

Companies lose nearly

$1 trillion

every year due to mismanaged tasks, resulting in wasted productivity.

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What is "Knowledge Work Automation"?

For any enterprise, the concept of "work automation" emcompasses a wide variety of activities from the basic (automating system tasks) to the revolutionary (automating decisioning).

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A Knowledge Work Automation Maturity Model

The technology to do these things largely exists today

In reality, vendors are working towards this technology

Automating Decisioning

Automating Insights

Automating Work

Artificial Intelligence

Machine Learning

Automating Workflows

Automating Knowledge Work, Itself

Automating Workfront

Automating Work Between People and Systems

Automating Systems

Process Driven

Data Driven

Doing

Thinking

Then why haven't large enterprises automated more of their work (even the mundane stuff)?

- Primarily because work within an enterprise is necessarily:
  - Complex
  - Process Heavy
  - And almost always….unique to every enterprise
  - And…processes must be capable of be tweaked / improved over time to maintain business agility
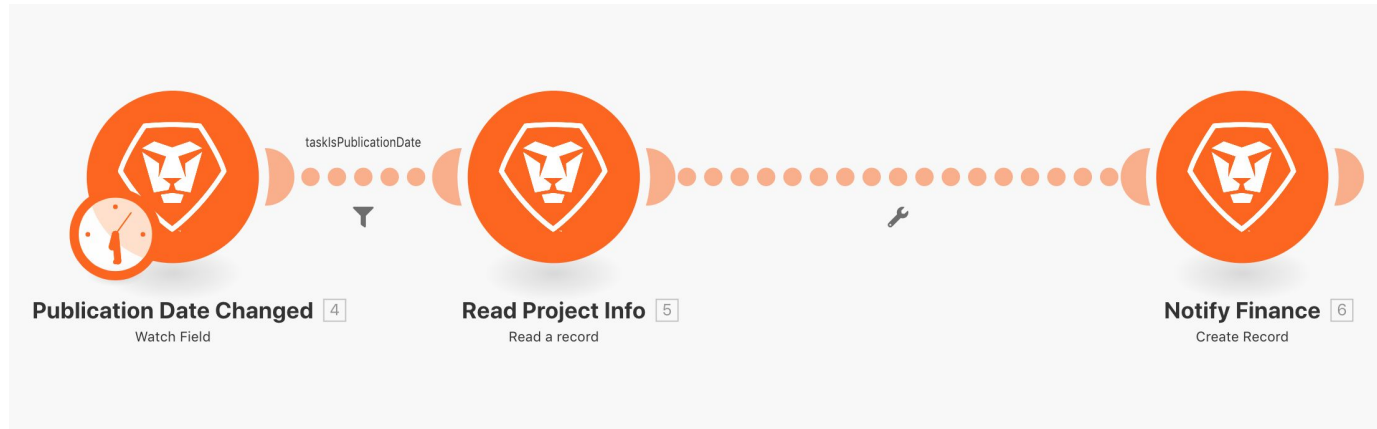
The Real Solution

Work Management Platform (common automation) accelerated with a **Work Automation Engine** (bespoke automation)

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What is a Work Automation Engine?

Enables the capability for process managers to automate virtually any portion of a <u>unique</u> work process.

Workfront Fusion as a Work Automation Engine

Advantage Media uses Workront Fusion to ensure that their finance team is automatically notified whenever there is a change to key publication dates. The notification includes key information about the project and task so they can take action immediately.

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Workfront Fusion as a Work Automation Engine

Doner uses Workfront Fusion to automatically validate that each user's timesheet meets their unique validation rules and notifies the user if it is accepted or rejected, with instructions on what to fix, if appropriate.

As a result, people get paid on time without manual intervention from payroll teams.

Doner.

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Workfront Fusion as a Work Automation Engine

Welcome to Workfront and DIGITAL Employee Channel Requests

McKesson Corporation uses Workfront Fusion to automatically allow users to self service administrative tasks and get them assigned to the correct groups or layout templates.

User's Email and Name [12]
Read a record

Catch IMLError

Watch Issue Record [5]
Watch Record

Ignore [17]

Routing of the Issue [10]

Welcome Email

Digital Requests

Update User Record [7]
Update Record

Update issue with Closed Status [9]
Update Record

Read Group Name [14]
Read a record

Microsoft 365 Email [11]
Create and send a message

Microsoft 365 Email [19]
Create and send a message

MCKESSON

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Workfront Fusion as a Work Automation Engine

Sage uses Workfront Fusion to manage a single request queue for users across the globe, which can automatically route requests to the right teams(s) with the right work plan pre-populated.

The result is that work is easy to kick off and keep track of and the right teams are immediately engaged.
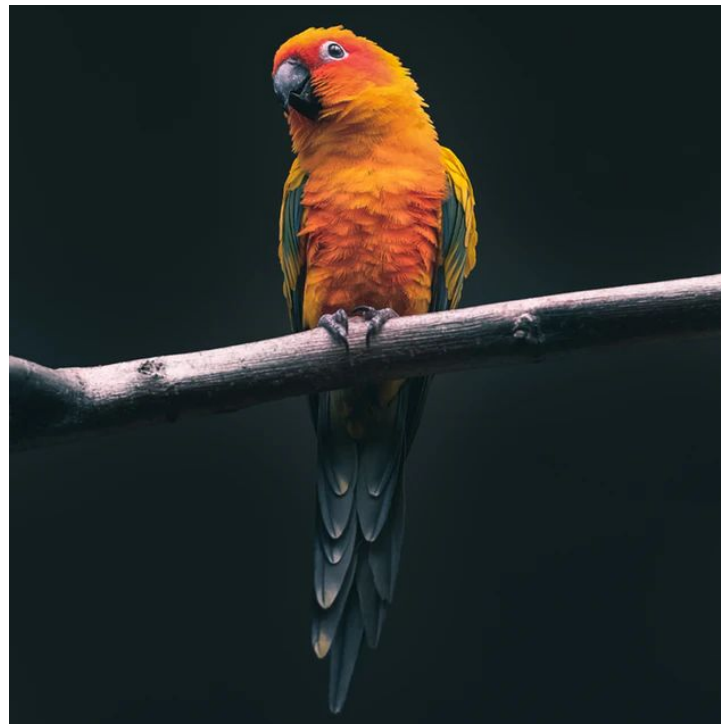
Questions?

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"Birds of a Feather" Group Discussions

- Go around the room and share:

  - Are you leveraging integrations today?

  - Have you automated any work processes w/in Workfront?

  - If not, what would you like to do in the future? What's holding you back?

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Purple + Workfront Fusion

Process Maturation in a Vertically Integrated Organization

Nathan Hanamaikai, MBA, PhD, PMP

Program Manager, Process and Digital Transformation

nathan.ha@purple.com

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Agenda

- The Company
- The Challenge
- The Solutions
- The Lessons Learned

- Past: The Tale of Two Brothers

- Present: Year of COVID, Year of Growth

- Future: Jumping Point (Out and Up)

State of the Company

Purple Innovation Inc   PRPL

$36.90   ↑186.49%   +24.02 1Y

Feb 2, 2:55:39 PM UTC-5 · USD · NASDAQ · Disclaimer

1D   5D   1M   6M   YTD   1Y   5Y   MAX

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The Challenge
The Maturation of Startup Processes, Vertical Integration

- High-performing Teenager
  - "If it ain't broke" mentality
- We are a vertically integrated manufacturer (not just assembler) ☐ The silos stay
  - Integrating systems vertically
  - Bridging siloes horizontally

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The Solutions

Incremental Improvements, Iterative Releases

Process Examples

Launched:
- Custom Purchase Approval Process (WF > WF)
- Custom Jira Ticket Creation (bidirectional) (WF <> Jira)
- Executive Alert (WF > Outlook)
- Promo Guardrails Approval/Alert (WF > WF/Outlook)

WIP:
- $0 Sales Orders (WF > Fusion > Celigo > Netsuite)
- Jira Sprint Points to Original Request (Hours/Status) (Jira > WF)
- Fixed Asset Creation (WF > L2L)
- SOP/WI Auto Add to Fixed Asset for Maintenance (ETQ > Fusion > L2L)
- Maintenance Work Order creation and hours tracking (WF <> L2L)

Scheduled:
- Contract Approval Process Transparency
- Tracking Contract Spend Limits to Finance system of record
- Syncing project/asset spend to Finance system of record

Custom Purchase Approval Process
- Too many IFTTTs in our process for the standard approvals to be manageable
- We needed greater flexibility without having to reconfigure our queue, queue topics, and topic groups every time we needed an update or the org structure changed
- Combine all purchase request processes into one centralized processes with display logic

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Types of Solutions

Solution is defined by the problem being solved

Patch

- **Put out the fire**

Root

- **Prevent the next fire**

PLEASE
BE
CAREFUL!

PREVENT WILDFIRES
NEW JERSEY FOREST FIRE SERVICE

Hybrid

- **Fire management strategy**
  - **Address hotspots**
  - **Prevent out-of-control spread**
  - **Learn**

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Stages of Solutions

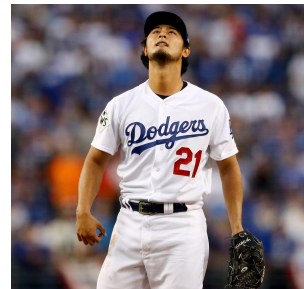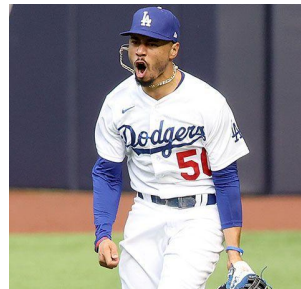Stage is defined by the approach to the solution

Preventative

- **Walking the batter**

Iterative

- **Pre-2020 pitching changes**
- **Post-2020 pitching strategy**

Additive

- **Mookie Betts**
- **Yu Darvish**

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The Prime Example

Custom Purchase Approval Process

- Too many IFTTTs in our process for the standard approvals to be manageable
- We needed greater flexibility without having to reconfigure our queue, queue topics, and topic groups every time we needed an update or the org structure changed
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Run once

Run once

Run once

ON
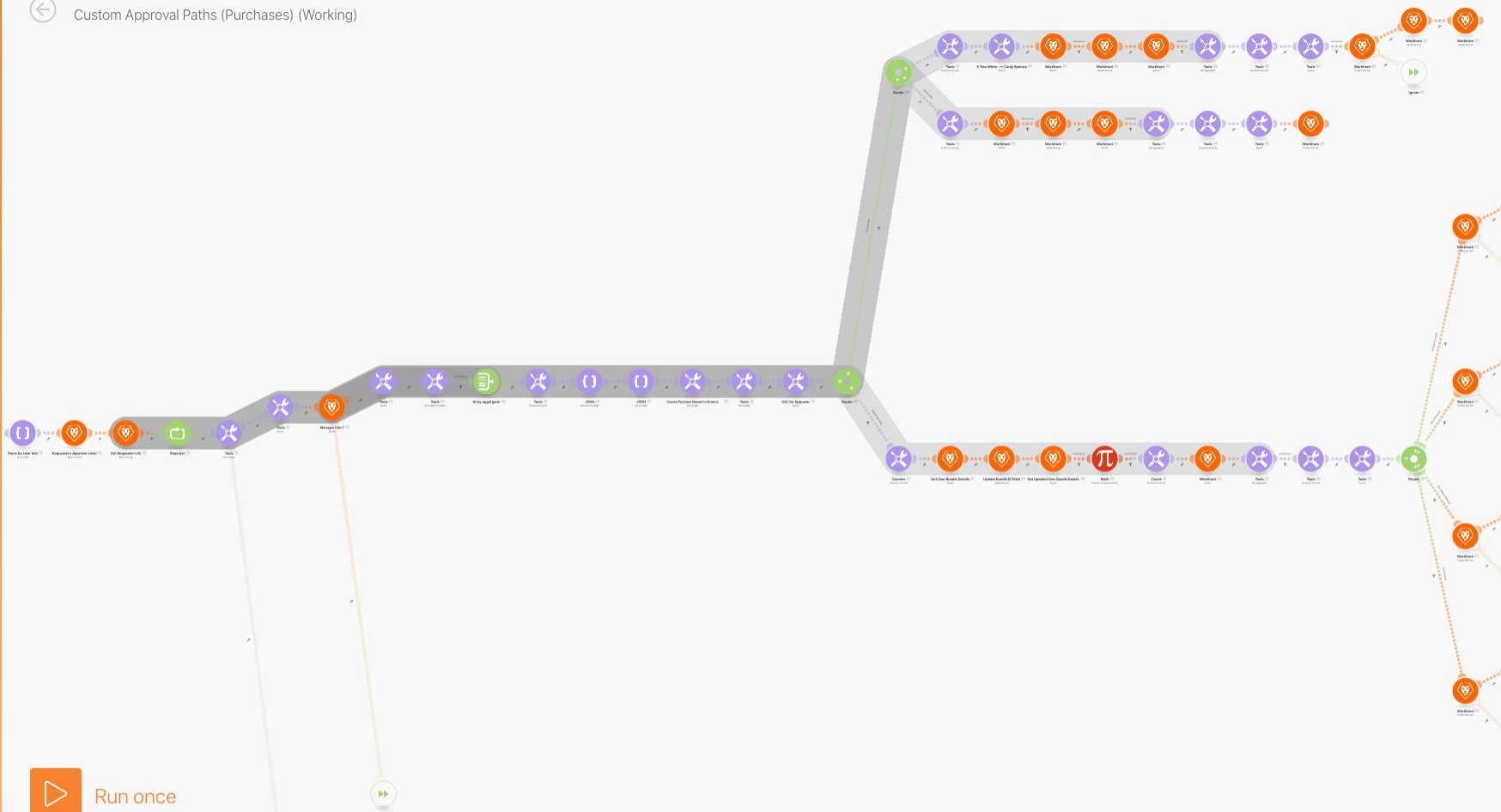
SCHEDULING

CONTROLS

TOOLS

FAVORITES

Lessons Learned

Do

- Implement Lean Six Sigma RCA methodologies
  - Five Whys
- Build your proof of concept in the production environment if your solution is complex, unless you are syncing your sandbox every night
  - The more variables there are, the more important this is…unless you like debugging in both environments
- Implement unit testing
- Communicate the changes
  - State problem
  - State solution
  - State impact
  - Provide contact info
- Implement a safety net alert system

Don't

- Go for 100%
- Be afraid to pull the trigger
- Underestimate the questions there will be
- Assume you saw around every corner and identified every blind spot
- Skimp on the training and on-demand reference collateral
- Close the book after initial launch

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Questions?

Nathan Hanamaikai, MBA, PhD, PMP
Program Manager, Process and Digital Transformation
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Wrap-up and Next Steps

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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

- Feb 9: Advanced: Integrations and Process Automation
- Feb 23: Reporting & Dashboards

Coming soon!

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

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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.

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