

# Virtual User Group: Transitioning to the new Workfront experience

Tuesday, April 20, 2021

Today's Host



# Kristin Farwell

Sr. Manager, Customer Marketing  
Workfront

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

## HOUSEKEEPING



Use the **Audio** and **Video** icons to control your settings.

To view attendees and chat, use the **Participants** and **Chat** icons.



Select **Gallery View** or **Speaker View** to customize your experience

Type  
into  
chat:

# HELLO

*my name is*

- Company, Role and Location
- What do you hope to take away from today?
- What did you have for breakfast?

# Agenda

- 11:00 a.m. Welcome and Agenda
- 11:05 a.m. Transitioning to the new Workfront experience  
*Josh Boston, Workfront*
- 11:25 a.m. Group Discussion
- 11:45 a.m. Customer Spotlight: Nationwide Insurance  
*Brandon Pritchard, Specialist, Business Consultant*  
*Jennifer Demboski, Consultant, Marketing Operations*
- 12:05 p.m. Group Discussion
- 12:25 p.m. Wrap-up Next Steps
- 12:30 p.m. Event Ends





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
- Change management and communication (how to prepare users and build excitement)
- Resources
- Changes in NWE vs Classic
- Layout templates
- Transition best practices, tips and tricks, what worked well



Presenter



## Josh Boston

Sr. Program Manager  
Workfront

# 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

# Changes in NWE vs Classic

Parity with Classic functionality in NWE

## 20.3

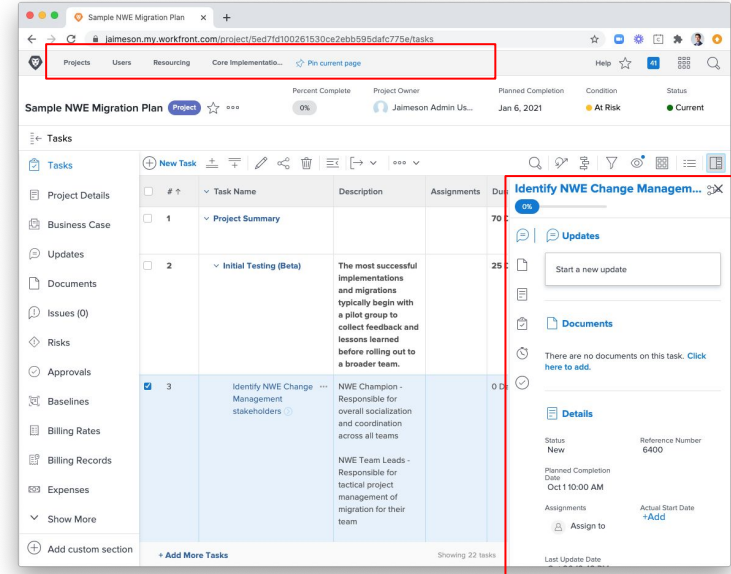
- Workfront Goals & Scenario Planner in NWE only
- Setup & Configuration enhancements

## 20.4

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

## 2021 & Beyond

- New Request experience
- Improved usability of key workflows
- Blueprints
- New reporting experience
- Proof more fully integrated into Workfront



# New Workfront Experience Enhancements

## 2021.1 | Navigate with greater ease

### Optimizing the navigation and intake experience

- Better navigation between objects
- Breadcrumb labels, truncation, and page titles
- Request queue enhancements

## 2021.2 | Engage with work faster

### Usability

- Greater customizability (set a default Filter/View/Grouping via Layout Template)
- Optimize the viewing, creation, and editing experience
- Enhanced request submission and tracking
- Quicker access to projects (header filters)

# Classic Deprecation Schedule



## Final Release of any new Classic Functionality

Workfront 21.2 Release - Week of May 10, 2021



## Classic Customer Support/Bug Support Cut-Off

March 31, 2022



# 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.



Transition Champions



Transition Team Leads



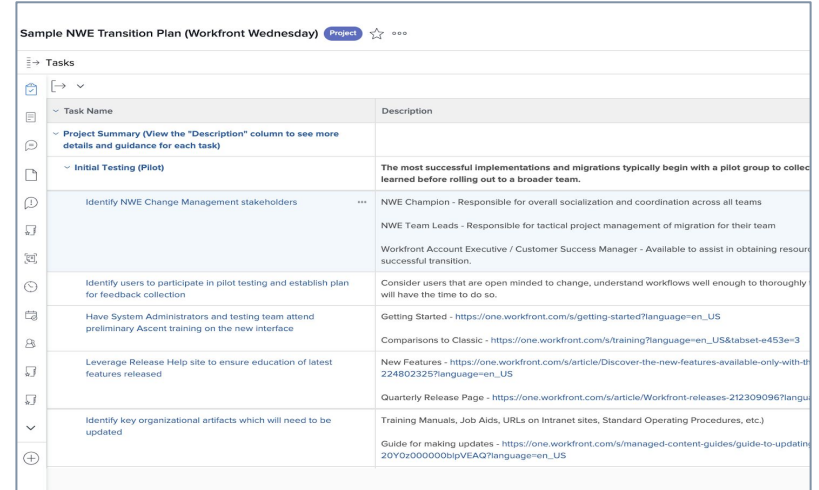
Workfront Users

# Transition Best Practices

## Create a migration plan and deadline

Download a sample transition plan 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.



Sample NWE Transition Plan (Workfront Wednesday) Project ☆ ○○○

Tasks

Task Name	Description
Project Summary (View the "Description" column to see more details and guidance for each task)	
Initial Testing (Pilot)	The most successful implementations and migrations typically begin with a pilot group to collect 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 for 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 will have the time to do so.
Have System Administrators and testing team attend preliminary Ascent training on the new interface	Getting Started - <a href="https://one.workfront.com/s/getting-started?language=en_US">https://one.workfront.com/s/getting-started?language=en_US</a> Comparisons to Classic - <a href="https://one.workfront.com/s/training?language=en_US&amp;tabset-e453e-3">https://one.workfront.com/s/training?language=en_US&amp;tabset-e453e-3</a>
Leverage Release Help site to ensure education of latest features released	New Features - <a href="https://one.workfront.com/s/article/Discover-the-new-features-available-only-with-ff-224802325?language=en_US">https://one.workfront.com/s/article/Discover-the-new-features-available-only-with-ff-224802325?language=en_US</a> Quarterly Release Page - <a href="https://one.workfront.com/s/article/Workfront-releases-212309096?language=en_US">https://one.workfront.com/s/article/Workfront-releases-212309096?language=en_US</a>
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 - <a href="https://one.workfront.com/s/managed-content-guides/guide-to-updating-20Y0z00000bipVEAQ?language=en_US">https://one.workfront.com/s/managed-content-guides/guide-to-updating-20Y0z00000bipVEAQ?language=en_US</a>

# Transition Best Practices

## Communicate early and often

This will instill confidence in your users 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.

**TIP:** The new Workfront experience Onboarding Guide offers several communication templates (pages 19-23) to inform your teams at each stage of the transition.

SAMPLE EMAIL TEMPLATES FOR COMMUNICATION

### 1. Educating your core teams

<b>Purpose</b> Introduce the new Workfront experience to your users. Announce the new experience is ready for a select group of users to try out.	<b>EMAIL SUBJECT LINE</b> The new Workfront experience is here
<b>Audience</b> Early adopter team	<b>EMAIL CONTENT</b> Hello, everyone!  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.  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].
<b>Sender</b> Champion, System Administrator	Starting today, the new Workfront experience is available for a group of early adopters at [company]. <b>We'd like you to be a part of this pilot group</b> , doing your daily work in the new Workfront experience and providing feedback/recommendations.  [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.  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: <ul style="list-style-type: none"><li>• <b>The new Workfront experience page</b>—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.</li><li>• <b>Learn the new Workfront experience</b>—Video tutorials and downloadable quick guides help get you up-to-speed on the changes in the new experience.</li><li>• <b>Product documentation</b>—Dig into the details of the changes with step-by-step product support documentation.</li></ul> 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.  I've been trying out the new design, and I've found [positive comment].  If you have questions about the new Workfront experience, please let me know.  Thank you,  [your email signer]



# Migration experiences from 3 different customers

## 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

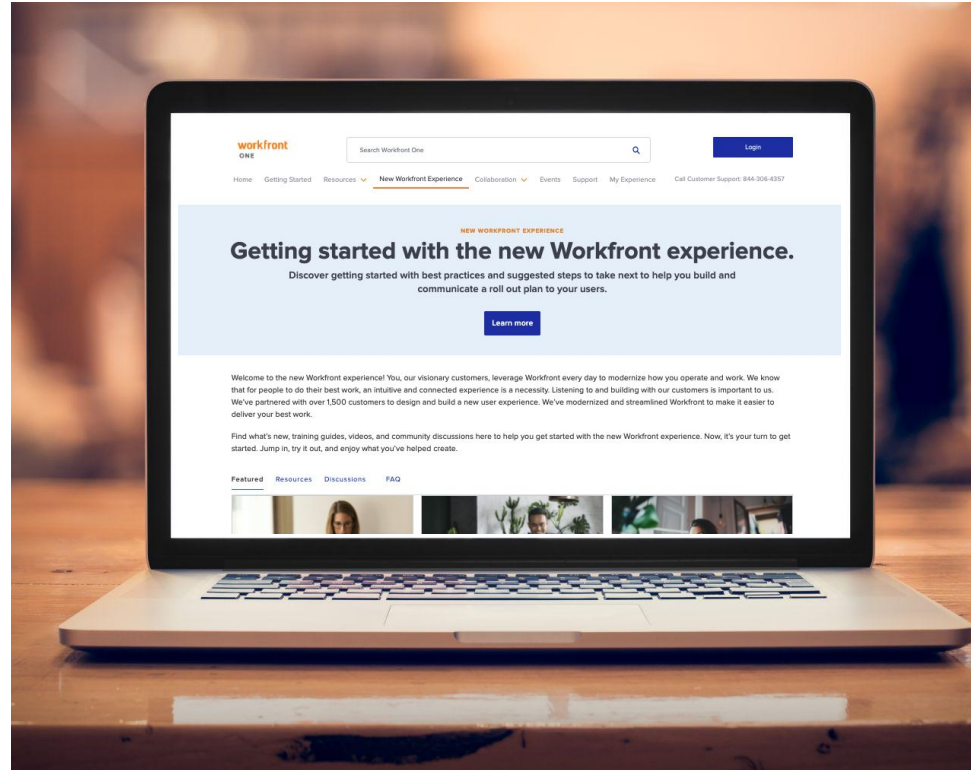
Used custom dashboards by group to help monitor progress

3 months for 80% migration

# Resources

The **new Workfront experience page** on Workfront One is a complete index of everything you might need, including:

- Answers to common questions
- Training guides
- Downloadable Powerpoint templates
- Communication examples
- Videos
- Sample project templates
- 1-month transition plan
- Interface comparisons
- Documentation
- Customer discussions
- And more!

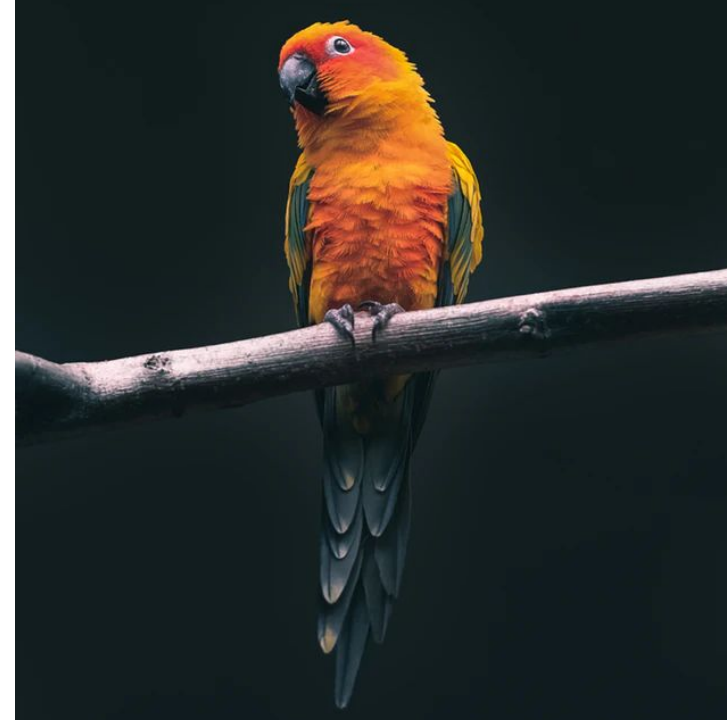


# Questions?

# “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?



Looking for the  
**New Workfront Experience**  
Virtual User Group?

You're in the right place!

*It's a bit quiet in here  
because our attendees  
are in Breakout Rooms  
for group discussion.*

*A moderator will be  
with you shortly!*

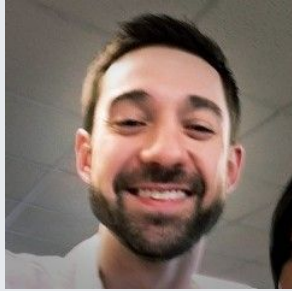
DISCUSSION

**Welcome back!**

What was a takeaway from breakout?

Was there an “aha” moment?

Presenter



## Brandon Pritchard

Specialist, Business Consultant  
Nationwide



## Jennifer Demboski

Consultant, Marketing Operations  
Nationwide

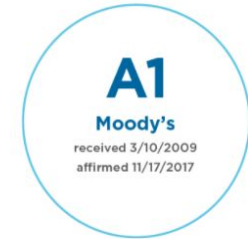
# The New Workfront Experience with Nationwide





# Who is Nationwide Mutual Insurance?

- ❑ Founded in 1926
- ❑ We insure; home, auto, pet, life, recreational, commercial, retirement, etc...
- ❑ At Nationwide, we exist to protect people, businesses and futures with extraordinary care.
- ❑ Our Vision is to be the most trusted, most caring and most customer-focused protection company.
- ❑ Our success comes through the purpose of our culture, the deep engagement of our associates, and the passion they bring to their work.



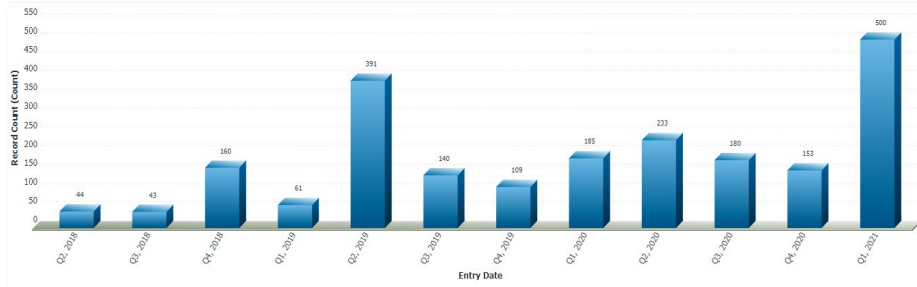
# Nationwide's Journey in **Workfront**

- Purchased in May 2018 – first projects entered in Nov 2018
- 1600 active users
- 400 licensed users
- 150+ project owners
- Adding in 300 more licensed users in the next 2 years

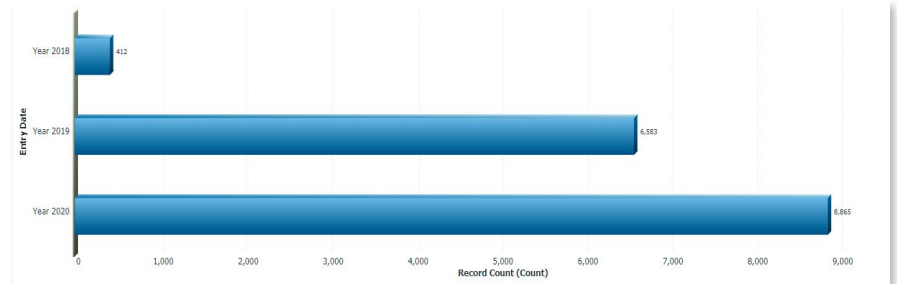
• 45,000 Updates per Quarter



- 500 New Users Last Quarter

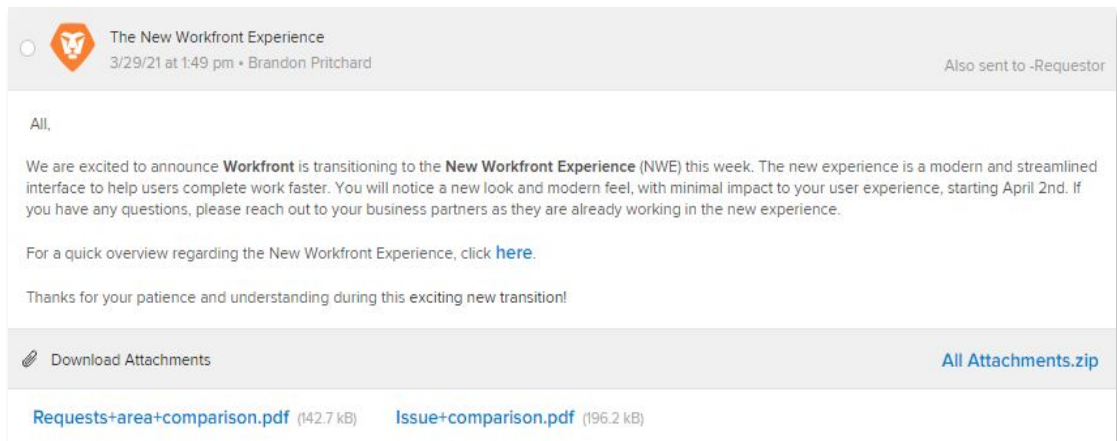


- Nearly 9,000 Project in 2020



# Nationwide's NWE Scope

- All current users
- New user groups are directly onboarded into the new experience
- New individual users are manually transitioned to the NWE
- Utilized WF announcements to communicate transition to larger audience



The screenshot shows an email notification from Workfront. The header includes the Workfront logo, the subject "The New Workfront Experience", the date and time "3/29/21 at 1:49 pm", the sender "Brandon Pritchard", and a recipient note "Also sent to -Requestor". The main body of the email contains the following text:

All,

We are excited to announce **Workfront** is transitioning to the **New Workfront Experience (NWE)** this week. The new experience is a modern and streamlined interface to help users complete work faster. You will notice a new look and modern feel, with minimal impact to your user experience, starting April 2nd. If you have any questions, please reach out to your business partners as they are already working in the new experience.

For a quick overview regarding the New Workfront Experience, click [here](#).

Thanks for your patience and understanding during this exciting new transition!

At the bottom of the email, there is a "Download Attachments" section with a link to "All Attachments.zip". Below this, two PDF attachments are listed: "Requests+area+comparison.pdf (142.7 kB)" and "Issue+comparison.pdf (196.2 kB)".



# Content & Delivery's Rollout



Three Team Types based off usage & expertise. Rollout was handled differently for each level.

- **High:** Power users, set up & manage projects and log time
- **Medium:** Upload documents, assigned tasks and log time
- **Low:** Range from being assigned tasks, download documents, use the calendar view to only logging time



## **Level: High**

Pilot ran for 2 months before training to the full team. Work instruction document was custom created for the team.

- Project Management Team (15 users)



# Content & Delivery's Rollout



## **Level: Medium**

Teams utilized a one-week Pilot. The group helped field questions for when the full teams transitioned.

Two teams had a demo meeting:

- Account Management Team (12 users)
  - 3 in Pilot
- Site Management Team (10 users)
  - 2 in Pilot

Communication was distributed to the team. It informed the team of the transition and highlighted a few key features:

- Creative Team (62 users)
  - 4 in Pilot



## **Level: Low**

Meetings were set up with each team. The time was spent highlighting new features, ensure teams transitioned without issues, report filters were still showing

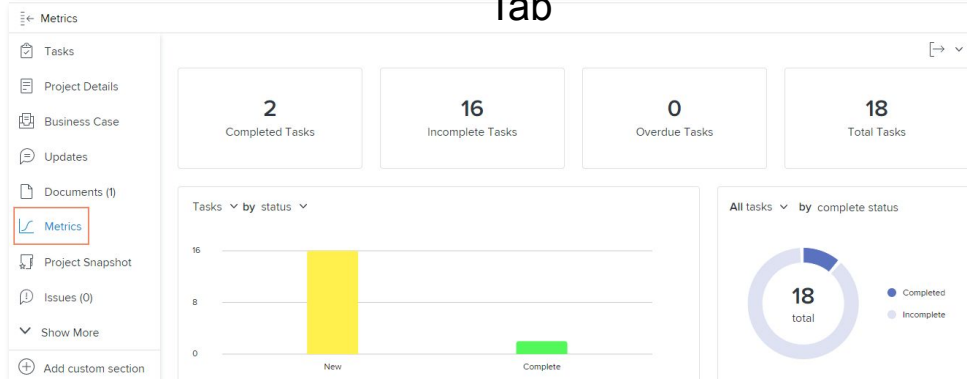
- Web Content Team (13 users)
- Email Team (13 users)
- Print Team (10 users)
- Agency Operations (5 members)



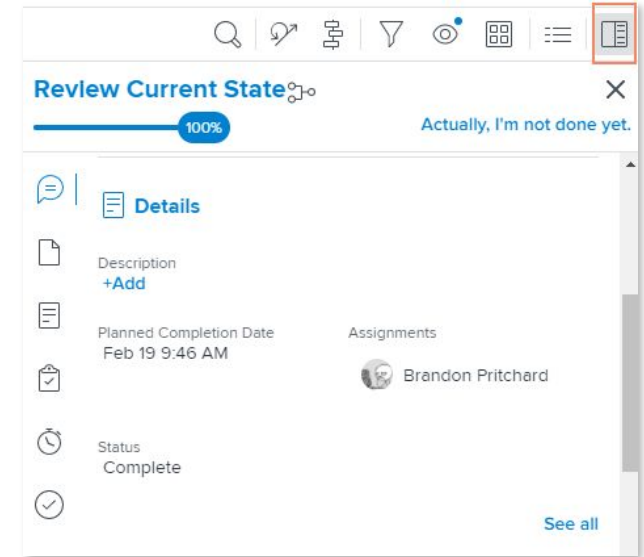
# Successes

- Users were asking to transition prior to the demos
- More User Friendly
- Pinned Pages
- Tailored Training and Documentation
- New/Updated Layout Templates
- Metrics and Task Details tabs

- Metrics Tab



- Task Details Tab



# Learnings

- Layouts transition, but not quite the same
- Admin can flip back and forth between Classic and NWE

- Home Screen Addtl Fields

CIC Website: Industry Videos\_BSMM\_

**Production Designer edits (if n...** ⋮ Done

Description	Project: Status	Planned Hours
<a href="#">+Add</a>	WIP	1.00
Planned Completion Date	Assignments	Status
Mar 25 5:00 PM		New
Planned Start Date	Duration	URBO Number *if applicable
Mar 25 11:00 AM	0.75 Days	<a href="#">+Add</a>

- Toggle between Classic and NWE



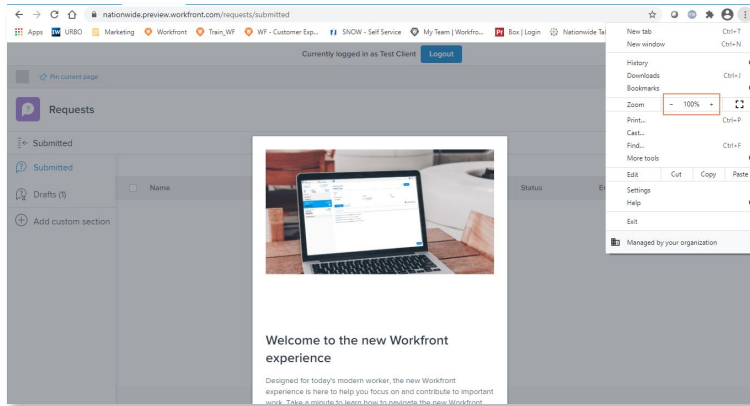
- Agile Story Addtl Fields

**Story Card**

Field	Display Name
Task » Planned Hours <span>ⓧ</span>	Actual Points
Field	Display Name
Type to filter items... <span>🔍</span>	
Field	Display Name
Type to filter items... <span>🔍</span>	

# Learnings

- New Users still need transitioned
- NWE pop up can be sticky
- Users may need to zoom out to close NWE pop up



- User report to identify new requestors (manually flip)

Client User Report

This report returns any new Requestors that logged in yesterday. [Show](#)

Details

[Edit](#) [Update](#) [Export](#) [More](#) [Filter](#)

<input type="checkbox"/>	Name	Email	Home Group
<input checked="" type="checkbox"/>	Raymond Gramke	gramkr1@nationwide.com	Requestor
<input type="checkbox"/>	Maxwell Conover	CONOV2@nationwide.com	Affinity... Management
<input type="checkbox"/>	Kannan Nagaraj	nagark3@nationwide.com	Annuit... anagement

The table shows a list of requestors. The 'Home Group' column for the first row is highlighted with a red box, and a dropdown menu is open, showing options like 'Requestor', 'Affinity... Management', 'Annuit... anagement', 'CEO & Staf... unications', and 'Content & Delivery'.

Set Filter Rules for your Report

User » Access Level ID Equal [Requestor](#)

AND

User » Entry Date Equal (Case Sensitive) \$\$TODAY-1d

+ Add another Filter Rule





# Q&A





## 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. The main content area features a welcome message and a large image of a group of people in a meeting. Below this, there are four featured cards: 'Take advantage of Virtual Leap', 'The new Workfront experience', 'Join the Community', and 'Network with Workfront Users'. Each card includes a brief description and a call-to-action button. At the bottom, there is a 'Community Discussions' section with a search bar and a 'Sort by' dropdown menu. To the right of the community discussions is a 'Product updates' section with links to 'What's new in Workfront' and 'What's new in Workfront Library'.

# Upcoming Virtual User Groups

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

- May 4: Leveraging the Group Admin Role
- May 11: Request Queues and Intake Forms

*Coming soon!*

- *May 18: Resource Management*
- *Jun 8: Training & Onboarding Users*
- *Jun 15: Reporting & Dashboards*
- *Jun 22: Transitioning to the New Workfront Experience*



Leap is now part of  
Adobe Summit—The Digital  
Experience Conference.

Adobe **SUMMIT**

A free virtual event April 27-28, 2021

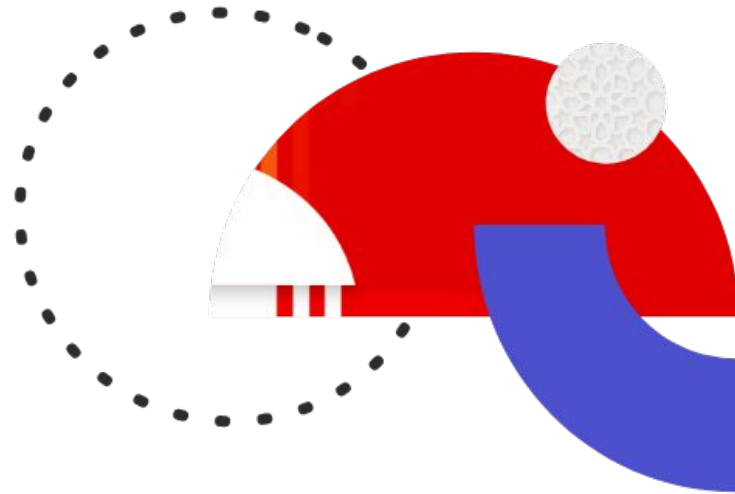
**SUMMIT**

# Network with other Workfront customers at Adobe Summit!

Connecting with like-minded individuals is one of the best parts of any event.

Connect with fellow Workfront customers (and anyone else attending Adobe Summit) 1:1 or in a small group with Braindate.

Visit [summit.adobe.com](https://summit.adobe.com) to learn more!



## Adobe Summit 2021

A free virtual event April 27-29. Join us for best practices, the latest insights, and inspiring ideas.

**Thank you.**

