



# Virtual User Group: Governance in Workfront

Tuesday, October 13, 2020

Today's Host



## Kristin Farwell

Sr. Manager, Customer Advocacy Programs  
Workfront

# Agenda

- 11:00 a.m. Welcome and Agenda
- 11:10 a.m. Establishing Governance in Workfront  
*Chris Berry, Senior Enterprise Solution Architect*
- 11:40 a.m. Group Discussion
- 12:25 p.m. Wrap-up Next Steps
- 12:30 p.m. Event Ends



PRESENTER



## Chris Berry

Senior Enterprise Solution Architect  
Workfront

# What is your most important reason for Governance?

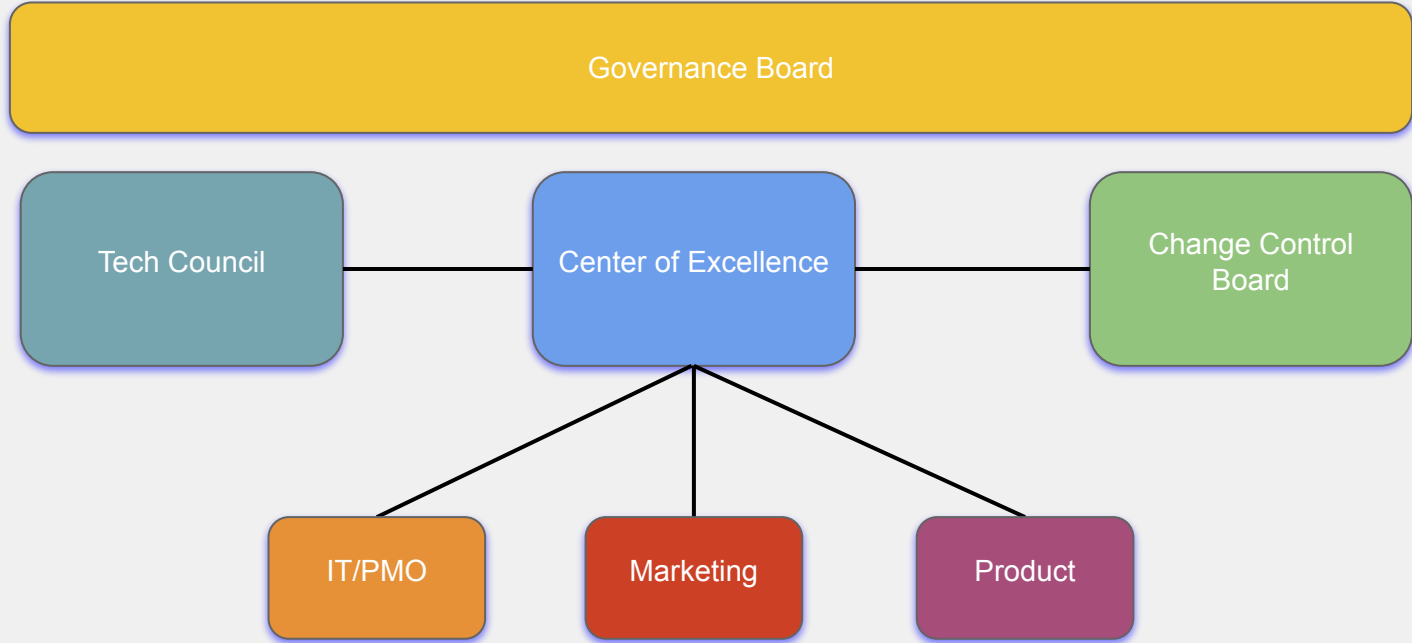
- Better Administration
- Co-existence
- Ability to Scale
- Best Practices
- Compliance
- Adoption
- ????

<Type your response in Zoom chat!>

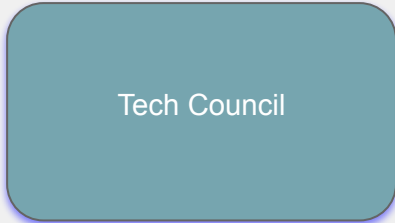
# Top Registration Topics

- Membership
- Documentation
- Best Practices
- Structure
- Starting Up

# Work Management Governance



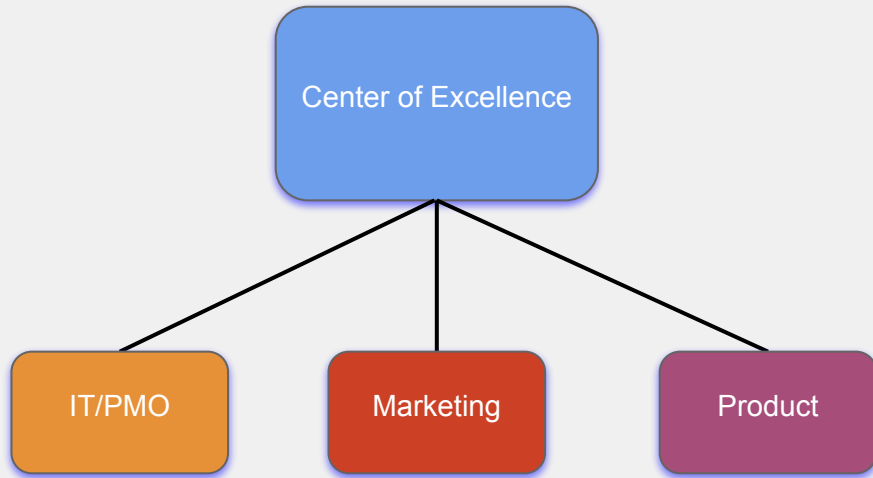
# Work Management Governance



Purpose
<ul style="list-style-type: none"><li>● Provides “tech stack” expertise</li><li>● Technical change management</li></ul>
Membership
<ul style="list-style-type: none"><li>● Enterprise/Group Admins</li><li>● Tech Platform Admins / SMEs</li></ul>



# Work Management Governance



Purpose
<ul style="list-style-type: none"><li>● Establishes standards</li><li>● Cultivates / Promotes best practices, shared learnings</li></ul>
Membership
<ul style="list-style-type: none"><li>● Community of Practice Leads</li><li>● SMEs</li><li>● Champions</li></ul>

# Work Management Governance

Change Control Board

## Purpose

- Provides platform change oversight
- Checks policy compliance

## Membership

- Enterprise Admin(s)
- Selected Business Leads

# Work Management Governance

Governance Board

## Purpose

- Establishes directional strategy
- Authorizes policy

## Membership

- Senior Leadership
- Governance Sub-Committee Reps
- Non-Platform Business Leaders

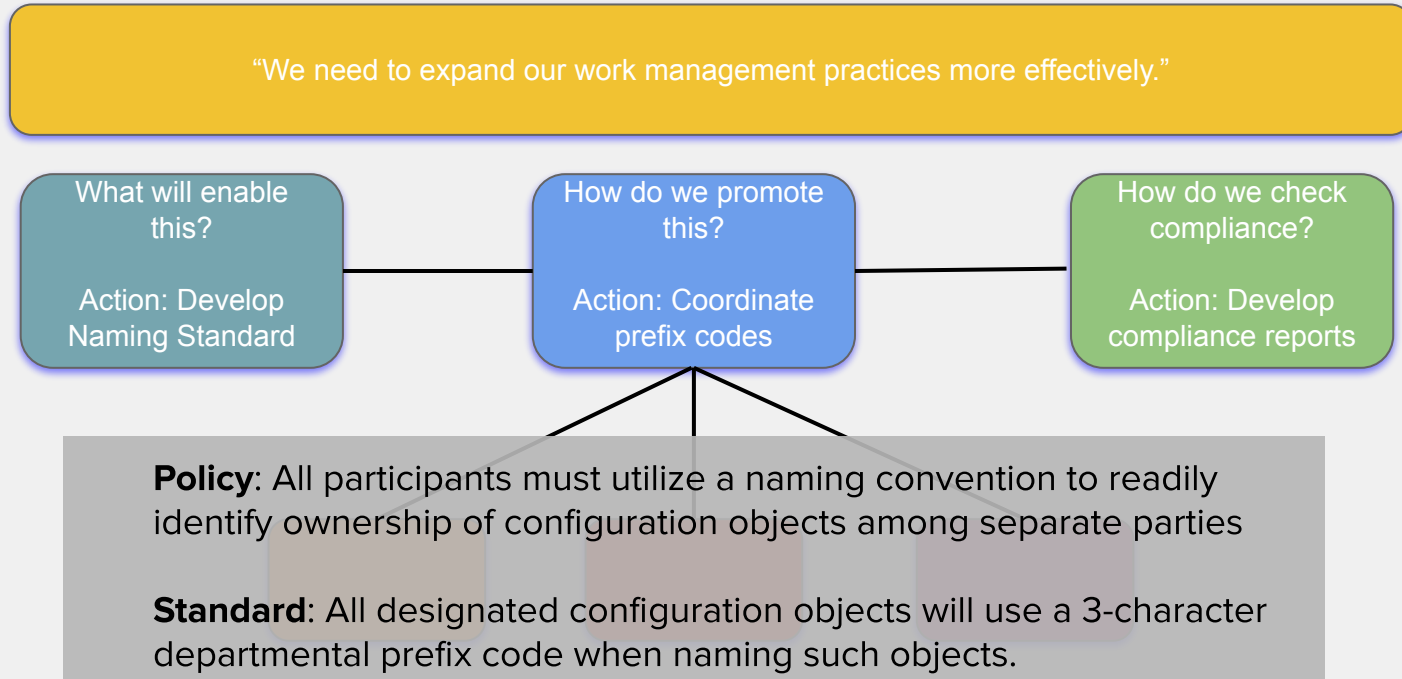
# Governance Policies

- All participants must utilize a naming convention to readily identify ownership of configuration objects among separate parties
- All participants must enforce a restricted administrative model to ensure privacy of information for all parties
- All participants must contain configuration changes within the scope of their context, or otherwise agreed to by all participants when all parties are impacted

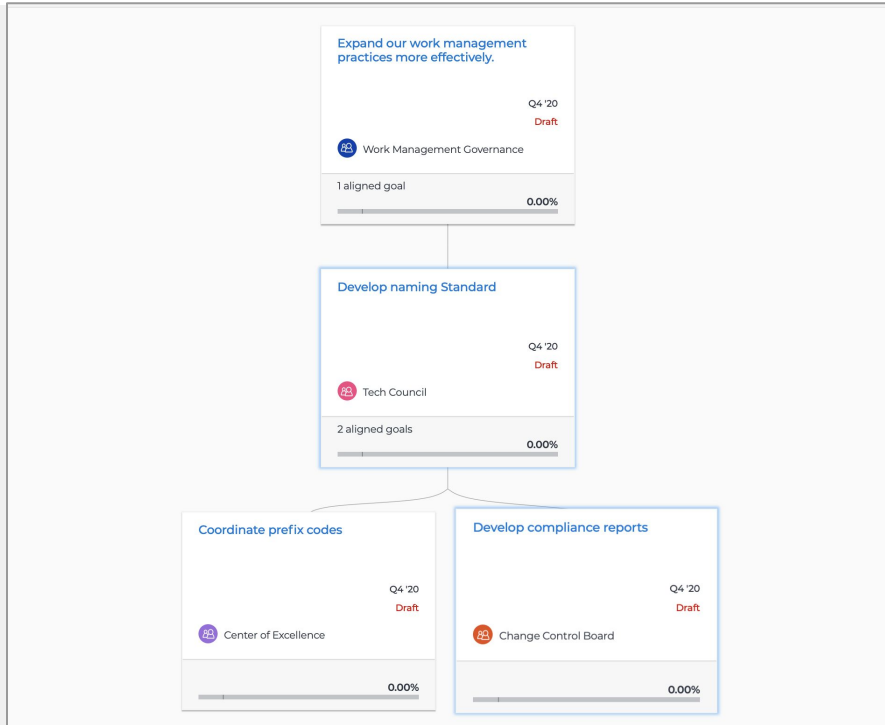
# Developing Strategic Policy



# Developing Strategic Policy



# Documenting & Driving Results



- Use available methods to self-document and provide direction
- Each governance team works to fulfill the objective within their focus.

# Other Documentation Methods

Item	Description	Method
Decisions	Decisions, outcomes from meetings	Issues Log
Discussion Topics	Submissions for meeting consideration	Request Queue
Policies	Formal policy statements	Governance Charter
Standards	Descriptive guidance for fulfilling policies	Operational Guides
Change Requests	Release / environmental changes for consideration before CCB	Request Queue



# Top Registration Topics - Recap

Membership

- Think of membership relative to focus groups

Documentation

- Leverage Workfront as much as possible

Best Practices

- Consider how policies help drive best practices

Structure

- Develop a model consistent with your maturity path

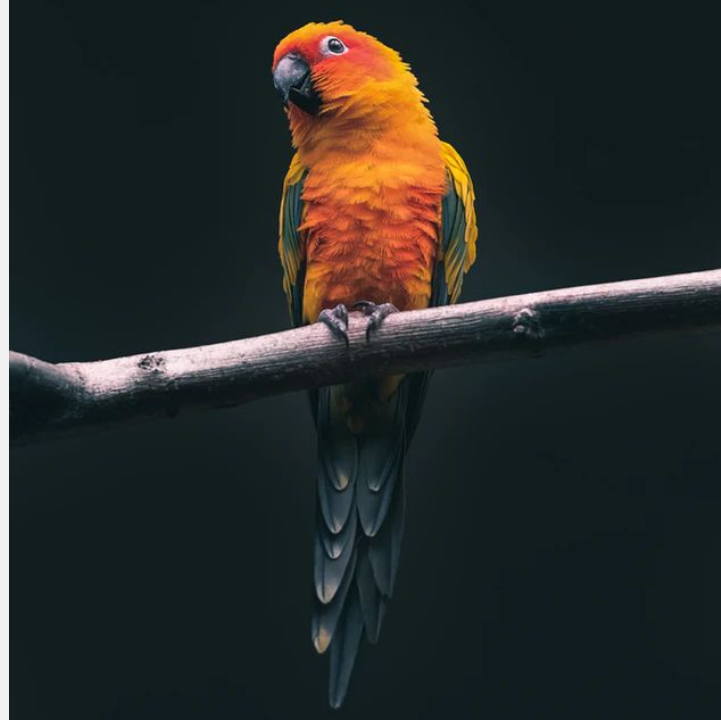
Starting Up

- Start small and scale appropriately, relative to your needs

**Questions?**

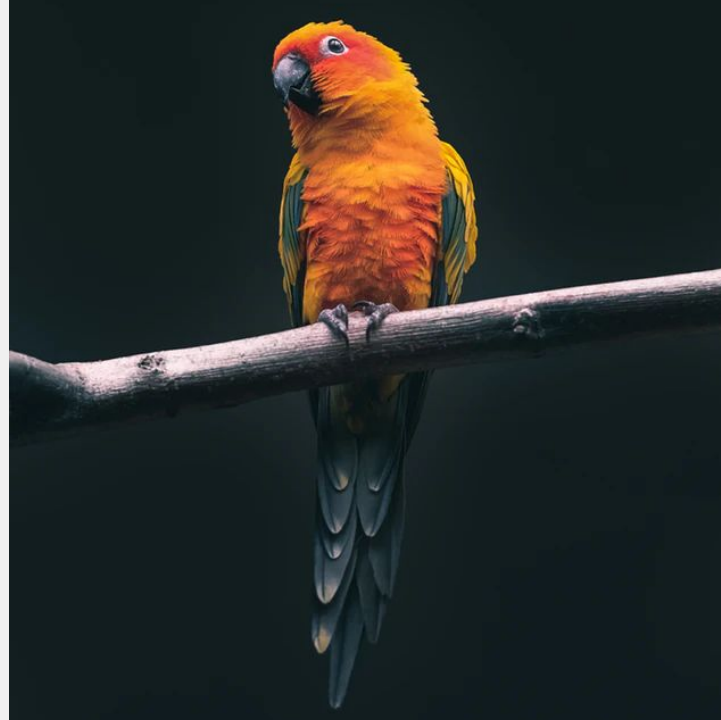
# “Birds of a Feather” Group Discussions

- Where does your organization have the most opportunity to improve in terms of governance in Workfront?



# “Birds of a Feather” Group Discussions

- What is an example governance process you’ve put in place in your organization that has made a big difference?





## 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

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We have 8 special edition Leap User groups for you to learn and connect with other Workfront users the week following Virtual Leap.

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Community Discussions

Question  Poll

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[For the Love of Pets](#)  
Workboldy · Kristin Farwell · June 8, 2020 at 7:50 AM 100 2 11

**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

## Virtual User Groups - Fall 2020

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

- Oct 27: Transitioning to the New Workfront Experience
- Nov 3: Workflows & Process
- Nov 17: Tracking Time in Workfront (i.e. Timesheets!)

*Coming soon!*

- *Reporting to Executives*
- *Integrations and Process Automation*



**Thank you.**



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