



Virtual User Group:

Transitioning to the new Workfront experience

Tuesday, October 27, 2020

Today's Host

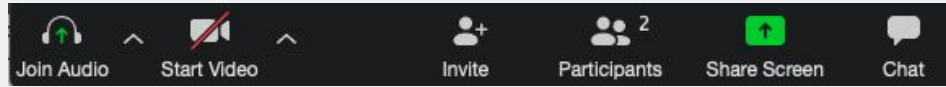


Mike Plunkett

Strategic Customer Success Manager
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 is your go to guilty pleasure playlist, song or band?**

Agenda

- 11:00 a.m. Welcome and Agenda
- 11:05 a.m. Transitioning to the new Workfront Experience
Jaimeson Wennerstrum, Workfront
- 11:35 a.m. Group Discussion
- 12:25 p.m. Wrap-up Next Steps
- 12:30 p.m. Event Ends



PRESENTER



Jaimeson Wennerstrum

Strategic Customer Success Manager
Workfront

Stats

Of registrants to this User Group...

→	40%	I know a bit, and we've started our transition
	30%	I know a little, but not enough to comfortably transition
	16%	I do not know much at all
→	14%	I know a lot, we've already transitioned

57%
of ALL customers have
started / finished their
NWE migration

What topics do you want to discuss?

Migration experiences from other customers

User adoption & change management

Changes in NWE vs Classic

Layout Templates

Transition best practices

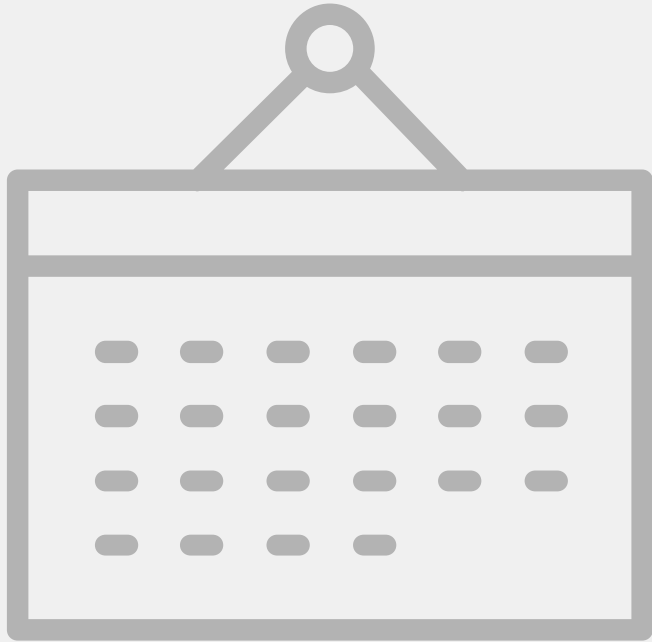
Why Transition *now* to the New Workfront Experience

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 end-of-life and eventual deprecation.

Timeline TBD

(but coming soon)

Changes in NWE vs Classic

Parity with Classic functionality in NWE

20.3

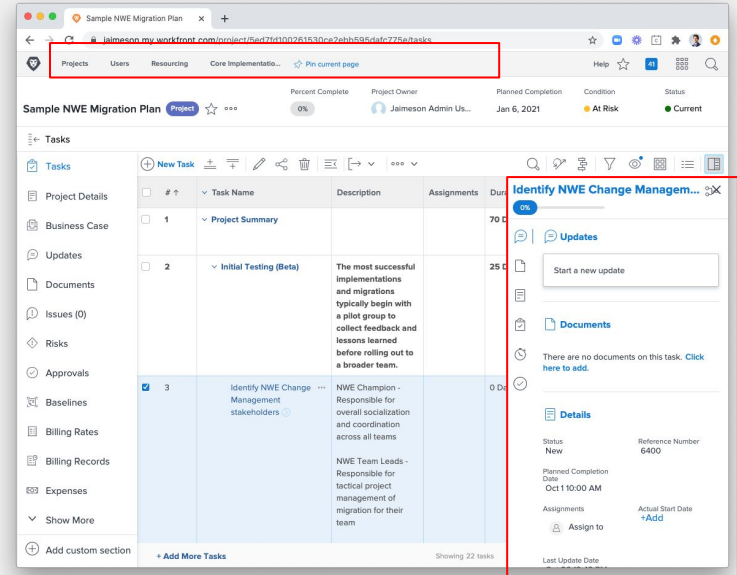
- Align & Scenario Planner in NWE only
- Setup & Configuration enhancements

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-20Y0x000000pVEAG?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

Purpose

Introduce the new Workfront experience to your users. Announce the new experience is ready for a select group of users to try out.

Audience

Early adopter team

Sender

Champion,
System Administrator

EMAIL SUBJECT LINE

The new Workfront experience is here

EMAIL CONTENT

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].

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.

[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:

- **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.

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

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 and
Group Admins could version

Used custom dashboards by
group to help monitor progress

3 months for 80% migration

Training & Enablement Materials

Powerpoint Training Guides

- [Collaborator](#), [Planner](#) and [Worker](#)

[Onboarding Guide](#)

- Pg 7 - high level UI overview
- Pg 18 - sample communication plan to end users about migration plan

Text mode to track [NWE Migration progress](#) on Workfront One

[New Workfront Experience](#) on Workfront One

Common Feedback

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

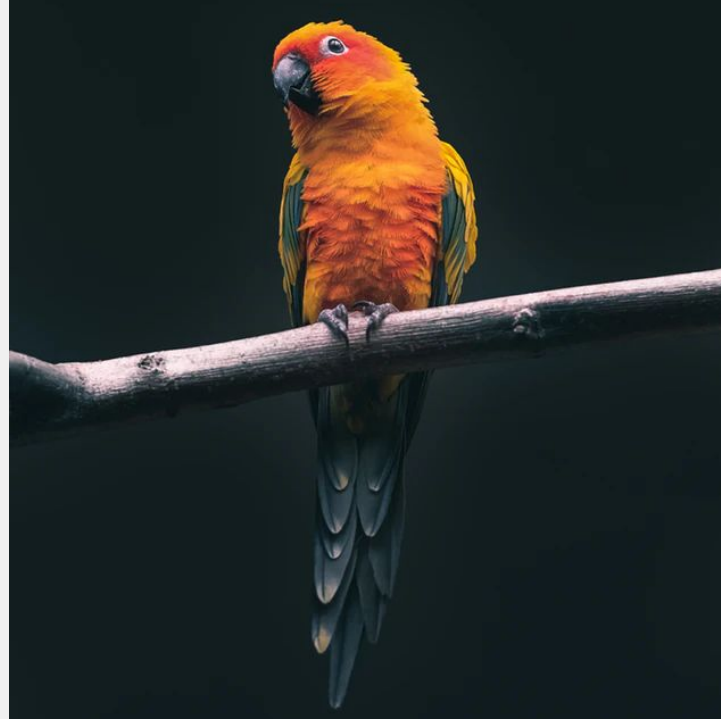
Change management and end user adoption - **maybe a flood of requests**

Layout Template configuration, training, deployment

Questions?

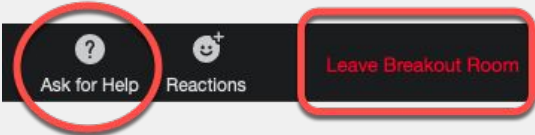
“Birds of a Feather” Group Discussions

- 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?



HOUSEKEEPING

In a moment, you will automatically be placed into a Zoom Breakout Room for group discussion.



If you have questions during the breakout, simply click **Ask for Help**, or **Leave Breakout Room**



When you see this message, it's time to **wrap up your discussion**.

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!*

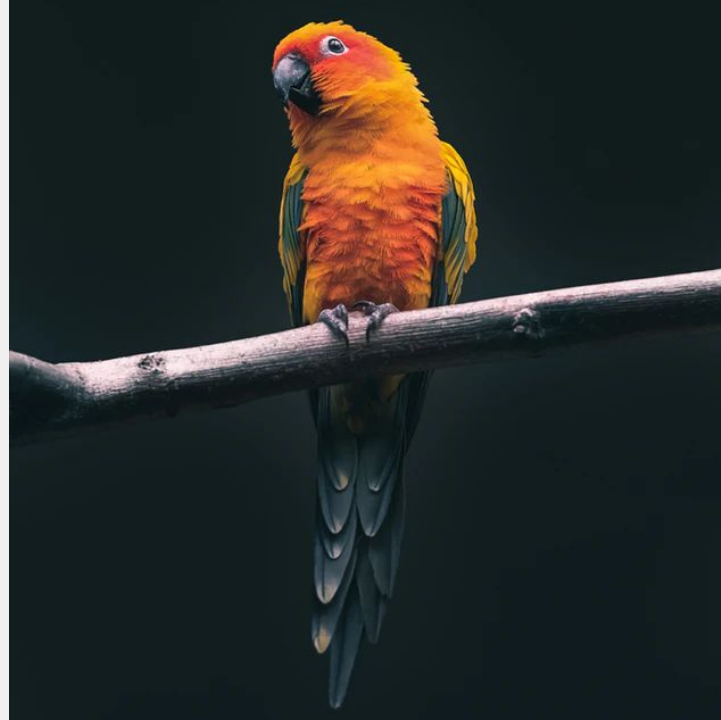
Welcome back!

What was a takeaway from breakout?

Was there an “aha” moment?

“Birds of a Feather” Group Discussions

- What questions do you have (for Workfront or for those who have already transitioned) about the new Workfront experience?
- What is your timeline for transition?





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".

Virtual User Groups - Fall 2020

one.workfront.com/events

- Nov 10: Workflows & Process
- Nov 17: Tracking Time in Workfront (i.e. Timesheets!)

Coming soon!

- *Reporting to Executives*
- *System Admin Best Practices - Enablement*
- *Advanced User Group - Integrations & Work Automation*



Thank you.

workfront[®]