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Virtual User Group: Onboarding & Adoption Best Practices

Tuesday, July 21, 2020

WELCOME!

We'll get started shortly.

Please ensure your microphones are muted.

Enable your camera, if possible.

Use the chat function if you have any questions.

@Workfront #workfrontug

Today's Host

Mike Plunkett

Sr. Customer Success Manager

Workfront

Agenda

11:00 a.m.	Welcome and Agenda
11:10 a.m.	Onboarding & Adoption Best Practices *Erica Foisy, Integrate*
11:40 a.m.	Group Discussion
12:25 p.m.	Wrap-up Next Steps
12:30 p.m.	Event Ends

Onboarding & Adoption User Group

Erica Foisy, Integrate

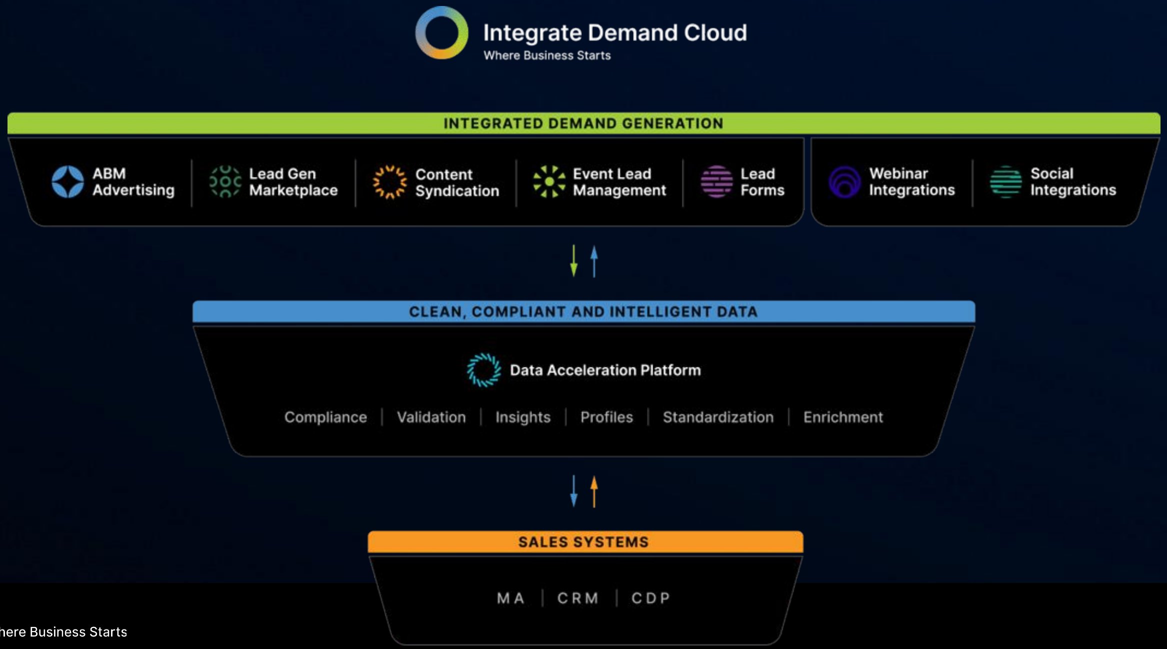
SESSION SPEAKER

Erica Foisy

Senior Customer Operations Manager
Workfront Admin

We are Integrate. For the past ten years, we've been working closely with B2B marketers to solve the inefficiencies and challenges with connected marketing solutions and innovative technologies.

As a result, we can generate more than $1 trillion in pipeline for our customers, every year.



Life Before Workfront

~~Resource Management~~

~~Data Influenced Decisions~~

~~Customer Visibility~~

Requirement Gathering

Offshore Partners

- Task Management
- Time Tracking
- Queue Management

Team Size: 18

Executives

- Resource Management
- Account/Customer Management
- Services Tracking

Technical Account Manager

- Workload Visibility
- Time Tracking

Team Size: 2

Campaign Services (Professions Services)

- Contract Management
- Time Tracking/Resource Management
- Queue Management

Team Size: 35

Customer Success Manager

- Time Tracking/Resource Management
- Customer Visibility

Team Size: 13

Customer Onboarding

- Contract Management/Visibility
- Time Tracking/Resource Management

Team Size: 6

Requirement Gathering

Resource Management

- ✔ Executives
- ✔ Professional Services
- ✔ Offshore Team
- ✔ Technical Account Manager
- ✔ Customer Onboarding
- ✔ Customer Success Managers

Contract/Task Management

- ✔ Professional Services
- ✔ Customer Onboarding

Task Queue

- ✔ Professional Services
- ✔ Offshore Team

Contract/Customer Visibility

- ✔ Executives
- ✔ Professional Services
- ✔ Technical Account Manager
- ✔ Customer Onboarding
- ✔ Customer Success Managers

Where do you start?

- ✔ Planning
- ✔ Team Size
- ✔ Team Needs
- ✔ Business Impact/Benefit

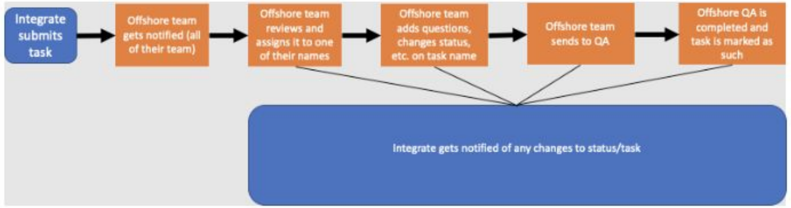
Integrate users can have option to select:
(this includes both Phase 1 and Phase 2 items. Items in Blue are for Phase 1)

1. Send task to Offshore Team - MS/MP
   a. These are different people on the Offshore Team. Dedicated resources for the Marketplace and Managed Services Team
   b. Some of these people will be on the other offshore teams
2. Send task to Offshore Team – Digital
   a. These are different people on the Offshore Team. Dedicated resources for the Digital Tasks Only
   b. Some of these people will be on the other offshore teams
3. Send task to Offshore Team – Customer X
   a. These are different people on the Offshore Team. Dedicated resources for the Customer X Only
   b. Some of these people will be on the other offshore teams
4. Send task to Integrate Specialist Team (Internal)
5. Send task to Integrate Digital Team (Internal)

Priority Descriptions:

- None = Request in planning stages/ongoing, no due date
- Low = Recurring request/request due in greater than 5 business days
- Normal = Recurring request/request due within 5 business days
- High = Due within two business days, end date cannot be adjusted
- Urgent = Due within 24 hours, end date cannot be adjusted

OFFSHORE TASK FLOW:



- Integrate will need access to see the offshore team's queue

Building

- ✔ Start with the end – what reporting do your teams need?
- ✔ Build ***FOR*** End Users
- ✔ Get Feedback
- ✔ Document process/decisions/feedback
- ✔ Include all parties
  - Needs vs. Wants

	Feedback Date	Your Name	What role is the feedback coming from? ( )	Feedback/Issues/Learning Moment	Erica Feedback
	11/13/19			I (as the CSM) should not see all the subtasks related to internal optimizations. Those are solely managed by the campaign managers.	11/14 - lets talk this through.. a little confused on what this means/how this would be setup
Thinsg we are trying to achieve:	11/13/19			It gets confusing to mix our CSM and CM tasks into one view on the project; Proposed solution would be to have the CSM submit a request and the Internal Advertising Team creates the project/or adds the task to the existing project (IO)	11/14 - are you suggesting that all tasks are sent to you (internal team) from the CSM and your team converts that request into a project?
Determine if codes/tasks/project configurations that we have outlined work for all delivery teams	11/13/19			on the marketplace side- who assigns tasks to a CM?	11/14 - CMs are the one assigning the tasks.. the CSM does not own any of this process.. CMs sometimes do the work, and sometimes send the work to the internal speciast team and sometimes to Lister, but
Determine if all the reporting makes sense (by product, by project, by customer, by task)	11/13/19			For joint Integrate Advertising and Marketplace IO's- do we share a project or separate?	11/14 - excellent question. Might need to brainstorm this
In addition to project-based tasks, can teams also easily account for recurring tasks (non-customer related work)	12/2/19			If an RFP needs to be requested, the account name does not exist in WF since they are not a customer yet. How do we track this?	1. Leave the current lookup field for Account Name and add an option that says "RFP - See Details" 2. If they select RFP from the drop down - allow an additional field to show "RFP Account Name" and it will be open text 3. If it turns into a real customer, you will be able to change the "RFP - See Details" to the actual account name once its added to WF 4. If it doesn't turn into a real customer, you will still have an account name field to show for reporting
Is it easy to adjust/add/change based on unexpected needs	12/2/19			Doesn't appear we are able to bulk download attachments in the "Documents" tab	This has been resolved.. There is a download all button
	12/2/19			When completing a task, we have found it beneficial to write an update tagging the requester and our internal team so that everyone is notified	
	12/4/19			What should we do with a single task that applies to multiple SO#'s/same client? For example- a client wants to make a change across all active campaigns/all contracts	
	12/5/19			On the Project Auburn Update call today it was decided that the process of submitting requests/issues, and then the Internal Advertising team wrapping those up into Projects (IO's) was clunky and left a lot of room for human error. The new proposed workflow is that have Project Templates that consist solely of the items they request out to Ops. When submitting a task to Ops with this workflow, they would simply choose the task, load all documents, fill out any custom forms, due dates, etc and MOVE the task to the correlating Ops Project. This allows the to only see the tasks that are applicable to them/allows them to quickly assign out the appropriate	

Training and Roll Out

- ✔ Rolled out in Phases
  - Task Queue
  - Project from Templates
  - Time Tracking
- ✔ User Guide
- ✔ Knowledge Base
- ✔ Office Hours
- ✔ PUGS

Customer Operations / Workfront Knowledge Base

PUGS

Created by Erica Foisy

Our Mission Statement

The PUGS (Power User Group) consists of front-line team members from OCMs, CMs, CS and other support functions to grow our overall knowledge base of Workfront, increase our internal support network, and provide direct user feedback to CS Operations.

Benefits

- **Develop more Subject Matter Experts** to support peer groups with basic questions
- **Improve direct communication** with trusted team members to cascade key information
- **Increase first-hand user testing** of updates and enhancements prior to release

Responsibilities (~2-4 hr/month)

- **Attend monthly 1 hour meeting** to discuss key issues, enhancement schedule and communication needs
- **Provide peer-to-peer guidance** how to use Workfront
- **Submit User Support Requests** on behalf of peers
- **Distribute and cascade** information or communications
- **Volunteer to testing/feedback** of product enhancements

Why would you want to be come a PUG?

- Gain experience in Workfront
- Enhance your leadership skills as a trusted advocate for your team
- Help shape product enhancements

Interested in becoming a PUG?
Enter your name here

Who do I go to for questions?

PUGS

- General Questions on Workfront Projects
- Questions on Time Tracking
- Feedback/Process Improvements

Questions should be sent in the Slack Channel *#Workfront*

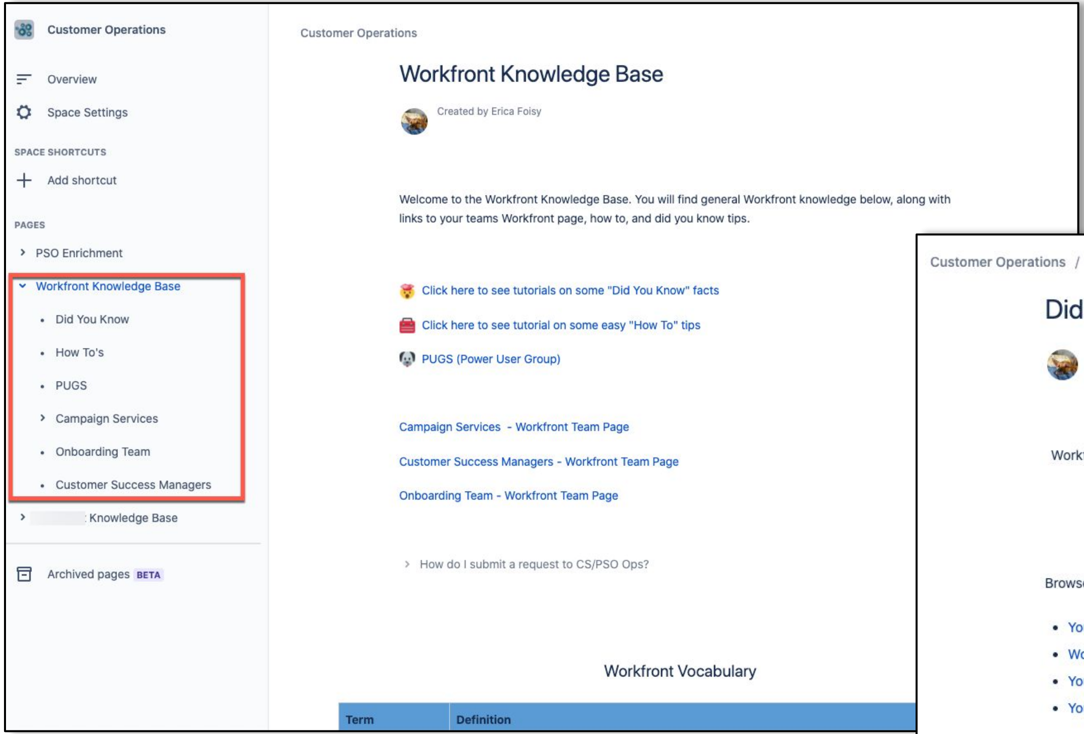
This helps any of out PUGS help answer but also allows other users to learn incase they have similar questions. If you do not see the slack channel, let myself or any of the PUGS know.

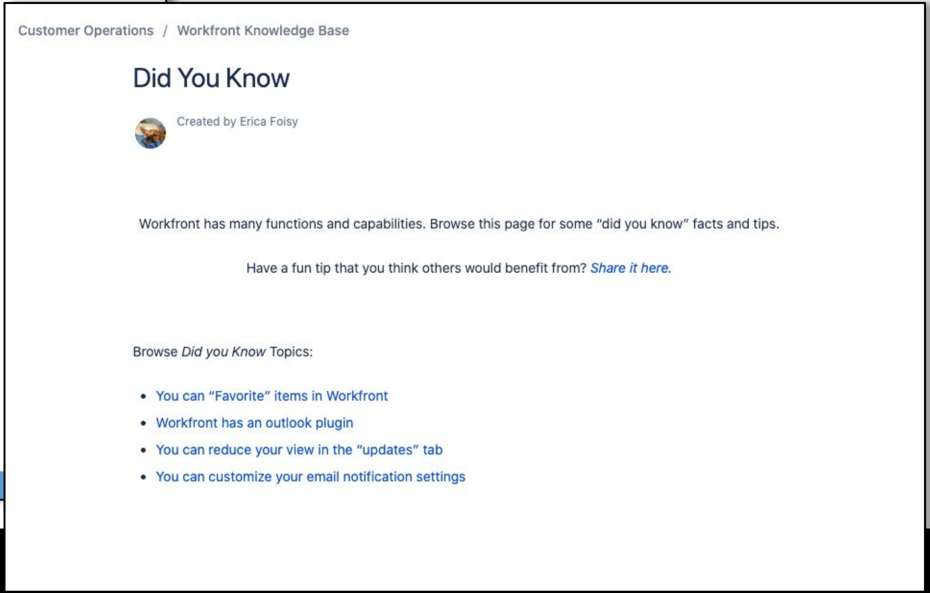
ADMIN

- Issues inside Workfront regarding setup, view, something is not working as expected
- My view is not correct/not seeing something I should
- Product related questions/issues

Issues/Admin Questions should be sent through request queue. Please be as descriptive as possible and provide screenshots where necessary. The more descriptive you are, the quicker the issue can be resolved.

Knowledge Base





User Guide

V1.0 - February 2020

INTEGRATE

Workfront User Guide

For Internal Use Only

This document is intended for Integrate employees only and should not be distributed to anyone outside of Integrate.

Table of Contents

V1.0 - January 2020

INTEGRATE

Workfront User Guide

Assigning a Task

1. To assign a task, click on the task name. There is a description for each task to help you identify the purpose of the task.
   <u>**Note**</u>: *Parent Task should **not be assigned.** Parent tasks are shown in bold and have a note in the description outlining that the task is a parent task.*

2. Once you open a task, you will update the **Overview** and the **Custom Form**. Every task has a Custom Form that MUST be filled out. To get started, navigate to the Task Details tab.

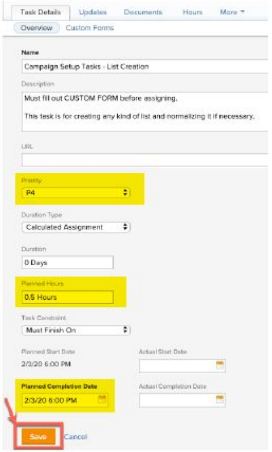
   a. **Overview**: Click on "Edit Overview" and update the following fields.

      i. **Priority**: Update the Priority for the task using the P1 – P5 levels. All tasks will default to a P4 rating.

      ii. **Planned Hours**: Update how long it should take for the assigned user to complete the task. You can enter either the decimal version of 1 hour or you can type it in minutes and Workfront will convert it for you.

      iii. **Planned Completion Date**: Update this date and time to the date that the task is due. Be sure that you are updating the time as well.
      If the task is recurring, this date should be the date that the task should no longer be completed.

      iv. **Click Save**

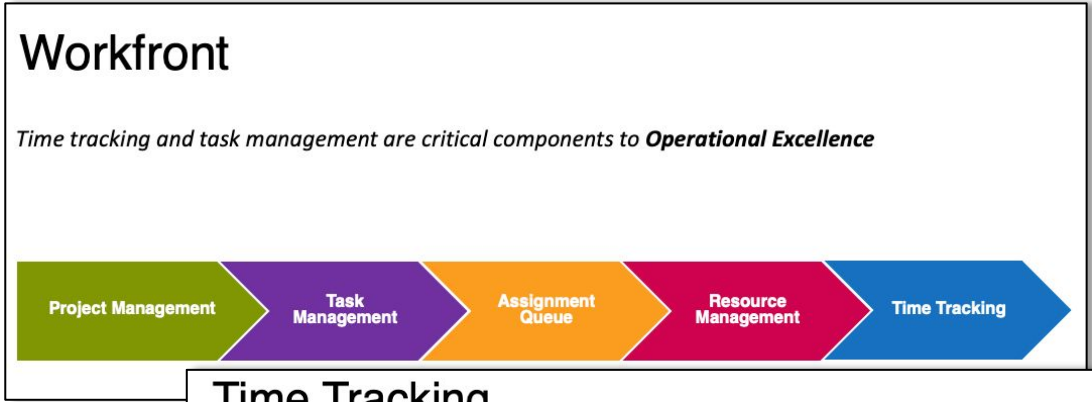


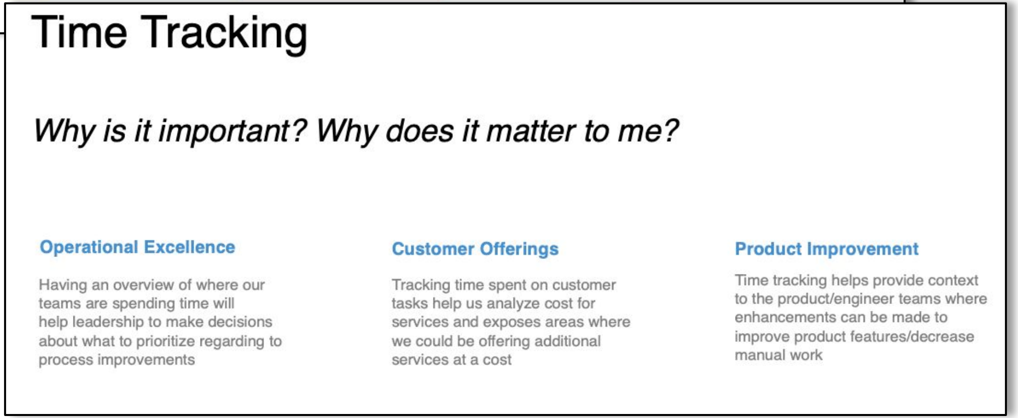
PRO TIP: If the planned completion date is grayed out, change the "Task Constraint" to "Must Finish On".

User Adoption

User Adoption

- ✔ State the goal of using Workfront
- ✔ Remind the users what they will get out of it





User Adoption

Workfront Pulse Check

Hi Erica, when you submit this form, the owner will be able to see your name and email address.

* Required

1. What team are you on? *

- Integrate Advertising
- Operational Campaign Manager
- Campaign Manager
- Campaign Specialist
- Management (Manager, Director, VP)

2. From your perspective, did you feel supported during the launch of Workfront? *

I did not feel supported during the rollout ☆ ☆ ☆ ☆ ☆ I felt supported and comfortable as questions or for help

3. Please rate the below on your comfort level: *

	N/A to my role	Would like more help/training	Somewhat comfortable but would benefit from more help	Moderately Comfortable	Very comfortable
Creating Project from Templates	○	○	○	○	○
Assigning Tasks from within a Project	○	○	○	○	○
Filling out the Custom Forms (including the Additional Task Details)	○	○	○	○	○
Using the Updates Tab	○	○	○	○	○
Assigning work from the Request Tab	○	○	○	○	○
Changing the Task/Request Status	○	○	○	○	○
Time Tracking on the Task/Request	○	○	○	○	○
Time Tracking using the Timesheet	○	○	○	○	○
Updating Task Details (including new due date, priority, instructions)	○	○	○	○	○
Re-Opening a Task after it has been closed/Completed	○	○	○	○	○
Completing a Project	○	○	○	○	○
How to check when your tasks are In Progress or Completed	○	○	○	○	○

4. Is there anything that has already been taught that you would like to learn more on/reviewed?

Enter your answer

5. Have you learned anything or are you doing anything that others would benefit from learning?

Enter your answer

6. What would you like to learn more about?

Enter your answer

7. Is there anything else that you would like to share?

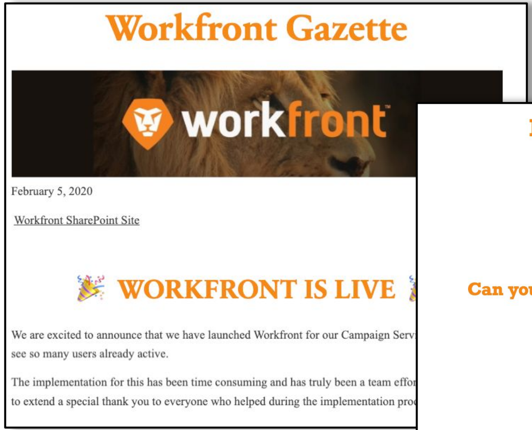
Enter your answer

Submit

Newsletters/Personalization

HEDGEHOG CATALOG

- ✔ Celebrate small wins
- ✔ Communication and swag
- ✔ Involve the teams, make it fun



Workfront Gazette

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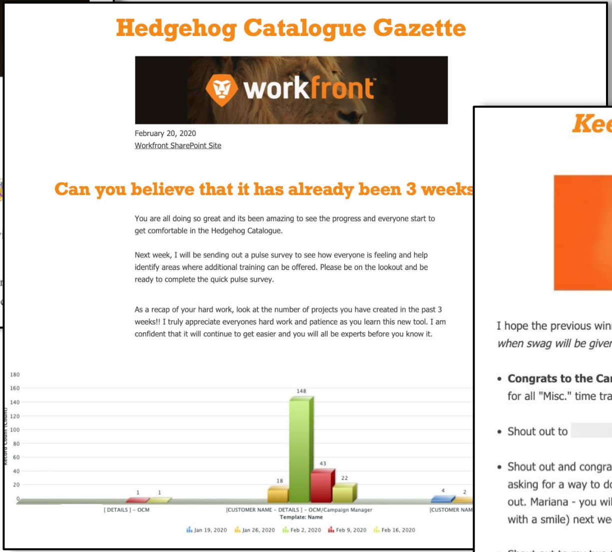
February 5, 2020

Workfront SharePoint Site

WORKFRONT IS LIVE

We are excited to announce that we have launched Workfront for our Campaign Serv
see so many users already active.

The implementation for this has been time consuming and has truly been a team effor
to extend a special thank you to everyone who helped during the implementation proc



Hedgehog Catalogue Gazette

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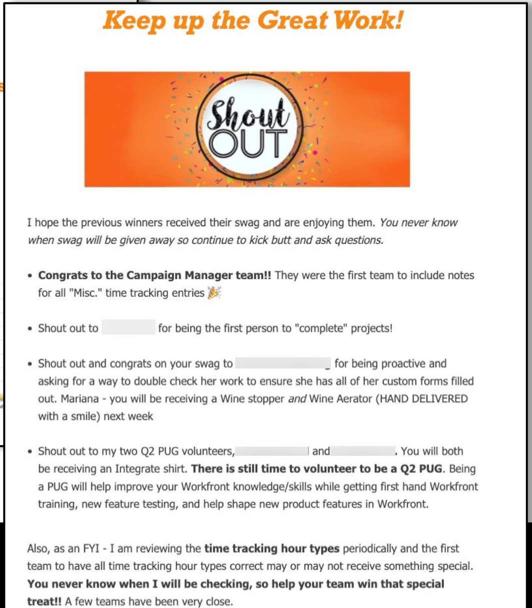
February 20, 2020
Workfront SharePoint Site

Can you believe that it has already been 3 weeks

You are all doing so great and its been amazing to see the progress and everyone start to get comfortable in the Hedgehog Catalogue.

Next week, I will be sending out a pulse survey to see how everyone is feeling and help identify areas where additional training can be offered. Please be on the lookout and be ready to complete the quick pulse survey.

As a recap of your hard work, look at the number of projects you have created in the past 3 weeks!! I truly appreciate everyones hard work and patience as you learn this new tool. I am confident that it will continue to get easier and you will all be experts before you know it.



Keep up the Great Work!

Shout OUT

I hope the previous winners received their swag and are enjoying them. *You never know when swag will be given away so continue to kick butt and ask questions.*

- **Congrats to the Campaign Manager team!!** They were the first team to include notes for all "Misc." time tracking entries 🎉
- Shout out to for being the first person to "complete" projects!
- Shout out and congrats on your swag to for being proactive and asking for a way to double check her work to ensure she has all of her custom forms filled out. Mariana - you will be receiving a Wine stopper *and* Wine Aerator (HAND DELIVERED with a smile) next week
- Shout out to my two Q2 PUG volunteers, and . You will both be receiving an Integrate shirt. **There is still time to volunteer to be a Q2 PUG**. Being a PUG will help improve your Workfront knowledge/skills while getting first hand Workfront training, new feature testing, and help shape new product features in Workfront.

Also, as an FYI - I am reviewing the **time tracking hour types** periodically and the first team to have all time tracking hour types correct may or may not receive something special. **You never know when I will be checking, so help your team win that special treat!!** A few teams have been very close.

What would I have done differently?

- Hands on quickly with some example or practice work
  - There's a lot of buttons, options, dropdowns and selections in WF that are easy to nod your head in a training and think you understand, but until you jump in to make something you realize just how little you retained
- Kickoff with a physical overview of Workfront and examples of how people are using (so many ppl are visual)
- Different training sessions per team instead of everyone together
- A few different sessions – spread out instead of doing everything at once
- Prioritizing the fundamentals first and then sprinkling in best practices or preferences later, there would be a greater chance for full retention down the road

Do

- ✔ Build processes to match business needs
- ✔ Start with the end first
- ✔ Develop change management plan
  - change champions
  - communication, learning modules
- ✔ Reinforce Knowledge over time
  - celebrate small wins
  - did you know?
- ✔ Keep the training materials digestible
- ✔ Know your audience and implement based on

Do Not

- X Underestimate user input or assume what is best for the users
- X Make immediate changes without consideration of changes to all stakeholders/users/teams (technical and process)
- X Own process problems that are best resolved between other stakeholders
- X Ignore maintenance of your support documentation and sandbox environment
- X Be afraid to contact Workfront Support
- X Be afraid to speak up with ideas

Questions?

"Birds of a Feather" Group Discussions

- Share the highlights of your onboarding process. How do new users get access to Workfront? How are they trained?

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“Birds of a Feather” Group Discussions

Let’s Switch Groups!

- How do you ensure ongoing adoption of your users? Where are you seeing the best success, where are your biggest challenges?

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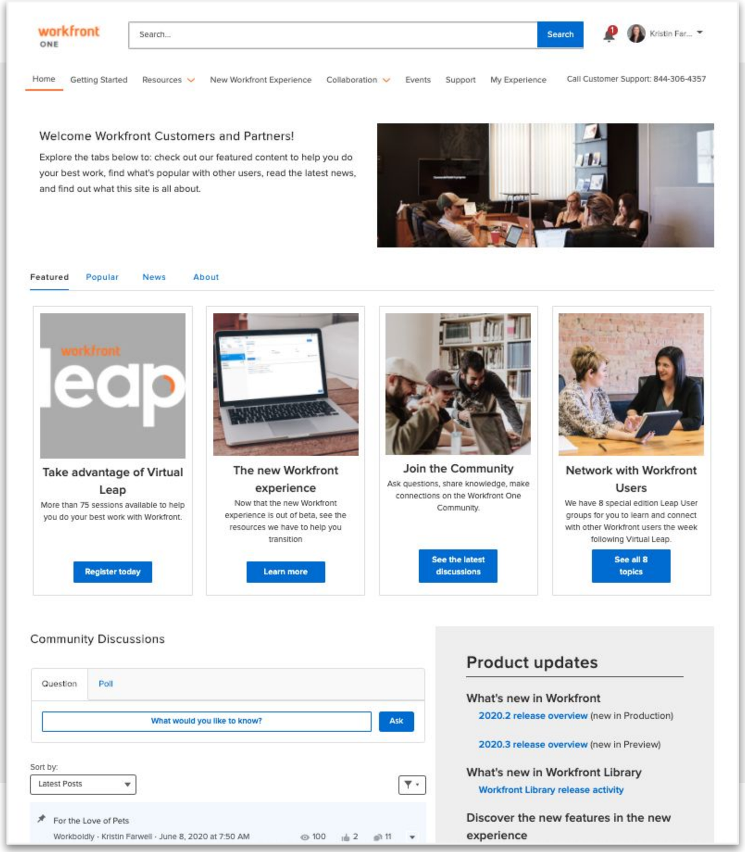
Wrap-up and Next Steps

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



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Virtual User Groups - Summer 2020

one.workfront.com/events

- July 28: Advanced: API & Integrations
- Aug 11: Creative Agencies & Marketing: Workfront Proof
- Aug 18: Workfront in Healthcare
- Aug 25: Change Management

Coming soon!

- *Sept 15: Agile in Marketing*

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Dive deeper into Leap!

- Over the coming weeks many of our fantastic Leap speakers will be starting a thread on the Community where you can ask them any questions about their sessions.

- Visit the “All Discussions” group regularly over the coming weeks to see that latest conversations!

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Thank you.

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