workfront®

Virtual User Group:
Creative Agencies and Marketing - Workflow & Process

Tuesday, July 14, 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

Kristin Farwell

Sr. Manager, Customer Advocacy Programs

Workfront

workfront

Agenda

11:00 a.m.   Welcome and Agenda

11:10 a.m.   How to Engineer Efficient Marketing Processes
              Linnie Ciepolowski, Esri

11:40 a.m.   Group Discussion

12:25 p.m.   Wrap-up Next Steps

12:30 p.m.   Event Ends

workfront

SESSION SPEAKER

Linnie Ciepielowski

Project Manager, Esri

2019 Lion Award Winner:
Change Leader

End-to-End: How to Engineer Efficient Marketing Processes

workfront

Key Phases for "End-to-End" Process Creation:
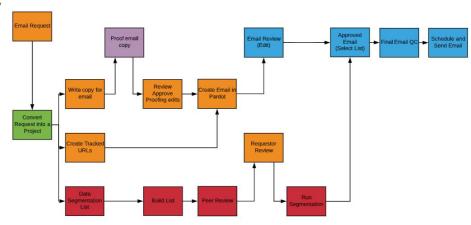
| 1. Defining | 2. Implementing | 3. Measuring |

Defining End-to-End Processes

- An "end-to-end" process captures all steps necessary to produce a deliverable

- Using end-to-end processes improves visibility into the work being done, resulting in efficiencies and reducing duplicative efforts

- "If you can't measure it, you can't improve it."

  – Peter Drucker

Sample Process | Email Workflow

Collaborative Process Creation

- Establish a Workfront Governance Committee

- Stakeholder Personas: (1) Team Members, (2) Project Managers, and (3) Requestors

- Take notes for Layout Templates, Reports and Dashboards

Implementing End-to-End Processes

- Esri Marketing's Workfront Implementation Story

- Prosci ADKAR Model of Change Management

- Top Technical Tips for Process Implementation

Esri Marketing's Workfront Implementation Story

BEFORE...

74+

Legacy request forms (in 18+ different systems) used prior to implementing Workfront.

AFTER...

1

One system, containing 200+ workflows for teams within Esri Marketing and partnering departments (to date).

- ✓ Graphics Request System (74 forms)
- ✓ Web Request System
- ✓ Asana
- ✓ Marketing Materials Request Form (MMRF)
- ✓ Aprimo
- ✓ Trello
- ✓ Copyediting Request Form
- ✓ On-Site/Internal Event Request
- ✓ Production Center Request Form
- ✓ YouTube Upload Request Form
- ✓ Video/Photography Production Request Form
- ✓ Marketing Operations Request Form
- ✓ Print Materials Authorization Form (PMA)
- ✓ Seminar Request Form
- ✓ Marketing Division Purchase Approval Form
- ✓ Tradeshow Request System (TRS)
- ✓ Survey Request Form
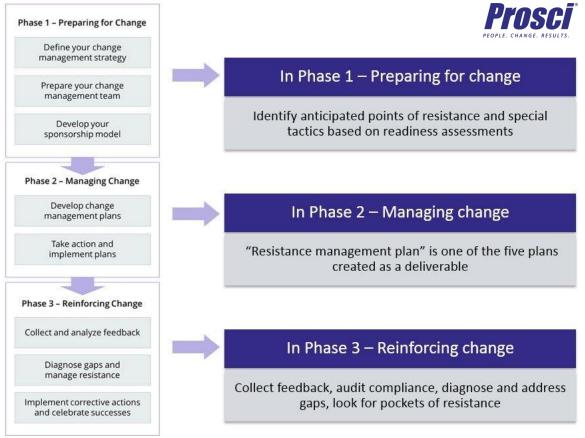- ✓ Digital Retrieval Request Form

leap

workfront

Prosci ADKAR Model of Change Management

- What is Change Management?

- The Prosci ADKAR Model

- The Three Phases of Change Management

Prosci's 3-Phase Change Management Process

Phase 1 – Preparing for Change
- Define your change management strategy
- Prepare your change management team
- Develop your sponsorship model

Phase 2 – Managing Change
- Develop change management plans
- Take action and implement plans

Phase 3 – Reinforcing Change
- Collect and analyze feedback
- Diagnose gaps and manage resistance
- Implement corrective actions and celebrate successes

In Phase 1 – Preparing for change

Identify anticipated points of resistance and special tactics based on readiness assessments

In Phase 2 – Managing change

"Resistance management plan" is one of the five plans created as a deliverable

In Phase 3 – Reinforcing change

Collect feedback, audit compliance, diagnose and address gaps, look for pockets of resistance

Top Technical Tips for Process Implementation

- Create a "Template Planning View" to elevate data relevant to process creation

    We create columns for Task Name, Task Description, Approval Process, Assignments, Duration, Planned Hours, Predecessors, Task Constraints and a custom field "Template Task Notes"

- Standardize task names/descriptions across project templates to simplify reporting

- Use a custom field to group similar project templates together according to project type (EX: Web, Email, Video)

- Evaluate proof approvals (Proof HQ) vs. object-based approvals

Top Technical Tips, Continued:

- If you're using object-based approvals, always create global approval processes for your templates. Private approval processes will not update if you change Approval Settings in Setup menu

- Create a parent task for all tasks in your project template to quickly summarize the duration, planned hours, and projected dates for your project

- Use cross-project predecessors for projects with interdependent tasks

- Create an Admin-only project custom form and add it to every template. This will be your project calculated fields library.
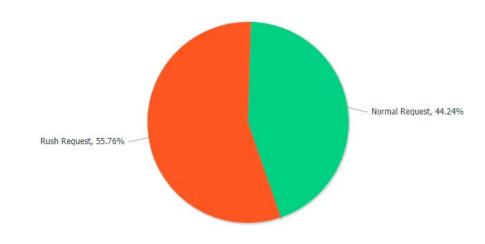
workfront

PART III

Measuring Your Processes

- Identifying and Reporting on Key Performance Indicators (KPIs)

- Optimizing Your Objects for Visual Reporting

- User Surveys, Project Retrospectives, & Calculated Fields

Identifying and Reporting on KPIs

- **KPIs = Key Performance Indicators**

- **Potential KPIs for Marketing teams:**

  *Go to Market Velocity

  *Volume of Rush vs. Normal Requests

  *Number of Proof Revisions

  *Volume of Issues Logged to Projects

  *Request Processing Time

  *On Time vs. Late Projects

- **Use calculated fields to measure KPIs**

Normal Request, 44.24%

Rush Request, 55.76%

Optimizing Your Objects for Visual Reporting

- Create hidden Calculated Field custom forms to organize calculated fields for each object

*Add the Project version to every template

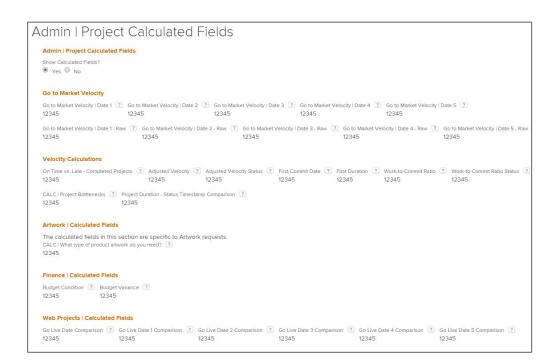***Add the Task version to every template task**

*Add the Issue version to every queue topic

*Add to every User profile during onboarding

*Caution: custom forms automatically re-share with the author's Home Group. Use a dummy user account and/or Home Group to avoid this.

Run this report with the Access Rights of:

   👤 Linnie Ciepielowski

Admin | Project Calculated Fields

Admin | Project Calculated Fields

Show Calculated Fields?
⦿ Yes ◯ No

Go to Market Velocity

Go to Market Velocity | Date 1 ?   Go to Market Velocity | Date 2 ?   Go to Market Velocity | Date 3 ?   Go to Market Velocity | Date 4 ?   Go to Market Velocity | Date 5 ?
12345   12345   12345   12345   12345

Go to Market Velocity | Date 1 - Raw ?   Go to Market Velocity | Date 2 - Raw ?   Go to Market Velocity | Date 3 - Raw ?   Go to Market Velocity | Date 4 - Raw ?   Go to Market Velocity | Date 5 - Raw ?
12345   12345   12345   12345   12345

Velocity Calculations

On Time vs. Late - Completed Projects ?   Adjusted Velocity ?   Adjusted Velocity Status ?   First Commit Date ?   First Duration ?   Work-to-Commit Ratio ?   Work-to-Commit Ratio Status ?
12345   12345   12345   12345   12345   12345   12345

CALC | Project Bottlenecks ?   Project Duration - Status Timestamp Comparison ?
12345   12345

Artwork | Calculated Fields

The calculated fields in this section are specific to Artwork requests.
CALC | What type of product artwork do you need? ?
12345

Finance | Calculated Fields

Budget Condition ?   Budget Variance ?
12345   12345

Web Projects | Calculated Fields

Go Live Date Comparison ?   Go Live Date 1 Comparison ?   Go Live Date 2 Comparison ?   Go Live Date 3 Comparison ?   Go Live Date 4 Comparison ?   Go Live Date 5 Comparison ?
12345   12345   12345   12345   12345   12345

Find Objects Missing the Calculated Field Form

- Create reports to identify objects missing the calculated field custom form

- Caution: Do not set up the Task version of this form as a "Task Default Custom Form" on your projects, if the form has restricted access

- Caution: Batch-editing tasks/issues in iterations may push updates to other users. To avoid this, temporarily disable the global notification settings shown here:

Text Mode Code for Report Filter:

EXISTS:1:$$EXISTSMOD=NOTEXISTS

EXISTS:1:$$OBJCODE=OBJCAT

EXISTS:1:categoryID=Your form ID here

EXISTS:1:objID=FIELD:ID

✓ Project Progress Change to Project Owner

✓ Project Progress Change to Project Sponsor

User Surveys and Project Retrospectives

- Assign post-project activities to the Project Manager

- Send a survey to the Project Sponsor

- Complete a "Project Retrospective" custom form

    *Bottleneck Themes: Content Delay, Approval Delay,

Process Not Followed, etc.

- Use the results to inform process changes

Project Retrospective

Project Bottlenecks
+Add

Did the internal project team work effectively together?
+Add

Did the project team work effectively with stakeholders?
+Add

Did the deliverable meet the project sponsor's expectations?
+Add

Did the project meet its goals?
+Add

Did the project team produce high-quality work?
+Add

What important decisions were made during this project?
+Add

What can we do better next time?
+Add

Project Notes
+Add

workfront

Project Calculated Fields

Go to Market Velocity

CONCAT(WEEKDAYDIFF(Entry Date,Go to Market Date 1*),'' Business Day(s)'')

Go to Market Date 1 is a project custom field we ask project managers to populate at the end of the project. This is only necessary if the Go to Market Date is not equivalent to the Project's Planned Completion Date. Remove the concatenation (blue text), and change the calculated field to "Number" format to get raw data that can be aggregated.

On Time vs. Late – Completed Projects

IF(CLEARTIME(Planned Completion Date)>CLEARTIME(Actual Completion Date),"Early Project",IF(CLEARTIME(Planned Completion Date)=CLEARTIME(Actual Completion Date),"On Time Project",IF(CLEARTIME(Planned Completion Date)<CLEARTIME(Actual Completion Date),"Late Project","")))

Task Calculated Fields

Early, Late or On Time Tasks *(controls for tasks received late; if the task is completed within the allotted duration, it will still report out as "On Time")*

IF(CLEARTIME(Actual Completion Date)<CLEARTIME(Planned Completion Date)||WEEKDAYDIFF(Handoff Date,Actual Completion Date)<WEEKDAYDIFF(Planned Start Date,Planned Completion Date),"Early Task",IF(CLEARTIME(Actual Completion Date)=CLEARTIME(Planned Completion Date)||WEEKDAYDIFF(Handoff Date,Actual Completion Date)=WEEKDAYDIFF(Planned Start Date,Planned Completion Date),"On Time Task",IF(CLEARTIME(Actual Completion Date)>CLEARTIME(Planned Completion Date)&WEEKDAYDIFF(Handoff Date,Actual Completion Date)>WEEKDAYDIFF(Planned Start Date,Planned Completion Date),"Late Task","")))

Measure Performance by Assignee Home Team or Home Group

IF(!ISBLANK(Assigned To ID),IF(!ISBLANK(Assigned To.Home Team ID),Assigned To.Home Team.Name,Assigned To.Home Group.Name),Team.Name)

workfront

Issue Calculated Fields

Normal vs. Rush Requests

IF(Queue Topic.Default Duration Minutes>Planned Duration Minutes,"Rush Request","Normal Request")

Request Processing Time (Range)

IF(WEEKDAYDIFF(Entry Date,Resolve Project.Entry Date)<=0,"Less than 1 Business Day",IF(WEEKDAYDIFF(Entry Date,Resolve Project.Entry Date)<=1.9,"1 Business Day",IF(WEEKDAYDIFF(Entry Date,Resolve Project.Entry Date)<=2.9,"2 Business Days",IF(WEEKDAYDIFF(Entry Date,Resolve Project.Entry Date)<=5.9,"3-5 Business Days",IF(WEEKDAYDIFF(Entry Date,Resolve Project.Entry Date)<=7.9,"5-7 Business Days",IF(WEEKDAYDIFF(Entry Date,Resolve Project.Entry Date)<=10.9,"7-10 Business Days",IF(WEEKDAYDIFF(Entry Date,Resolve Project.Entry Date)>=11,"More than 10 Business Days","")))))))

Issue or Project Duration (Range)
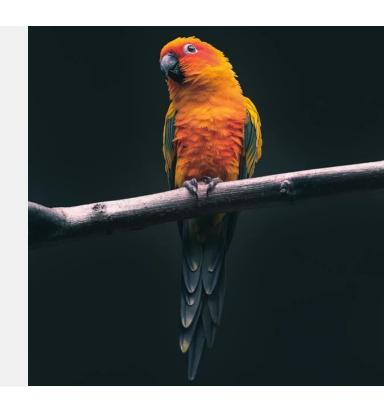
 IF(WEEKDAYDIFF(Entry Date,Actual Completion Date)<=0||WEEKDAYDIFF(Entry Date,Resolve Project.Actual Completion Date)<=0,"Less than 1 Business Day",IF(WEEKDAYDIFF(Entry Date,Actual Completion Date)<=4.9||WEEKDAYDIFF(Entry Date,Resolve Project.Actual Completion Date)<=4.9,"1-5 Business Days",IF(WEEKDAYDIFF(Entry Date,Actual Completion Date)<=9.9||WEEKDAYDIFF(Entry Date,Resolve Project.Actual Completion Date)<=9.9,"5-10 Business Days",IF(WEEKDAYDIFF(Entry Date,Actual Completion Date)<=24.9||WEEKDAYDIFF(Entry Date,Resolve Project.Actual Completion Date)<=24.9,"10-25 Business Days",IF(WEEKDAYDIFF(Entry Date,Actual Completion Date)<=49.9||WEEKDAYDIFF(Entry Date,Resolve Project.Actual Completion Date)<=49.9,"25-50 Business Days",IF(WEEKDAYDIFF(Entry Date,Actual Completion Date)>=50||WEEKDAYDIFF(Entry Date,Resolve Project.Actual Completion Date)>=50,"50+ Business Days","")))))))
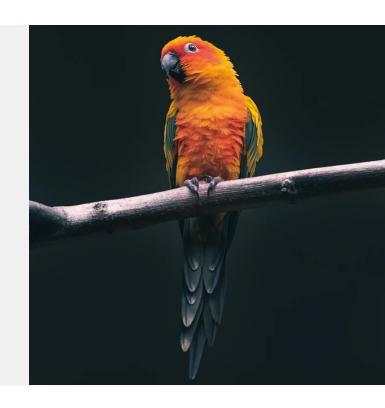
Questions?

"Birds of a Feather" Group Discussions

- Share the highlights of your current workflow process. How do you use Workfront and how does it fit into your workflow?

CONFIDENTIAL

workfront

"Birds of a Feather" Group Discussions
Let's Switch Groups!

- If you could wave a magic wand and change something about your workflow and approval process, what would it be?
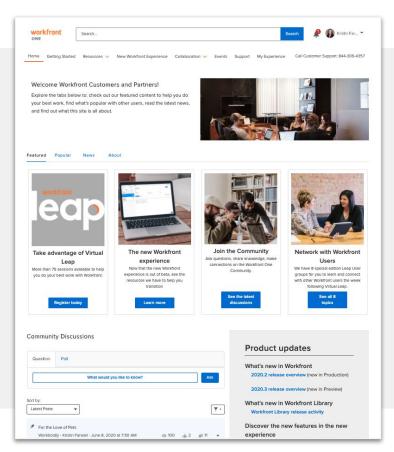
workfront

Wrap-up and Next Steps

workfront

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

Virtual User Groups - Summer 2020

one.workfront.com/events

- July 21: User Onboarding & Adoption Best Practices

- 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*

workfront

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!

workfront

Thank you.