

Virtual User Group: Creative Agencies - Reporting & Dashboards

Tuesday, June 16, 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.*

Today's Host



Kristin Farwell

Sr. Manager, Customer Advocacy Programs
Workfront

Type
into
chat:

HELLO
my name is

- Company, Role and Location
- What do you hope to take away from today?
- What was your first job?

Agenda

- 11:00 a.m. Welcome and Agenda
- 11:10 a.m. Workfront Reporting for Agencies
Sophy Regelous, Cella
- 11:40 a.m. Group Discussion - Dashboards / Reports & Resourcing
- 12:25 p.m. Wrap-up Next Steps
- 12:30 p.m. Event Ends



Workfront Reporting for Agencies

The Cella logo is positioned on the right side of the slide. It consists of a large, dark blue circle with a complex, wavy, concentric pattern in a lighter blue shade. Overlaid on the right side of this circle is a smaller, solid dark blue circle. The word "Cella" is written in white, bold, sans-serif font within this smaller circle, followed by a small trademark symbol (TM).

Cella™

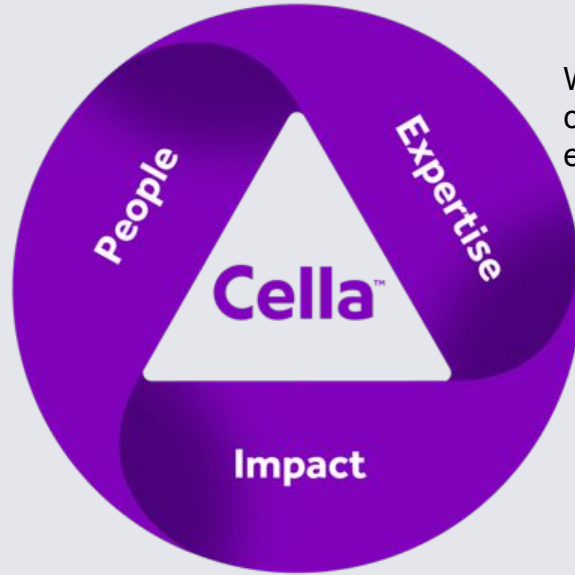
Sophy Regelous

- Managing Director, Consulting, Cella
- External advertising agency experience as a COO, CTO and CEO
- Operational & Financial turnarounds
- IT Infrastructure implementations and transformations



Cella is an award-winning leader in consulting, staffing and managed solutions for creative, marketing, digital and proposal teams.

We have the right people—the best and most passionate in the business.



We understand our clients. We're a team of experts, for experts.

We deliver results. We don't just know how to do it, we do it for you.

Company Facts

- World-Class NPS
- 1000+ Employees
- 400+ Clients Worldwide
- WBENC-Certified

Resources

[2020 In-House Creative Industry Report](#)



[COVID-19 Impact Report on Creative, Marketing and Digital Teams](#)



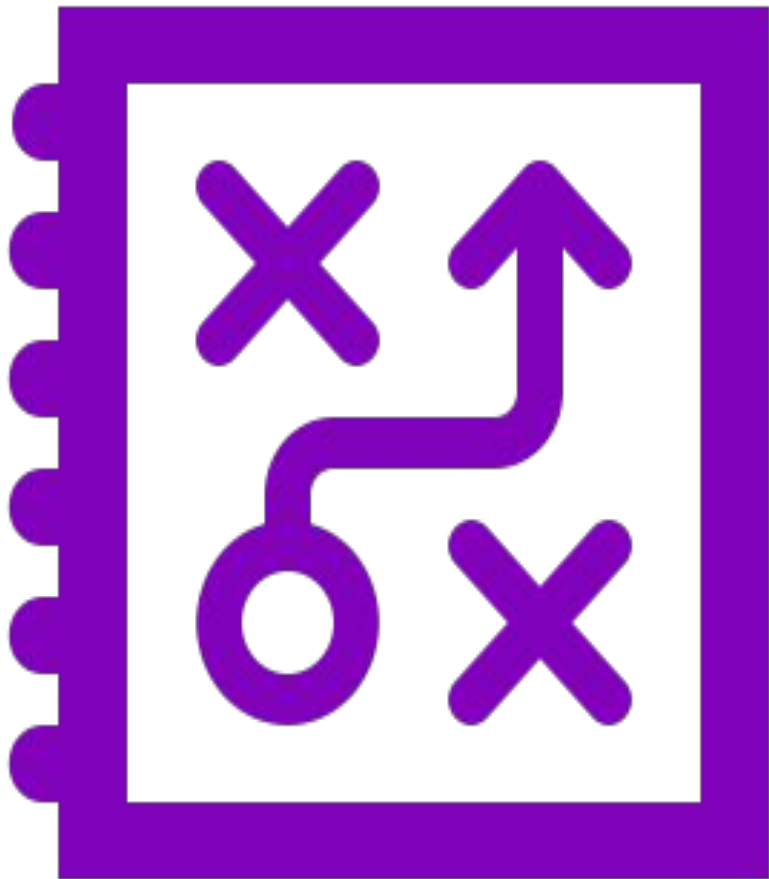


Topics For Discussion

- Strategy
- K.I.S.S.
- Helpful Reports
- Q&A

Strategy

- What are your goals?
- What data can support or advise on reaching that goal?
- Where should that data be created?
- How should it be collected and viewed?
 - Single Report
 - Dashboard
- Who is the report for?



K.I.S.S.

- See what you have
- Understand your fields
- Watch your selected report 'types'
- Be prepared to change
- Ask for help
- Be patient



Export

Showing default Report Filters, Views and Groups

			Planned Start Date													Total	
			January		February		March	April		May	June	July	August	September	October		
			Original Planned Hours	Original Planned Hours	Original Planned Hours	Original Planned Hours	Original Planned Hours	Original Planned Hours	Original Planned Hours	Original Planned Hours	Original Planned Hours	Original Planned Hours					
Assigned To: Name	Project: Name	Value	0	1560	0	1500	0	0	4680	0	0	0	0	0	0		
Angela Conway			-	-	-	-	-	-	-	86 Hours	0 Hour	10 Hours	20 Hours	20 Hours	-	136 Hours	
			-	-	-	-	-	15.5 Hours	-	-	-	-	-	-	-	15.5 Hours	
			-	-	-	-	-	10 Hours	-	-	-	-	-	-	-	10 Hours	
			-	-	-	-	-	53 Hours	0 Hour	58 Hours	19 Hours	-	-	-	-	130 Hours	
Danny Rickard			-	-	-	-	-	-	-	54 Hours	-	38 Hours	20 Hours	16 Hours	-	128 Hours	
		-	-	-	-	-	-	-	-	22 Hours	-	30 Hours	30 Hours	20 Hours	0 Hour	102 Hours	
		-	-	-	25 Hours	-	-	-	-	-	-	-	-	-	-	25 Hours	
David Iscove			-	-	0 Hour	-	7 Hours	19 Hours	-	4.05 Hours	-	-	-	-	-	-	30.05 Hours
			-	-	-	-	27 Hours	2 Hours	-	-	3.45 Hours	-	-	-	-	-	32.45 Hours
			-	-	-	-	-	-	-	0 Hour	-	0 Hour	-	-	-	-	0 Hour
			-	-	-	-	-	-	-	-	-	5 Hours	-	-	-	-	5 Hours
Sophy Regelous			-	-	-	-	-	0 Hour	-	10 Hours	0 Hour	10 Hours	10 Hours	8 Hours	0 Hour	38 Hours	
			-	-	-	-	-	-	-	0 Hour	-	-	-	-	-	-	0 Hour
			-	-	0 Hour	-	-	-	-	-	-	-	-	-	-	-	0 Hour
			-	-	-	-	-	-	-	20 Hours	-	-	-	-	-	-	20 Hours

Current Project Hours Matrix

Assigned To ID In 5c3fa88600e00685050e5af6052e0b6b, 5c8bbbb10071df64b879cb5833b5291f, 5c8bbb4f007215aecc99f02a243e878c, 5ccc717100ab5574af0cedc684f48ea5, 5d9cd0e80125e5f681005c8f92f3d9c8
and Planned Start Date between \$TODAYby and \$TODAYey
and Project Portfolio ID In 5cb66b6f006c24cf06cle5584980bffe
and Project Status In Level Two, In Process, SOW, Won
and Role ID In 5c7ee07e00a96eaab41b7e508eb427ae, 5dea94fa00279346778db1f1f5e994e94, 5dea951000279d3529b82671de6e8fc8, 5dea97a7002919c786c99c73d6b3d298, 5e3c4a220033307df639e1da6e9b0e4d, 5e8222b8020004ce6c9ee256e560b5d9, 5e824bc8021ef8a2ef440b30c2f33719

Prompts Selected:
Planned Start Date any

Hide Filters and Prompts

Report Actions

As of Jun 10, 2020 11:23 am Eastern Daylight Time

Details

Matrix

Prompts

Export

Showing default Report Filters, Views and Groups

			Planned Start Date														
			January		February		March	April		May	June	July	August	September	October		
			Original Planned Hours		Original Planned Hours		Original Planned Hours	Original Planned Hours		Original Planned Hours	Original Planned Hours	Original Planned Hours	Original Planned Hours	Original Planned Hours	Original Planned Hours		
Assigned To: Name	Project: Name	Value	0	1560	0	1500	0	0	4680	0	0	0	0	0	0		Total
Angela Conway			-	-	-	-	-	-	-	86 Hours	0 Hour	10 Hours	20 Hours	20 Hours	-	136 Hours	
			-	-	-	-	-	15.5 Hours	-	-	-	-	-	-	-	15.5 Hours	
			-	-	-	-	-	10 Hours	-	-	-	-	-	-	-	10 Hours	
			-	-	-	-	-	53 Hours	0 Hour	58 Hours	19 Hours	-	-	-	-	130 Hours	
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		-	-	-	-	-	-	-	-	22 Hours	-	30 Hours	30 Hours	20 Hours	0 Hour	102 Hours	
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			-	-	-	-	27 Hours	2 Hours	-	-	3.45 Hours	-	-	-	-	-	32.45 Hours
			-	-	-	-	-	-	-	0 Hour	-	0 Hour	-	-	-	-	0 Hour
			-	-	-	-	-	-	-	-	-	-	-	-	-	-	-

Viable Clients

[Show Filters](#)

[Report Actions](#) ▾

As of Jun 11, 2020 9:29 am Eastern Daylight Time

Details

Export ▾

Filter [Report Default](#) ▾

View [Report Default](#) ▾

Grouping [Nothing](#) ▾

<input type="checkbox"/>	Company Name	Client Contact Name	Client Phone Number	Are you tracking time?	If there is contract labor, do you have access to niche creative staffing partners to support your team?	Staffing Mix – What is your mix of FTE to contract labor? 50/50, 70/30, etc.	Do you have term limits for contractor talent?
<input type="checkbox"/>				Yes, through a tool			Yes
<input type="checkbox"/>				Not yet - we want to start	staffing partner - BLR	we use 90% contingency	No
<input type="checkbox"/>					we use our HR team	about 60% contract	Yes
<input type="checkbox"/>				Not yet - we want to start			
<input type="checkbox"/>				Not yet - we want to start	yes	60% contingent	Yes
<input type="checkbox"/>				Not yet - we want to start	yes	60% contingent	Yes

Showing 6 projects



Cella Consultants (...)

L2 Team

Pipeline

Level Two Consulta...

Project User Assign...

Current Project Hou...

★ Unpin current page

Help



164

Level Two Consultant Request Project ★ ...

Percent Complete

0%

Project Owner



Sophy Regelous

Planned Completion

Mar 19, 2020

Condition

● On Target

Status

● Queue

Issues (17)



Tasks



Project Details



Business Case



Updates



Documents (37)



Issues (17)



Risks



Approvals



Baselines



Billing Rates



Billing Records



Expenses



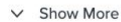
Hours



Scheduling



People



Show More



Add custom section

+ New Issue [↔] ▾



Open

Due Date View

Nothing



<input type="checkbox"/>	Name	Entered By	Entry ↓	Age	Assigned	Due Date	Status Update
<input type="checkbox"/>		Tim Durney	6/5/20	6 Days		6/8/20	
<input type="checkbox"/>		Meredith Zlatkin	6/1/20	10 Days		6/9/20	
<input type="checkbox"/>		Albert Daily	5/20/20	22 Days	Sue Wolski	5/21/20	Sue Wolski Hi Sue, let me know how you want to tackle this one. Would you like me to write a draft since this is a workfront job and then we can review together?
<input type="checkbox"/>		Meredith Zlatkin	5/18/20	24 Days	David Iscove	5/19/20	David Iscove Hey David - can you reach out to Meredith to get some background on this request? Meredith Zlatkin Hey Meredith please reach out to David to set up a time to bring him up to speed on a call with Forrester, Thanks guys!
<input type="checkbox"/>		Meredith Zlatkin	5/11/20	31 Days	Sophy Regelous	5/12/20	Meredith Zlatkin have you delivered the DAM service offerings to the client? Let me know how you support this opportunity and what next steps may be. Thanks
<input type="checkbox"/>		Eva Keough	5/11/20	31 Days	Sophy Regelous	5/12/20	
<input type="checkbox"/>		Eva Keough	5/1/20	41 Days	Sophy Regelous	5/4/20	Eva Keough - Hi Eva, should we jump on a call to discuss next steps with his project? Is there here I can do to help? Please try to respond through Workfront by following this link, Thanks!
<input type="checkbox"/>		Albert Daily	4/30/20	42 Days	Angela Conway	5/1/20	
<input type="checkbox"/>		Albert Daily	4/29/20	43 Days	David Iscove	4/30/20	
<input type="checkbox"/>		Tim Durney	4/28/20	44 Days	David Iscove	4/29/20	Sophy - It feels like you have established some momentum here on an approach. Please let me know how I can support you to complete the SOW.
<input type="checkbox"/>		Tim Durney	4/23/20	49 Days	David Iscove	4/29/20	Durn - What's the latest on this opp?

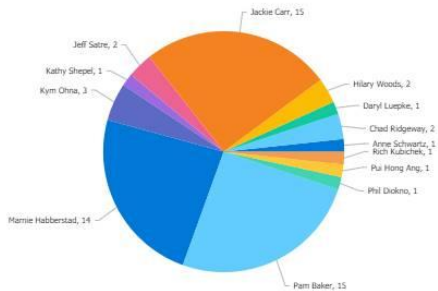
BSCS Global Approvals Panel (All Pending + Your)

[Dashboard Actions](#) As of Jun 15, 2020 8:34 am Central Daylight Time 

BSCS ALL Pending Proof Approvals

[Export](#) [Hide Values](#)

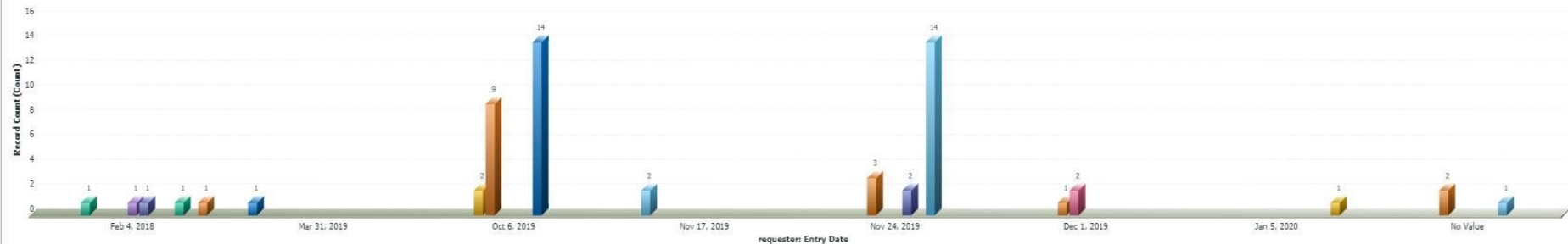
[Details](#) | [Summary](#) | [Chart](#)







BSCS ALL Pending Proof Approvals by Request Date

[Export](#) [Hide Values](#)

[Details](#) | [Summary](#) | [Chart](#)



<div>  Setup Users Projects Reports Requests Dashboards Portfolios Pin current page </div> <div> Help  164   </div>						
<input type="checkbox"/> BSCS Quality						
<input type="checkbox"/> BSCS Staff Engagement						
<input type="checkbox"/> BSCS Products						
<input type="checkbox"/> BSCS Community Engagement	Anne Schwartz	Anne Schwartz	Ryan Ledebuhr	Daryl Luepke		
<input type="checkbox"/> BSCS Global Leadership						
<input type="checkbox"/> BSCS History & Heritage						
<input type="checkbox"/> BSCS-MCHS	DeeDra Vosburg	Sean Kane	Erin Kuchera	Daryl Luepke		Sara Steinbach
<input type="checkbox"/> BSCS Education						
<input type="checkbox"/> BSCS Research						
<input type="checkbox"/> BSCS Consultative Requests						
<input type="checkbox"/> BSCS Sponsorships						
<input type="checkbox"/> BSCS MCL Business Partnerships						
Showing 15 of 26 portfolios See more						

BSCS - Portfolio/Program Ownership 1						
<div>Export ▾</div> <div>Details Summary Chart</div>						
<input type="checkbox"/> Name	Primary Contact: Name	Account Manager: Name	Creative Operations Manager: Name	Creative Director	Art Director	Marketing Manger
Portfolio: Name: BSCS Clinical Practice (25)						
<input type="checkbox"/> GI and Hepatology						
<input type="checkbox"/> Pulmonology (Cancer Only)						Anne Wright, Kayla Clay
<input type="checkbox"/> GYN Surgery (Cancer Only)						Anne Wright, Kayla Clay
<input type="checkbox"/> Urology						
<input type="checkbox"/> Otorhinolaryngology						
<input type="checkbox"/> Medical Oncology						Anne Wright, Kayla Clay
<input type="checkbox"/> Medical Professionals	Anissa Blanshan		Ryan Ledebuhr	Anne Stassen		Anissa Blanshan
<input type="checkbox"/> Radiation Oncology						Anne Wright, Kayla Clay
<input type="checkbox"/> Colon and Rectal Surgery						
<input type="checkbox"/> General Surgery						
<input type="checkbox"/> Neuro/Neuro Surgery	Kerry Todd		Ella Noterman	Anne Stassen		Kerry Todd, Deanna Constans
<input type="checkbox"/> Ad Campaign	DeeDra Vosburg			Dan Brevik		Sara Steinbach

Q&A



Thank you!

cellainc.com

Sophy Regelous

Managing Director, Consulting

s.regelous@cellainc.com

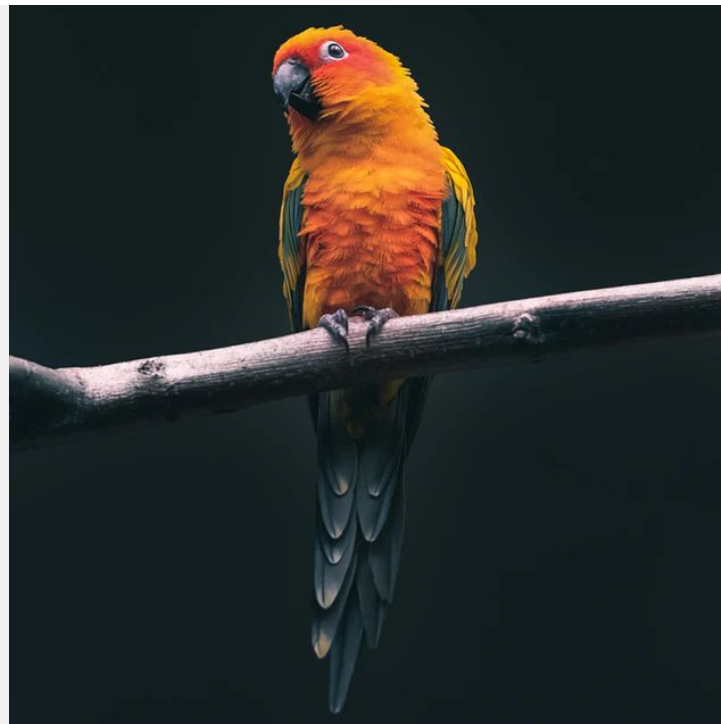
917.912.5822

The Cella logo is a large, stylized letter 'C' composed of concentric, wavy lines in shades of blue and green, creating a sense of depth and movement. The word 'Cella' is written in a bold, white, sans-serif font, with a small 'TM' trademark symbol to the upper right of the 'a'.

Cella™

“Birds of a Feather” Group Discussions

- Dashboards
- Reports & Resourcing





Wrap-up and Next Steps

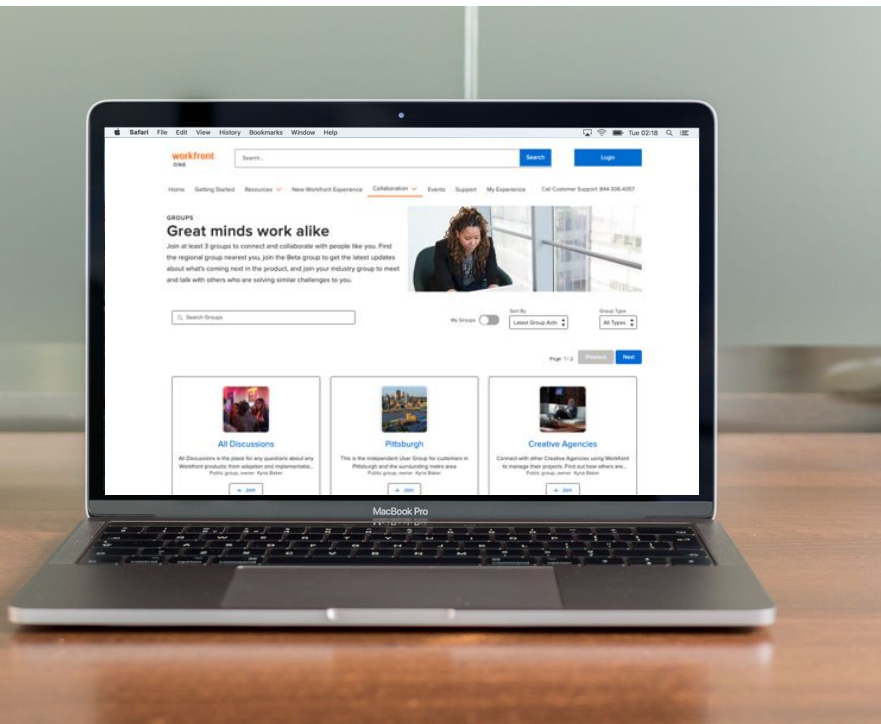
workfront[®]

ONE

Workfront One was built to provide all the resources you need to succeed in enterprise work management—all in one place.

- Group discussions
- Upcoming events
- Weekly Tips (“Workfront Wednesday”)
- New Workfront Experience migration guidance
- Regional and Industry Groups

 *Are you a member?*



Virtual User Groups - Spring/Summer 2020

one.workfront.com/events

- **Week of June 29 - Special Edition Leap User Groups!**

Implementation & Adoption
All Things Reporting
Emails & Notifications
Marketing Workflows & Approvals
IT Workflows & Approvals
Audit Trails & Compliance
Resource and Capacity Planning
Getting Started with Agile

- *July and August schedule is coming soon!*





Leap Virtual Conference

workfront.com/leap

June 24, 2020 - 8:00 a.m. PDT

- Enjoy keynotes and 75+ breakout sessions - all free
- See the latest and greatest from the Workfront product team
- Network virtually with a global Workfront audience

workfront wednesday



**ASK THE
EXPERT**

Champion the New Workfront Experience

Wednesday, June 17, 2020 | 11:00 a.m. Eastern

Join us to see a demonstration and ask questions of Workfront experts on the topics of:

- Why the new Workfront experience was built
- How it can be used to support and drive adoption within your organization
- Best practices for migrating users

Register at one.workfront.com/events

Thank you.