

VIRTUAL NETWORKING SESSION

Virtual User Group: Implementation & Adoption

Welcome!

We will begin shortly



*Please ensure your
microphones are muted.*



*Enable your camera,
if possible.*



*Use the chat function if you
have any questions.*

SESSION HOST



Andrew Dadour
Strategic Customer Success Manager
Workfront

AGENDA

- 8:00 a.m. Welcome and Housekeeping
- 8:05 a.m. Key Components to a Successful Implementation
- 8:20 a.m. Group Discussion
- 8:55 a.m. Wrap-up and Next Steps
- 9:00 a.m. Session Concludes



Key Components to a Successful Implementation

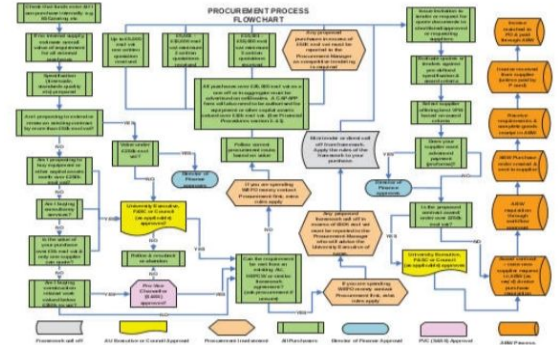
SESSION SPEAKERS



Teale McCleaf
Program Manager, Hays Corporation



Christa Levine
Program Manager, Hays Corporation

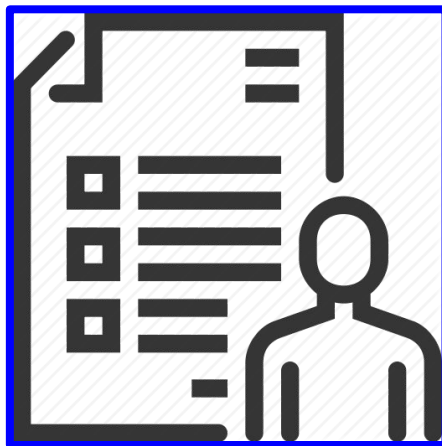


4 Key Components



Intake Process

Form that details the end users use case for using Workfront.



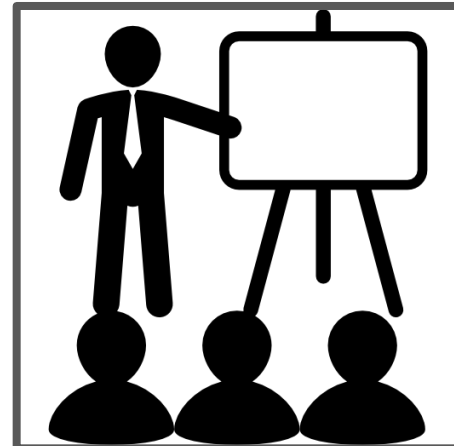
Requirements Gathering

Documentation used to gather a deeper understanding of the use case to determine how much assistance the team will need



Onboarding Template

System configuration guide for users and admins to execute on the team's requirements



Training

Resources for furthering a users understanding of Workfront



INTAKE PROCESS

Three Main Sections

- General Information
 - Use Case(s)
 - Desired Solutions
 - Setting Expectations
- Value Metrics
 - Time Savings
- Client Relationship Management
 - Primary Contact Information
 - Follow-up Items





Workfront Onboarding Intake

General Onboarding Questions
These questions apply to all customers regardless of desired level of service.

What team do you work for? What Level of Service are you interested in?

Self-Service Supported Service

List problems to resolve by using Workfront

Check all Use Cases that interest the Team

<input type="checkbox"/> Approve Workflows	<input type="checkbox"/> Financials	<input type="checkbox"/> Governance Boards
<input type="checkbox"/> Manage Budgets	<input type="checkbox"/> CRM	<input type="checkbox"/> Portfolio/Program/Project Management
<input type="checkbox"/> Project Work Intake	<input type="checkbox"/> Resource Management	<input type="checkbox"/> Risks, Actions, Issues & Key Decisions
<input type="checkbox"/> Status Reporting	<input type="checkbox"/> Other	

*** Date owner approval from VP or above is required for use of Workfront by your team as per SevOps directive (p/w/data-owner-approval)
No implementation efforts can begin until this approval is in place. ***

Do you already have executive support - VP and above?
-- Select --

How many users do you expect to create and manage projects in Workfront?
-- Select --

Do you require integration with Internal Google systems, which one?
 BigQuery GSuite AdSense Analytics Other

Do you require exporting data for reporting tools like PLT?
-- Select --

Check all tools that you have a requirement to migrate data from

<input type="checkbox"/> Oracle	<input type="checkbox"/> SAP	<input type="checkbox"/> Microsoft
<input type="checkbox"/> IBM	<input type="checkbox"/> Jira	<input type="checkbox"/> MS Project
<input type="checkbox"/> Other	<input type="checkbox"/> Ask	

Measure of Success
Consider time spent creating Reports, attending Meetings, and obtaining Approvals as some examples. Please include as much detail as possible.

Success Criteria

Congratulations! You've completed the questions. Everything that follows are useful links for you to begin your journey into Workfront.

Use this link to Check Your Access in Workfront.

Schedule a Demo

The Workfront Hub
Click here to access the plethora of useful information about:

Steps to Onboard
Existing Integrations
Workfront Terminology
Training, etc.

Workfront Resources

Workfront Information

Workfront is a 3rd Party, cloud-based, customizable, extensible Portfolio-Program-Project management planning and tracking tool. The software provides a standard project management solution across portfolios to understand progress, dependencies and risks. It has built-in capabilities for managing project schedules, dependencies, and RAID items.

Getting Started

This section provides quick links to information and processes to assist new teams that want to use the Workfront tool.

Onboarding	Access	Community Groups
Onboarding Questionnaire	Request for User Edit Access	Workfront-Announce
Workfront Knowledge Base	Workfront Help go/wf-request	Workfront-Discuss
Workfront Instances		

Workfront

Home | Workfront Onboarding | General Knowledge | Integration | FAQ | Team-Specific Help

Introduction

Workfront is a third party, customizable, extensible Portfolio-Program-Project management planning and tracking tool used by 1,000+ Google's across 25+ teams and supported by CorePart PMAT.

Key Features

- Integrations with Google Internal tools such as PL, Bigquery, AdSense, Teampgraph, and more
- Built-in capabilities for managing portfolios, programs, projects, RAID items and their dependencies
- Built-in customizable reporting capabilities
- Built-in functionality to manage work intake
- Approval Workflows
- Resource Management

Cost
Licenses are freely available to anyone with a corporate google.com account. All users have View access, however [higher level permissions](#) must be requested.

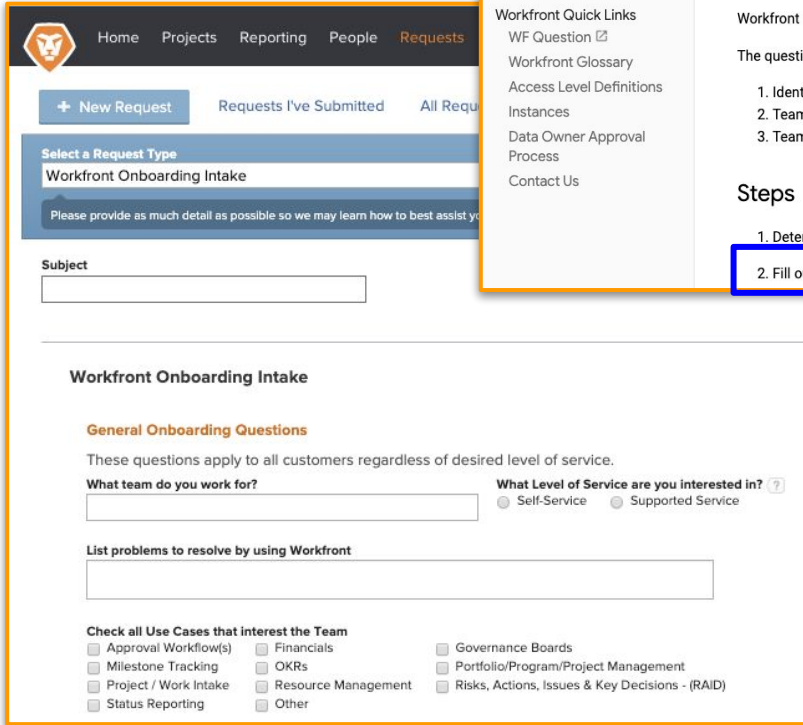
Support

- PMAT offers two [supportment levels](#) for teams looking to implement Workfront: Self Service and SME Support
- PMAT offers [office hours](#) weekly for teams that need extra help
- [User Requests](#) can be made by users and will be answered in a timely manner by knowledgeable experts
- User discussion groups for all Google Workfront Users

Contents

- Introduction
- Why Features
- Cost
- Support
- Why Teams Choose Workfront?
- Workfront Announcements

TIP: Not sure Workfront is for you? Check out our [Google Project Management Comparison Tool](#) for a side-by-side comparison of functionality between Workfront, Karbon, Central and Plan.



Home Projects Reporting People Requests

+ New Request Requests I've Submitted All Requests

Select a Request Type

Workfront Onboarding Intake

Please provide as much detail as possible so we may learn how to best assist you.

Subject

Workfront Onboarding Intake

General Onboarding Questions

These questions apply to all customers regardless of desired level of service.

What team do you work for?

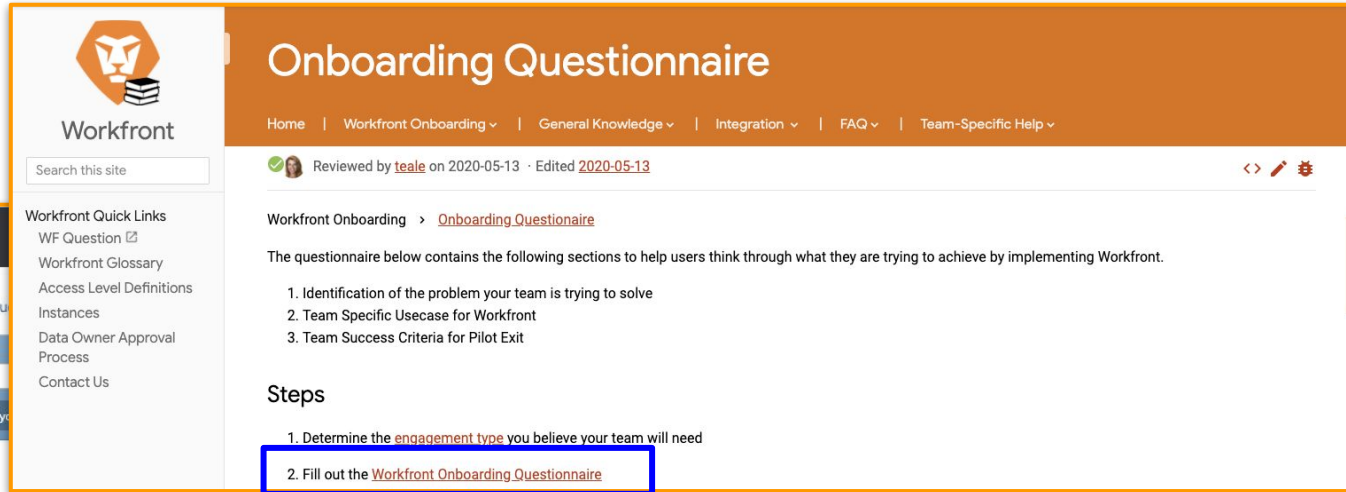
What Level of Service are you interested in? ?

Self-Service Supported Service

List problems to resolve by using Workfront

Check all Use Cases that interest the Team

<input type="checkbox"/> Approval Workflow(s)	<input type="checkbox"/> Financials	<input type="checkbox"/> Governance Boards
<input type="checkbox"/> Milestone Tracking	<input type="checkbox"/> OKRs	<input type="checkbox"/> Portfolio/Program/Project Management
<input type="checkbox"/> Project / Work Intake	<input type="checkbox"/> Resource Management	<input type="checkbox"/> Risks, Actions, Issues & Key Decisions - (RAID)
<input type="checkbox"/> Status Reporting	<input type="checkbox"/> Other	



Workfront

Search this site

Home | Workfront Onboarding | General Knowledge | Integration | FAQ | Team-Specific Help

Reviewed by [teale](#) on 2020-05-13 · Edited [2020-05-13](#)

Workfront Onboarding > [Onboarding Questionnaire](#)

The questionnaire below contains the following sections to help users think through what they are trying to achieve by implementing Workfront.

1. Identification of the problem your team is trying to solve
2. Team Specific Usecase for Workfront
3. Team Success Criteria for Pilot Exit

Steps

1. Determine the [engagement type](#) you believe your team will need
2. Fill out the [Workfront Onboarding Questionnaire](#)





Workfront Onboarding Intake

General Onboarding Questions

These questions apply to all customers regardless of desired level of service.

What team do you work for?

What Level of Service are you interested in? [?]

Self-Service
 Supported Service

List problems to resolve by using Workfront

Check all Use Cases that interest the Team

- | | | |
|------------------------------------------------|----------------------------------------------|------------------------------------------------------------------|
| <input type="checkbox"/> Approval Workflow(s) | <input type="checkbox"/> Financials | <input type="checkbox"/> Governance Boards |
| <input type="checkbox"/> Milestone Tracking | <input type="checkbox"/> OKRs | <input type="checkbox"/> Portfolio/Program/Project Managem... |
| <input type="checkbox"/> Project / Work Intake | <input type="checkbox"/> Resource Management | <input type="checkbox"/> Risks, Actions, Issues & Key Decisio... |
| <input type="checkbox"/> Status Reporting | <input type="checkbox"/> Other | |

*** Data owner approval from VP or above is required for use of Workfront by your team as per SecOps directive (go/wf-data-owner-approval)
No implementation efforts can begin until this approval is in place.***

Do you already have executive support - VP and above?

How many users do you expect to create and manage projects in Workfront?

Do you require Integration with Internal Google systems, which one? [?]

- Buganizer
 Guts
 Ariane
 Salesforce
 Other
 N/A

Do you require exporting data for reporting tools like PLX? [?]

Check all tools that you have a requirement to migrate data from

- Smartsheet
 Sheets
 MS Project
 Other
 N/A

Measure of Success

Consider time spent creating Reports, attending Meetings, and obtaining Approvals as some examples. Please include as much detail as possible.

Success Criteria

Congratulations! You've completed the questions. Everything that follows are useful links for you to begin your journey into Workfront.

Congratulations! You've completed the questions. Everything that follows are useful links for you to begin your journey into Workfront.

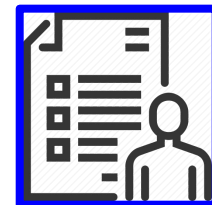
Use this link to Check Your Access in Workfront.

Schedule a Demo

The Workfront Hub

Click here to unlock the plethora of useful information about:

[Steps to Onboard](#)
[Existing Integrations](#)
[Workfront Terminology](#)
[Training, etc.](#)



Requirements Gathering

Needs vs. Wants

- Ask the questions to...
 - Clarify existing processes
 - Think through future ones
 - Understand what Workfront functionality exists
 - Prioritize the functionality based on their use case determined during the intake process



Business Requirements Document (BRD)



Problem Statement (Required)

Please define the problem that you are facing and how you would like to solve it.

- Use Cases

Please define the scenarios in which this problem exists and any current processes. A typical use case contains the following syntax: As a < type of user >, I want < some goal > so that < some / reason >

- Business Benefits/ Impact

Please explain what benefits or impact solving this problem will have on your team/group/organization, etc. Please be as specific as possible and include any KPIs.

Business Requirements (Optional)

Please specify what you would like the system to do in order to solve the problem defined above. Please include any future state process flows if applicable.

- Reporting Requirements

Please define the reporting needs that will come from solving this problem.

J. King
Modern Analyst



Concept Card

- Brings together user requirements and admin configuration steps
- Allows for collaboration on the proposed solution
- Documents approvals



Workfront Change Request Concept Card: Documents problem, opportunity and proposal, secure sign-off and implement through a standard process. ([go/workfront change request](#))

Author: <add requester name or Workfront team member name who authors>

Approval level	Approvers	Approved: Yes/No	Date
Team SME			
Team CCB			
PMAT SME			
PMAT PgM			
Google Workfront CCB			

Problem:

- <one line problem description>

Opportunity:

- <short opportunity description>

Proposal (Business Requirements):

- <requirement description>

Proposal (Workfront Implementation):

- <implementation description>

<screenshots if any, or else delete this section>	<screenshots if any, or else delete this section>
---------------------------------------------------	---------------------------------------------------

For Custom forms: Who will access this custom form:

- <team or organisation>

Impact of this change:

- <impact description>

Final Workfront Implementation:

Resources:



ONBOARDING TEMPLATE

Three Key Uses

- Division of Responsibilities
 - Who is responsible for executing what
- Checklist for Execution
 - Includes best practices and examples of optimal configurations
- Links to Documentation
 - One stop shop to set up training



ONBOARDING TEMPLATE



(LEAP) Workfront Onboarding Guidance v2.0

Template Tasks | Template Details | Updates | Documents | Risks | Approvals | More ▾

+ New Template Task | Export ▾

# ↑	Task Name	Description	Assignments	Duration	Pin Hrs	Predecessors
1	Project Summary			17 Days	8.8 Hours	
2	Planning			17 Days	2.15 Hours	
3	Request Data Owner Approval	Data Owner Approval Process: https://information.link.here.com Notes for Data Owner Approvers: https://information.link.here.com		7 Days	0.5 Hours	
4	Submit Buganizer Ticket to Whitelist Components	https://information.link.here.com Place buganizer link team submitted to whitelist their components.		10 Days	0.5 Hours	3
5	Create folder to store reference docs	Workfront Rollout Activities - https://information.link.here.com	Workfront SME	1 Day	0.15 Hours	3
6	Facilitate Requirements Gathering with Stakeholders	Use the Workfront On-boarding Requirements Sheet - Link is located on the custom form in this project. If not already done - Make a copy, prefix with the team name and save to new folder created in previous task.	Workfront SME	1 Day	1 Hour	3 5
7	User Configuration			11 Days	5.15 Hours	
14	Workfront Setup and customizations	Generic Planner Training: https://information.link.here.com		1 Day	0.5 Hours	
23	Reporting	Additional information on building reports and dashboards in Workfront can be found here: https://information.link.here.com		1 Day	0 Hours	
26	Training			1 Day	1 Hour	
28	Resource Management Setup (optional)	Getting Started with Resource Planning: https://support.workfront.com/hc/en-us/articles/115003216187		1 Day	0 Hours	
32	Request Queue Setup (optional)	Create and Manage Request Queue's https://information.link.here.com		1 Day	0 Hours	



Training

Train the Trainer

- Identify the key people on the team who will be your first line of defense
- Provide them access to all the necessary training materials
- Train & troubleshoot side by side



Workfront Knowledge Library Examples



Welcome to AR Experiences

Workfront is a platform used by AR Experiences to provide visibility on project(s) status across various programs. Information in WF is updated weekly. Please refer to the above dashboards for info on upcoming, recently launched & projects at risk.

My Projects

NOTE: You have to be a project owner to see any projects. To **create** projects use the "Projects" tab in the navigation tab above.

Top Level Dashboards

Quick links to High Level Dashboards. Reviews Calendar also in the tabs above

Major Snippets

Team Snippets

Moments and Key Features

Projects at Risk

This month's Launches

Reviews Calendar

Programs

Programs across AR Experiences - ongoing and competed projects

A grid of 12 rounded rectangular buttons arranged in 3 rows and 4 columns. The first two columns contain text labels: 'Major Snippets', 'Team Snippets', 'Moments and Key Features', 'Projects at Risk', 'This month's Launches', and 'Reviews Calendar'. The remaining two columns contain empty buttons.



Workfront

How to Create a Project from a Template

To create a project using a template from the Projects sub-tab:

1. Navigate to the **Projects** area in the Global Navigation Bar and select the **Projects** tab.
2. Select **New Project**.

A screenshot of the Workfront interface showing the 'New Project' dialog. The 'New from Template' section is expanded, showing a list of templates. A blue circle '3' highlights the 'Marketing Template' option. The background shows the 'Projects' navigation bar and a table of project data.

	Pin Start	Proj Start	Act Start
	7/7/17	7/10/17	7/10/17
	7/10/17	7/10/17	7/10/17
	7/3/17	7/10/17	7/10/17

3. Select a template from the list of available choices in the **New from Template** section in the drop-down list. There may be many available templates in the system. Templates relevant to you will likely have your teams name in as a prefix. -br> The **Create Project From Template** dialog box is displayed. This dialog box contains all of the pre-populated details from the original template settings.

WORKFRONT GUIDE

[HOME](#)

[TPGM HANDBOOK](#)

[RESOURCES](#)

[GO/LENS](#)

WORKFRONT: [GO/WF](#)

[SEE ALL DASHBOARDS](#)

What is Workfront?

Workfront is a platform that the Daydream AR team use for tracking projects. You can:

- View project status
- Find Project Documentation
- Request for AR Reviews (majors)

Recent Workfront Updates - 4/13/2020:

- Workfront page banner - "Disregard % Complete" - **LIVE**
 - TPGM/Program Dashboards - **Complete**
- See details at [go/wf-news](#)



Training Material Tips

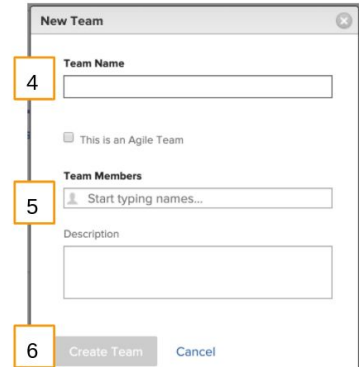
- Keep the training materials digestible
- Create them as self help guides
- Link to Workfront documentation as much as possible

How to Create A Team

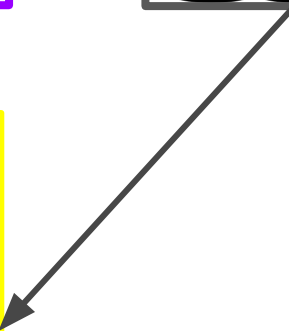
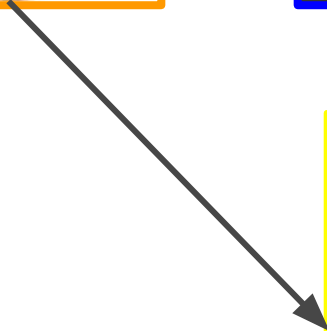
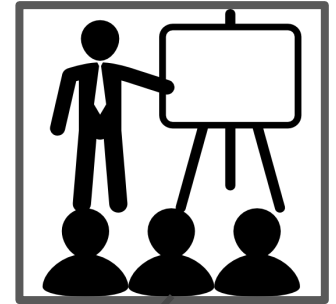
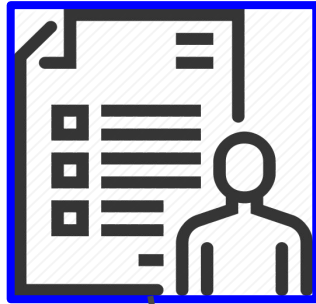
- 1 - Navigate to the People tab
- 2 - Click drop-down arrow to right of Your Team Name
- 3 - Click Create New Team



Example One Pager



- 4 - Input Team Name
- 5 - Input Team Member names
- 6 - Click Create Team







BIRDS OF A FEATHER

Group Discussion

- Introductions - meet your group!
- What does onboarding look like at your organization?
- How do you ensure consistent usage?



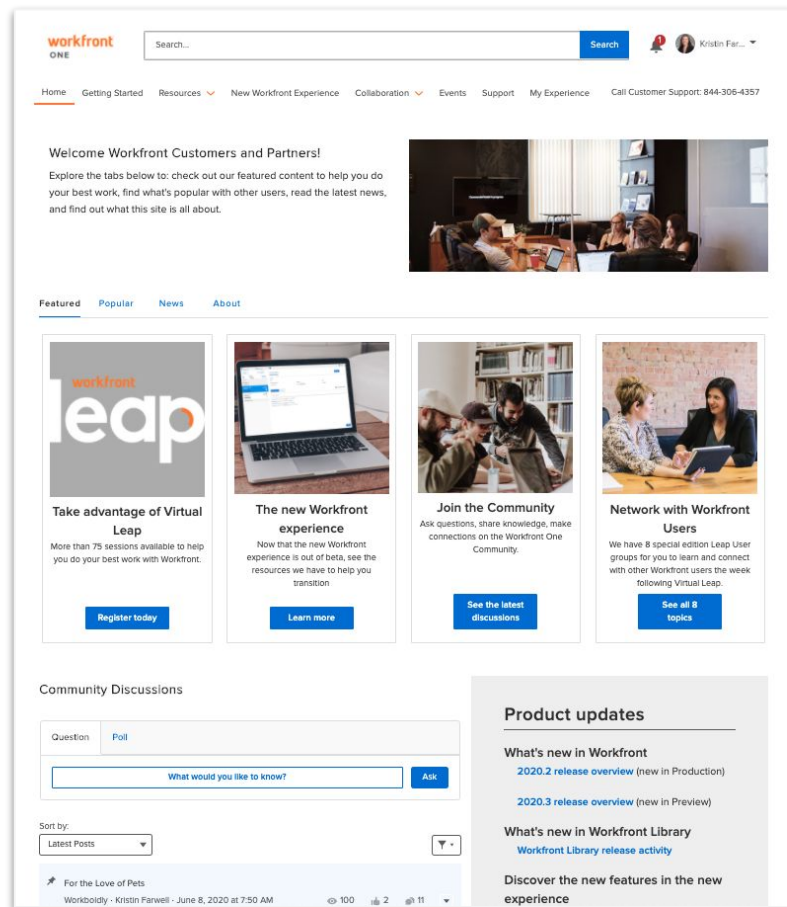
30 MINUTES



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 navigation bar with a search bar, a user profile for Kristin Farwell, and a menu with items like Home, Getting Started, Resources, New Workfront Experience, Collaboration, Events, Support, My Experience, and Call Customer Support: 844-306-4357. Below the navigation is a welcome message: "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." To the right of this message is a photo of a group of people in a meeting. Below the welcome message is a "Featured" section with four cards: "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). Below the featured section is a "Community Discussions" section with a "Question" tab selected, a text input field with the placeholder "What would you like to know?", and a "Ask" button. Below the input field is a "Sort by" dropdown menu set to "Latest Posts". At the bottom of the community section is a post titled "For the Love of Pets" by Workboldy - Kristin Farwell, dated June 8, 2020 at 7:50 AM, with 100 views, 2 likes, and 11 replies. To the right of the community section is a "Product updates" section with two sub-sections: "What's new in Workfront" featuring "2020.2 release overview (new in Production)" and "2020.3 release overview (new in Preview)", and "What's new in Workfront Library" featuring "Workfront Library release activity". Below these is a link to "Discover the new features in the new experience".