Request Queues – Mastering the Intake Process from Submission to Completion

Customer Success Workshop – August 22, 2023

Agenda

5 minutes	Welcome & Introductions
10 minutes	3 Advantages to Using Request Queues Request Queue Best Practices Request Queues 101 - Setup
30 minutes	Sample Request Queues Live Demo
5 minutes	Sample Success Metrics Experience League Resources
10+ minutes	Open Q&A / Discussion

Meet the Team – Introduce Yourself

Nichole Vargas
Customer Success Manager,
Adobe Workfront

Salt Lake City, UT

Connect with me on LinkedIn

Cynthia Boon
Customer Success Manager,
Adobe Workfront

Fort Worth, TX

Connect with me on LinkedIn

Leslie Spier
Customer Success Manager,
Adobe Workfront

Denver, CO

Connect with me on LinkedIn

Say hi in the chat!

- Name and Company
- How long you've been a Workfront Sys Admin
- Are you currently using Request Queues?

3 Advantages of Using Request Queues

Track

Standardize the process for effective work management

Act as a funnel to capture all incoming work requests

Get important details upfront for immediate action – mirror current practice

Organize

System of record - all information in a single space

Make priorities clear – what should be focused on next

Easily make assignments, post comments and update progress

Report

Group requests by topic to analyze use or lack thereof

Provide a visual of what is being asked, by whom, on what topic, and how quickly it's delivered

Share data across the organization from users to leadership

Request Queue Best Practices

- Document your workflow. Train your requesters, traffic managers, fulfillment teams, and approvers on the process.
- Define metrics for reporting and analysis. Connect with stakeholders to see what matters to them with this new data.
- Create a custom project status for "Request Queue" that equates with Current to distinguish request queue projects.
- Leverage automation. Automatically assign new requests using Routing Rules.
- Include a description for each element —the request queue project, topic groups, queue topics, and routing rules.
- If you plan to use issue approvals with requests submitted through a queue, create an issue status called Rejected.
- Avoid sharing request queues with everyone. Set up the queue details settings so users only see relevant queues.
- Build a dashboard so traffic managers or system administrators can easily track, update and manage issues.
- Use layout templates to remove request queue setup options from the left panel menu for users who don't need access.
- Create a Sys Admin request queue for users to ask WF-related questions, update users, schedule new user training, etc.
- Audit request queues on a regular basis to identify and un-share queues that aren't being used.
- Keep custom forms simple. Share rows for less scrolling.
- Keep it organized. Use topic groups to create shorter, easier to manage lists.
- Create a project template specific for request queues, as these projects typically have different settings/configurations.
- **Do you have additional best practices to share?**

Request Queue Setup

Adobe

Request Queue Setup – How To

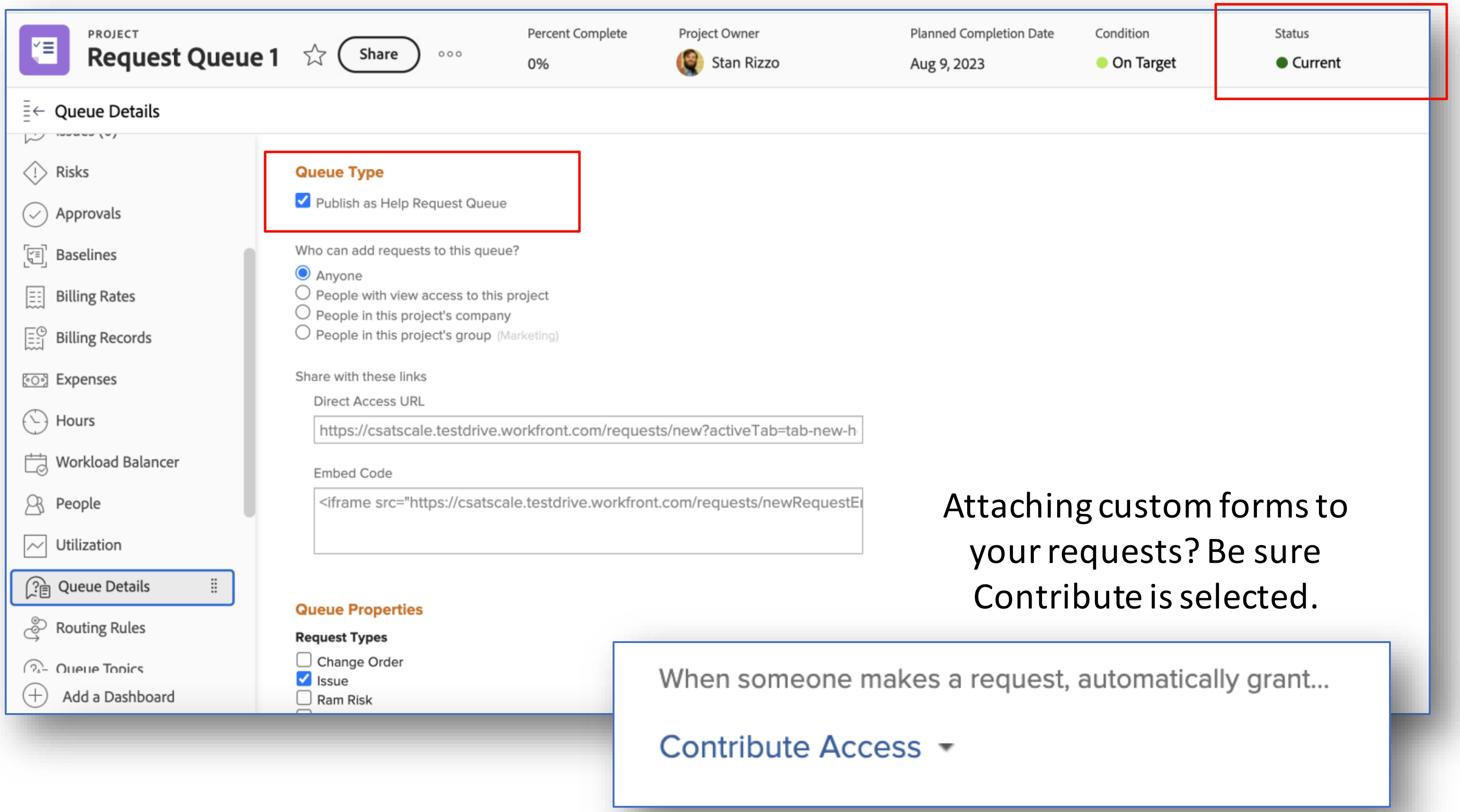
You set up a request queue as a project. Recommendation: Add 1 task to your project titled "DO NOT ADD TASKS – REQUEST QUEUE PROJECT" or similar so users know not to add any.

There are 2 requirements for the queue to become accessible from the Requests area:

- ☑ Check the box for, Publish as a Help Request Queue. Click Save.
- ☑ Set the project to a Current (or equivalent) status.

Additional things to consider

- Who can submit requests?
- Routing rules
- Issue (request) fields
- Custom Forms – are forms shared?



Attaching custom forms to your requests? Be sure Contribute is selected.

Adobe

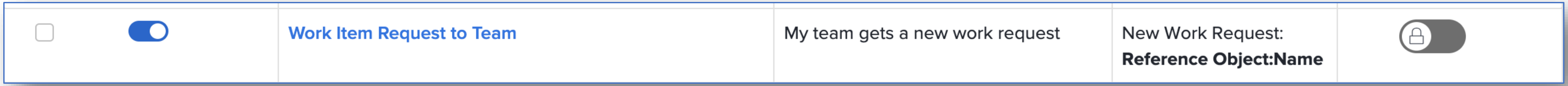
Request Queue Setup – Routing Rules

Routing Rules automatically assign incoming work. Recommendation: Route requests to a team, rather than an individual. If you are creating a team specifically for routing rules, consider labeling it something like "Request Routing" so you can easily identify which role this team plays in your Workfront instance.

Additional things to consider

- Make sure the email notification for My team gets a new work request (Work Item Request to Team) is activated at the global level and users have it turned on in their personal profile.
- Create an issue report that pulls in all issues assigned to this team for quick access

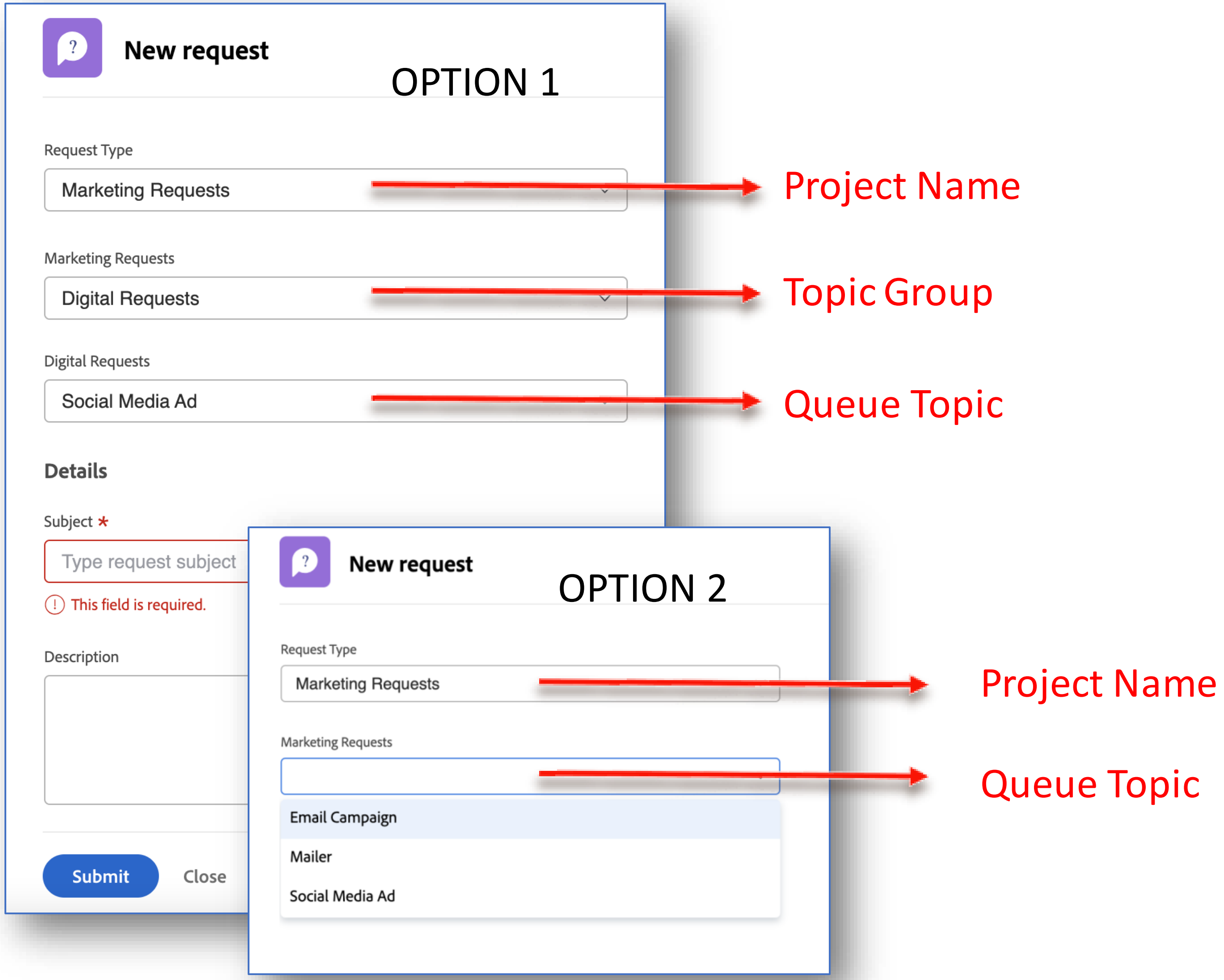
  Issue > Team ID > Equal > Request Routing



Request Queue Setup – Topic Groups & Queue Topics

Topic Groups and Queue Topics help layer requests into categories. Think of them like parent-child relationships in a project. The project name is the name of your Request Queue. Topic Groups are the Parent Tasks (not always required) and Queue Topics are the child tasks.

Recommendation: If multiple layers are needed, create Topic Groups first. That way, when you create Queue Topics, you can associate them to the appropriate Topic Group.



Sample Request Queues

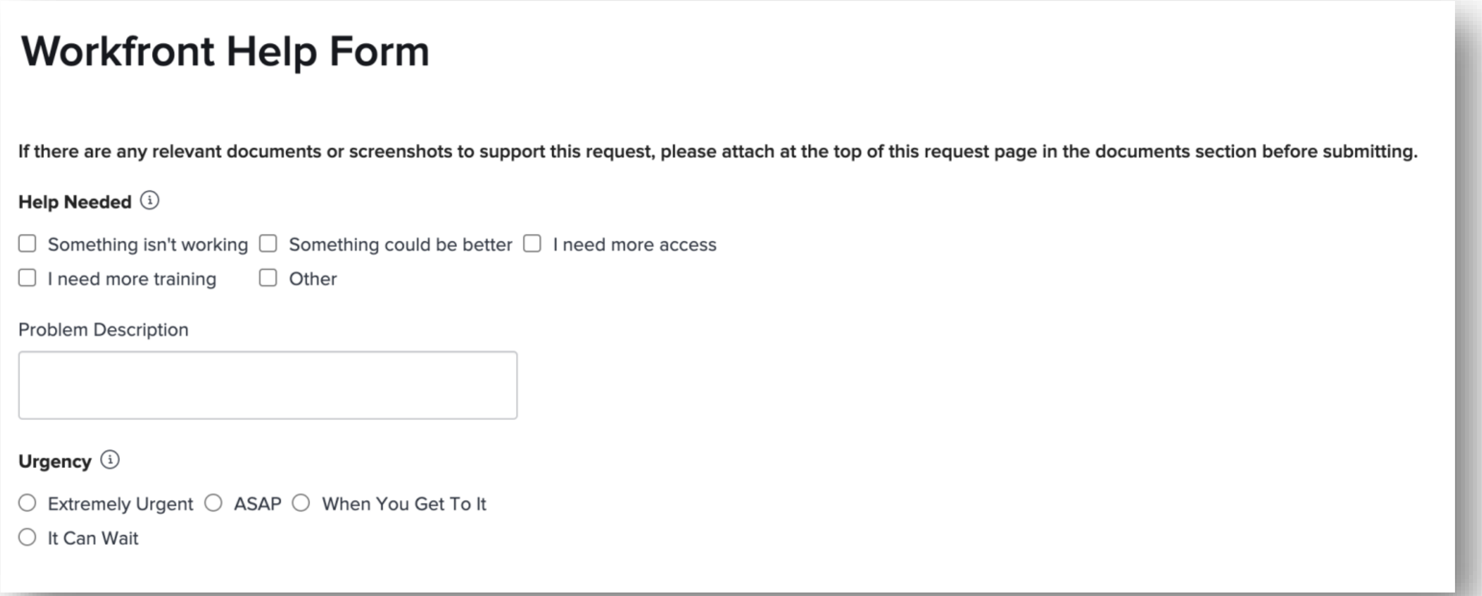
Adobe

Sample Request Queue #1 – System Admin Requests

How often are you being asked to build reports, add or deactivate users, edit custom forms, help with training, create new teams, adjust layout template settings and everything else? Can you turn those ad-hoc asks into an organized funnel for Sys Admin Requests to track, filter and report on those?

Request Queue details/setup:

- Anyone can submit a request
- Stick to issue resolution vs converted projects
- Leverage single custom form with minimal choices for optimal end user experience
- Automatically route to Sys Admin



Workfront Help Form

If there are any relevant documents or screenshots to support this request, please attach at the top of this request page in the documents section before submitting.

Help Needed

- [ ] Something isn't working
- [ ] Something could be better
- [ ] I need more access
- [ ] I need more training
- [ ] Other

Problem Description

Urgency

- ○ Extremely Urgent
- ○ ASAP
- ○ When You Get To It
- ○ It Can Wait

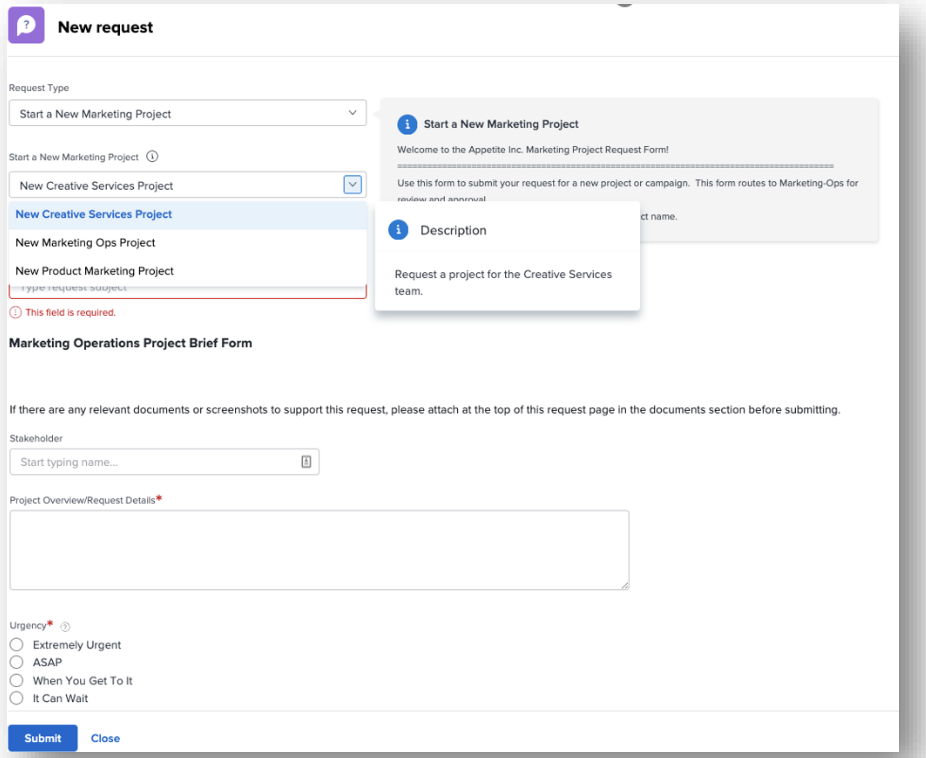
Pro-Tip: Submit Adobe Workfront Requests from MS Teams

Sample Request Queue #2 – Project Request & Approval

The real magic of the request queue functionality is when initiating new projects or large cross-functional campaigns. Create a standardized, transparent intake process for requests, capture key (reportable) details for those projects, along with seamless review and approval workflows, supported by consistent yet flexible project creation templates that include milestone and proofing processes from initiation to delivery.

This example includes:

- Queue setup with Marketing Project Brief as Custom Form
- Queue Topic Routing based on type of request
- Issue Approval Path with Custom Status for Executive Approval
- Project Templates with Approval Path, Milestones, and Portfolio attached
- Approval Path routes from PM to TC and then back to PM for Initiation



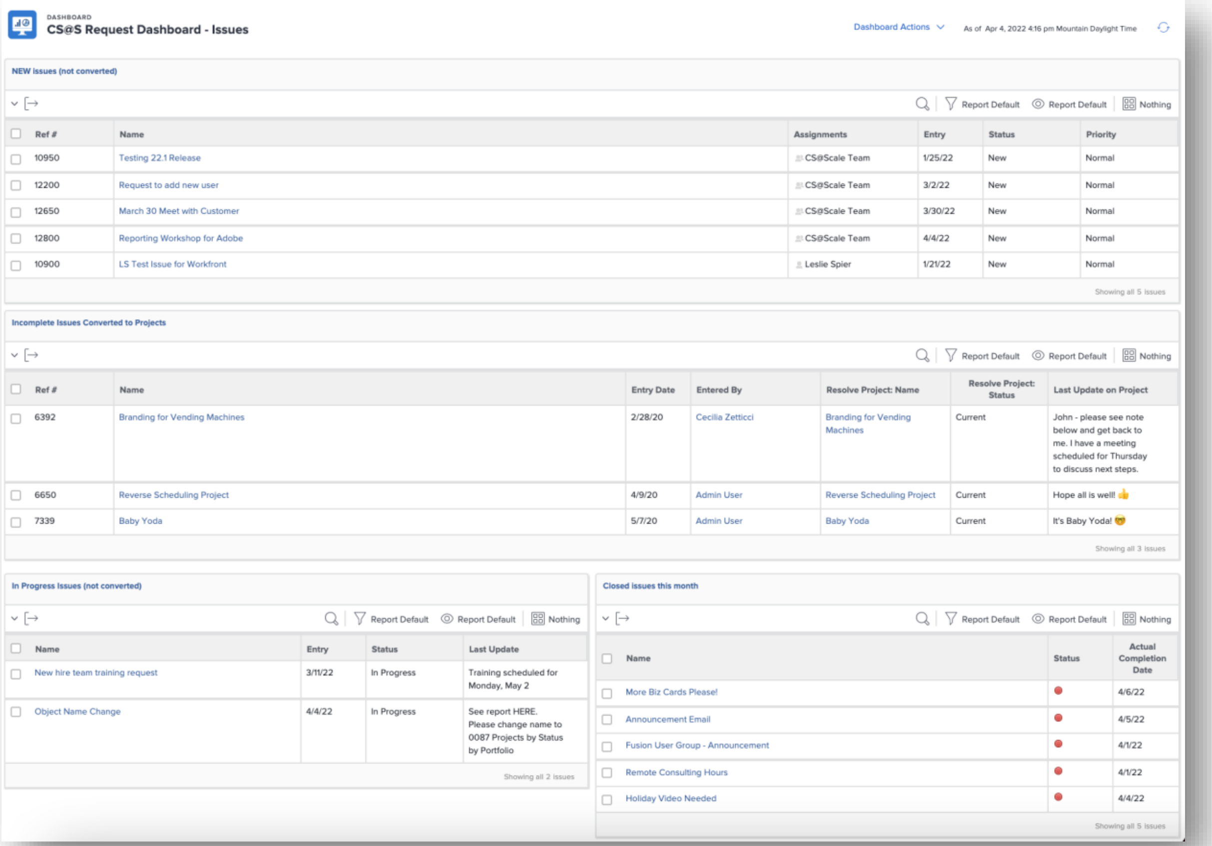
Adobe

Sample Request Dashboard

Dashboards don't have to be used just for reporting – they can also be a way to find, manage, update and complete work. Consider building a request dashboard that shows ALL work requests, everything from new, to in progress, to closed, to converted and project (or task) status updates.

Include reports for:

- Issues entered this month that are still in a new status (not converted)
- Issues entered this month that are in progress (not converted)
- Issues closed this month (not converted)
- Issues converted to projects / tasks with that resolve object status and recent update



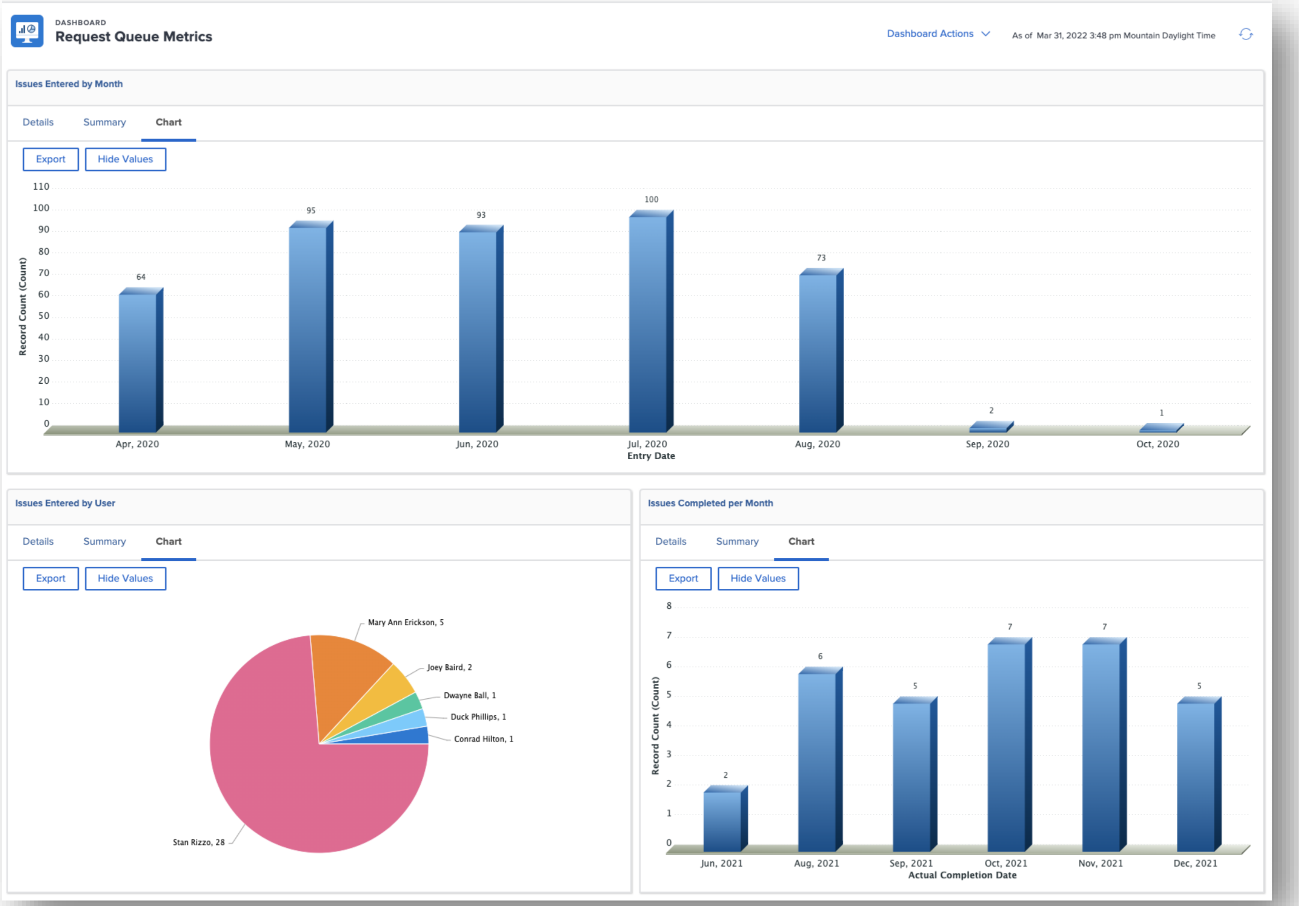
Adobe

Live Demo

Adobe

Sample Success Metrics

- # of days between actual start date and actual completion date – avg per month, quarter, year
- # of days between entry date and the actual start date – avg per month, quarter, year
- # of requests submitted per month, quarter, year
- # of requests completed per month, quarter, year
- # of requests by user per month, quarter, year
- # of requests by topic per month, quarter, year
- # of rejected requests per month, quarter, year
- # of requests converted to tasks and/or projects per month, quarter, year
- **What KPIs/metrics are you currently using?**



Adobe

Step-by-step report creation instructions

# of requests submitted per month

- Create an issue report
- Group the results by Issue Entry Date > Month
- Add a chart of your choice. By default, the chart will use the entry date grouping you selected
- Save and close your report

# of requests completed per month

- Create an issue report.
- Add a filter for Issue > Status Equates With > Closed
- Group the results by Issue > Actual Completion Date > Month
- Add a chart of your choice. By default, the chart will use the actual completion date grouping your selected
- Save and close your report

# of requests by user per month

- Create an issue report
- Group the results by Issue Submitted By > Name followed by Issue Entry Date > Month
- Add a column chart. Set your bottom (x) axis to Submitted by > Name and then toggle on Group Columns. Choose the Stacked option and group data by Submitted By > Name
- Save and close your report

# of days between actual start date and actual completion date

- Create (or edit) an issue custom form
- Create a new calculated custom field, ROUND(DIV(WORKMINUTESDIFF(Actual Completion Date, Actual Start Date),480),2)
- Attach custom form to all issues and include field in reports

Step-by-step report creation instructions (continued)

# of days between issue entry date and issue actual start date

- Create (or edit) an issue custom form
- Create a new calculated custom field, ROUND(DIV(WORKMINUTESDIFF(Entry Date, Actual Start Date),480),2)
- Attach custom form to all issues and include field in reports

# of days between issue entry date and resolve project actual start date

- Create (or edit) an issue custom form
- Create a new calculated custom field, ROUND(DIV(WORKMINUTESDIFF(Entry Date, Resolve Project.Actual Start Date),480),2)
- Attach custom form to all issues and include field in reports

Key Takeaways

Document and train users on a formal submission process

Share the WHY – why does this benefit you?

A single space to track, organize and prioritize all incoming work

Capture all details upfront to help reduce rework and guesswork

Leverage a Traffic Manager/Traffic Manager team to oversee incoming work requests

Build a high-level overview dashboard to easily identify new, in progress and completed work

Authority to assign, delegate and adjust deadlines as needed

Prioritize requests to ensure the right work is being done at the right time by the right people

Measure the impact of work

What were you hoping to accomplish by creating a request queue? Has it been successful?

Make continuous improvements based on user feedback – **adoption is key!**

Resources

Documentation / Training

- Create and Manage Request Queues
- Request Queue best practices
- Request Queue Management Course
- Display vs Skip Logic – Custom Forms

Connect with your Peers

- Ask questions and get ideas from other Workfront users on the Community
- Check the Events tab for upcoming webinars & workshops

Blogs

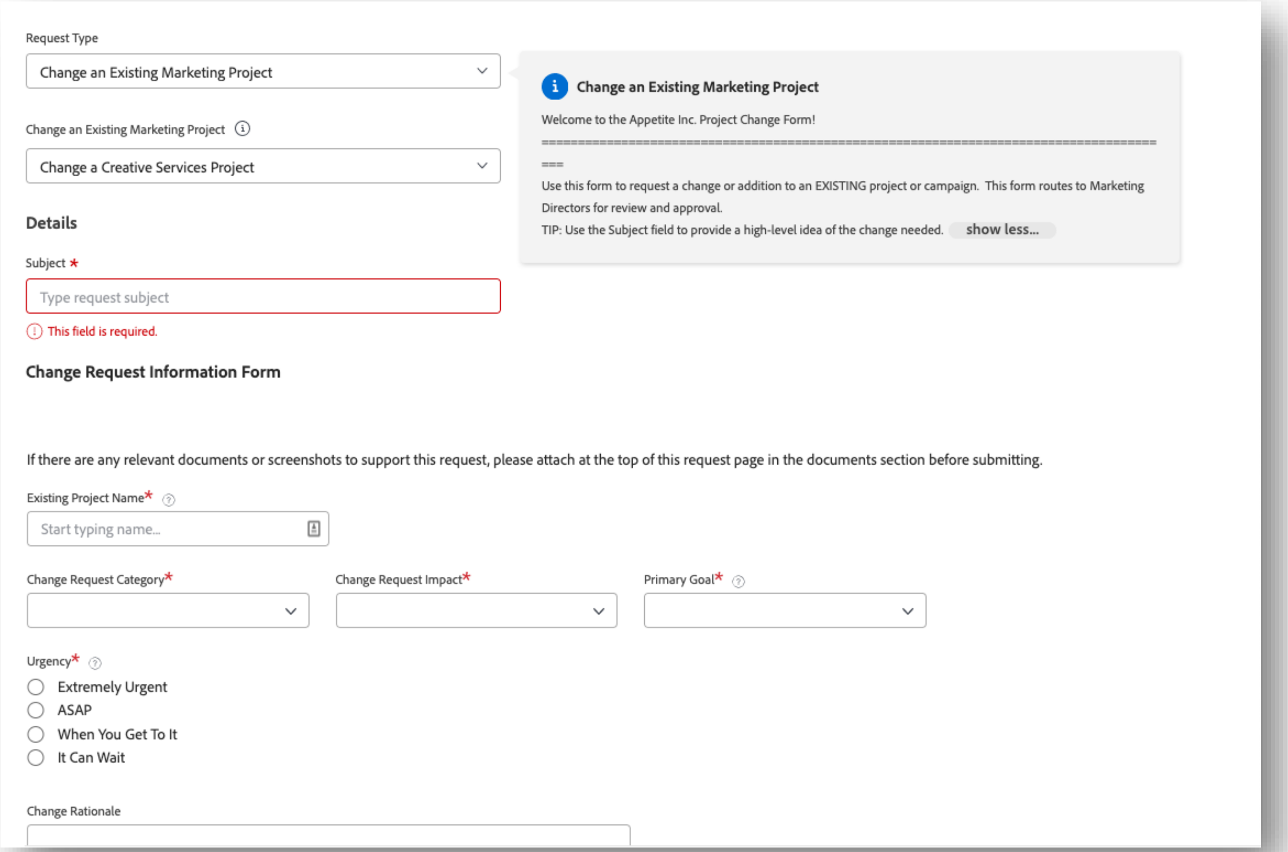
- Customer Success Tips: Work Intake
- Workfront is Simple – Optimizing Work Management
- A Toolkit to Drive Efficiency and Visibility

Sample Request Queue #3 – Change Requests

Here's an example of how to manage Change Requests/Changes in Scope to Projects. In this example, these were handled by attaching an Approval Process routed to a Governance Team, and then once approved, converting to a Task in the relevant Project.

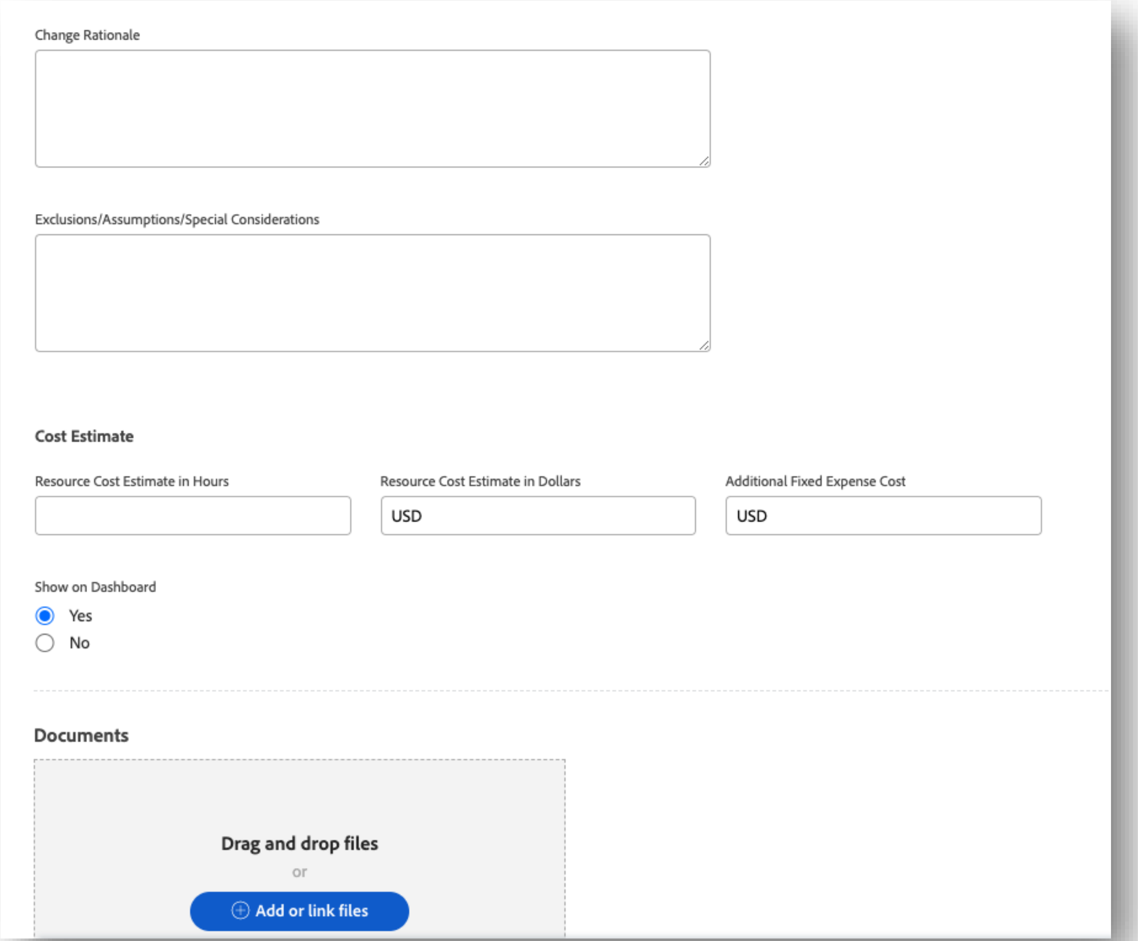
This example includes:

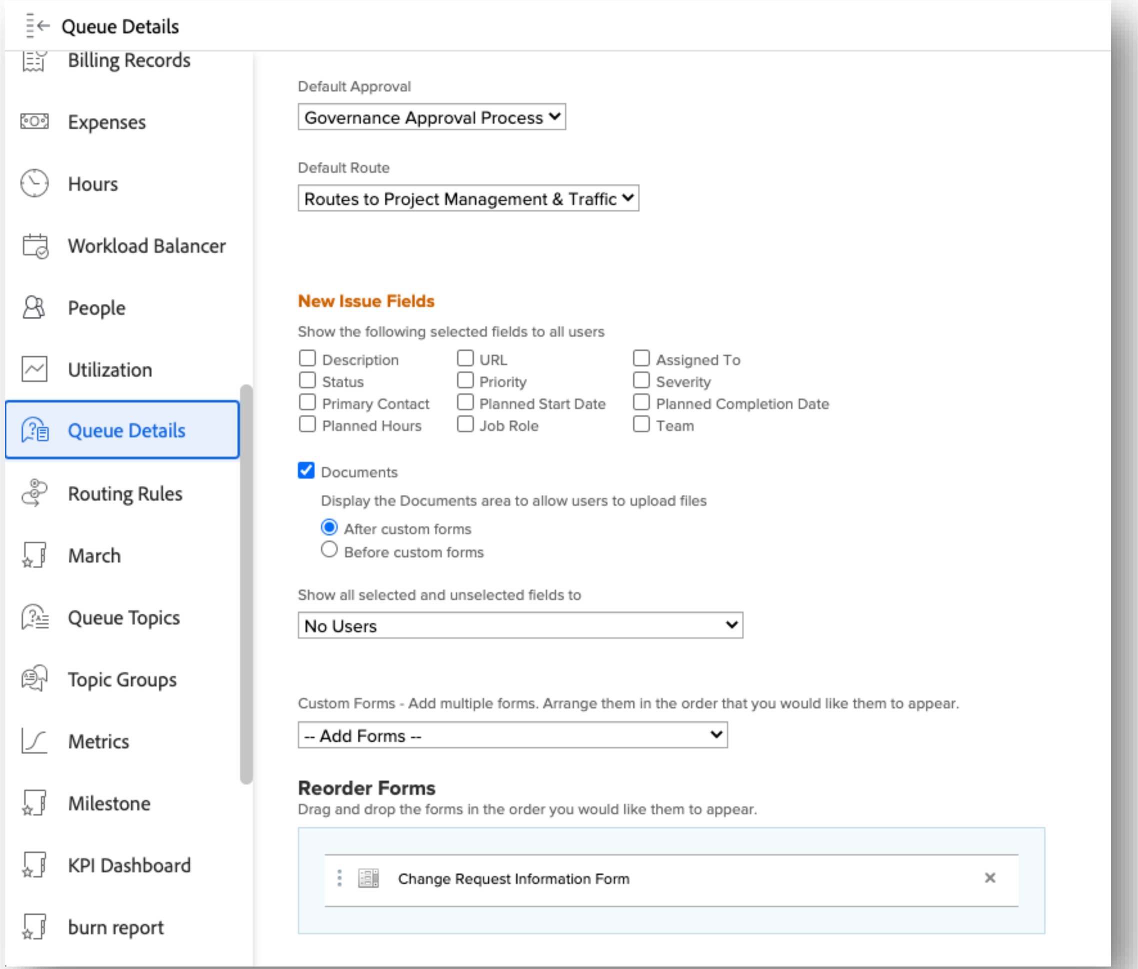
- Queue setup with Change Existing Project Custom Form
- Queue Topic Routing based on type of request
- Issue Approval Path with Custom Status for Executive Approval



Sample Request Queue #3 – Change Requests

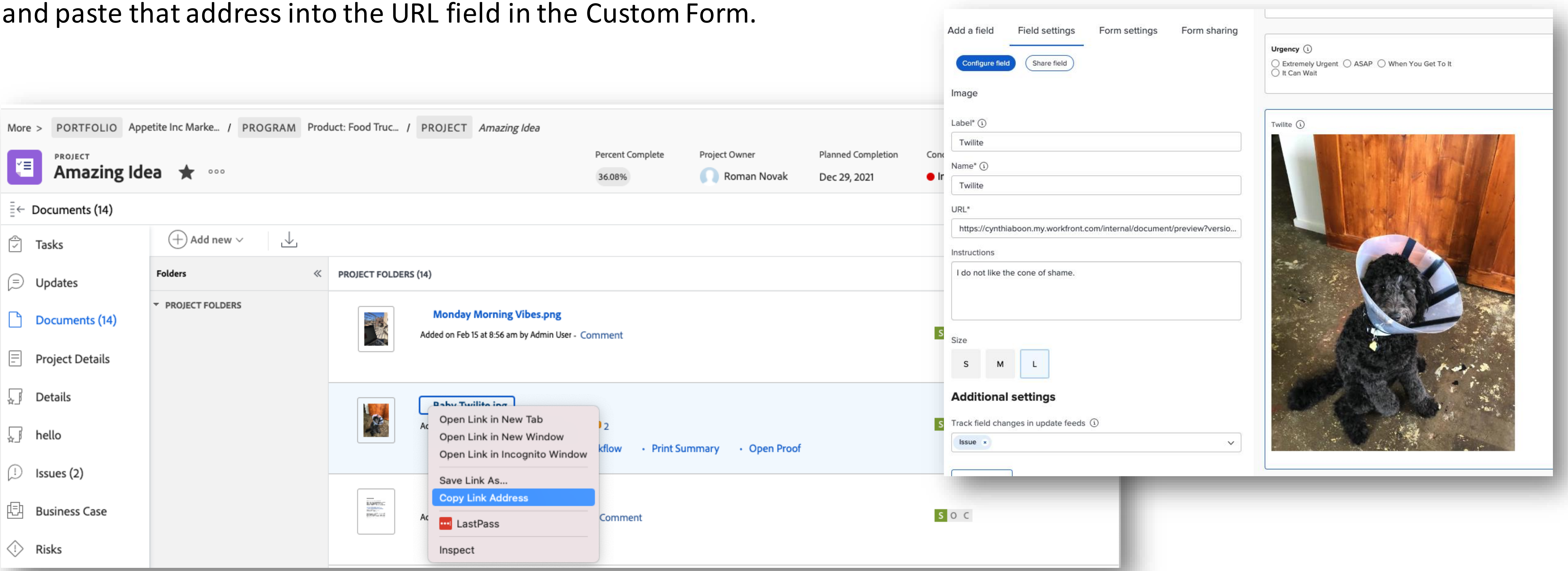
Additional Images of the Request and the Queue Details





Adding Images to Custom Form from Workfront Image

Ensure the image is uploaded to your preferred Workfront Project, then right-click on the image name, copy link address and paste that address into the URL field in the Custom Form.

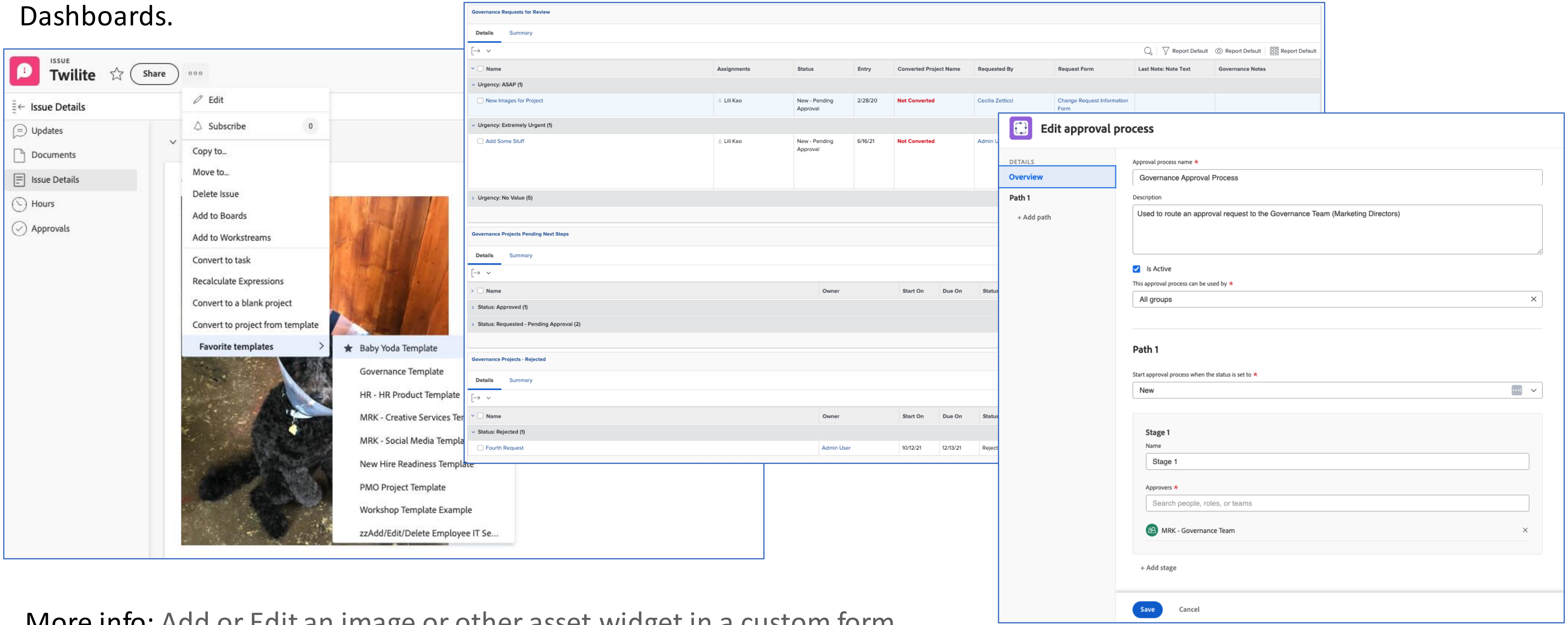


More info: [Add or Edit an image or other asset widget in a custom form]

Adobe

Bonus Tips!

Super charge your Request Queues with Favorite Project Templates, Issue Approval Processes, and Request Status Dashboards.

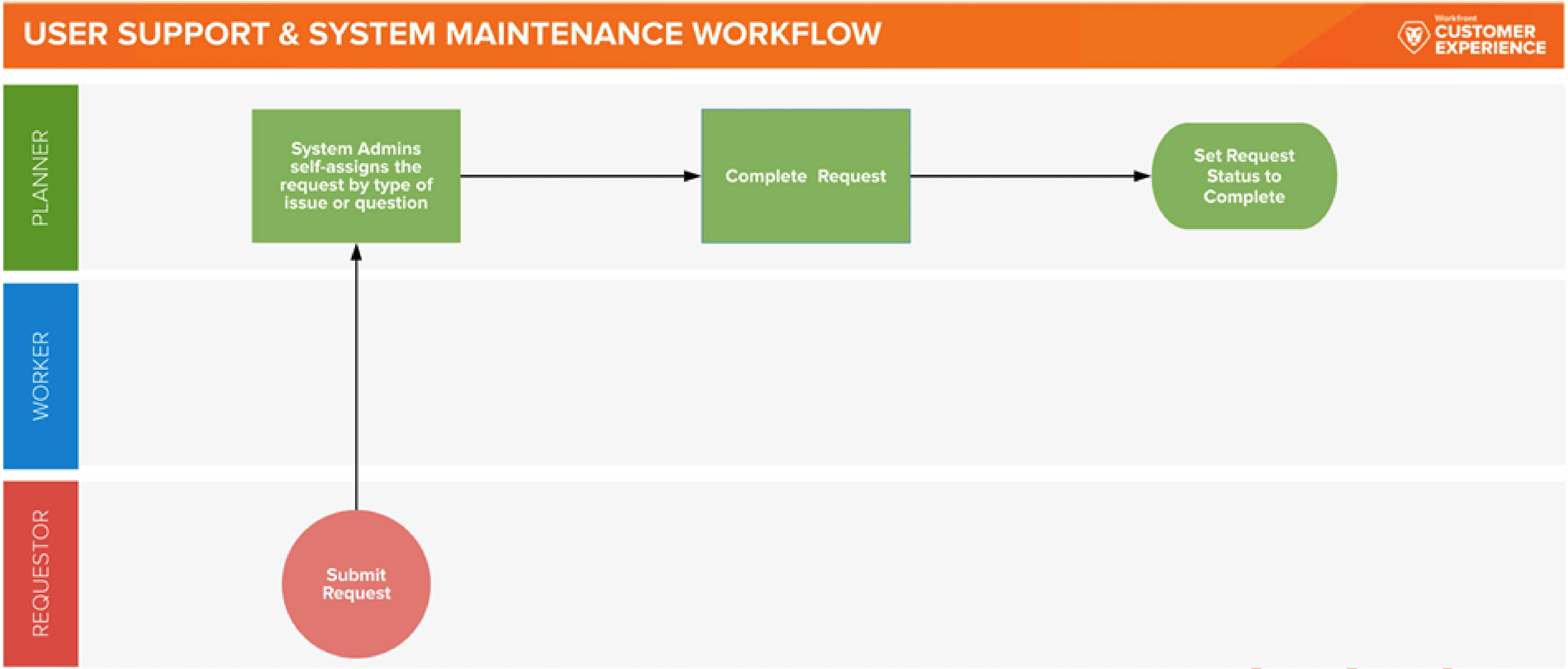


More info: Add or Edit an image or other asset widget in a custom form

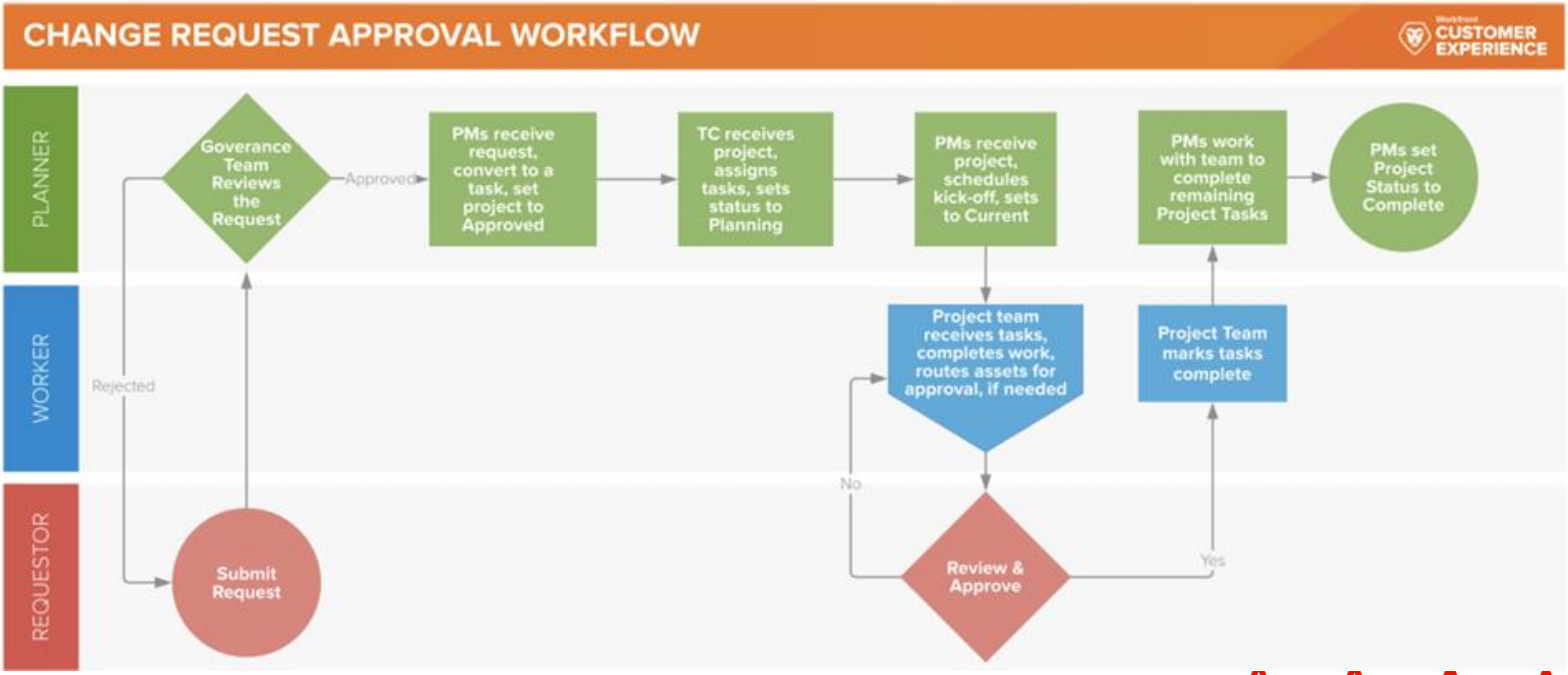
Adobe

Appendix

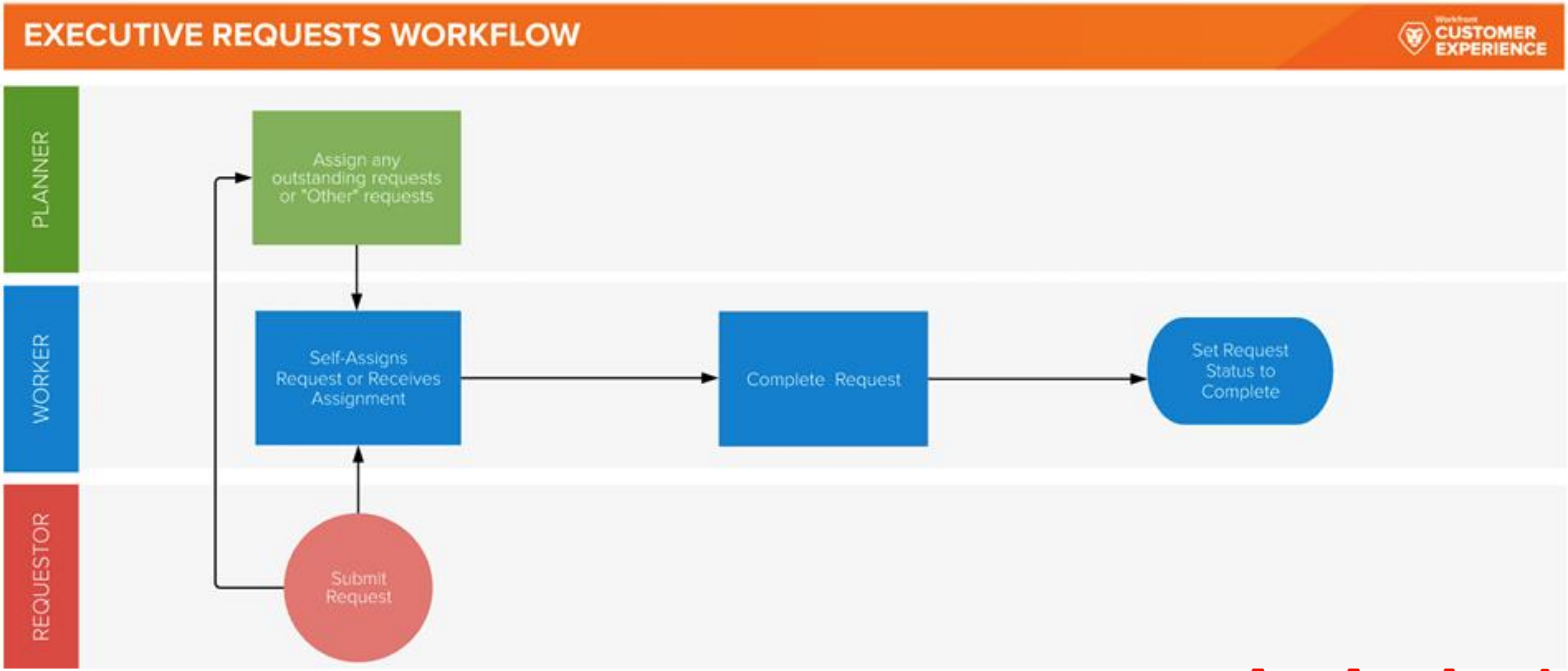
Example: User Support & Sys AdminWorkflow



Example: Change Request & Approval



Example: Issues only Workflow



Adobe