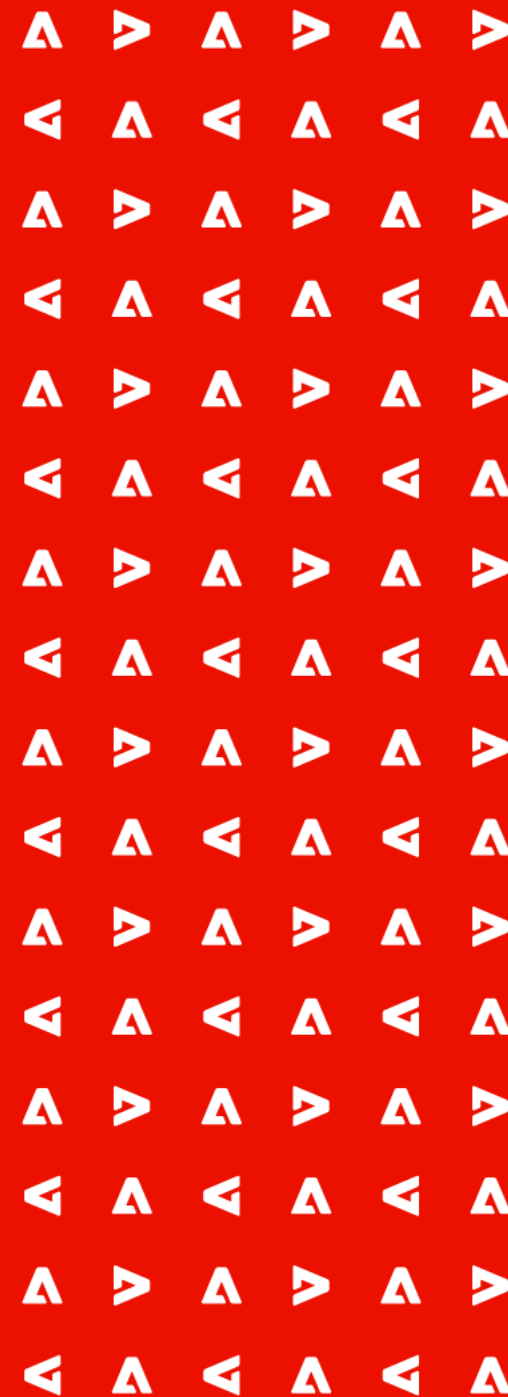




Learn: Making the case for a Full-time System Admin

Customer Success Workshop

September 7, 2023



Introductions



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Say hi in the chat!

- Where are you from?
- What brought you here today?
- How's the weather?



CSatScale@adobe.com

Disclaimer & Release Updates

Just a reminder...

- Any roadmap disclosures are for informational purposes only, are not a guarantee of any future feature or functionality and are subject to change at any time.

2023 Remaining Releases – Info to note:

- 23.9 release scheduled for September 28, 2023
- 23.10 release scheduled for October 26, 2023
- [4th Quarter 2023 Release Overview Page](#)
- [Enable or Disable Fast Releases](#)

Reminder! [Prepare for an Adobe Workfront Quarterly Release](#)



Agenda

5 minutes Welcome & Introductions

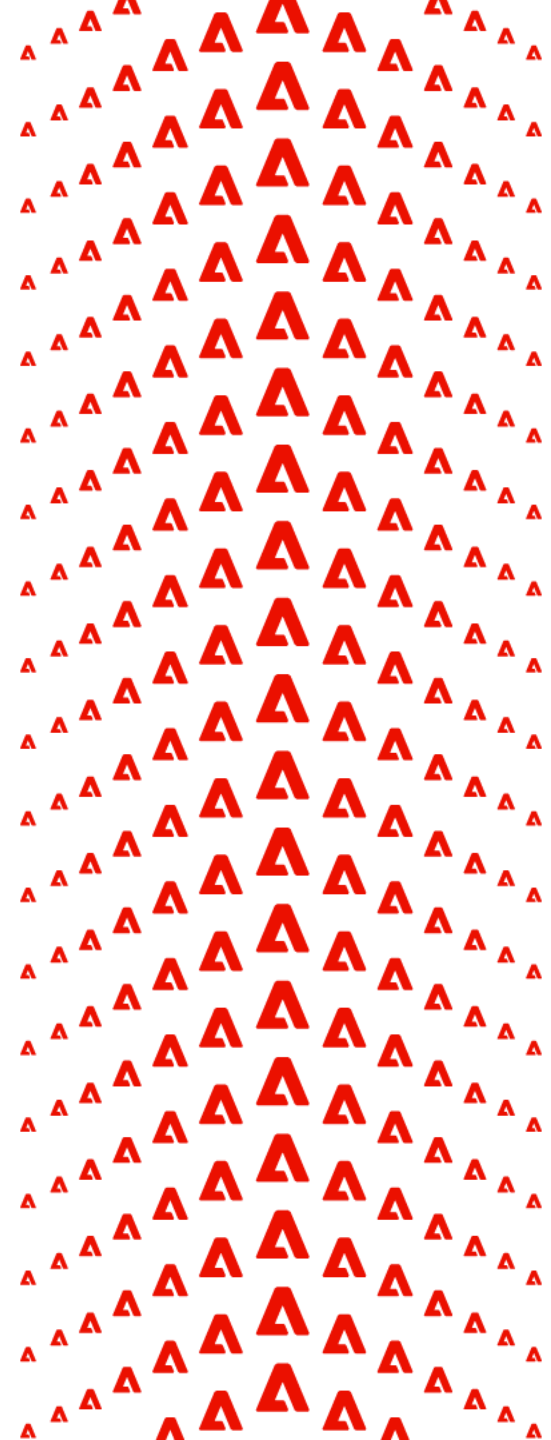
5 minutes Background & Objectives

10 minutes Getting Started

10 minutes Let's walk through the assets

25 minutes Open Q&A / Discussion

5 minutes Wrapping Up

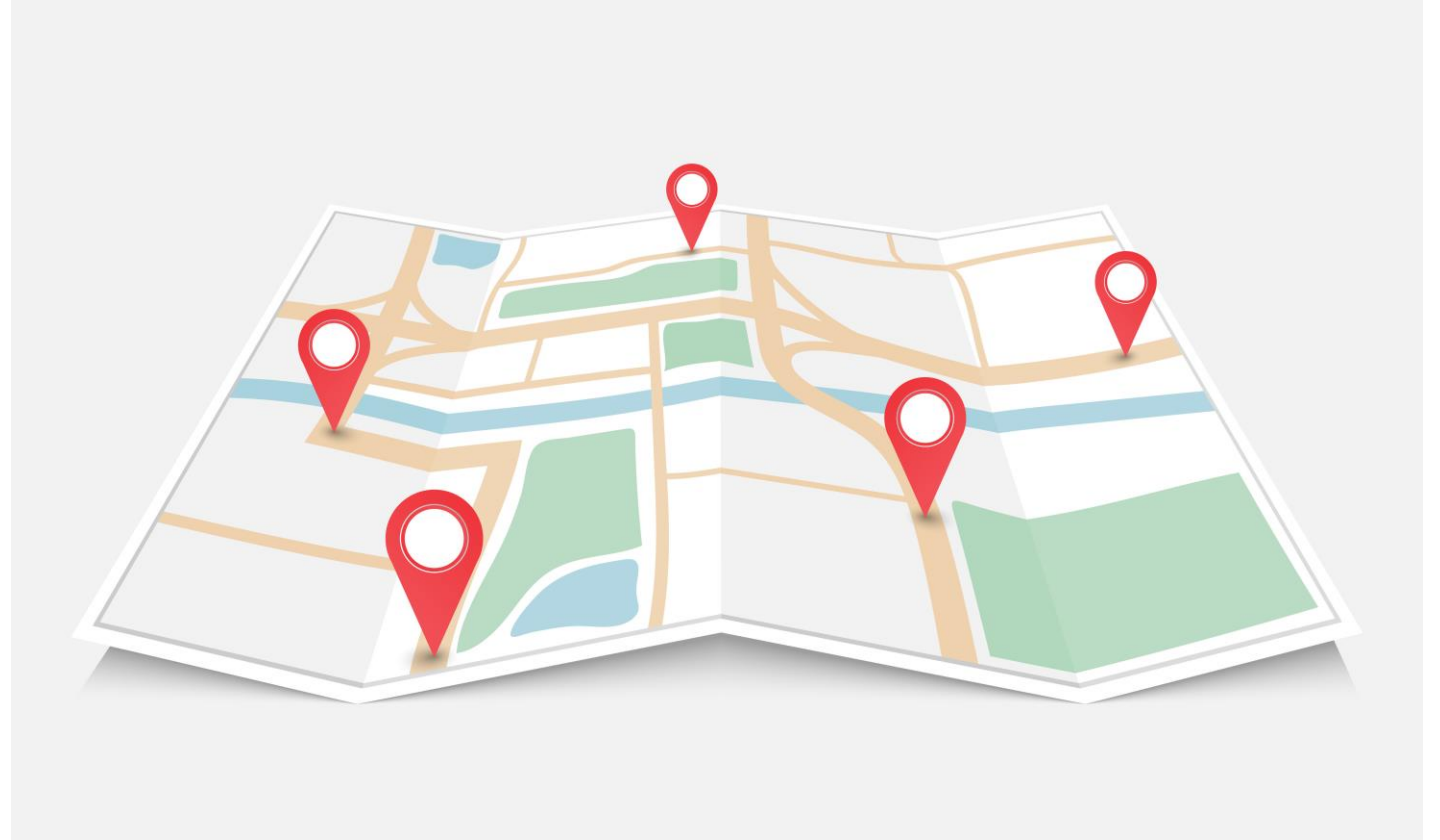


Let's go back in time



Back to the present - you are here...?

- Workfront Sys Admin as 2nd, 3rd, 4th job?
- No Sys Admin at all?
- Group Admin with limited access?
 - (Sys Admin controlled by another business unit)?
- Looking for back-up?



Choose your own adventure...

- Consider the possibilities
- There are more than you think
- What do you want to do?



Let's get ready to negotiate!



Politics & Strategy

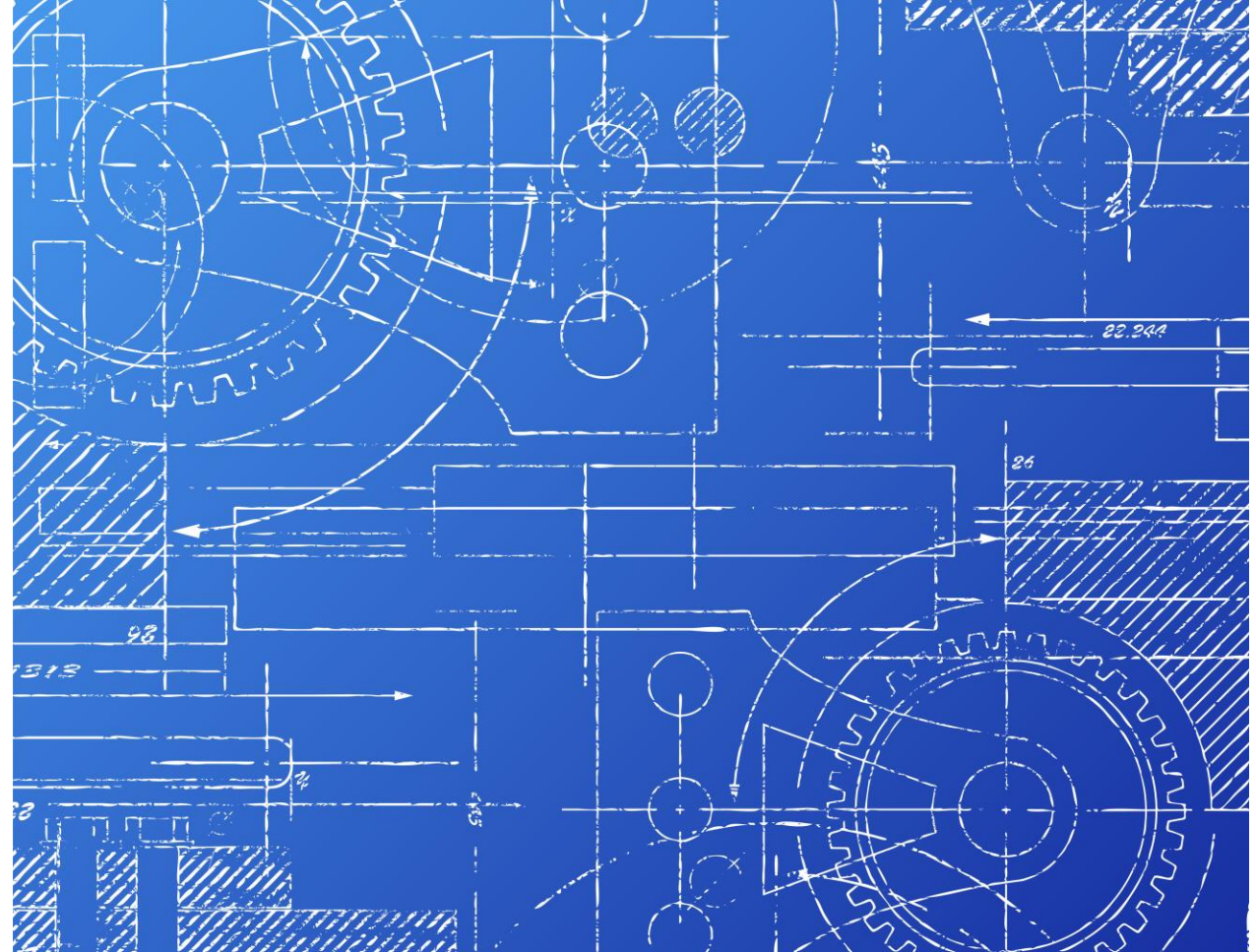
- Find your partners
- Start with best option
- Accept all ideas (even dumb ones) gracefully
- Prepare to compromise

What is your vision?



Build a picture

- What are we really talking about?
 - New Job
 - New Team
 - New Approach
- Timing is Key
 - Great resignation
 - New leadership
 - Reductions



Your Toolkit



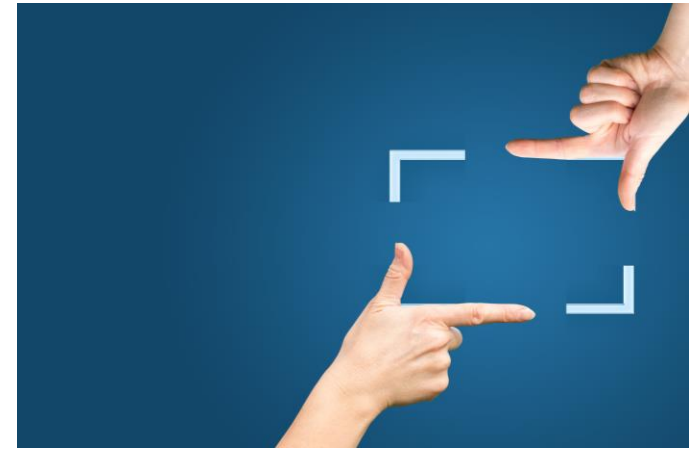
The Job

Where is Workfront headed in your org?



The Vision

Who should be included in your team?



The Data

Prepare your case with evidence

A goal without a plan is just a wish. Antoine de Saint-Exupéry

Let's open the treasure chest...

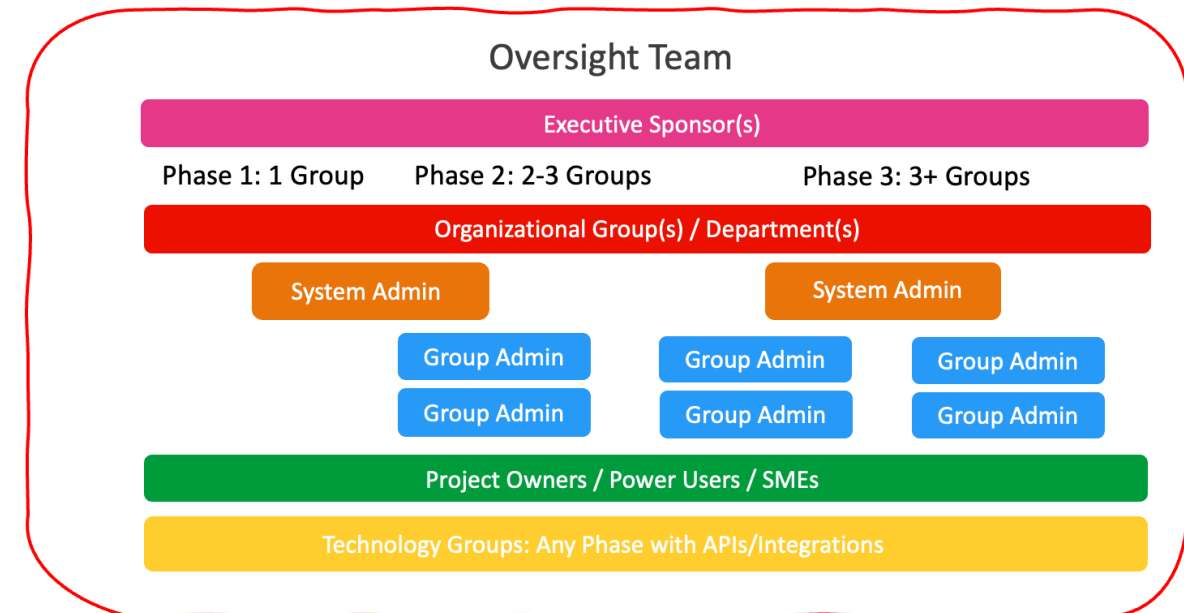


Job Descriptions – Sys Admin

- Find your candidate
- Combine roles
- Be creative
- Be flexible
- Decide what's important
 - Summary
 - Responsibilities
 - Experience
 - Certifications
 - Skills
 - Personality
- So many titles to choose from!
 - System Admin – Workfront
 - Workfront Administrator
 - Workfront Admin
 - Workfront Systems – Admin
 - Workfront Business Analyst (Can be used for Sys Admin or Group Admin)
 - [Department] Operations Specialist/Analyst/Manager/Administrator
 - [Department] Operations Systems Specialist/Analyst/Manager/Administrator

Job Descriptions – Group Admin

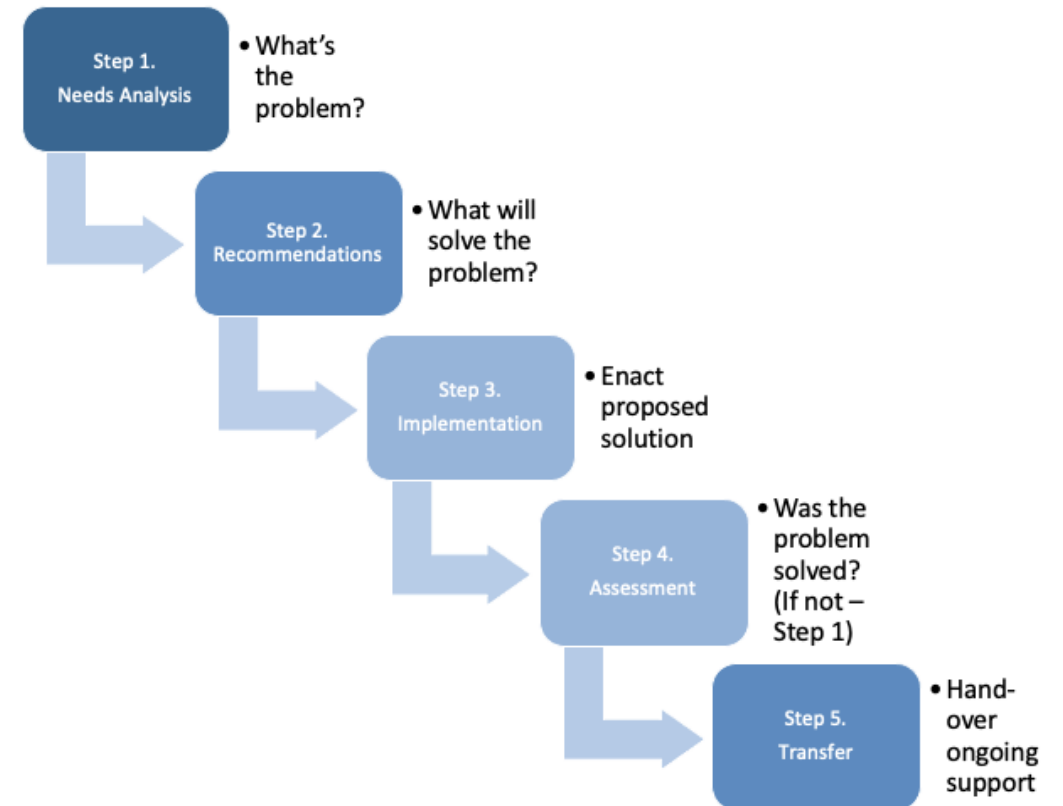
- Build your team
 - It's most always NOT about the number of users
 - It's about the effort (number of processes)
- Choose wisely
 - Who cares the most?
 - Who will be a partner?
 - Who understands the business processes best?
 - Who is your "voice of reason"?
 - Who is willing to always be learning?
- Don't assume!
 - That they aren't interested
 - That they are "content" in their current role or duties
 - That they require more pay or have a fancy title



Business Plan Best Practices

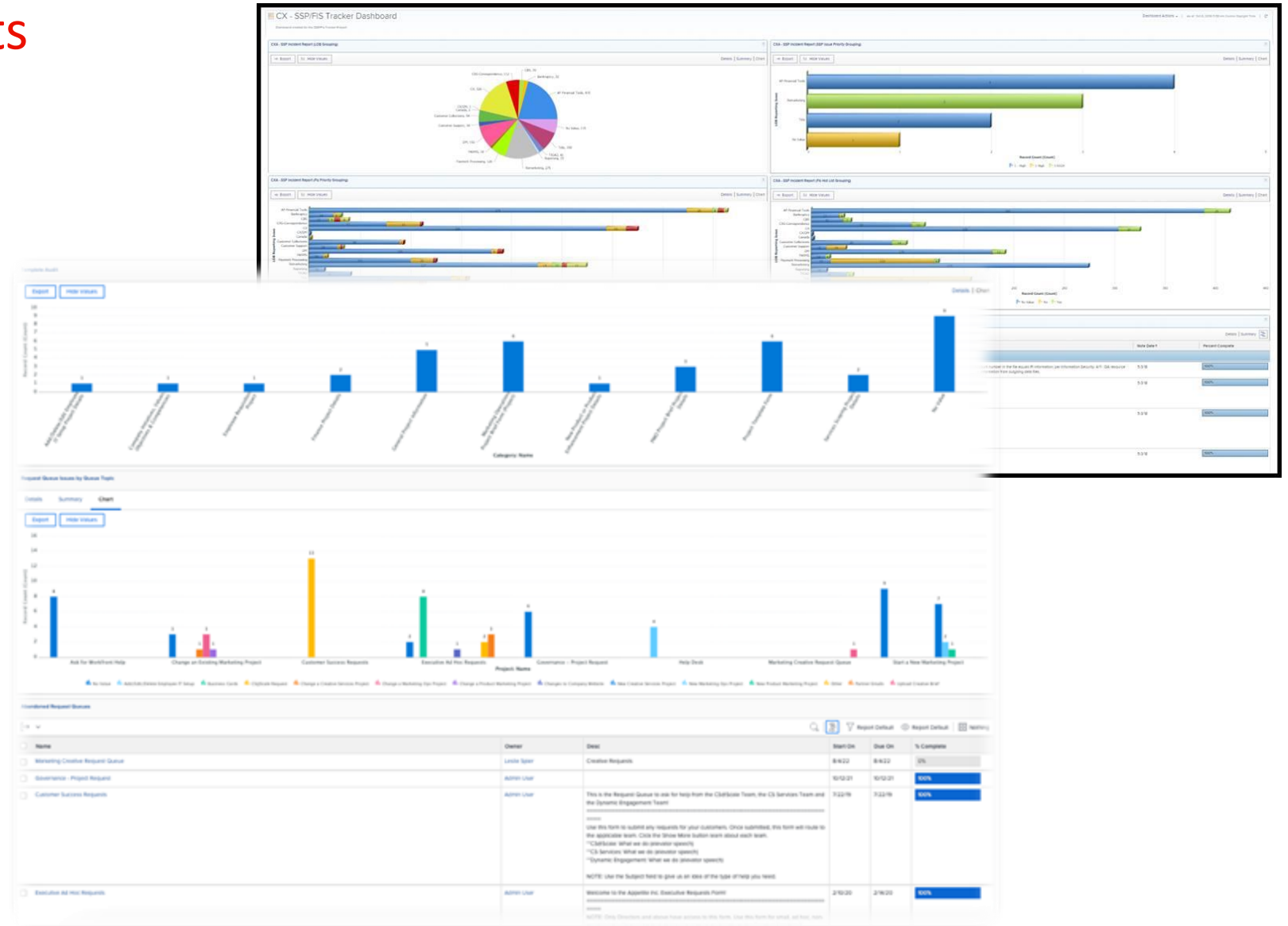
- Pictures are powerful!
- Test the waters...
- Create an elevator speech – choose your words carefully
- Incorporate feedback – regardless of feasibility
- Find champions to sell it for you
- Use your plan to solve other challenges to gain buy-in, including budget
- Keep it short, easy to understand and communicate
- Be flexible
- Be patient
- Don't give up

Structured Approach to Work & Processes



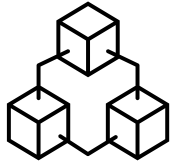
Workfront Reports & Assets

- Company-level
- Portfolio
- Programs
- Projects/Templates
- Custom Form Fields
- Request Queues
- Reports/Dashboards



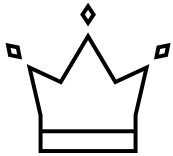
Need Report Ideas? System Maintenance Dashboard

Where will you start today?



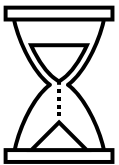
Create one Workfront object

Request Queue? Expansion Project Template? Backlog Project? Sys Admin Report?



Identify your Champion

Who "gets" it? Who is the best at navigating office politics? Who is the most popular?



Define your Timeline

Be realistic. Be flexible. Be ready to communicate your plan.

Back to the Basics: [Sys Admin Best Practices - Anthony Imgrund from 2020](#)

Questions / Open Discussion



The Big Picture...



Time

- For most of us, this effort will take time
- The solution may not be what we expected
- Ideas may need to be presented multiple times

Relationships

- Call it politics or bridge-building, this effort is about cultivating and maintaining relationships
- Ultimately, your reputation is your most precious commodity
- Include other approaches and ideas

Investment

- Take this opportunity to invest in your career
- Think about where you want to end up
- You might surprise yourself

Workfront Key Takeaways



Use Workfront to manage your administrative work

Teamwork makes the dream work! Tag in your collaborative coworkers to help review and test upcoming features. Using Workfront to make your life easier, while also building a champion network? Win-win!



Use Workfront data to communicate your message

If you tell them what they want to know, they'll love you! Be aware of "thought nuggets" - a snippet/soundbite that will stick with an executive. Be confident, but just be mindful of what you say. Listen for key words and "pain points" during meetings for report ideas

No data can be just as powerful as data (example: why does this team have zero tasks?)



Share the documentation & videos to streamline training

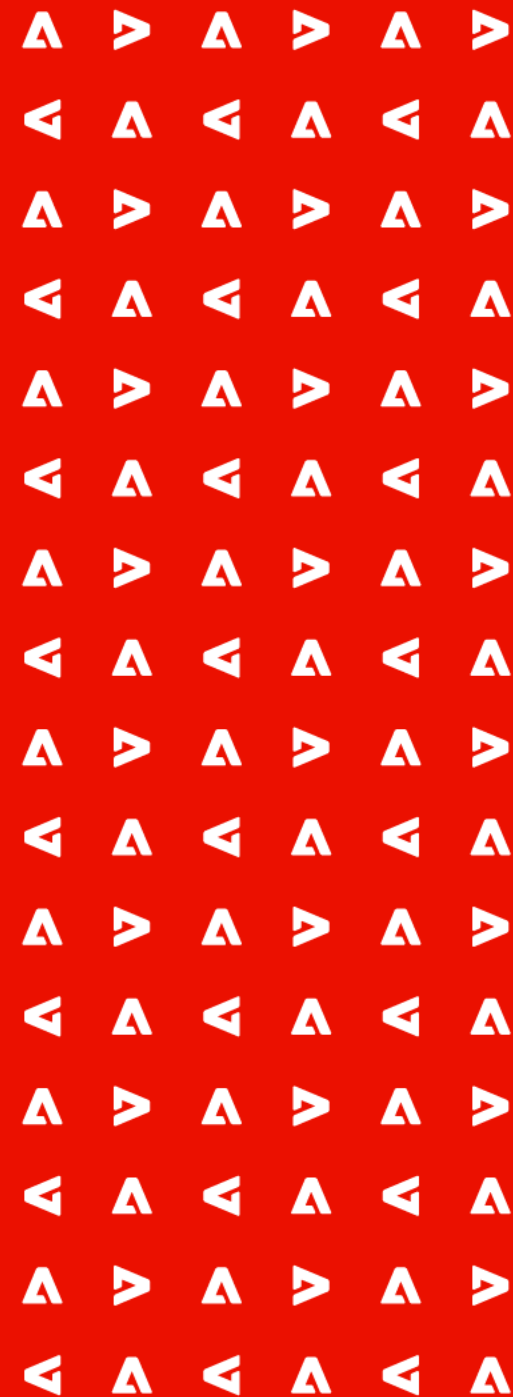
Communication is always the key to success! Share the documentation and videos with your users. Some of the best ideas for how to implement and expend Workfront features come from your own users.

Experience League Guide: [Discover the Possibilities of Experience League](#)





Appendix – System Examples



Workfront Encyclopedia Report (Thanks Rhonda!)

REPORT Encyclopedia of Workfront		Show Filters Report Actions As of Feb 23, 2023 4:26 pm Central Standard Time			
Details Summary					
Category	Topic	Bit of Knowledge	Last Note	Last Note by	Last Note Date
Parent: Name: BEST PRACTICES (14)					
Parent: Name: ***Workfront Encyclopedia Process*** (1)					
Parent: Name: REPORTING (5)					
<input type="checkbox"/> REPORTING	Conditional Formatting	Comparing dates (and more!) with conditional formatting. https://one.workfront.com/s/managed-content-blogs/workfront-wednesday-did-you-know-comparing-dates-and-more-with-conditional-forma-MCB64UAJFP6NGSFJ562WXWBB3SSQ	Match report colors with your company's style guide using text mode	Rhonda Triggs	2/17/23
<input type="checkbox"/> REPORTING	Date Diff	Column displayname=Week Day Difference textmode=true valueexpression=WEEKDAYDIFF({plannedCompletionDate},{actualCompletionDate}) valueformat=HTML displayname=Entry/Completion textmode=true valueexpression=WEEKDAYDIFF({entryDate},{actualCompletionDate}) valueformat=HTML		Rhonda Triggs	2/17/23

Sample Issue Report with Conditional Formatting

REPORT
Connect Event - Requests by Urgency

Prompt: N/A Output: List Grouping: Request Status Fields: Request (Issue Name), Assignments, Priority, Status, Entry, Act Comp, Converted Project Name Summary: A list report that shows requests (issues) submitted by \$\$userid.

Details Summary

Search Report Default Report Default Report Default

Name	Assignments	Urgency ↑	Status	Entry	Converted Project Name	Requested By	Request Form
Urgency: ASAP (1)							
<input type="checkbox"/> New Images for Project	Lili Kao	ASAP	New - Pending Approval	2/28/20	Not Converted	Cecilia Zetticci	Change Request Information Form
Urgency: Extremely Urgent (1)							
<input type="checkbox"/> Add Some Stuff	Lili Kao	Extremely Urgent	New - Pending Approval	6/16/21	Not Converted	Admin User	Change Request Information Form
Urgency: It Can Wait (2)							
<input type="checkbox"/> Fancy Logo Business Cards	Lili Kao	It Can Wait	New	2/28/20	Not Converted	Cecilia Zetticci	Executive Ad Hoc Request Form
<input type="checkbox"/> Meet with Customer	Lili Kao	It Can Wait	New	9/8/21	Not Converted	Admin User	Change Request Information Form Dynamic Engagement Custom Form - Issue
Urgency: When You Get To It (2)							
<input type="checkbox"/> Branding for Vending Machines	Lili Kao	When You Get To It	In Progress	2/28/20	Branding for Vending Machines	Cecilia Zetticci	Marketing Operations Project Brief Form
<input type="checkbox"/> Remote Consulting Hours	Lili Kao	When You Get To It	New	9/8/21	Not Converted	Admin User	Change Request Information Form Dynamic Engagement Custom Form - Issue
Urgency: No Value (2)							
<input type="checkbox"/> Third Request	Lili Kao		New	10/12/21	Not Converted	Admin User	PMO Project Brief
<input type="checkbox"/> Kang the Conquerer	Lili Kao		New	2/21/23	Not Converted	Admin User	Add/Delete/Edit Employee IT Setup

Showing 8 issues

Workfront Requests

New request

Share path

Request Type
Ask for Workfront Help

Details

Subject *
[Type request subject]

Priority
Normal

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* ?

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

Problem Description

0/2000

Urgency* ?

- Extremely Urgent
- ASAP
- When You Get To It

Ask for Workfront Help

Welcome to Workfront Help Form!

Use this form to submit any questions, challenges, improvements or training requests. Once submitted, this form will route to your Appetite, Inc. System Administrators. [show more...](#)

Portfolio & Programs

REPORT	
Sys Admin Portfolio Programs	
Details	
[→ v]	
<input type="checkbox"/> Name	
<input type="checkbox"/>	Ongoing System Management
<input type="checkbox"/>	Workfront Best Practices
<input type="checkbox"/>	Request Queues
<input type="checkbox"/>	Training: Soft Skill Initiatives
<input type="checkbox"/>	User Experience Improvements
<input type="checkbox"/>	Ongoing Audit & Cleanup
<input type="checkbox"/>	Expansion: Sales Operations
<input type="checkbox"/>	Training: New Employee Onboarding
<input type="checkbox"/>	Training - New User to Workfront
<input type="checkbox"/>	Expansion: Loan Originations
<input type="checkbox"/>	Workfront Training - Releases & Updates
<input type="checkbox"/>	Expansion: Collections
<input type="checkbox"/>	Training: Workfront Team Buildings
<input type="checkbox"/>	Training: Administration

Make sure you are tracking all the work you are doing to support your Workfront efforts:

- Training Users & Admins
- Driving Adoption
- Learning and Networking for Best Practices
- Setting and managing the Configuration
- Documenting the configuration
- Answering user questions
- Submitting and tracking Support tickets
- Implementing new processes
- Optimizing existing processes
- Prioritization and Governance
- Budgeting
- License Allocation
- Enhancement & Integration Roadmap
- Tracking Releases & Features
- Building new Reports/Dashboards
- Ongoing System Audit
- Managing and Communicating Changes

Reports/Dashboard - People Love Colorful Charts!

