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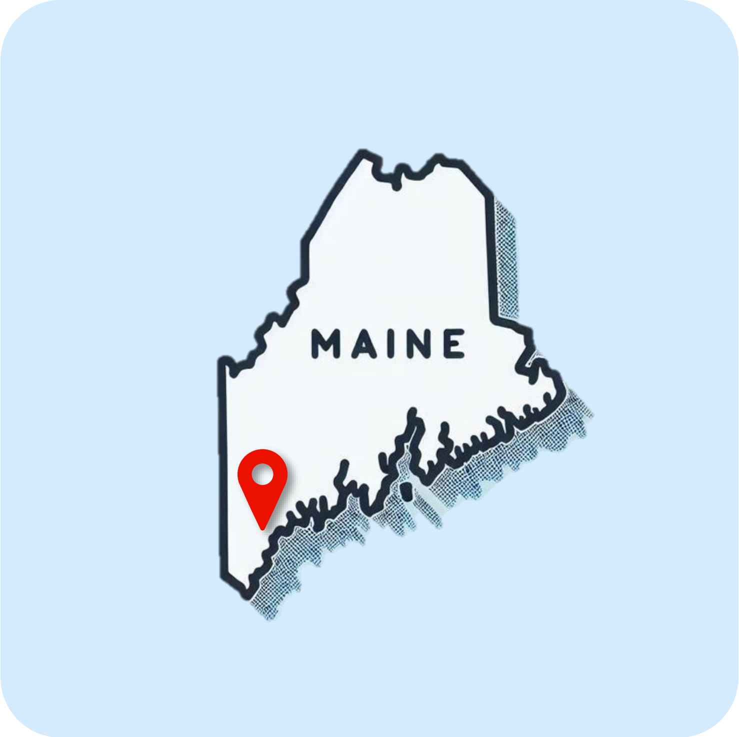
THE SKILL EXCHANGE

The Right Solution, Not the Solution: Process Optimization through Adobe Workfront

Lyndsy Denk
Marketing Training and Enablement Manager, IDEXX

Just a girl from Maine



Technical writer, instructional designer, weird aunt, genealogy nut, competitive public speaking coach

IDEXX

Customer since late 2016

< **2000** total users
195 licenses

Primary use	Creative and Digital Marketing
Key functions	• Projects, programs, portfolios • Proofing • Request queues • Resourcing

Today's journey

Problem: We receive too many ad hoc and urgent requests

The dashboard that fostered healthier collaborations

Problem: We have lots of ideas and little focus

The dashboard that increased my overall efficiency

Takeaways

Q&A

Problem:
We have lots of ideas and little focus

Problem: We have lots of ideas and little focus

Wrong solution

- Continue to be reactive.
- Complain about how much work you have to do.
- Sow your garden of Frankenstein efforts.

DASHBOARD

Workfront Optimization and Implementations

Dashboard Actions

As of Oct 18, 2024 2:44 pm Eastern Daylight Time

See what your system administration has been up to for improving your experience in Workfront.

Reports in this dashboard | Workfront Optimization and Implementations

Export

Details | Summary

Name ↑	Description
Report Folder: Name: Admin (3)	
Admin | Complete Optimization and Implementations Last 24 months	View a list of completed optimizations and implementations.
Admin | Planned Optimization and Implementations	View a list of scheduled optimizations and implementations.
Admin | Workfront Optimization and Implementation Backlog	See a list of requests or issues that we would like to addre

Admin | Planned Optimization and Implementations

Details Summary

Name	Priority ↓	T-shirt size | Plan
Planned Completion Date: Q4, 2024 (4)		

Fit All

2024 | Q2 - 2024 | Q3 - 2024 | Q1 - 2025

eb Mar Apr May Jun Jul Aug Sep Oct Feb

Find all CS at Scale community webinars on

Experience League Events >

DASHBOARD

Workfront Optimization and Implementations

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Admin | Planned Optimization and Implementations	View a list of scheduled optimizations and implementations.
Admin | Workfront Optimization and Implementation Backlog	See a list of requests or issues that we would like to address, but have yet to prioritize.

Showing all 3 reports

Admin | Planned Optimization and Implementations

Details Summary

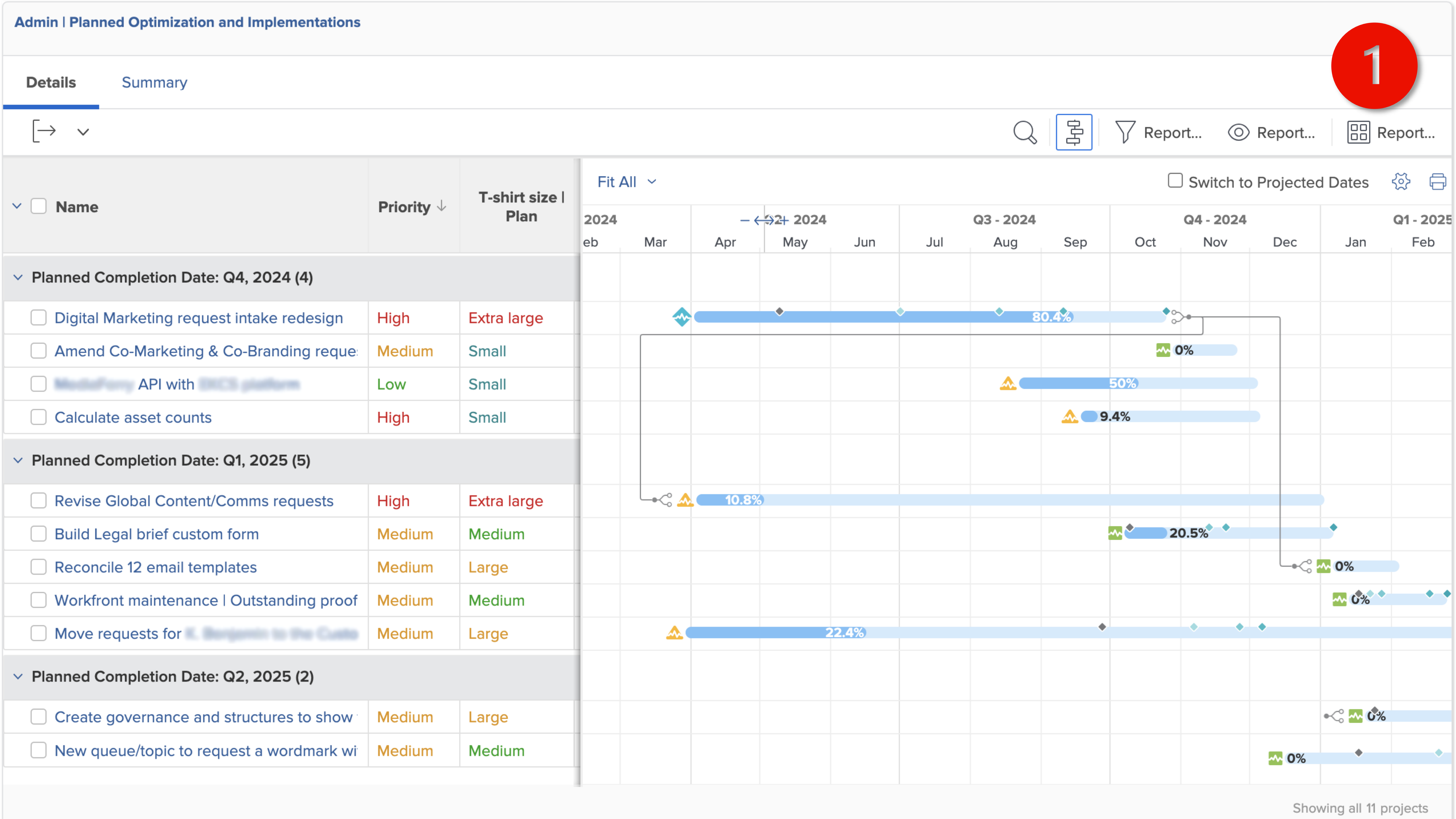
Name	Priority ↓	T-shirt size | Plan
Planned Completion Date: Q4, 2024 (4)		

Fit All

2024 | Q2 - 2024 | Q3 - 2024 | Q1 - 2025

Feb Mar Apr May Jun Jul Aug Sep Oct ... Feb

Find all CS at Scale community webinars on Experience League Events >



Admin | Planned Optimization and Implementations
1
Details
Summary
Report...
Report...
Report...
Fit All
Switch to Projected Dates
Name
Priority
T-shirt size | Plan
2024
Q2 - 2024
Q3 - 2024
Q4 - 2024
Q1 - 2025
Feb
Mar
Apr
May
Jun
Jul
Aug
Sep
Oct
Nov
Dec
Jan
Feb
Planned Completion Date: Q4, 2024 (4)
Digital Marketing request intake redesign
High
Extra large
80.4%
Amend Co-Marketing & Co-Branding reque
Medium
Small
0%
API with
Low
Small
50%
Calculate asset counts
High
Small
9.4%
Planned Completion Date: Q1, 2025 (5)
Revise Global Content/Comms requests
High
Extra large
10.8%
Build Legal brief custom form
Medium
Medium
20.5%
Reconcile 12 email templates
Medium
Large
0%
Workfront maintenance | Outstanding proof
Medium
Medium
0%
Move requests for
Medium
Large
22.4%
Planned Completion Date: Q2, 2025 (2)
Create governance and structures to show
Medium
Large
0%
New queue/topic to request a wordmark wi
Medium
Medium
0%
Showing all 11 projects

Planned Completion Date: Q2, 2025 (2)

Create governance and structures to show	Medium	Large
New queue/topic to request a wordmark wi	Medium	Medium

0%

0%

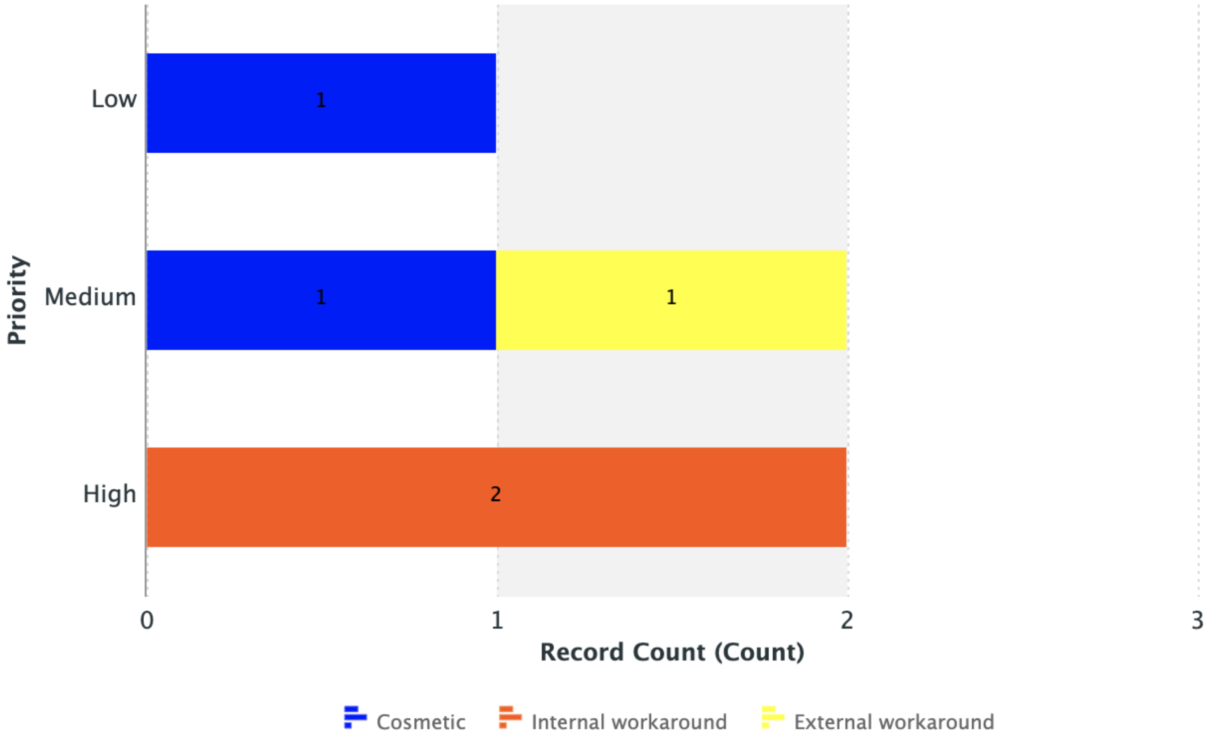
Showing all 11 projects

2

Admin | Workfront Optimization and Implementation Backlog

Details Summary **Chart**

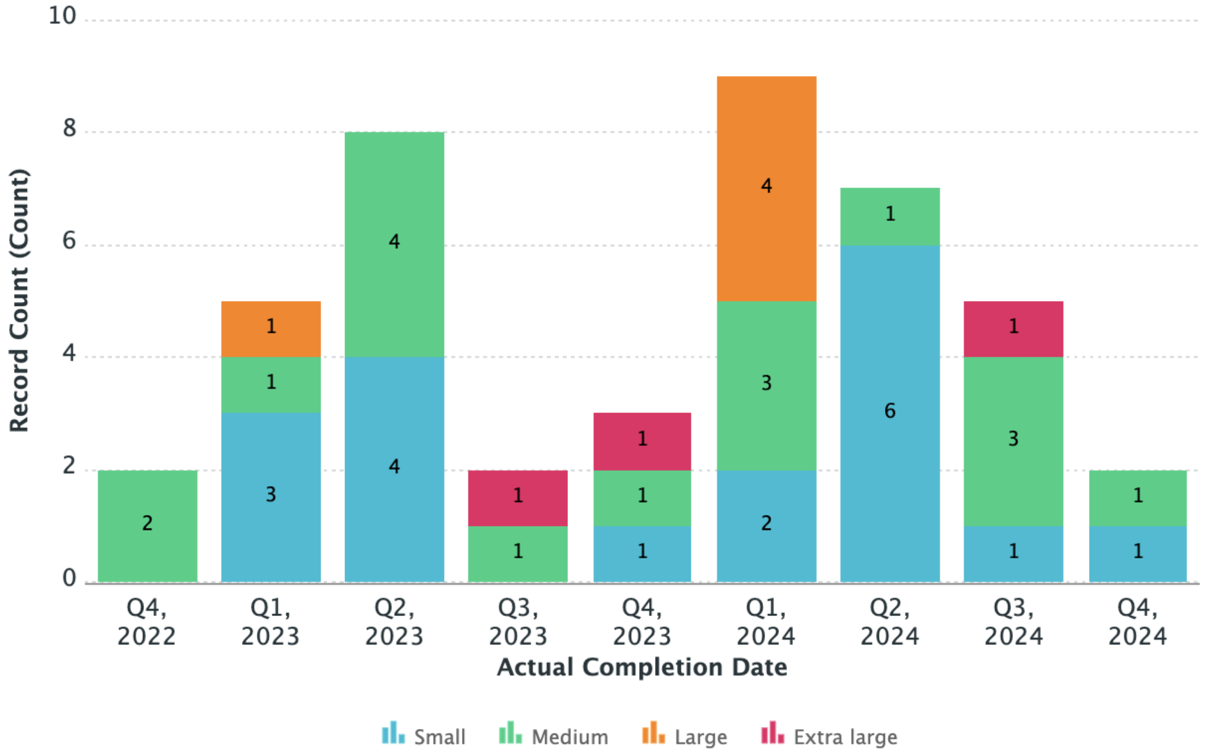
Export Hide Values



Admin | Complete Optimization and Implementations Last 24 months

Details Summary **Chart**

Export Hide Values



Planned Completion Date: Q2, 2025 (2)

Create governance and structures to show	Medium	Large
New queue/topic to request a wordmark wi	Medium	Medium

0%

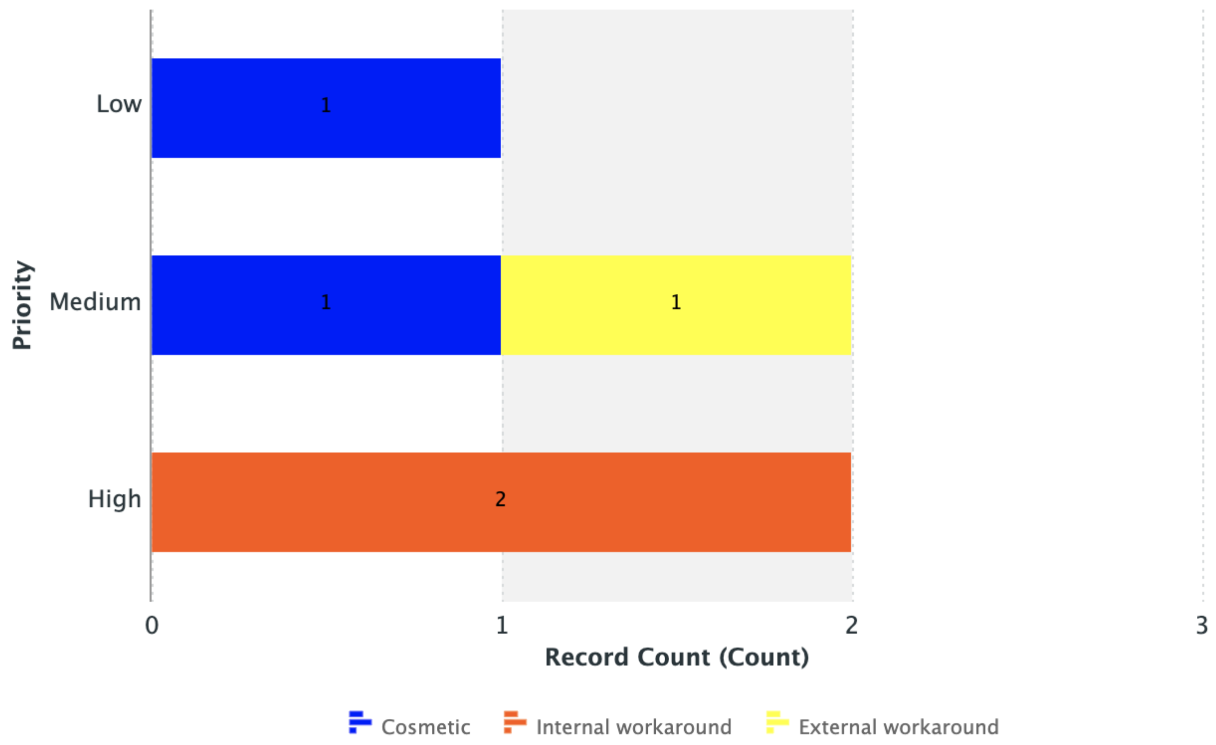
0%

Showing all 11 projects

Admin | Workfront Optimization and Implementation Backlog

Details Summary **Chart**

Export Hide Values

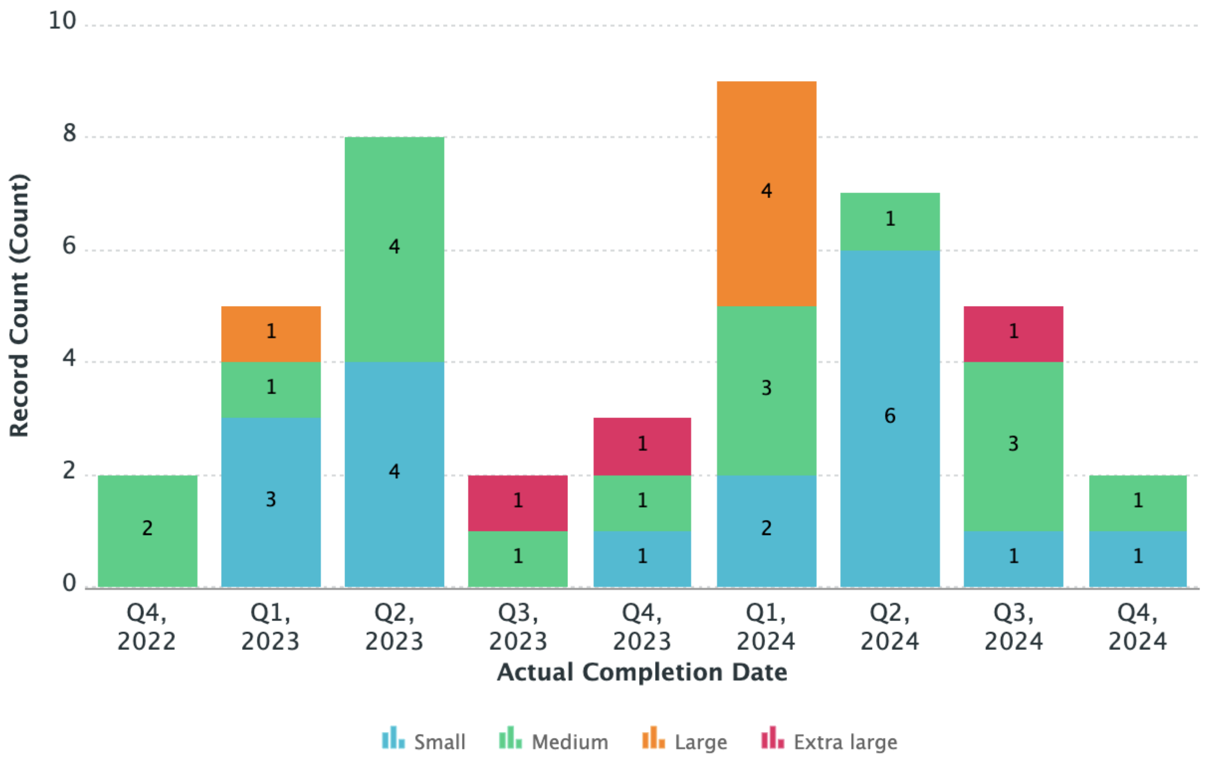


Admin | Complete Optimization and Implementations Last 24 months

3

Details Summary **Chart**

Export Hide Values



Behind the dashboard

Our data setup

- One project per effort.
- Projects organized in a portfolio with programs by year and sometimes initiative.
- Help Desk request queue to:
  - Traffic support tickets.
  - Quickly enter needs and ideas.
- Custom field to push help desk tickets to the backlog.
- Custom fields to assess effort size.

Custom fields for effort sizing

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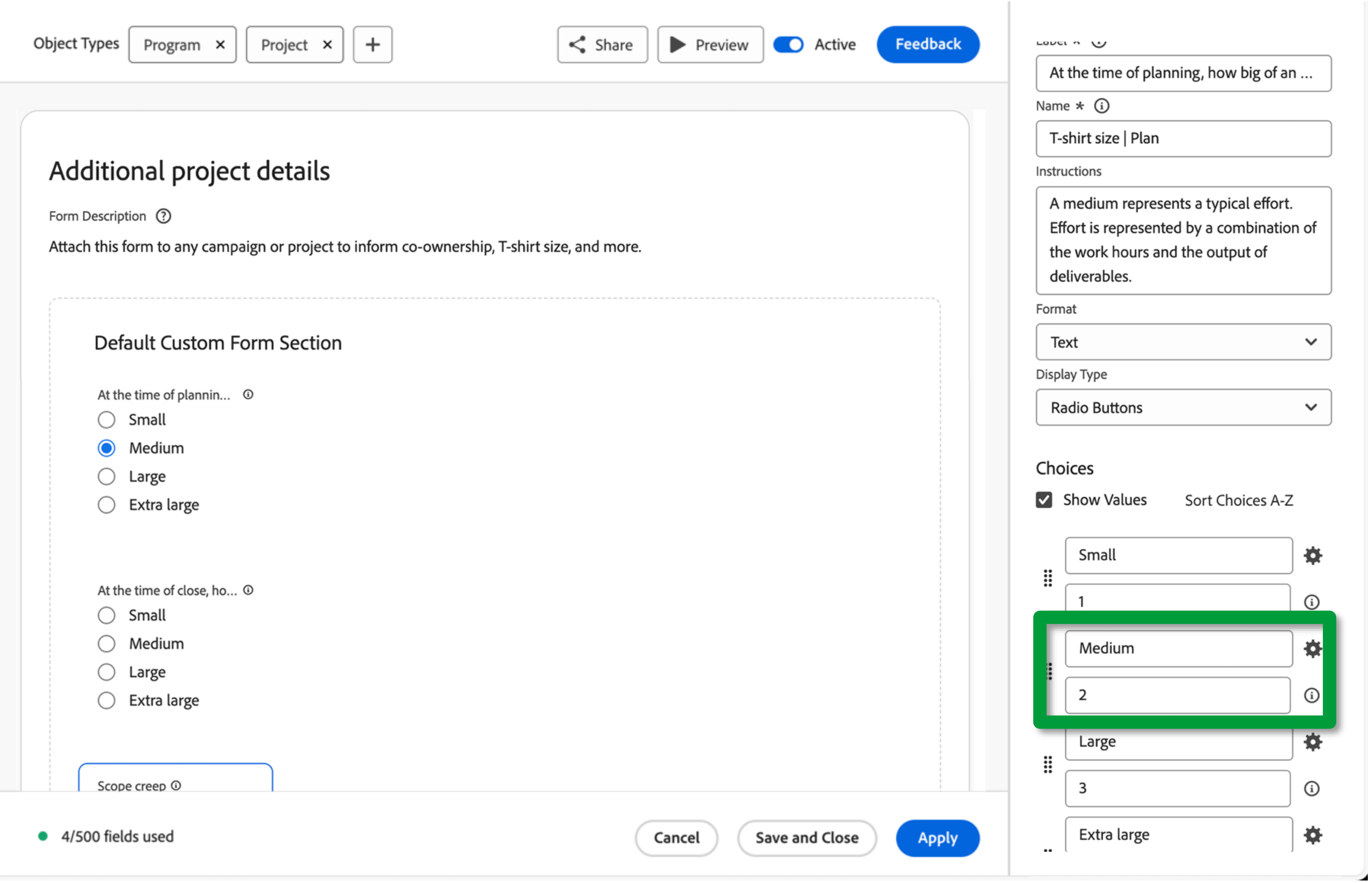
- Form type: Project, Program
- Fields:
  - **T-shirt size | Plan**
  - **T-shirt size | Actual**
  - Values assigned to each option

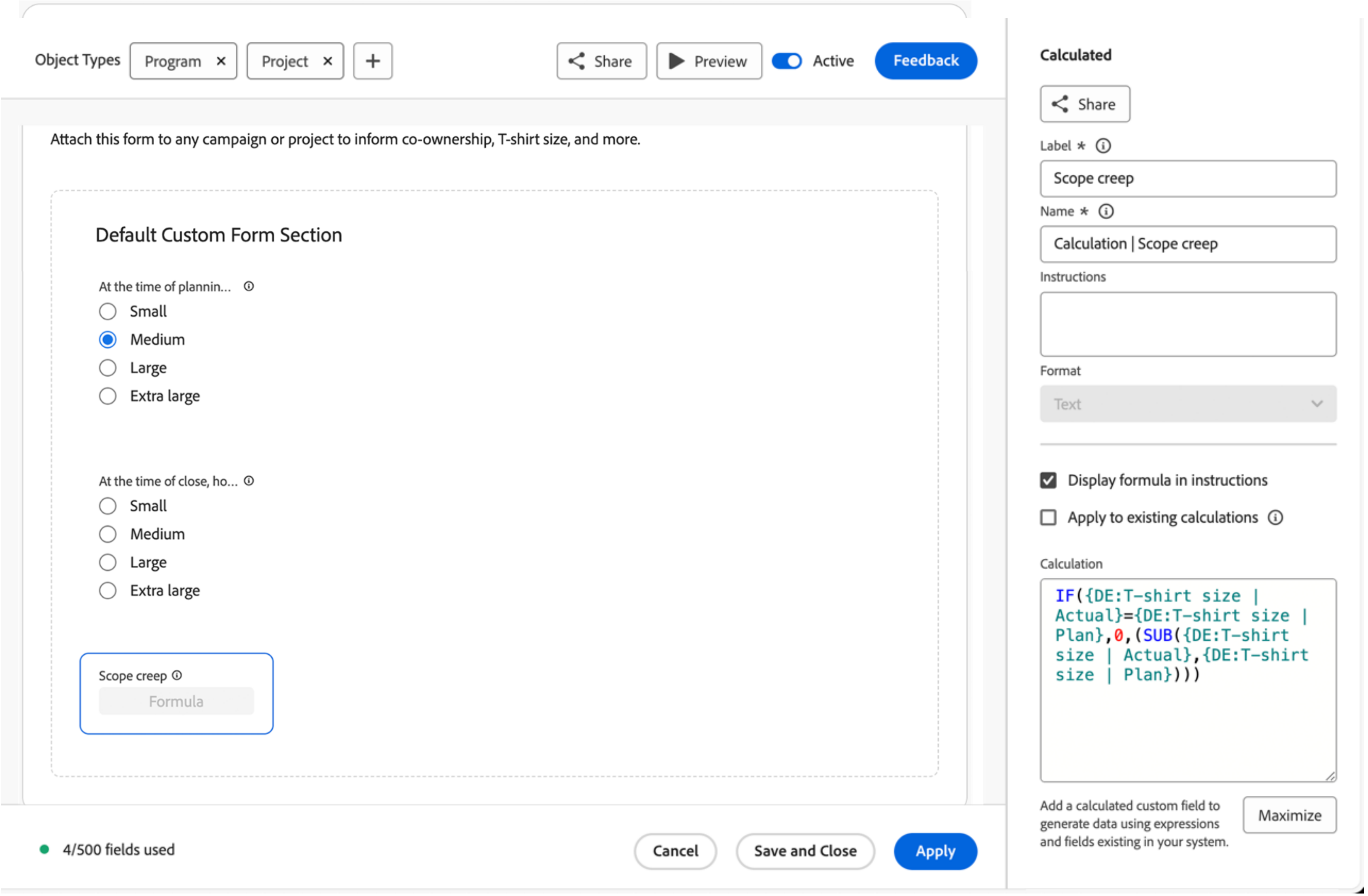


Custom fields for effort sizing

- Form type: Project, Program
- Field: **Scope creep** calculation

IF({DE:T-shirt size | Actual}={DE:T-shirt size | Plan},0,(SUB({DE:T-shirt size | Actual},{DE:T-shirt size | Plan})))

Translation: If T-shirt size is equal, display a 0. Otherwise, subtract Plan from Actual.



Custom fields for roadmap backlog

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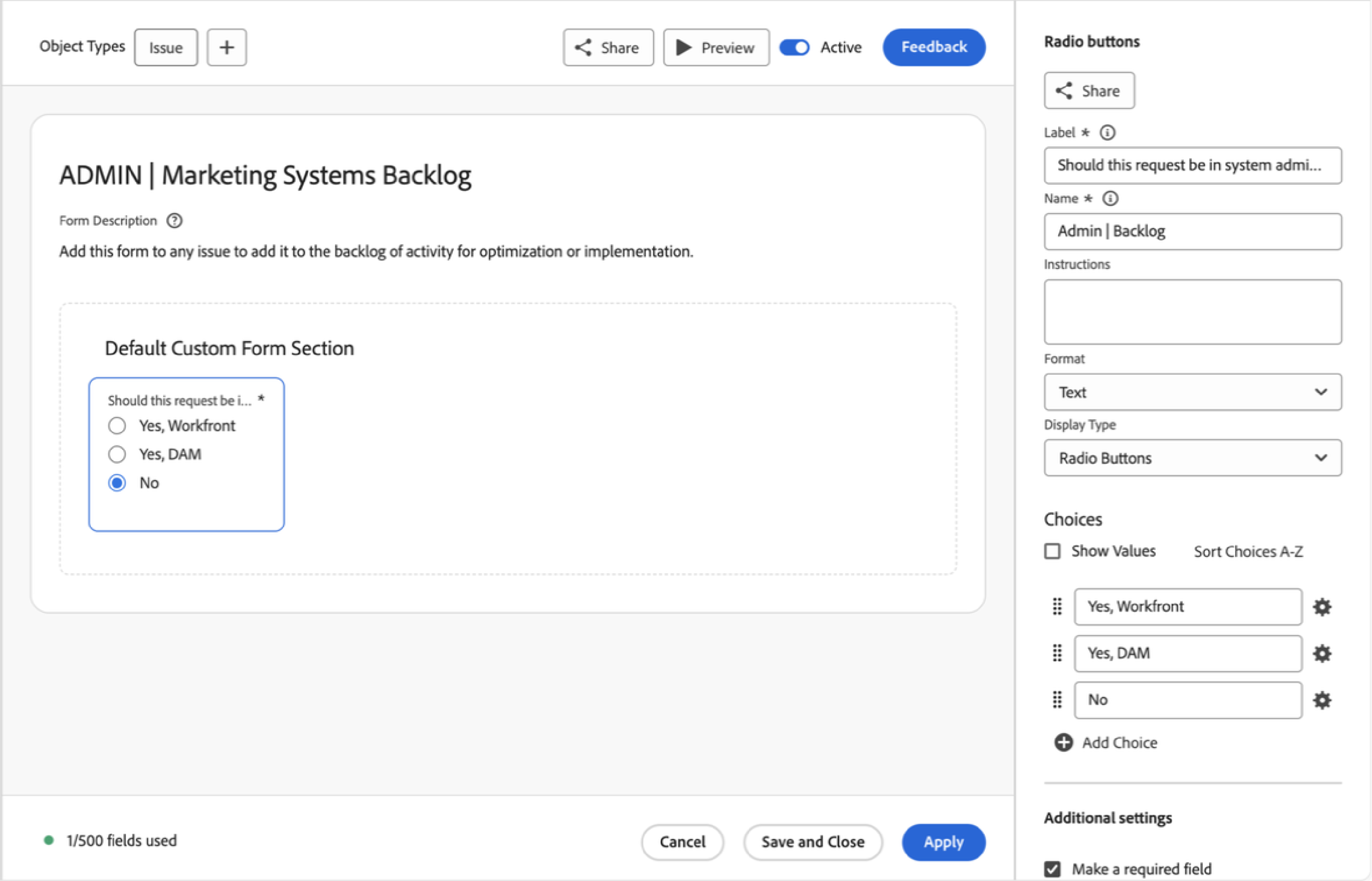
- Form type: Issue
- Label: Should this request be in system admin backlog?
- Options:
  - Yes
  - No (selected by default)



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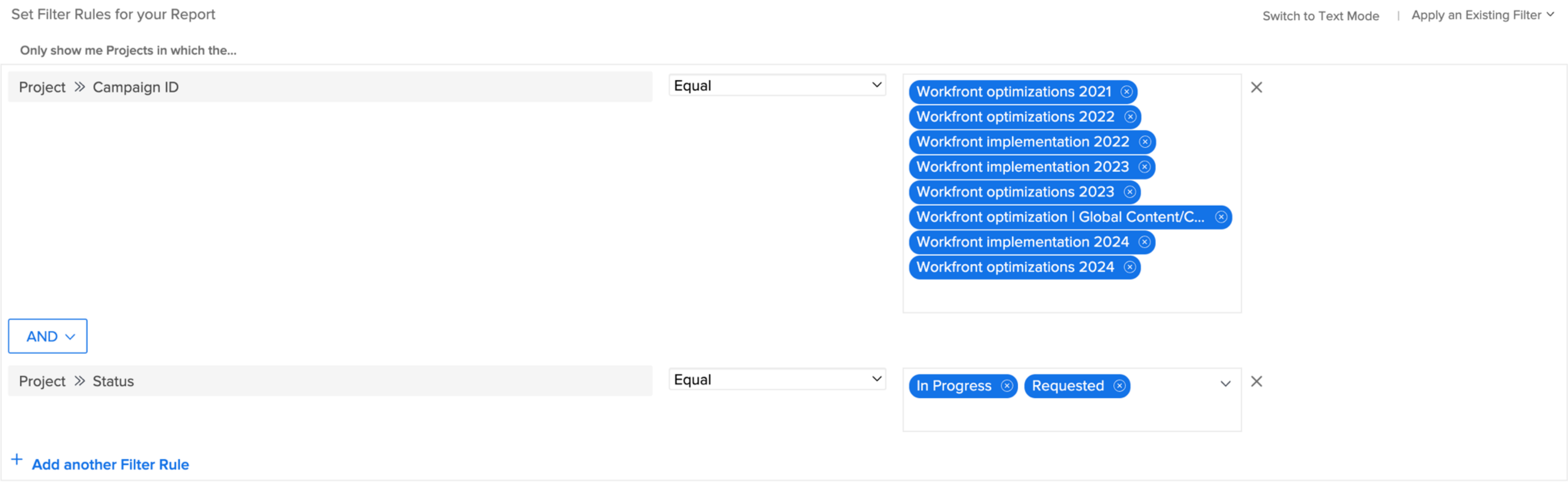
Reports in this dashboard

- Report type: Reports
- Filters:
  - Dashboards > ID = [the dashboard you created]
  - Report > ID /= [this report]
- Grouping: Report folder > Name
- Columns:
  - Name (sort by)
  - Description

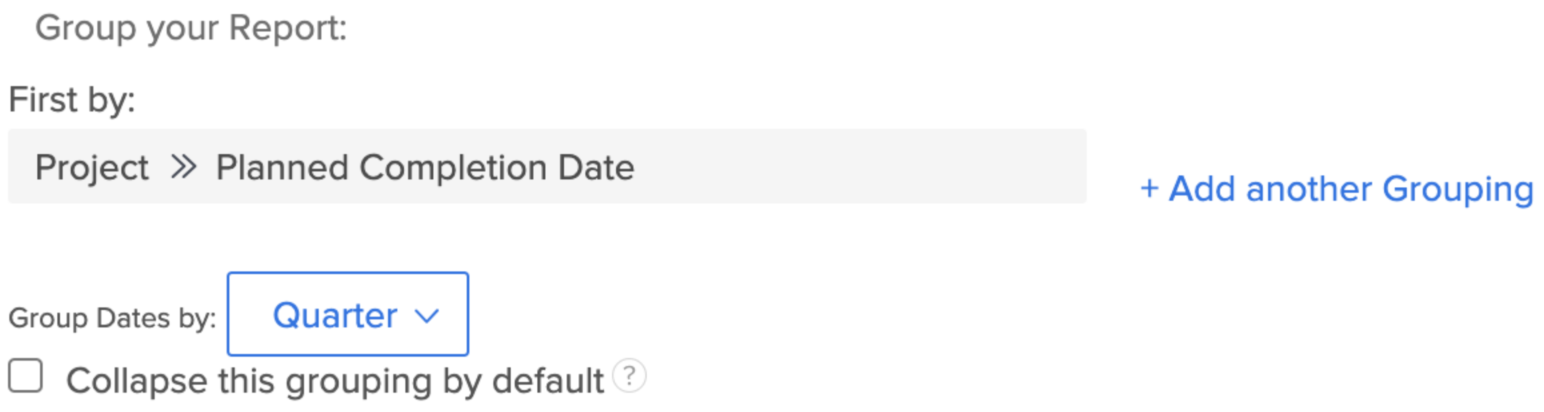
1 Planned Optimization and Implementations: Filters

- Program ID
- Project status



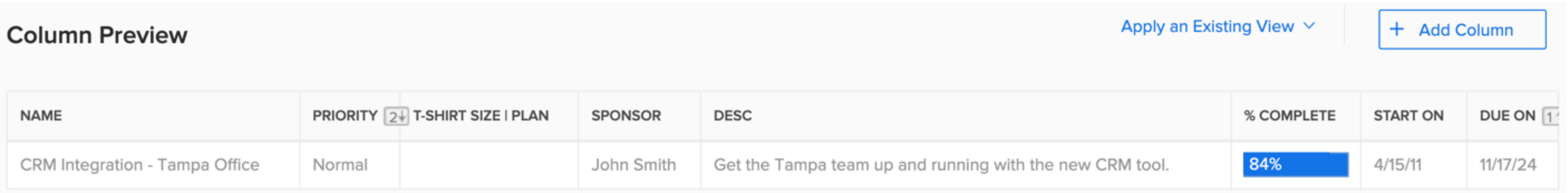
1 Planned Optimization and Implementations: Groupings

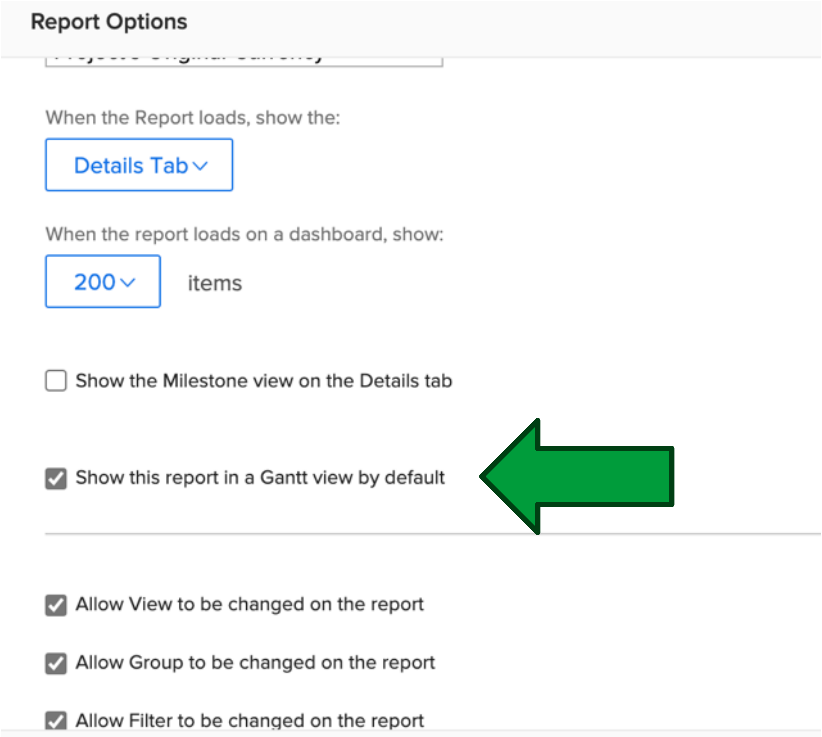
- Planned completion date by quarter



1 Planned Optimization and Implementations: Columns

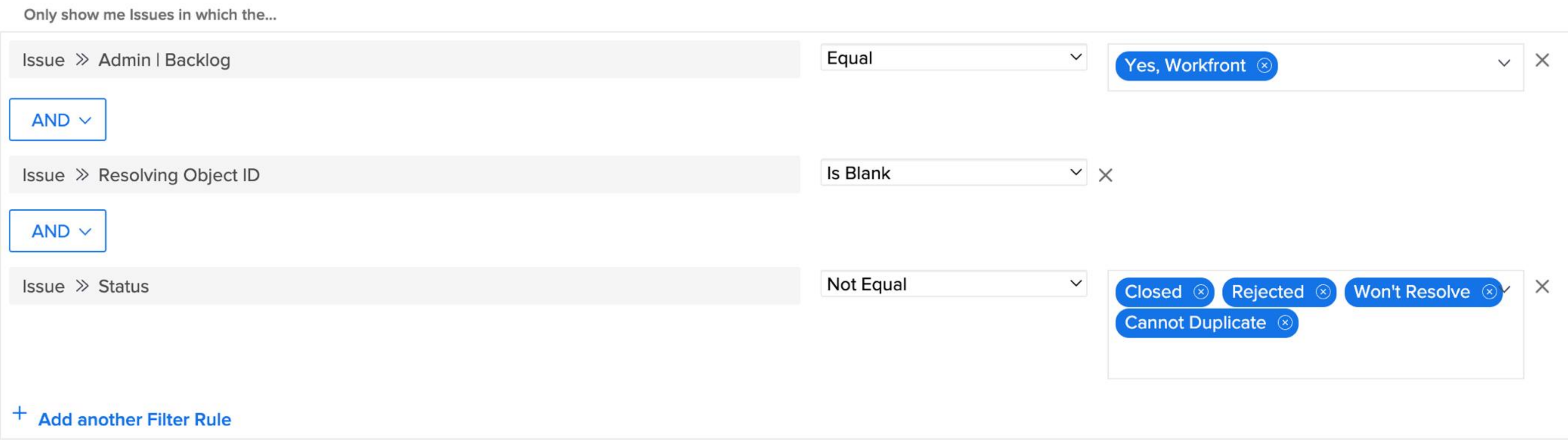
- In report settings, toggle on **Show this report in a Gantt view by default**





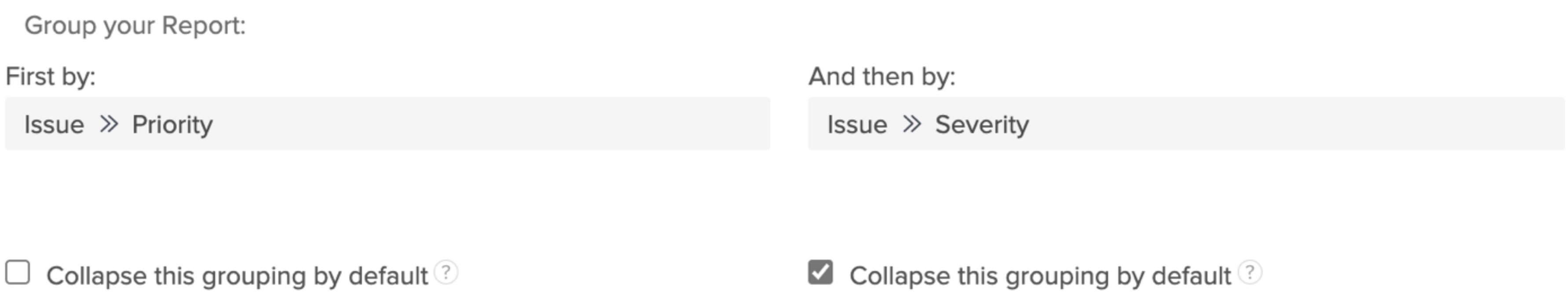
2 Backlog: Filters

- Backlog custom field
- Resolving Object ID IS BLANK to only include issues that haven't been planned in a project.
- Status equal to those that are still viable for planning.



2 Backlog: Groupings

- Priority
- Severity



2 Backlog: Columns

- Name
- Description
- Priority (sort first)
- Severity (sort second)
- Entry date
- Last update

Column Preview

Apply an Existing View

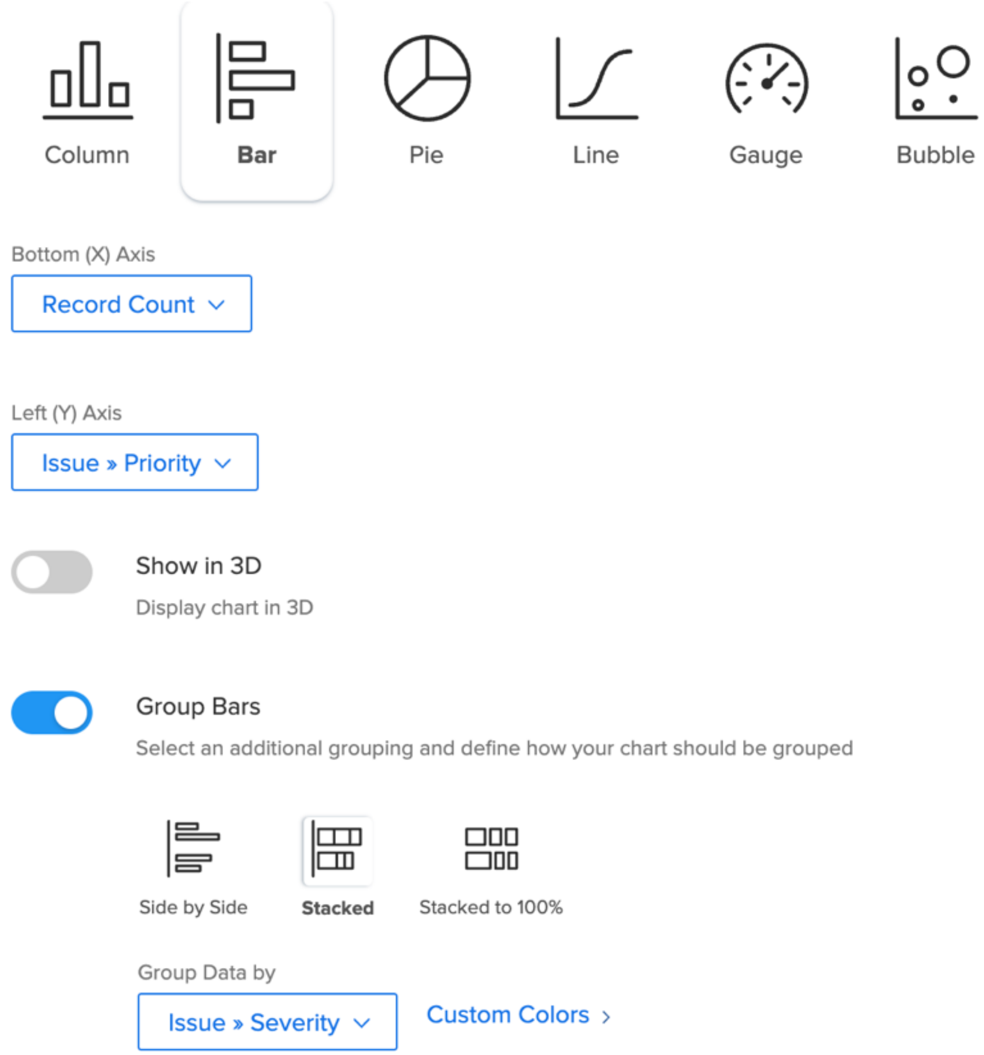
+ Add Column

NAME	DESCRIPTION	PRIORITY 1	SEVERITY 2	ENTRY	LAST UPDATE
Sync duplicating contacts	Sample Text	High	Cosmetic	4/15/11	Sample Text

Name	Description	Priority	Severity	Entry	Last update
Priority: Low (1)					
Severity: Cosmetic (1)					
Report | Proof approvals by portfolio	During a webinar someone shared some text mode that might be valuable: Filter and group a Proof Approval report by Portfolio. I stuffed this text mode in OneNote. EXISTS:1:$$OBJCODE=PROJ EXISTS:1:documents:currentVersionID=FIELD:documentVersionID EXISTS:1:portfolioID=insert portfolio ID here OR:1:EXISTS:1:$$OBJCODE=TASK OR:1:EXISTS:1:documents:currentVersionID=FIELD:documentVersionID OR:1:EXISTS:1:project:portfolioID=insert portfolio ID here	Low	Cosmetic	3/4/24	

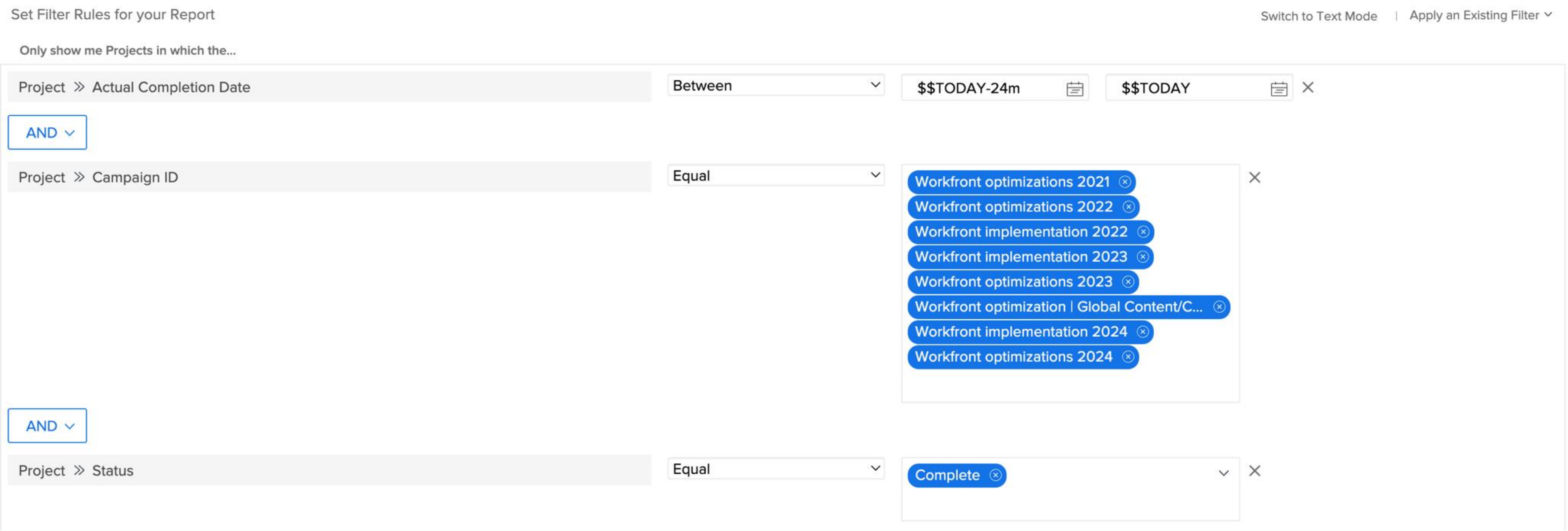
2 Backlog: Chart

- Bar chart
- Bottom (X) axis: Record count
- Left (Y) axis: Priority
- Group bars, stacked, by Severity



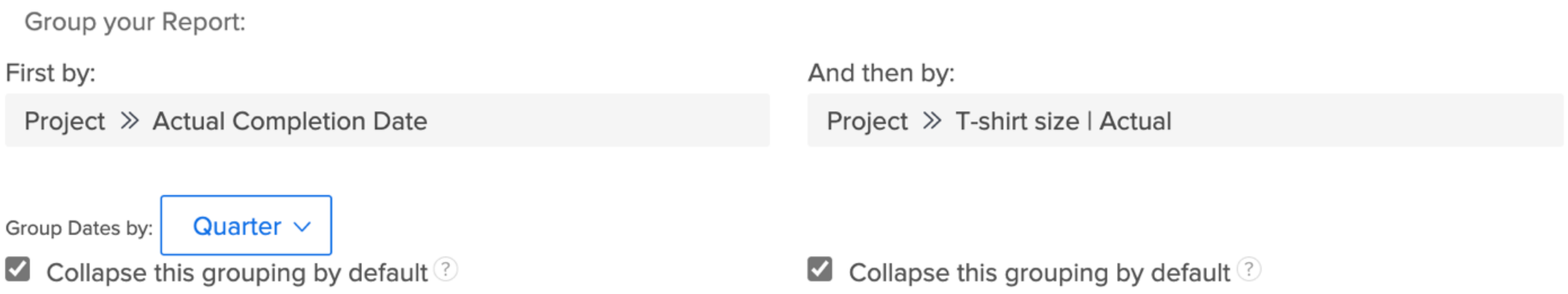
3 Complete Work: Filters

- Actual completion date
- Program ID
- Status = Complete



3 Complete Work: Groupings

- Actual Completion Date by quarter
- Custom field to group by actual effort size



3 Complete Work: Columns

- Name
- Planned effort size
- Actual effort size
- Difference between planned and actual effort
- Sponsor
- Actual completion date
- Description

Column Preview

Apply an Existing View

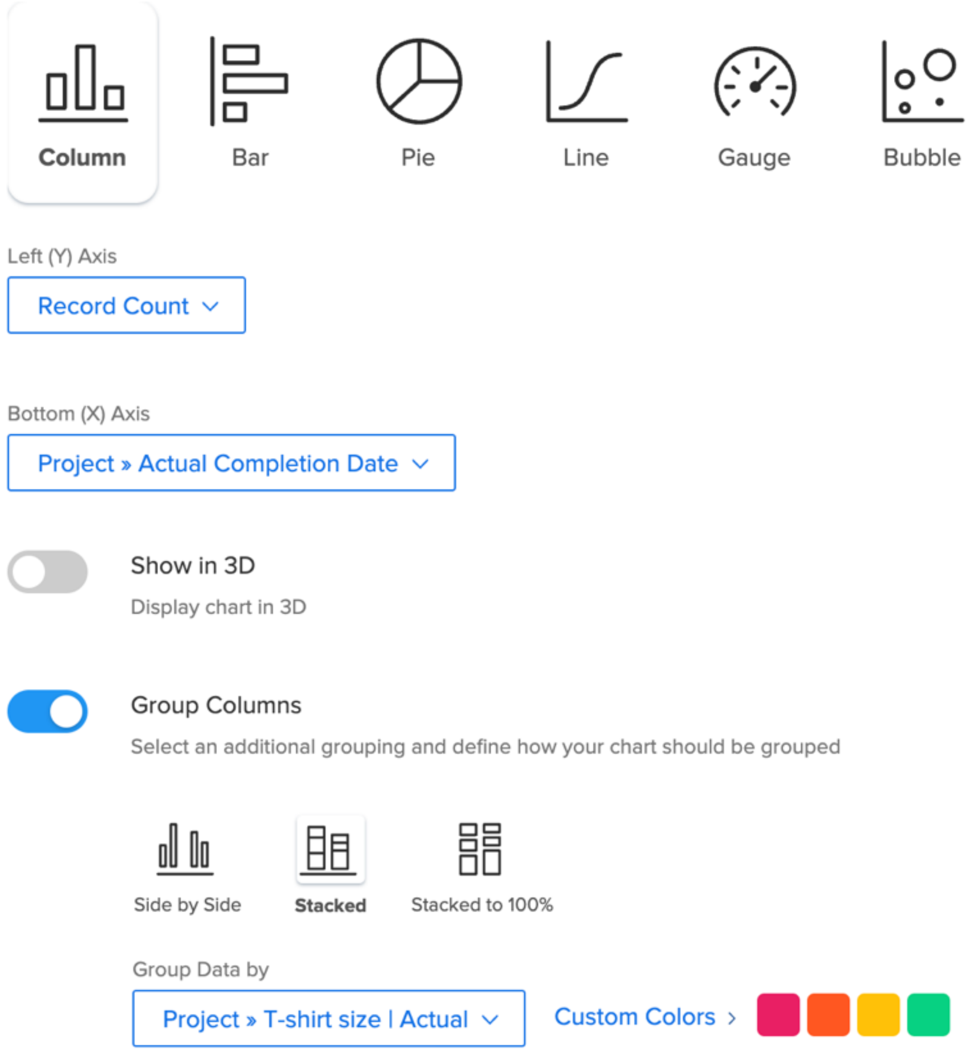
+ Add Column

NAME	T-SHIRT SIZE I PLAN	T-SHIRT SIZE I ACTUAL	CALCULATION I SCOPE CREEP	SPONSOR	ACTUAL COMPLETION DATE 1	DESC
CRM Integration - Tampa Office				John Smith	4/15/11	Get the Tampa team up and running with the

Name	Priority	T-shirt size I Plan	T-shirt size I Actual	Calculation I Scope creep	Sponsor	Desc	Actual Completion Dat
Actual Completion Date: Q3, 2024 (1)							
T-shirt size I Actual: Extra large (1)							
Reporting for translations	High	Large	Extra large	1	Conny Gangl	Devise a dashboard (and supporting standards as needed) to display translations by language. The goal is to present translation partners with a view that helps them understand where translations are and how they can contribute. At the same time, this should be efficient for PMs to build and manage.	9/17/24

3 Complete Work: Chart

- Column chart
- Left (Y) axis: Record count
- Bottom (X) axis: Actual Completion Date
- Group bars, stacked, by actual effort
- Custom colors to reflect sizing (bigger efforts get hotter colors)



Problem: We have lots of ideas and little focus

Wrong solution

- Continue to be reactive.
- Complain about how much work you have to do.

Right solution

- Count.
- Keep and document what works.
- Build tools to assess quickly.

Problem: We have lots of ideas and little focus

Right solution

- Count.
- Keep and document what works.
- Build tools to assess quickly.

Outcomes:

- Visuals advance conversations around prioritization and use of my time.
- I work with greater agility—and personal satisfaction.
- I now manage an additional system (our DAM) similarly.
- There is talk of me taking on a third system, but my dashboards help demonstrate the need for increased capacity first.

Problem:

We receive too many ad hoc and urgent requests

Problem: We receive too many ad hoc and urgent requests

Wrong solution

- Put up with it.
- Increasingly reject requests.
- Tell requestors to fix themselves.

Thanks
Workfront Consulting!

DASHBOARD

Volume of Requests and Work

Dashboard Actions

As of Oct 2, 2024 4:47 pm Eastern Daylight Time

The reports in this dashboard provide insights into the requests submitted by Regional Marketing and the projects that derive from those requests. These reports do not include requests to Online Experience.

Reports in this dashboard | Volume of Work (Copy)

Export

Details | Summary

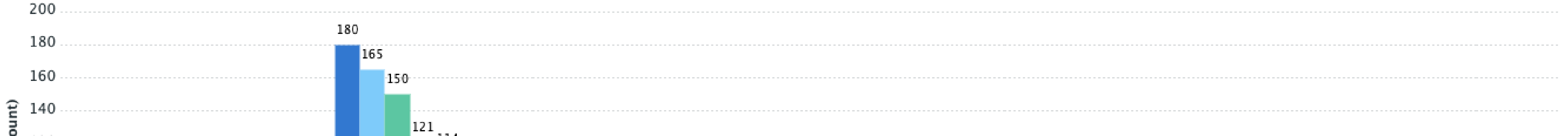
Name ↑	Description
Report Folder: Name: Creative Operations (4)	
Projects Derived from Requests This Year and Last (Copy)	Bar chart counting the projects created from requests across quarters.
Requests by Group this year and last (Copy)	Chart breaking down the number requests by quarter from each group.
Requests by Status This Year and Last (Copy)	Bar chart showing the status of requests by quarter. Over time, the number of CLOSED requests should increase.
Sum Requests by Country Past Year (Copy)	Of requests received, see the sum of requests by the target market. Expand the first level dropdown to see the sums broken down by the requestor Home Group.

Showing all 4 reports

Requests by Group this year and last (Copy)

Details Summary **Chart**

Export Hide Values



requestor Home Group.

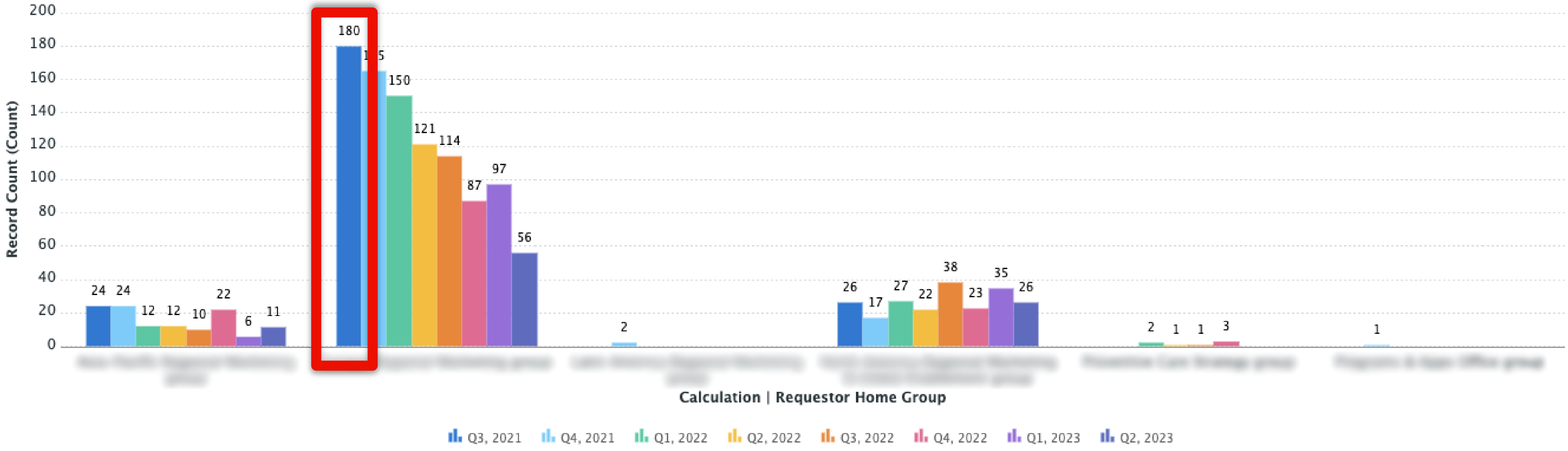
Showing all 4 reports

Requests by Group this year and last (Copy)

1

Details Summary **Chart**

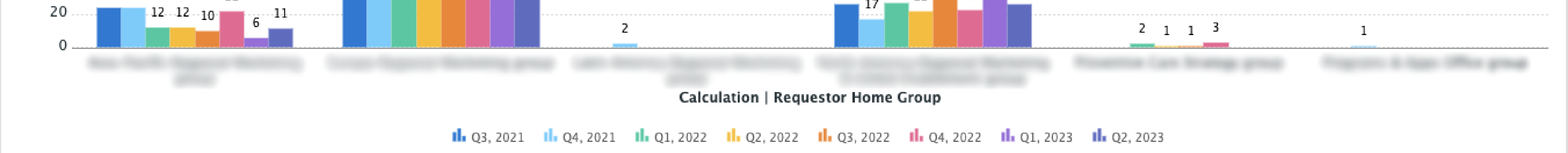
Export Hide Values



Projects Derived from Requests This Year and Last (Copy)

Details Summary **Chart**

Export Hide Values

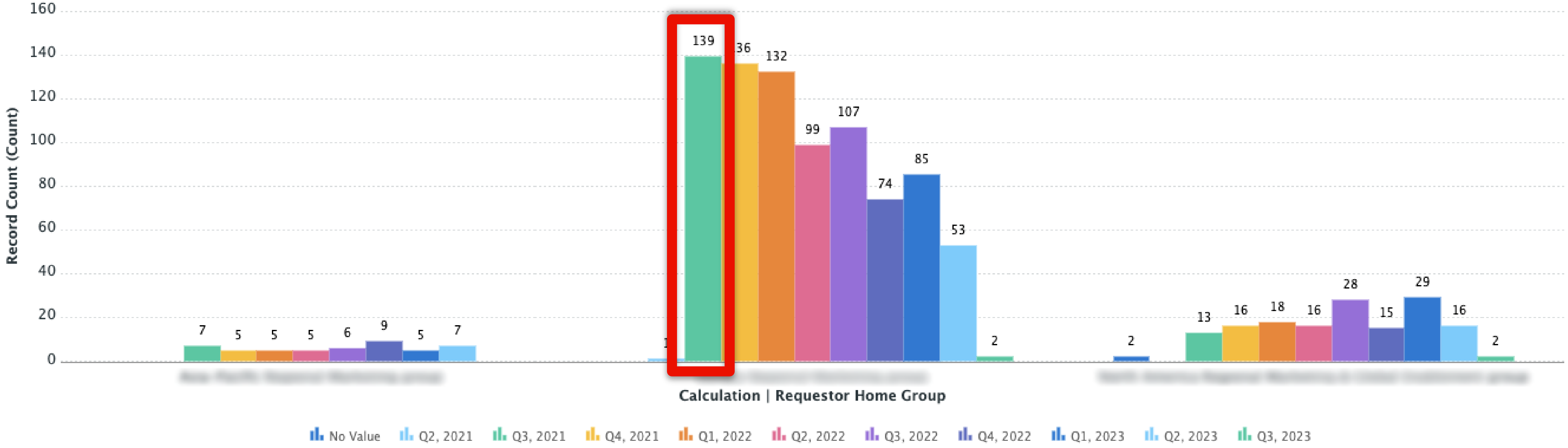


Projects Derived from Requests This Year and Last (Copy)

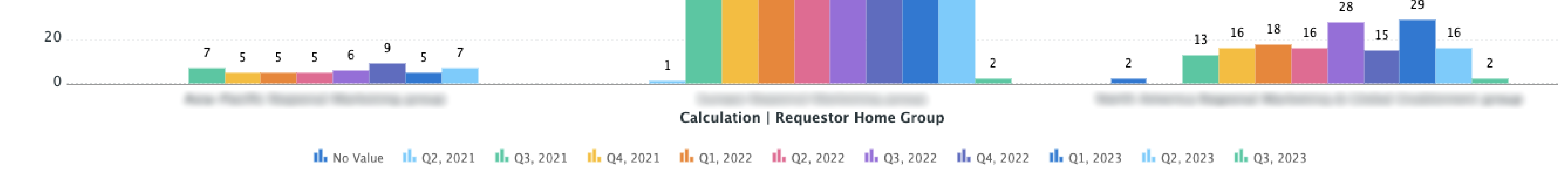
2

Details Summary **Chart**

Export Hide Values



Requests by Status This Year and Last (Copy)

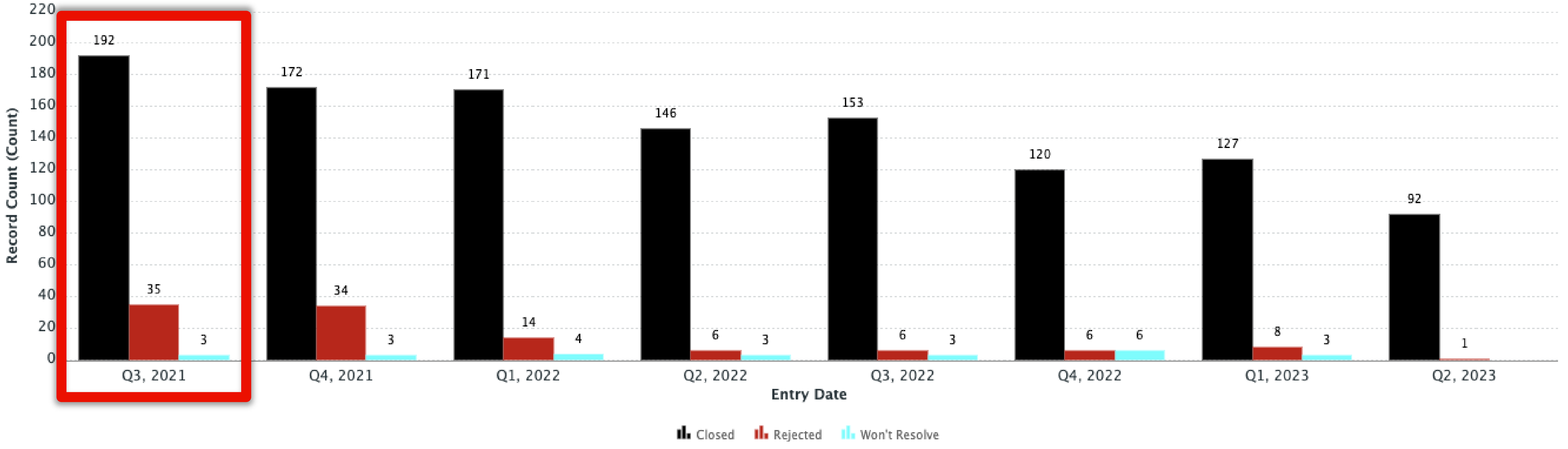


Requests by Status This Year and Last (Copy)

3

Details | Summary | **Chart**

Export | Hide Values



Sum Requests by Country Past Year (Copy)

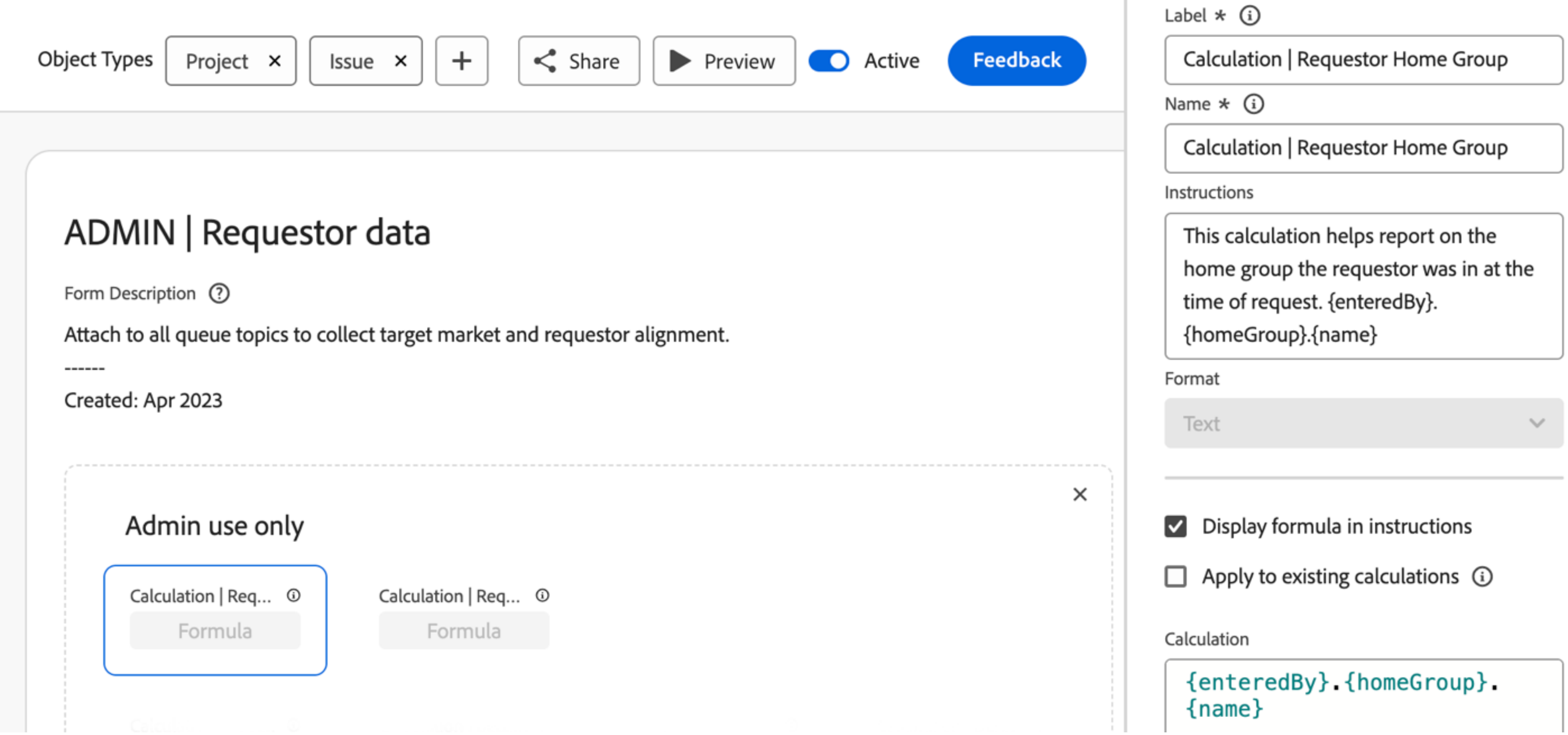
Behind the dashboard

Our data setup

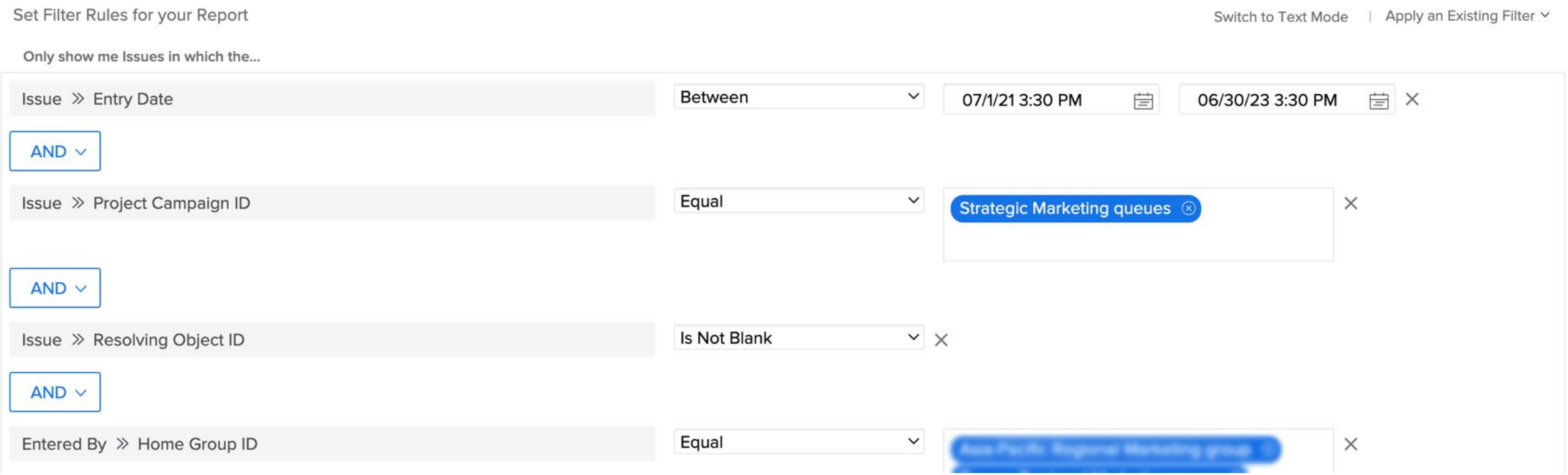
- All queues are filed in one portfolio then program by functional group.
- We nested User alignment by Group and Team—more than we usually do.
- We built calculated fields to build charts showing the Home Groups and Home Teams of the individuals who submitted requests.

Calculations

- {enteredBy}.{homeGroup}.{name}
- {enteredBy}.{homeTeam}.{name}
- Form sharing: Admins only

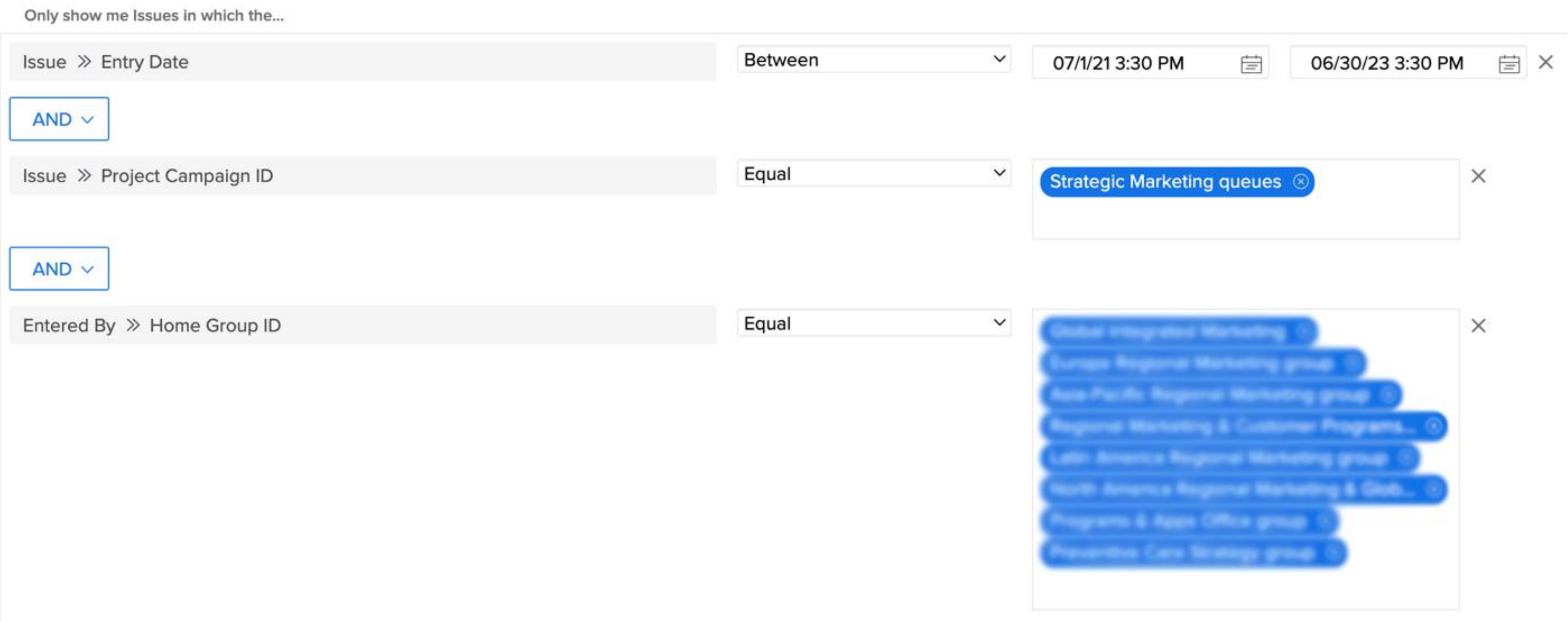


Determining which requests became projects



1 Requests by Group: Filters

- Entry Date
- Project Program ID to focus on requests directed to one functional area
- Entered By > Home Group ID to focus on certain requestors



1 Requests by Group: Groupings

- Entry Date
  - Group dates by Quarter
- Calculation | Requestor Home Group
- Calculation | Requestor Home Team

1 Requests by Group: Columns

- Report type: Issue
- Name
- Primary Contact Name
- Priority
- Entry Date
- Calculation | Requestor Home Group
- Status
- Resolving Object
- Resolve Project > Status

Column Preview

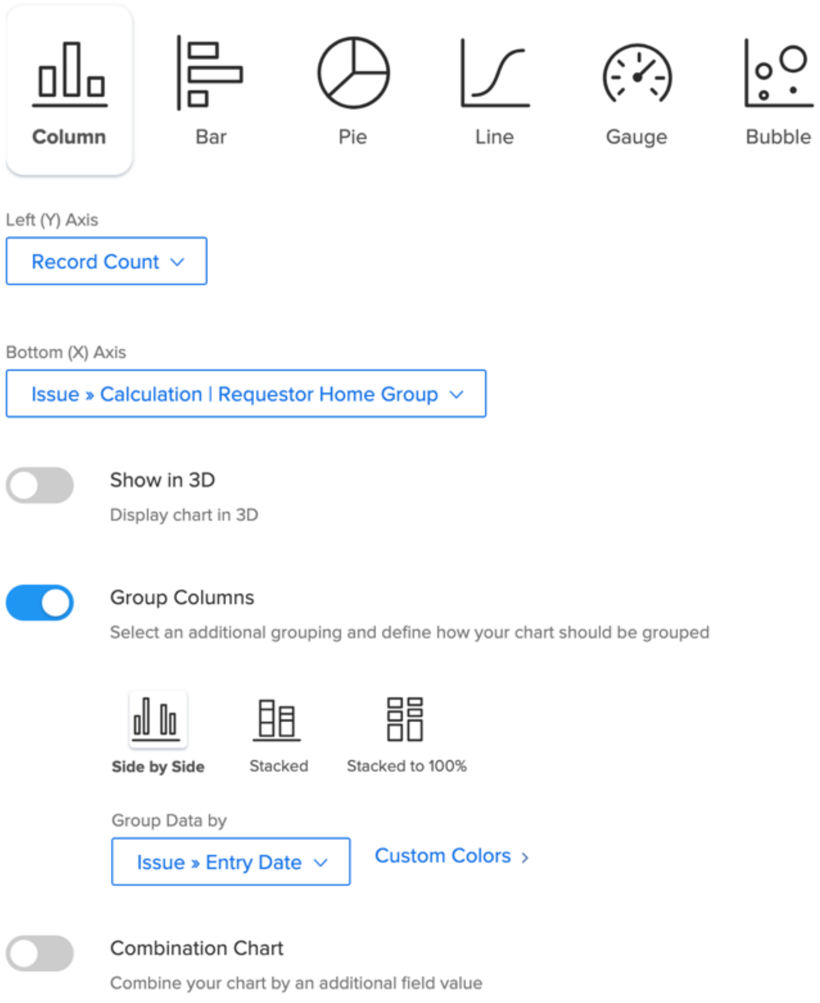
Apply an Existing View
+ Add Column

NAME	REQUESTOR	PRIORITY	ENTRY	REQUEST STATUS	PROJECT CREATED FROM REQUEST	PROJECT STATUS
Sync duplicating contacts	John Smith	High	4/15/11	Resolved		Current

Name	Requestor	Priority	Entry	Request status	Project created from request	Project status
Entry Date: Q1, 2022 (27)						
Calculation I Requestor Home Group: [illegible] group (27)						
Calculation I Requestor Home Team: [illegible] (27)						
[illegible] Minideck TRANSLATION CA-FR	[illegible]	Medium	1/5/22	Rejected		
Pricing updates for [illegible] Form	[illegible]	Medium	1/13/22	Closed	[illegible] 2022 pricing updates - [illegible] Form US	Complete
Localize [illegible] Diagnostics Detailer for Canada	[illegible]	Medium	1/18/22	Closed	[illegible] Diagnostics Detailer CA	Cancelled

1 Requests by Group: Chart

- Chart type: Column
- Left (Y) Axis: Record Count
- Bottom (X) Axis: Calculation | Requestor Home Group
- Group Columns: Side by side by Entry Date



2 Requests Derived from Requests: Filters

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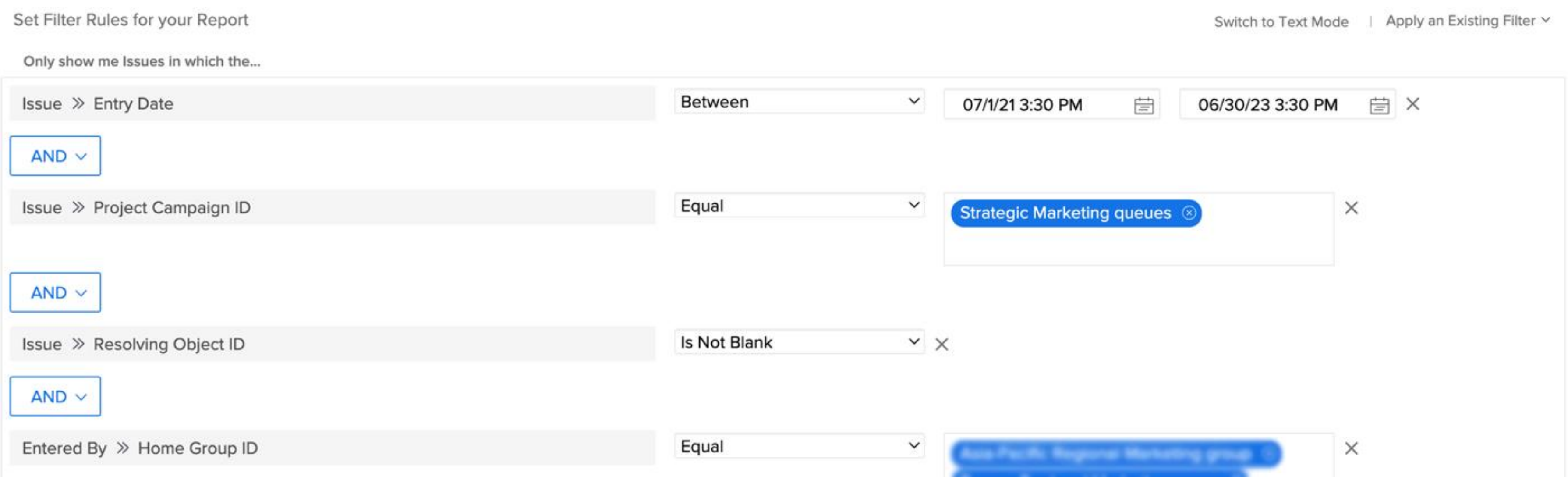
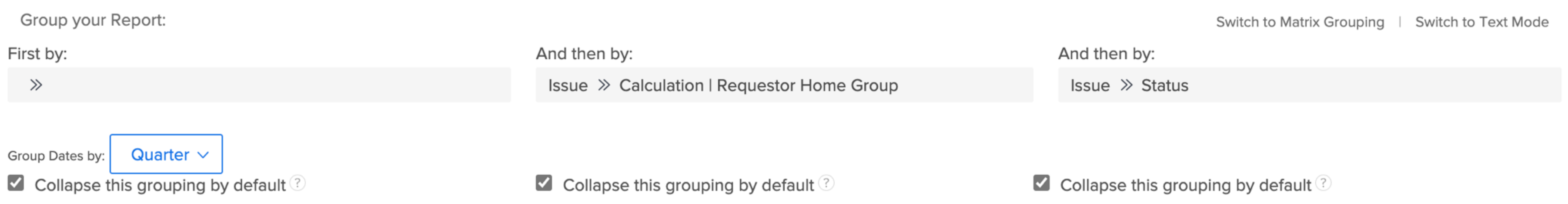
- Entry Date
- Resolving Object ID = Is Not Blank
- Project Program ID to focus on requests directed to one functional area
- Entered By > Home Group ID to focus on certain requestors



2 Requests Derived from Requests: Groupings

- Resolve Project > Entry Date (had to be selected rather than typed in)
- Calculation | Requestor Home Group
- Status



2 Requests Derived from Requests: Columns

- Issue name
- Resolving Object
- Resolve Project: Status
- Entry date (first sort, ascending)
- Resolve Project: Entry date
- Entered By Name
- Calculation | Requestor's Home Group
- Calculation | Requestor's Home Team

Column Preview

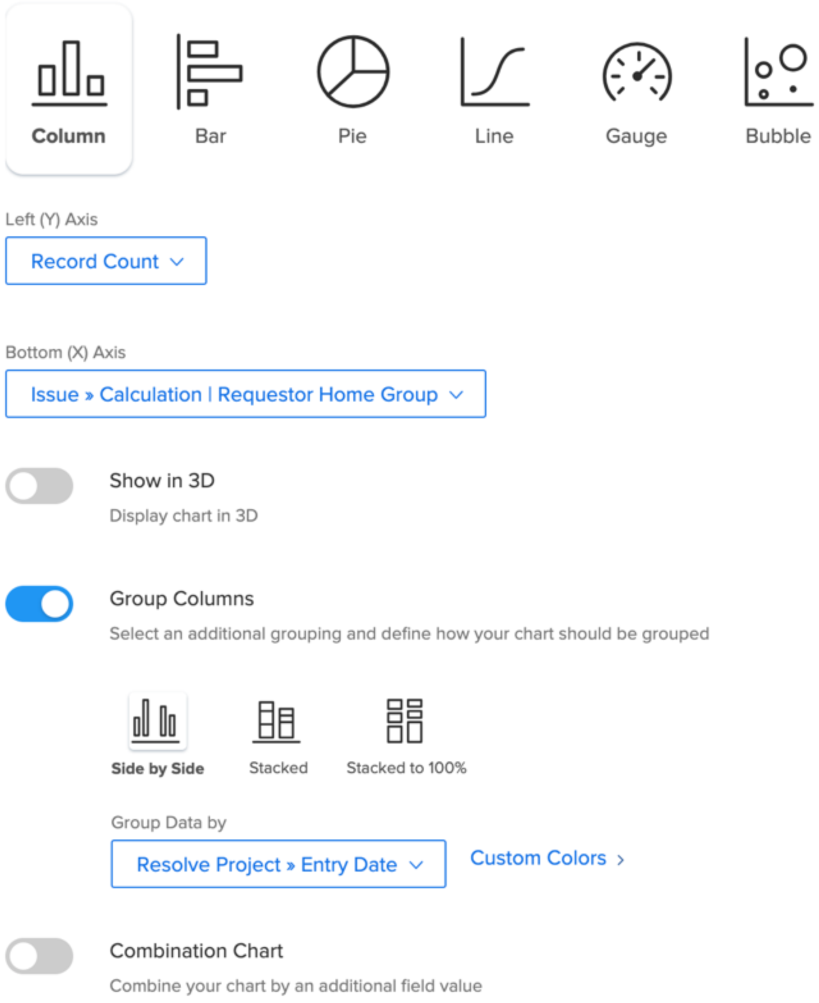
Apply an Existing View | + Add Column

REQUEST	PROJECT NAME	REQUESTED ON 1	PROJECT CREATED ON 2	REQUESTED BY	REQUESTOR'S HOME TEAM
Sync duplicating contacts		4/15/11	4/15/11	John Smith	

Request	Project Name	Requested on	Project created on	Requested by	Requestor's Home Team
Resolve Project: Entry Date: Q4, 2022 (74)					
Calculation | Requestor Home Group: [illegible] group (74)					
Status: Closed (74)					
Update Sales detailer [illegible]	ASSET UPDATE: EU - Translations [illegible] (IT, FR, ES, EN-NO, DE)	8/31/22	10/24/22	[illegible]	[illegible] Team
AT: E-Mailer Webinars	AT: E-Mailer Webinars	9/29/22	10/3/22	[illegible]	[illegible] Team
Convert [illegible] letter to PDF format	NEW ASSET: Regional [illegible] change letter	10/6/22	10/17/22	[illegible]	[illegible] Team

2 Requests Derived from Requests: Chart

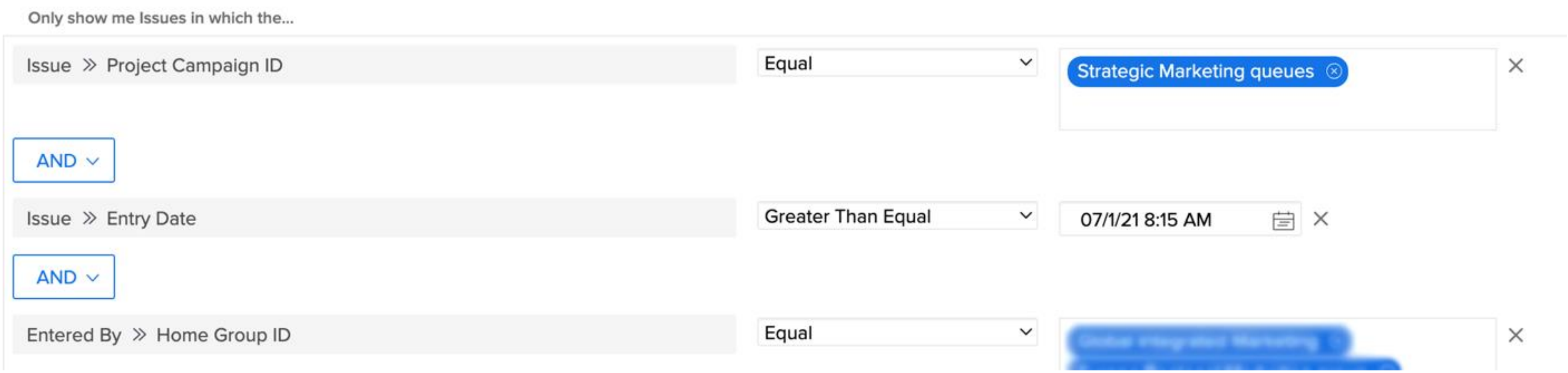
- Chart type: Column
- Left (Y) Axis: Record Count
- Bottom (X) Axis: Calculation | Requestor Home Group
- Group Columns: Side by side by Entry Date



3 Requests by Status: Filters

EXPERIENCE MAKERS
THE SKILL EXCHANGE

- Entry Date
- Project Program ID to focus on requests directed to one functional area
- Entered By > Home Group ID to focus on certain requestors



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3 Requests by Status: Groupings

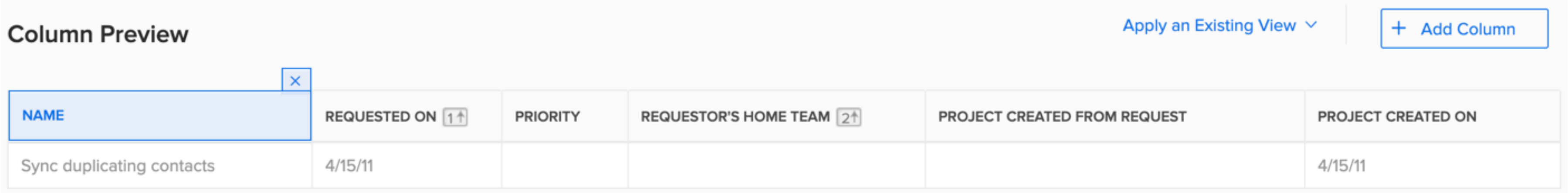
EXPERIENCE MAKERS
THE SKILL EXCHANGE

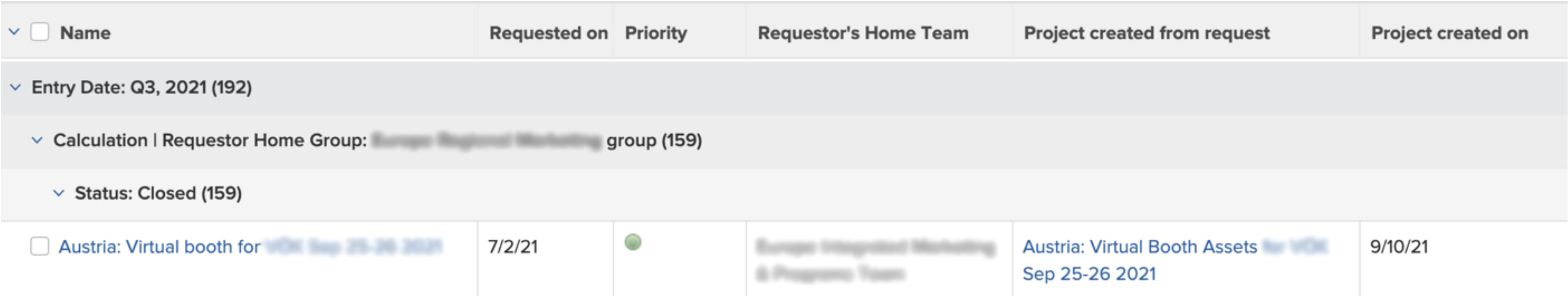
- Entry Date
  - Group dates by Quarter
- Calculation | Requestor Home Group
- Status

3 Requests by Status: Columns

EXPERIENCE MAKERS
THE SKILL EXCHANGE

- Issue name
- Entry date (first sort, ascending)
- Priority (with column rules to show icons instead of text)
- Calculation | Requestor’s Home Team
- Resolving object
- Resolve Project > Entry date





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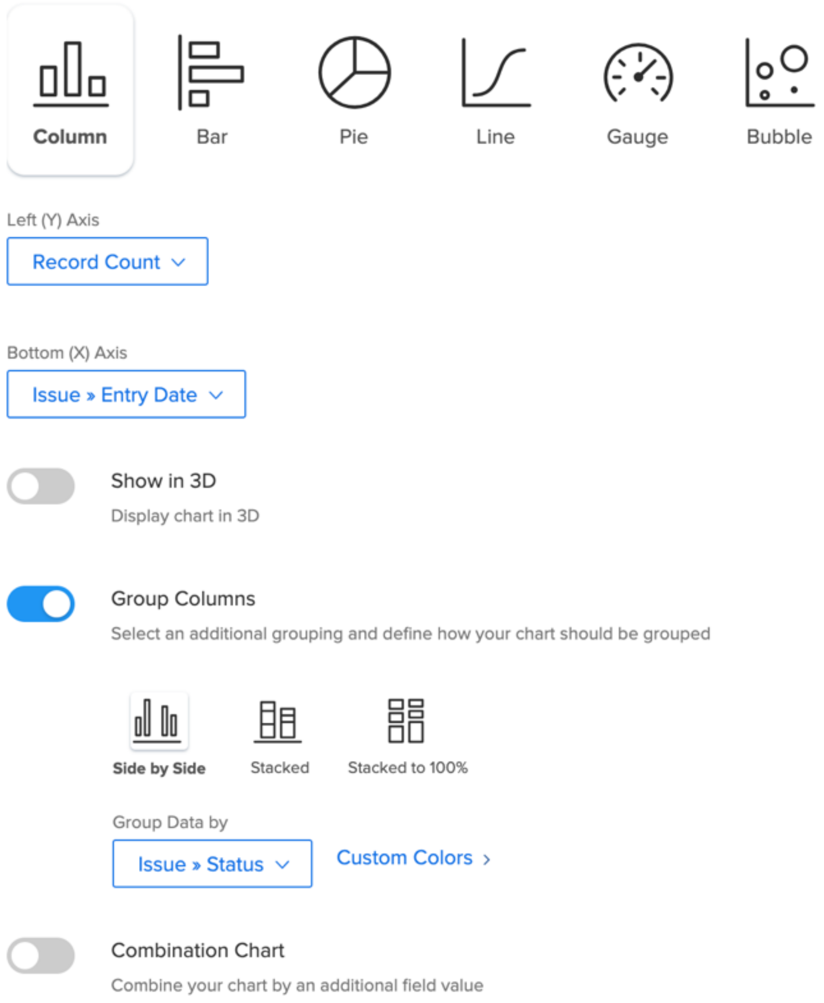
3 Requests by Status: Chart

- Chart type: Column
- Left (Y) Axis: Record Count
- Bottom (X) Axis: Entry Date
- Group Columns: Side by side by Status



Problem: We receive too many ad hoc and urgent requests

Wrong solution

- Put up with it.
- Increasingly reject requests.
- Tell requestors to fix themselves.

Right solution

- Conduct process analysis to better understand upstream causes.

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Right solution

- Conduct process analysis to better understand upstream causes.

	First 24 months	2021 to 2024
Requests	192 → 92 **52% ↓**	192 → 47 **75% ↓**
Rejections	Average 14 per quarter	Average 11 per quarter

Takeaways

Standardize where possible.

Play the long game.

Assess first.

Scaffold and compromise.

Q&A

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