

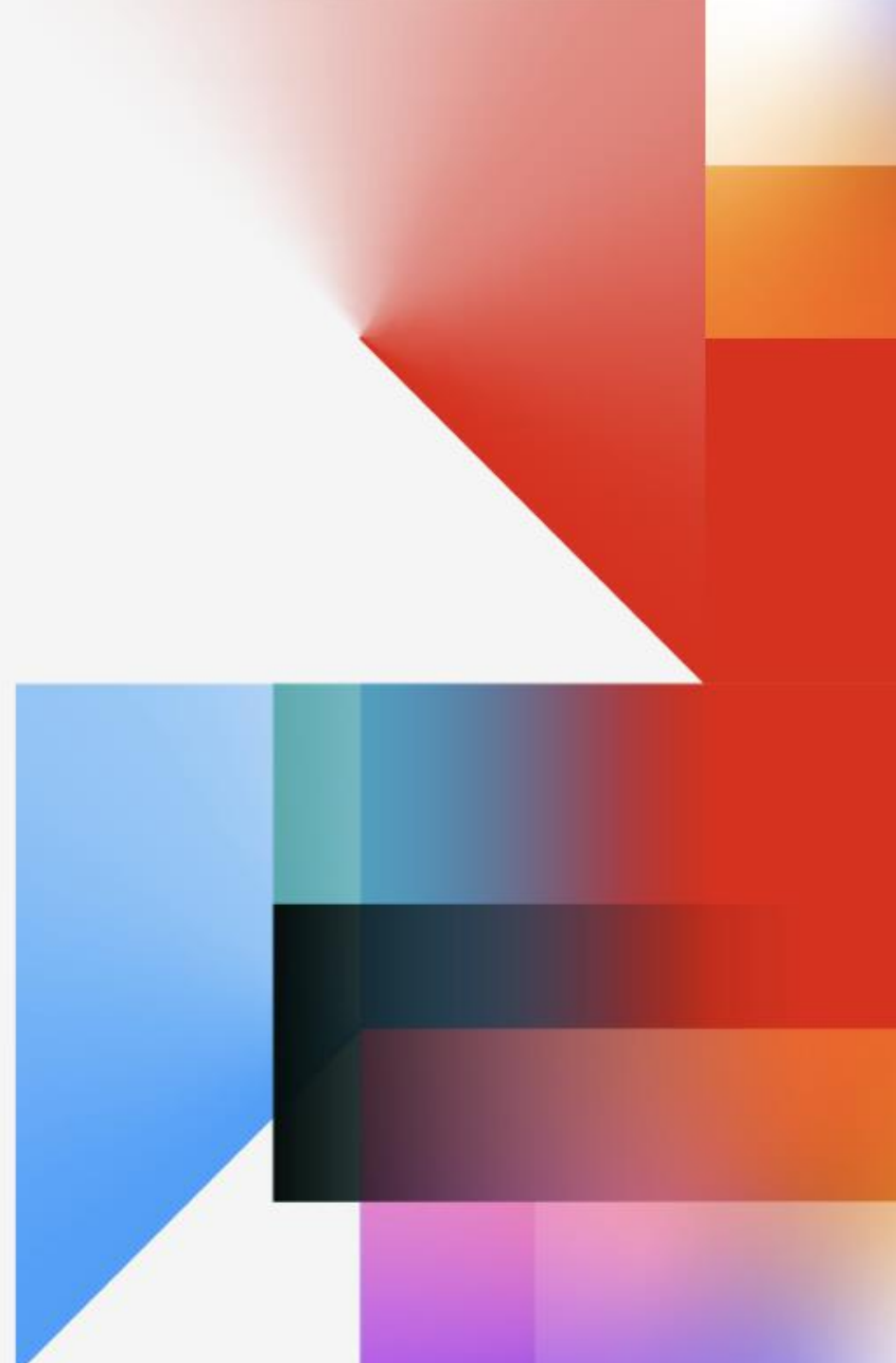


EXPERIENCE MAKERS **THE SKILL EXCHANGE**

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

Lyndsy Denk

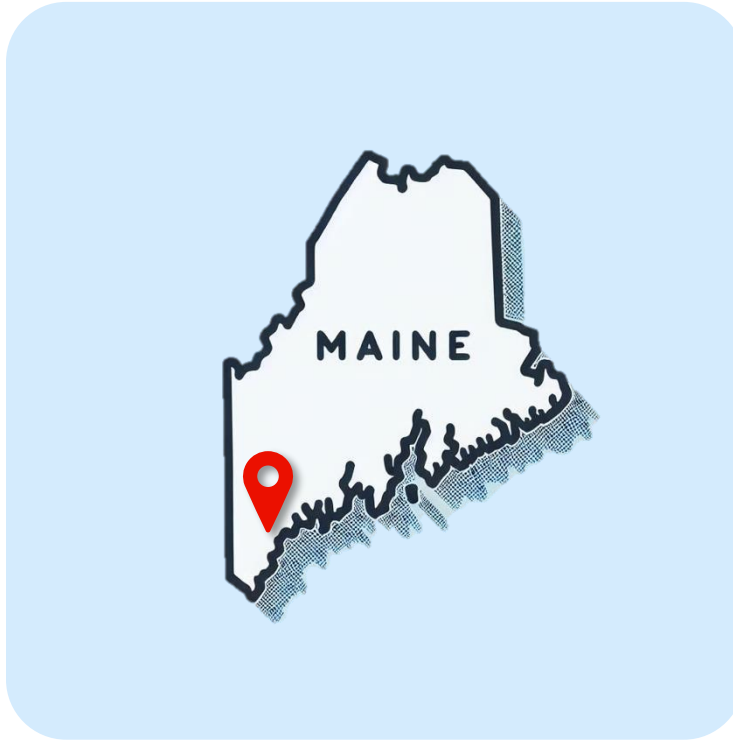
Marketing Training and Enablement Manager, IDEXX



Just a girl from Maine



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



Customer since late 2016



< 2000 total users
195 licenses

Primary use

Creative and Digital Marketing

Key functions

- Projects, programs, portfolios
- Proofing
- Request queues
- Resourcing

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.



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 address.

Admin | Planned Optimization and Implementations

Details | Summary

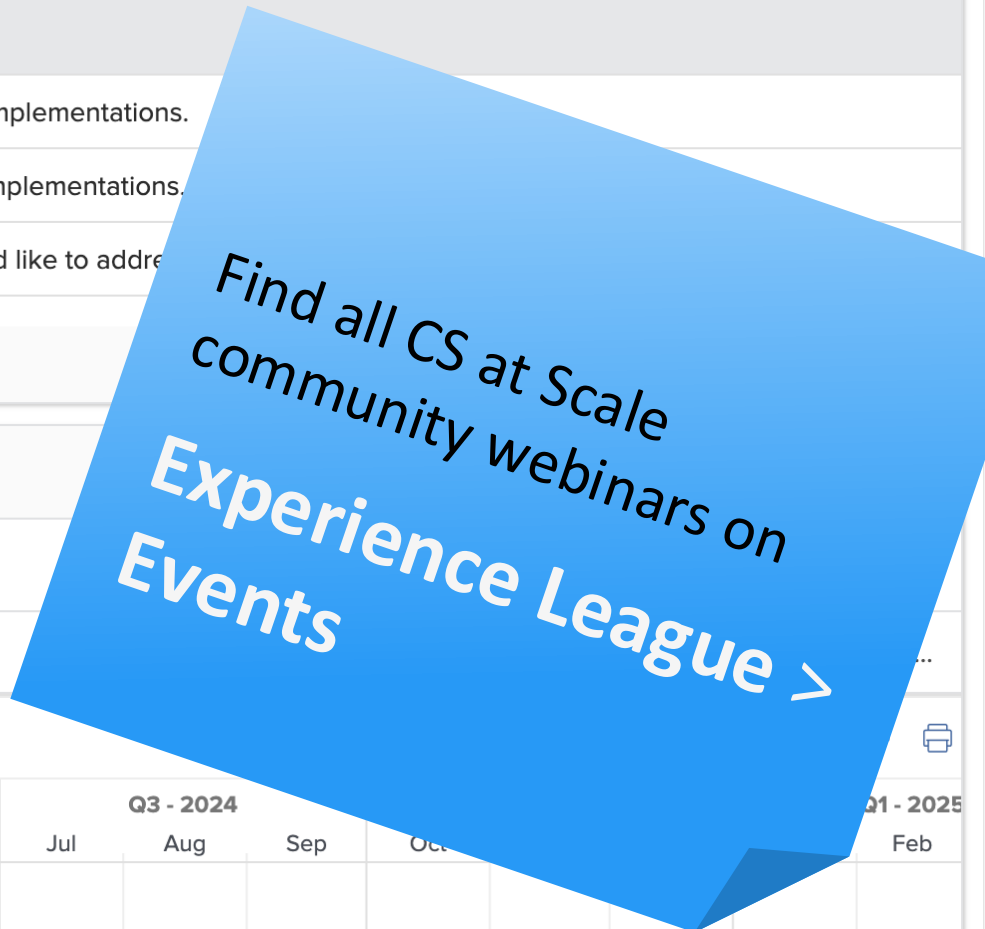
[→ ▾

▾ **Name** **Priority** ↓ **T-shirt size | Plan**

Fit All ▾

2024 eb Mar Apr May Jun Jul Aug Sep Oct 2025 Q1 - 2025 Feb

▾ Planned Completion Date: Q4, 2024 (4)





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 address, but have yet to prioritize.

Showing all 3 reports

Admin | Planned Optimization and Implementations

Details Summary

[→]

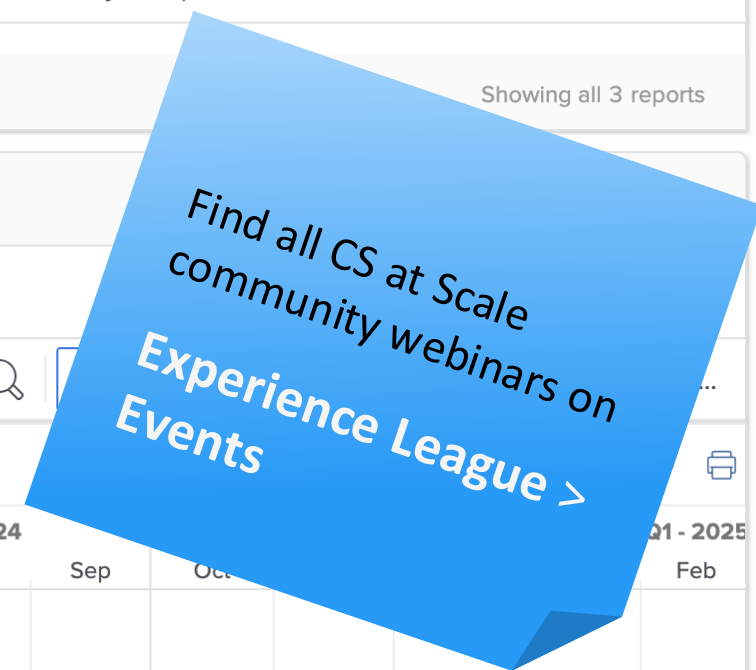


Name Priority ↓ T-shirt size | Plan

Fit All

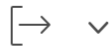
2024 eb Mar Apr May Jun Jul Aug Sep Oct 2025 Q1 - 2025 Feb

Planned Completion Date: Q4, 2024 (4)





Details Summary



Report...



Report...



Report...

Fit All

Switch to Projected Dates



2024 Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec 2024 Q3 - 2024 Q4 - 2024 Q1 - 2025 Feb

Planned Completion Date: Q4, 2024 (4)

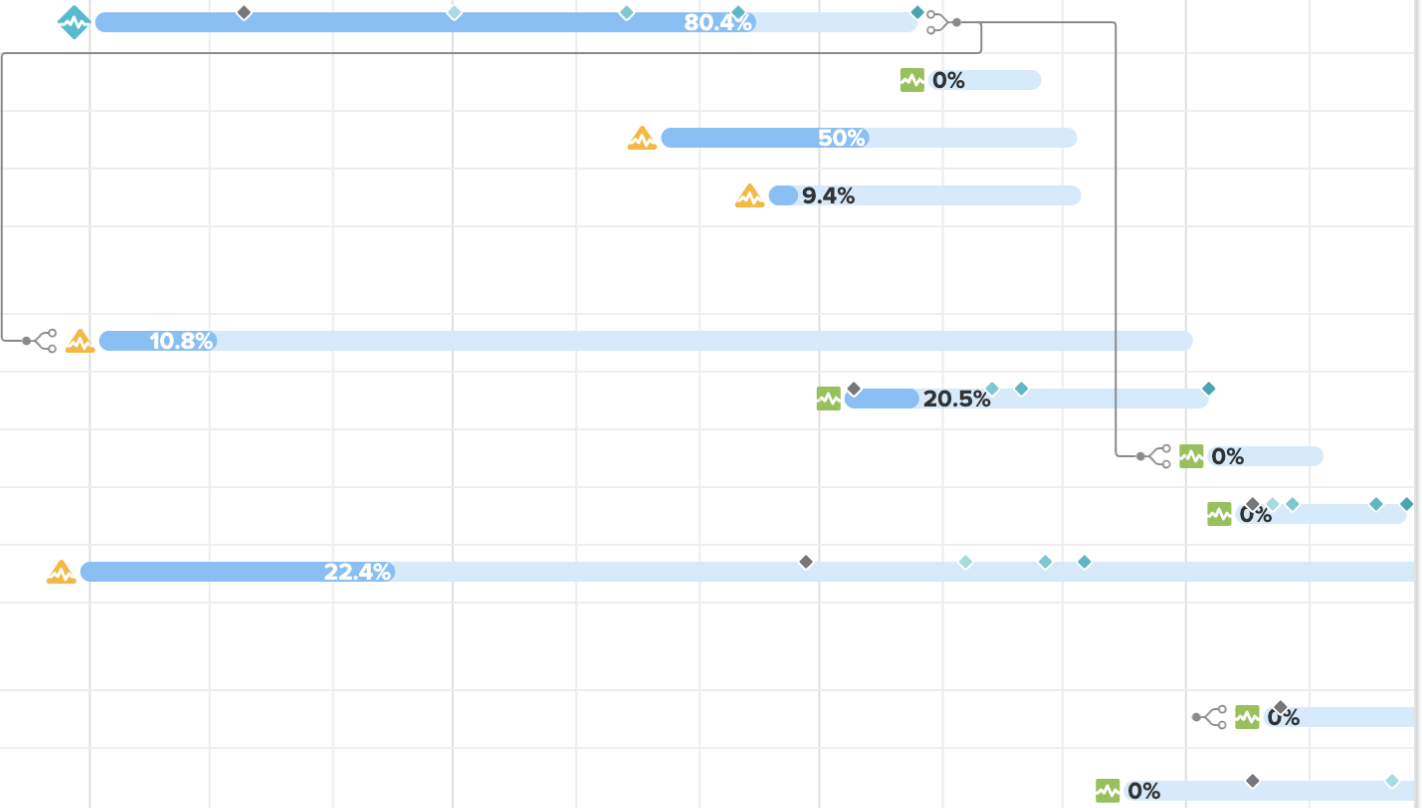
<input type="checkbox"/> Digital Marketing request intake redesign	High	Extra large
<input type="checkbox"/> Amend Co-Marketing & Co-Branding requ...	Medium	Small
<input type="checkbox"/> Modify API with BICS platform	Low	Small
<input type="checkbox"/> Calculate asset counts	High	Small

Planned Completion Date: Q1, 2025 (5)

<input type="checkbox"/> Revise Global Content/Comms requests	High	Extra large
<input type="checkbox"/> Build Legal brief custom form	Medium	Medium
<input type="checkbox"/> Reconcile 12 email templates	Medium	Large
<input type="checkbox"/> Workfront maintenance Outstanding proof	Medium	Medium
<input type="checkbox"/> Move requests for K. Bergstein to the C...	Medium	Large

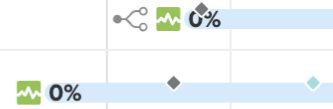
Planned Completion Date: Q2, 2025 (2)

<input type="checkbox"/> Create governance and structures to show	Medium	Large
<input type="checkbox"/> New queue/topic to request a wordmark wi	Medium	Medium



Planned Completion Date: Q2, 2025 (2)

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



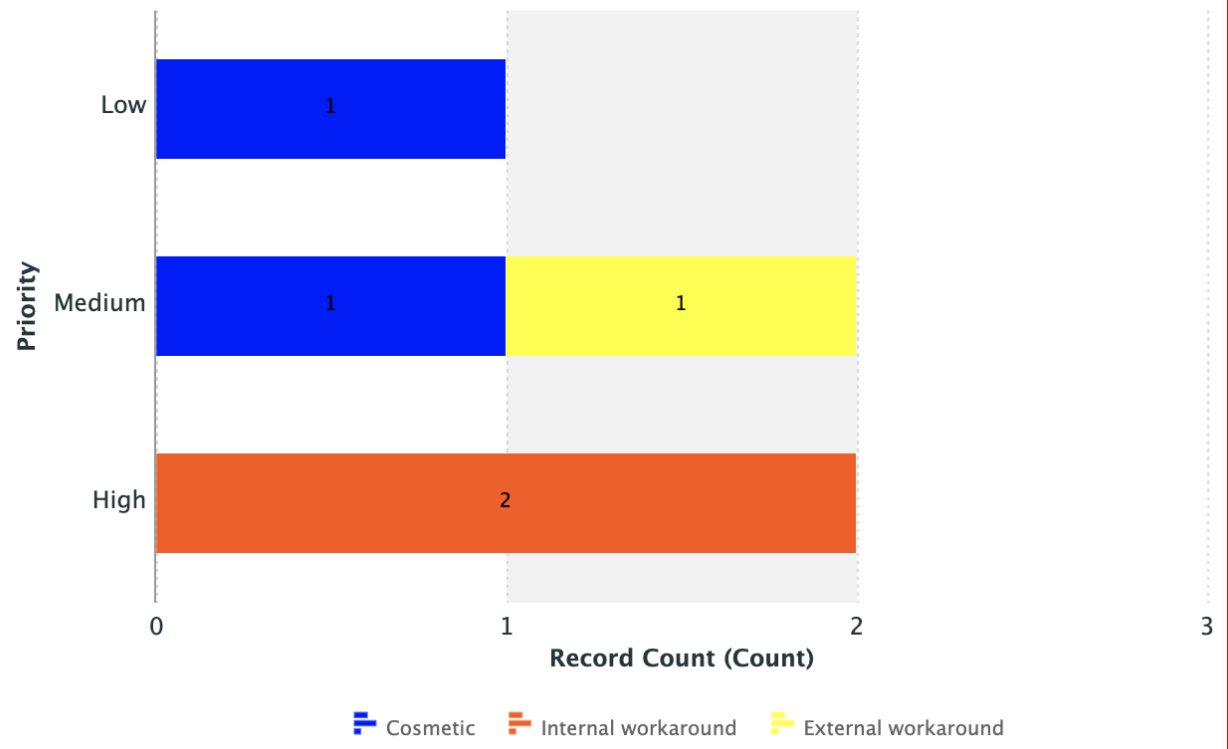
Showing all 11 projects

Admin | Workfront Optimization and Implementation Backlog

2

Details Summary **Chart**

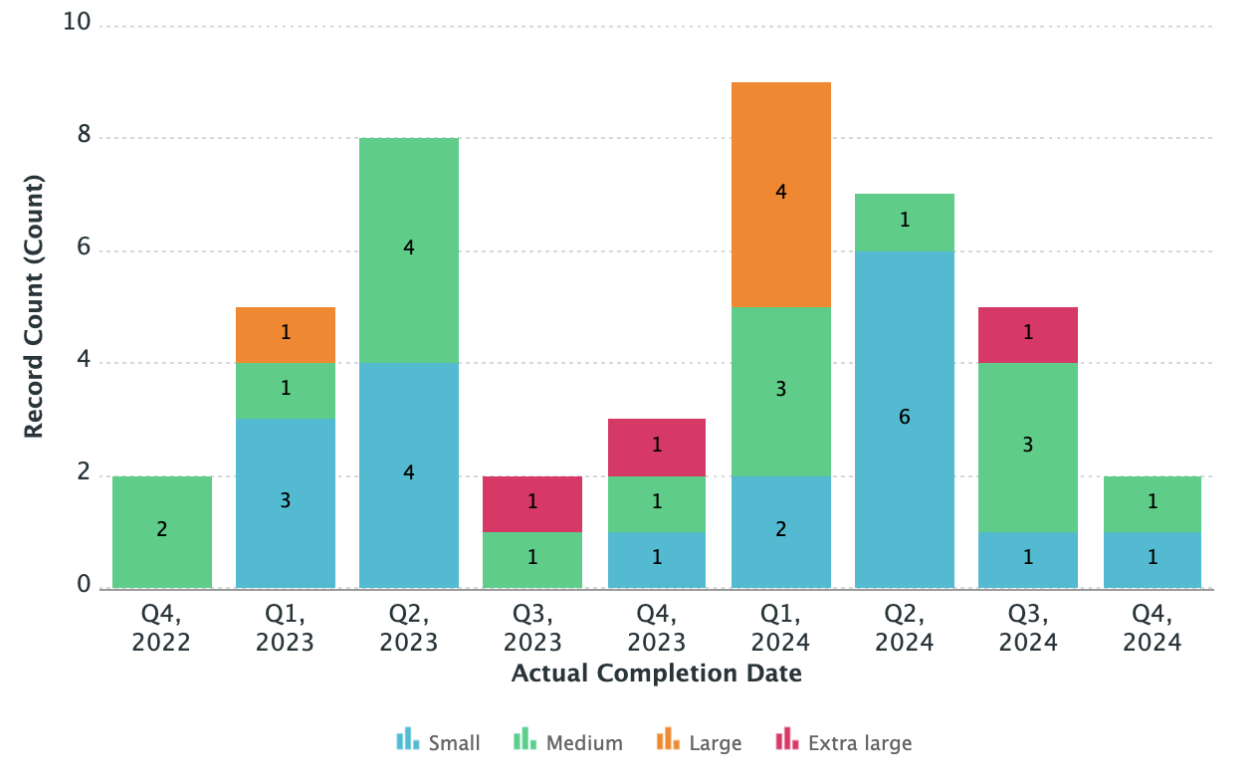
Export Hide Values



Admin | Complete Optimization and Implementations Last 24 months

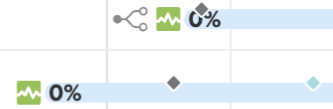
Details Summary **Chart**

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

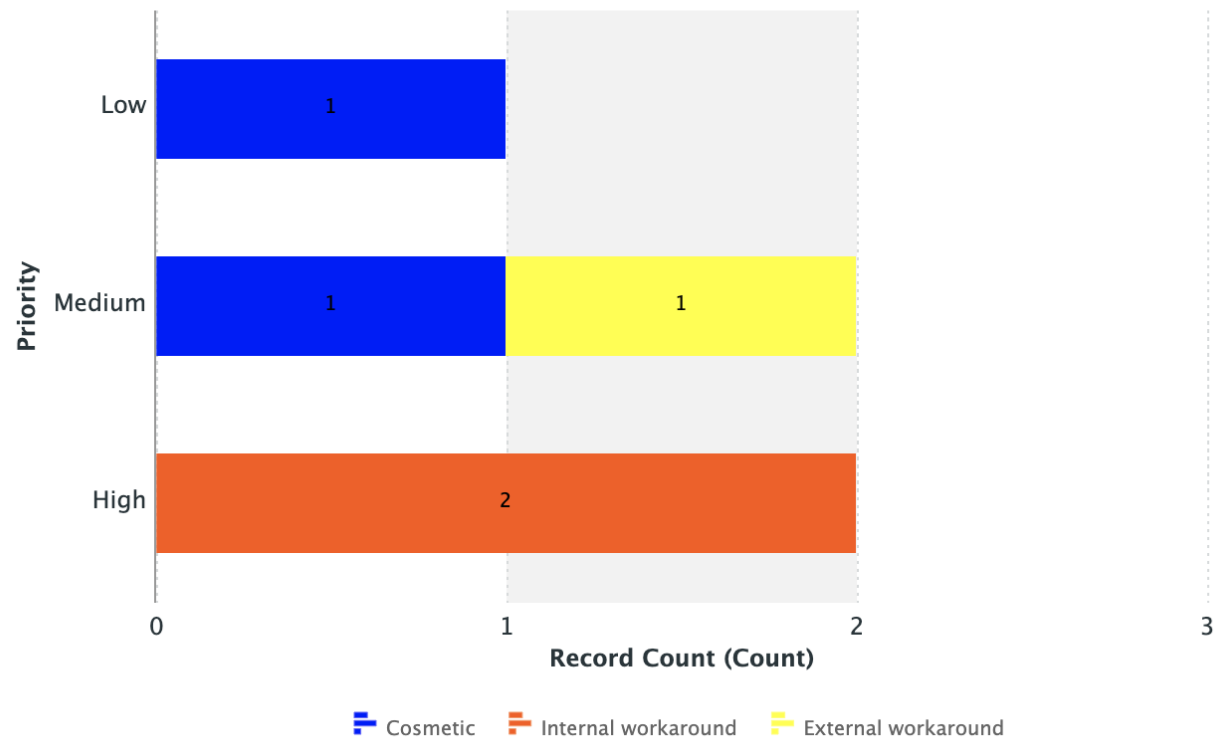


Showing all 11 projects

Admin | Workfront Optimization and Implementation Backlog

Details Summary **Chart**

Export Hide Values

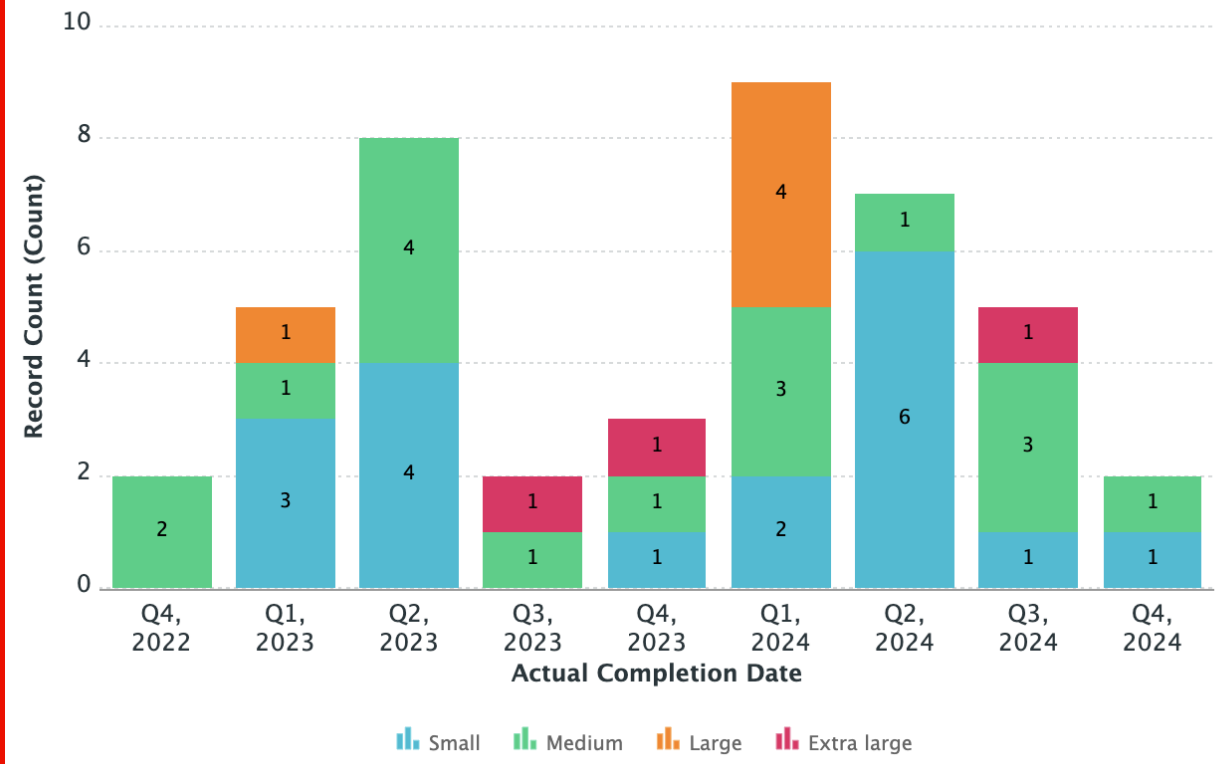


Admin | Complete Optimization and Implementations Last 24 months

3

Details Summary **Chart**

Export Hide Values



Behind the dashboard

- 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

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

The screenshot displays the Adobe Experience Manager form editor interface. At the top, there are tabs for 'Object Types' (Program, Project) and buttons for 'Share', 'Preview', 'Active', and 'Feedback'. The main content area is titled 'Additional project details' and contains a 'Form Description' field with the text: 'Attach this form to any campaign or project to inform co-ownership, T-shirt size, and more.' Below this is a 'Default Custom Form Section' containing two radio button groups. The first group is titled 'At the time of plannin...' and has options: Small, Medium (selected), Large, and Extra large. The second group is titled 'At the time of close, ho...' and has options: Small, Medium, Large, and Extra large. A 'Scope creep' field is also visible. On the right side, there is a configuration panel for the selected field. It includes a 'Name' field with the value 'T-shirt size | Plan', an 'Instructions' field with the text: 'A medium represents a typical effort. Effort is represented by a combination of the work hours and the output of deliverables.', a 'Format' dropdown set to 'Text', and a 'Display Type' dropdown set to 'Radio Buttons'. The 'Choices' section is checked for 'Show Values' and 'Sort Choices A-Z'. It lists four choices: 'Small', '1', 'Medium', '2', 'Large', '3', and 'Extra large'. The 'Medium' choice is highlighted with a green box, and the '2' choice is also highlighted with a green box. At the bottom, there is a status bar showing '4/500 fields used' and buttons for 'Cancel', 'Save and Close', and 'Apply'.

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.

The screenshot shows the configuration interface for a custom field. At the top, there are tabs for 'Object Types' (Program, Project) and buttons for 'Share', 'Preview', 'Active' (toggle), and 'Feedback'. Below this is a central area with a dashed border containing a 'Default Custom Form Section' with two radio button groups for 'At the time of plannin...' and 'At the time of close, ho...'. A 'Scope creep' field is shown with a 'Formula' button. On the right, the 'Calculated' section includes a 'Share' button, 'Label *' (Scope creep), 'Name *' (Calculation | Scope creep), 'Instructions' (empty text area), 'Format' (Text), and checkboxes for 'Display formula in instructions' (checked) and 'Apply to existing calculations'. The 'Calculation' section contains the formula: `IF({DE:T-shirt size | Actual}={DE:T-shirt size | Plan},0,(SUB({DE:T-shirt size | Actual},{DE:T-shirt size | Plan})))`. At the bottom, there are 'Cancel', 'Save and Close', and 'Apply' buttons, along with a 'Maximize' button. A status indicator shows '4/500 fields used'.

Custom fields for roadmap backlog

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

Object Types Issue + Share Preview Active Feedback

ADMIN | Marketing Systems Backlog
Form Description ?
Add this form to any issue to add it to the backlog of activity for optimization or implementation.

Default Custom Form Section

Should this request be i... *
 Yes, Workfront
 Yes, DAM
 No

Radio buttons

Share

Label * ?
Should this request be in system admin...

Name * ?
Admin | Backlog

Instructions

Format
Text

Display Type
Radio Buttons

Choices
 Show Values Sort Choices A-Z

Yes, Workfront ⚙️
 Yes, DAM ⚙️
 No ⚙️

+ Add Choice

Additional settings
 Make a required field

1/500 fields used Cancel Save and Close Apply

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

Set Filter Rules for your Report Switch to Text Mode | Apply an Existing Filter

Only show me Projects in which the...

Project » Campaign ID Equal

- Workfront optimizations 2021
- Workfront optimizations 2022
- Workfront implementation 2022
- Workfront implementation 2023
- Workfront optimizations 2023
- Workfront optimization | Global Content/C...
- Workfront implementation 2024
- Workfront optimizations 2024

AND

Project » Status Equal

- In Progress
- Requested

[+ Add another Filter Rule](#)

- Planned completion date by quarter

Group your Report:

First by:

Project » Planned Completion Date

[+ Add another Grouping](#)

Group Dates by:

Quarter ▾

Collapse this grouping by default [?](#)

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

Column Preview Apply an Existing View ▾ + Add Column

NAME	PRIORITY 2 ▾	T-SHIRT SIZE PLAN	SPONSOR	DESC	% COMPLETE	START ON	DUE ON 1 ▾
CRM Integration - Tampa Office	Normal		John Smith	Get the Tampa team up and running with the new CRM tool.	84%	4/15/11	11/17/24

Report Options

When the Report loads, show the:

Details Tab ▾

When the report loads on a dashboard, show:

200 ▾ items

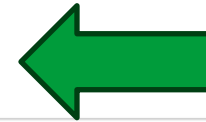
Show the Milestone view on the Details tab

Show this report in a Gantt view by default

Allow View to be changed on the report

Allow Group to be changed on the report

Allow Filter to be changed on the report



- 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.

Only show me Issues in which the...

Issue » Admin Backlog	Equal	Yes, Workfront	×
AND			
Issue » Resolving Object ID	Is Blank		×
AND			
Issue » Status	Not Equal	Closed Rejected Won't Resolve Cannot Duplicate	×

+ Add another Filter Rule

2 Backlog: Groupings

- Priority
- Severity

Group your Report:

First by:

Issue » Priority

And then by:

Issue » Severity

Collapse this grouping by default ?

Collapse this grouping by default ?

2 Backlog: Columns

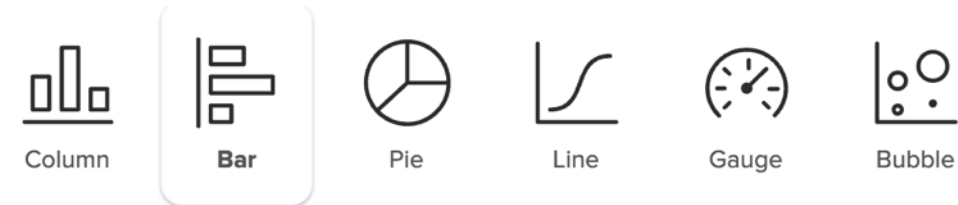
- Name
- Description
- Priority (sort first)
- Severity (sort second)
- Entry date
- Last update

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

<input type="checkbox"/> Name	Description	Priority	Severity	Entry	Last update
▾ Priority: Low (1)					
▾ Severity: Cosmetic (1)					
<input type="checkbox"/> Report Proof approvals by portfolio	<p>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.</p> <p>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</p>	Low	Cosmetic	3/4/24	

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



Bottom (X) Axis

Record Count ▾

Left (Y) Axis

Issue » Priority ▾



Show in 3D

Display chart in 3D



Group Bars

Select an additional grouping and define how your chart should be grouped



Side by Side

**Stacked**

Stacked to 100%

Group Data by

Issue » Severity ▾

Custom Colors >

3

Complete Work: Filters

- Actual completion date
- Program ID
- Status = Complete

Set Filter Rules for your Report Switch to Text Mode | Apply an Existing Filter

Only show me Projects in which the...

Project » Actual Completion Date	Between	\$\$TODAY-24m	\$\$TODAY	X
AND				
Project » Campaign ID	Equal	<ul style="list-style-type: none">Workfront optimizations 2021Workfront optimizations 2022Workfront implementation 2022Workfront implementation 2023Workfront optimizations 2023Workfront optimization Global Content/C...Workfront implementation 2024Workfront optimizations 2024		
AND				
Project » Status	Equal	Complete		

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

Group your Report:

First by:

Project » Actual Completion Date

Group Dates by:

Quarter ▾

Collapse this grouping by default ?

And then by:

Project » T-shirt size | Actual

Collapse this grouping by default ?

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

<input type="checkbox"/> Name	Priority	T-shirt size Plan	T-shirt size Actual	Calculation Scope creep	Sponsor	Desc	Actual Completion Date
Actual Completion Date: Q3, 2024 (1)							
T-shirt size Actual: Extra large (1)							
<input type="checkbox"/> 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

- 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)

The screenshot displays a configuration panel for a chart. At the top, there are six icons representing different chart types: Column, Bar, Pie, Line, Gauge, and Bubble. The 'Column' chart type is selected and highlighted with a light blue border.

Below the chart type selection, the 'Left (Y) Axis' is set to 'Record Count' via a dropdown menu.

The 'Bottom (X) Axis' is set to 'Project » Actual Completion Date' via a dropdown menu.

There are two toggle switches:

- 'Show in 3D' is turned off, with the text 'Display chart in 3D' below it.
- 'Group Columns' is turned on, with the text 'Select an additional grouping and define how your chart should be grouped' below it.

Under the 'Group Columns' toggle, there are three icons representing different grouping options: 'Side by Side', 'Stacked', and 'Stacked to 100%'. The 'Stacked' option is selected and highlighted with a light blue border.

At the bottom, the 'Group Data by' dropdown is set to 'Project » T-shirt size | Actual'. To the right of this dropdown is a 'Custom Colors' section with a right-pointing chevron and four colored squares: pink, orange, yellow, and green.

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.

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.





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)

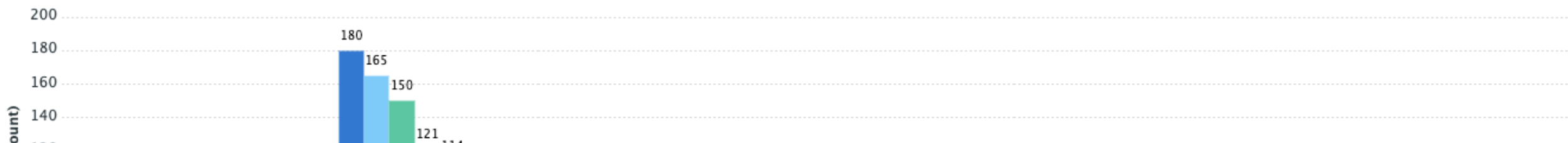
Details

Summary

Chart

Export

Hide Values

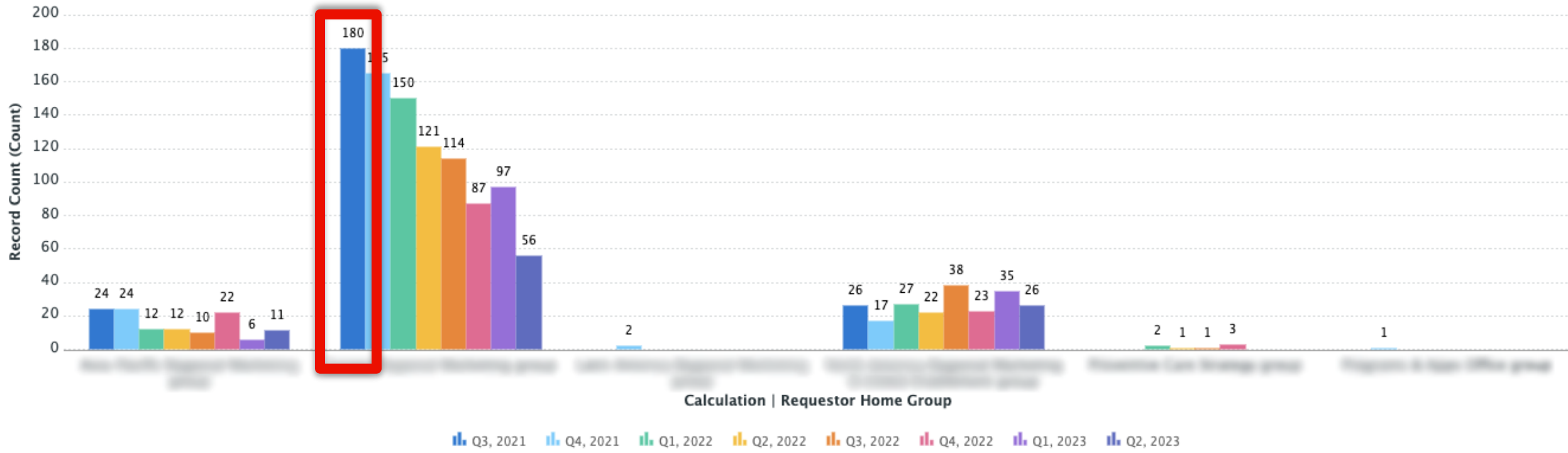




Requests by Group this year and last (Copy)

Details Summary **Chart**

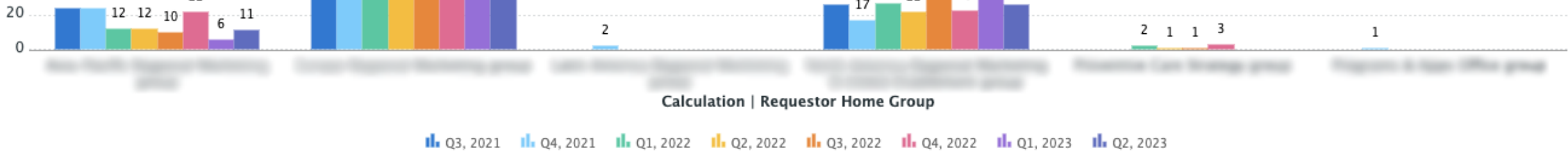
Export Hide Values



Projects Derived from Requests This Year and Last (Copy)

Details Summary **Chart**

Export Hide Values

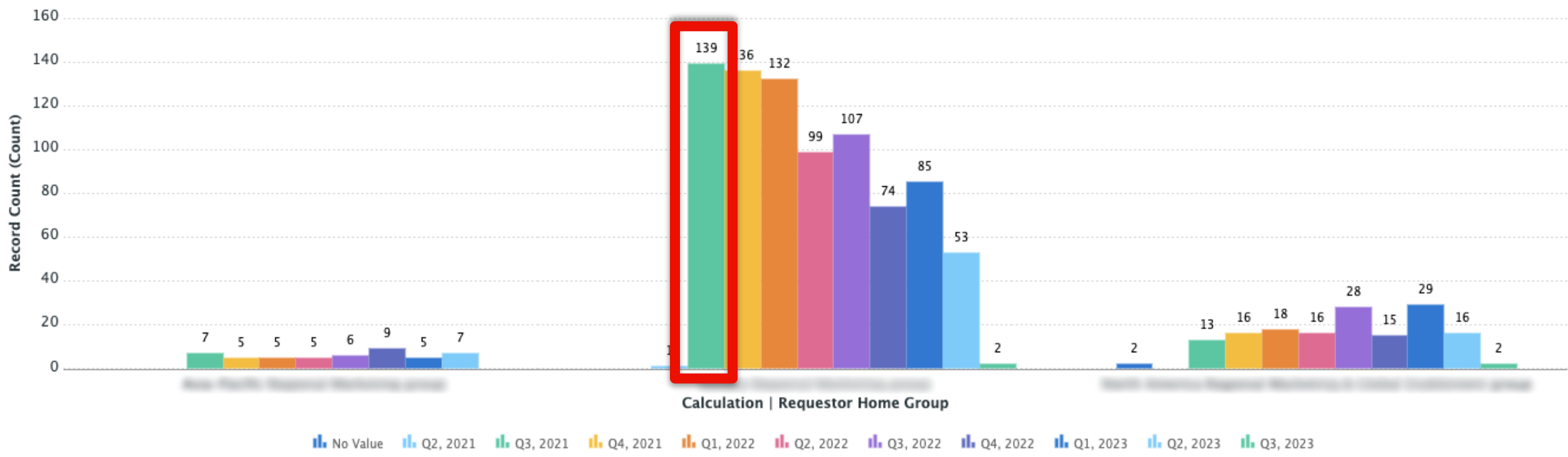


2

Projects Derived from Requests This Year and Last (Copy)

Details Summary **Chart**

Export Hide Values



Requests by Status This Year and Last (Copy)

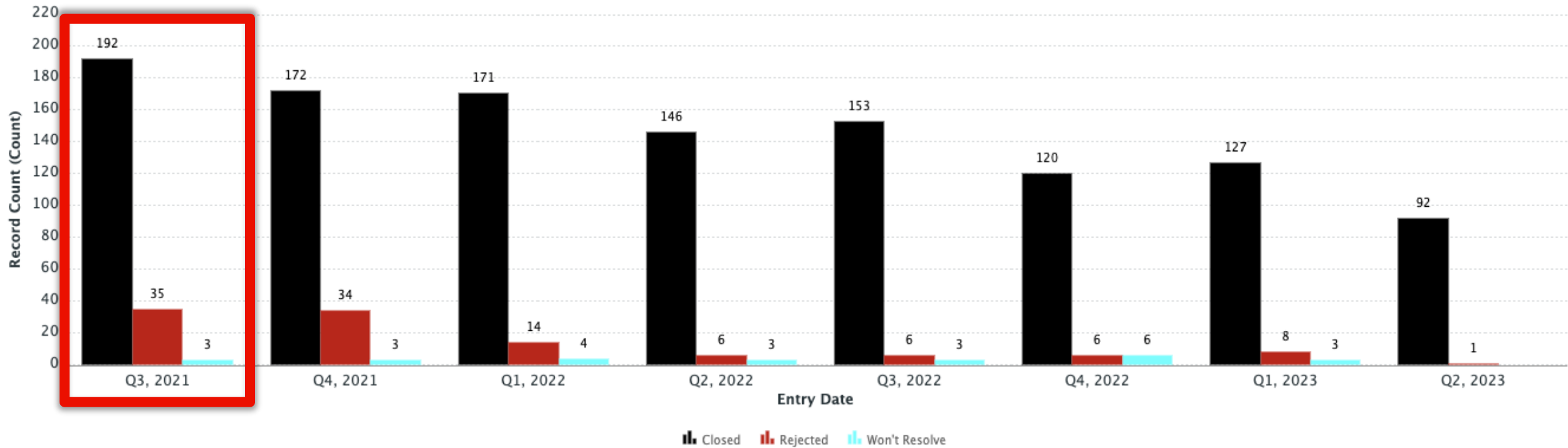


Requests by Status This Year and Last (Copy)

Details Summary **Chart**

Export

Hide Values



Sum Requests by Country Past Year (Copy)

Behind the dashboard

- 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.

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

The screenshot shows the configuration page for a calculation. At the top, there are controls for 'Object Types' (Project, Issue, +), 'Share', 'Preview', an 'Active' toggle, and a 'Feedback' button. The main content area is titled 'ADMIN | Requestor data' and includes a 'Form Description' section with the text 'Attach to all queue topics to collect target market and requestor alignment.' and a 'Created: Apr 2023' timestamp. Below this is a preview window titled 'Admin use only' showing two calculation widgets. The right-hand sidebar contains configuration options: 'Label' (Calculation | Requestor Home Group), 'Name' (Calculation | Requestor Home Group), 'Instructions' (This calculation helps report on the home group the requestor was in at the time of request. {enteredBy}. {homeGroup}.{name}), 'Format' (Text), 'Display formula in instructions' (checked), 'Apply to existing calculations' (unchecked), and the 'Calculation' formula: `{enteredBy}.{homeGroup}.{name}`.

Determining which requests became projects

Set Filter Rules for your Report

Switch to Text Mode | Apply an Existing Filter

Only show me Issues in which the...

Issue » Entry Date	Between	07/1/21 3:30 PM	06/30/23 3:30 PM
AND			
Issue » Project Campaign ID	Equal	Strategic Marketing queues	
AND			
Issue » Resolving Object ID	Is Not Blank		
AND			
Entered By » Home Group ID	Equal	Strategic Marketing queues	

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

Only show me Issues in which the...

Issue >> Entry Date	Between	07/1/21 3:30 PM	06/30/23 3:30 PM
AND			
Issue >> Project Campaign ID	Equal	Strategic Marketing queues	
AND			
Entered By >> Home Group ID	Equal	Global Integrated Marketing Europe Regional Marketing group Asia-Pacific Regional Marketing group Regional Marketing & Customer Programs Latin America Regional Marketing group North America Regional Marketing & Glob. Programs & Apps Office group Preventive Care Strategy group	

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

Group your Report:

First by: Issue » Entry Date

Group Dates by: Quarter ▾

Collapse this grouping by default ?

And then by: Issue » Calculation | Requestor Home Group

Collapse this grouping by default ?

And then by: Issue » Calculation | Requestor Home Team

[Switch to Matrix Grouping](#) | [Switch to Text Mode](#)

- 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

<input type="checkbox"/> Name	Requestor	Priority	Entry	Request status	Project created from request	Project status
<input type="checkbox"/> Entry Date: Q1, 2022 (27)						
<input type="checkbox"/> Calculation Requestor Home Group: North America Regional Marketing & Global Enrollment group (27)						
<input type="checkbox"/> Calculation Requestor Home Team: North America & Global Enrollment (27)						
<input type="checkbox"/> ProCys One PIV Minideck TRANSLATION CA-FR	Datta Gurnani-Bass	Medium	1/5/22	Rejected		
<input type="checkbox"/> Pricing updates for Shelter Enrollment Form	Samantha Mathur	Medium	1/13/22	Closed	NA 2022 pricing updates - Shelter Enrollment Form US	Complete
<input type="checkbox"/> Localize 2022-2023 US Diagnostics Detailer for Canada	Wenqiang Cheng	Medium	1/18/22	Closed	US 2022-2023 Diagnostics Detailer CA	Cancelled

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

The screenshot shows the configuration interface for a chart. At the top, there are six chart type icons: Column (selected), Bar, Pie, Line, Gauge, and Bubble. Below the icons, the 'Left (Y) Axis' is set to 'Record Count'. The 'Bottom (X) Axis' is set to 'Issue > Calculation | Requestor Home Group'. There are two toggle switches: 'Show in 3D' (disabled) and 'Group Columns' (enabled). Under 'Group Columns', there are three options: 'Side by Side' (selected), 'Stacked', and 'Stacked to 100%'. The 'Group Data by' dropdown is set to 'Issue > Entry Date', with a 'Custom Colors' link next to it. At the bottom, there is a 'Combination Chart' toggle switch (disabled) with the description 'Combine your chart by an additional field value'.

Column Bar Pie Line Gauge Bubble

Left (Y) Axis
Record Count

Bottom (X) Axis
Issue > Calculation | Requestor Home Group

Show in 3D
Display chart in 3D

Group Columns
Select an additional grouping and define how your chart should be grouped

Side by Side Stacked Stacked to 100%





Group Data by
Issue > Entry Date Custom Colors >

Combination Chart
Combine your chart by an additional field value

- 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

Set Filter Rules for your Report Switch to Text Mode | Apply an Existing Filter ▾

Only show me Issues in which the...

Issue >> Entry Date	Between ▾	07/1/21 3:30 PM 	06/30/23 3:30 PM 	×
<div style="border: 1px solid #ccc; padding: 2px; display: inline-block; margin: 2px;">AND ▾</div>				
Issue >> Project Campaign ID	Equal ▾	Strategic Marketing queues 		
<div style="border: 1px solid #ccc; padding: 2px; display: inline-block; margin: 2px;">AND ▾</div>				
Issue >> Resolving Object ID	Is Not Blank ▾	×		
<div style="border: 1px solid #ccc; padding: 2px; display: inline-block; margin: 2px;">AND ▾</div>				
Entered By >> Home Group ID	Equal ▾	[Redacted] 		

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

Group your Report:

First by: >>

Group Dates by: Quarter ▾

Collapse this grouping by default ?

And then by: Issue >> Calculation | Requestor Home Group

Collapse this grouping by default ?

And then by: Issue >> Status

[Switch to Matrix Grouping](#) | [Switch to Text Mode](#)

- 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	

<input type="checkbox"/> 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: <i>Europe Regional Marketing group</i> (74)					
▼ Status: Closed (74)					
<input type="checkbox"/> Update Sales detailer <i>Microsites Dynamic Index</i>	ASSET UPDATE: EU - Translations <i>Microsites Dynamic Index</i> (IT, FR, ES, EN-NO, DE)	8/31/22	10/24/22	<i>Andreas Schwandt</i>	Europe Integrated Marketing & Programs Team
<input type="checkbox"/> AT: E-Mailer Webinars	AT: E-Mailer Webinars	9/29/22	10/3/22	<i>Floriane Lecomte</i>	Northern and Eastern Europe Regional Team
<input type="checkbox"/> Convert <i>PDF change</i> letter to PDF format	NEW ASSET: Regional <i>PDF change</i> letter	10/6/22	10/17/22	<i>Cecile Lamy</i>	France Regional Team

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

The screenshot displays the chart configuration interface with the following settings:

- Chart Type:** Column (selected), Bar, Pie, Line, Gauge, Bubble.
- Left (Y) Axis:** Record Count
- Bottom (X) Axis:** Issue > Calculation | Requestor Home Group
- Show in 3D:** (disabled) - Display chart in 3D
- Group Columns:** (enabled) - Select an additional grouping and define how your chart should be grouped
 - Grouping Options:** Side by Side (selected), Stacked, Stacked to 100%
- Group Data by:** Resolve Project > Entry Date (selected) [Custom Colors >](#)
- Combination Chart:** (disabled) - Combine your chart by an additional field value

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

Only show me Issues in which the...

Issue » Project Campaign ID	Equal	Strategic Marketing queues
AND		
Issue » Entry Date	Greater Than Equal	07/1/21 8:15 AM
AND		
Entered By » Home Group ID	Equal	

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

Group your Report: [Switch to Matrix Grouping](#) | [Switch to Text Mode](#)

First by: Issue » Entry Date

Group Dates by: Quarter ▾

Collapse this grouping by default [?](#)

And then by: Issue » Calculation | Requestor Home Group

Collapse this grouping by default [?](#)

And then by: Issue » Status

Collapse this grouping by default [?](#)

- 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

Column Preview Apply an Existing View ▾ + Add Column

NAME	REQUESTED ON ¹ ↑	PRIORITY	REQUESTOR'S HOME TEAM ² ↑	PROJECT CREATED FROM REQUEST	PROJECT CREATED ON
Sync duplicating contacts	4/15/11				4/15/11

<input type="checkbox"/> Name	Requested on	Priority	Requestor's Home Team	Project created from request	Project created on
<input type="checkbox"/> Entry Date: Q3, 2021 (192)					
<input type="checkbox"/> Calculation Requestor Home Group: <i>Europe Regional Marketing</i> group (159)					
<input type="checkbox"/> Status: Closed (159)					
<input type="checkbox"/> Austria: Virtual booth for <i>VCM Sep 25-26 2021</i>	7/2/21	●	<i>Europe Integrated Marketing & Programs Team</i>	Austria: Virtual Booth Assets for <i>VCM Sep 25-26 2021</i>	9/10/21

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

The screenshot shows the configuration interface for a chart. At the top, there are six chart type icons: Column (selected), Bar, Pie, Line, Gauge, and Bubble. Below the icons, the 'Left (Y) Axis' is set to 'Record Count' and the 'Bottom (X) Axis' is set to 'Issue > Entry Date'. There are two toggle switches: 'Show in 3D' (disabled) and 'Group Columns' (enabled). Under 'Group Columns', there are three options: 'Side by Side' (selected), 'Stacked', and 'Stacked to 100%'. Below these, the 'Group Data by' dropdown is set to 'Issue > Status', with a 'Custom Colors' link next to it. At the bottom, there is a 'Combination Chart' toggle switch (disabled) with the text 'Combine your chart by an additional field value'.

Column Bar Pie Line Gauge Bubble

Left (Y) Axis
Record Count

Bottom (X) Axis
Issue > Entry Date

Show in 3D
Display chart in 3D

Group Columns
Select an additional grouping and define how your chart should be grouped

Side by Side Stacked Stacked to 100%

Group Data by
Issue > Status Custom Colors

Combination Chart
Combine your chart by an additional field value

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.

Problem: We receive too many ad hoc and urgent requests

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

Standardize
where
possible.

Play the long
game.

Assess first.

Scaffold and
compromise.

Q&A

