System Admin Essentials: Establishing a Workfront Center of Excellence

June 21, 2023

Agenda

Time (PST)	Topic
8:00 a.m.	Welcome and agenda
8:05 a.m.	**Establishing a Center of Excellence**
8:45 a.m.	Ask the Experts! Audience Q&A
8:55 a.m.	Wrap-up and next steps

Neal Gardner
Mgr., Marketing Asset Mgmt Operations
Mattel

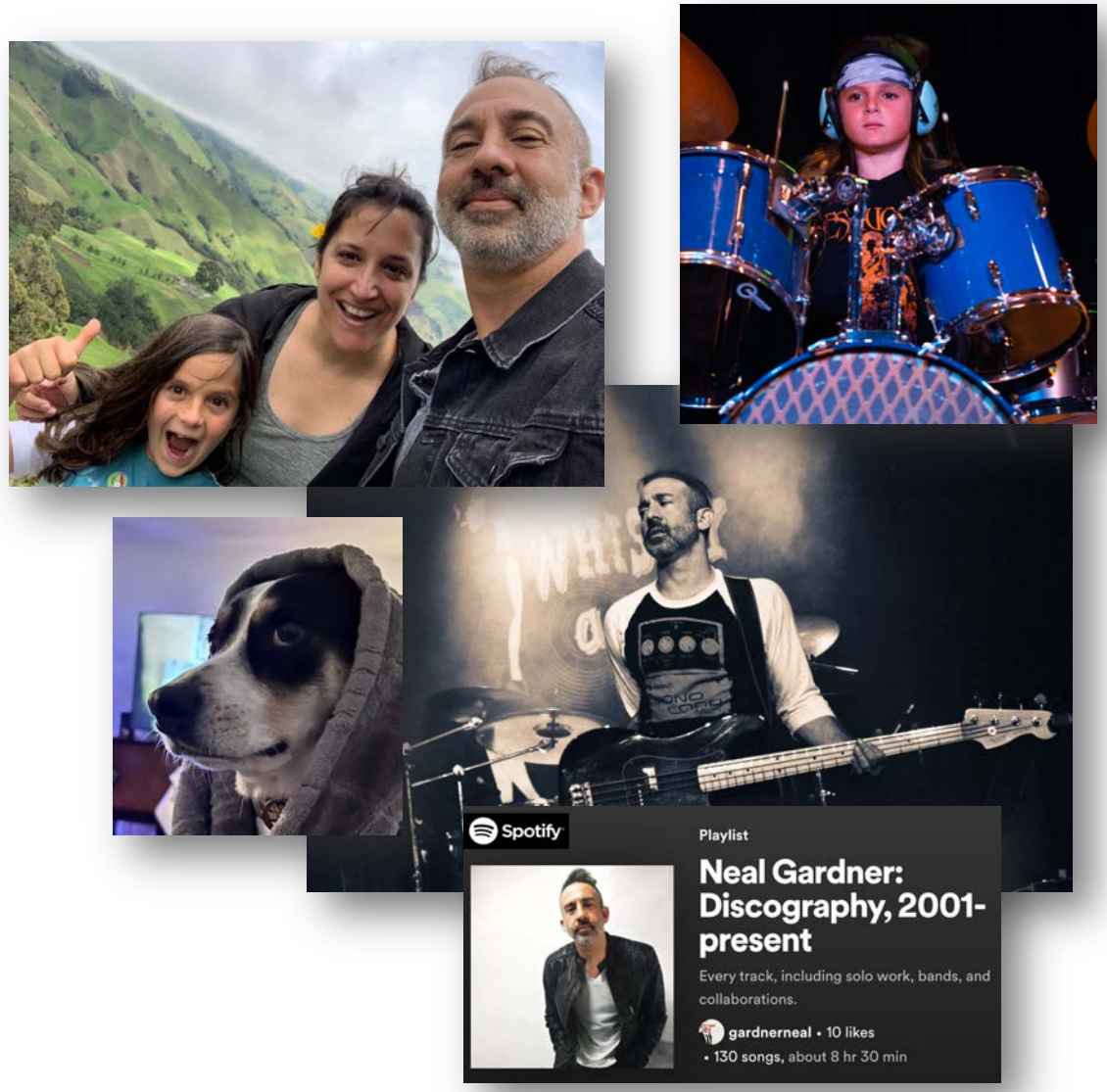
Samantha Bagley
Principal Customer Success Manager
Adobe

Neal Gardner

Manager, Marketing Asset Management Operations

Mattel

- Based in El Segundo, California
- Joined Mattel in November 2022
- Leads the Workfront Center of Excellence for Marketing Operations
- Currently managing the Workfront product roadmap for Mattel's Marketing Transformation initiative
- Lizeth (wife), Nico (son), Iggy (dog) live in Santa Monica, CA
- Has a 20+ year career in music with over 130 songs published on major streaming platforms



Mattel Marketing Transformation
Center of Excellence

Connect with me:

IG: nealgardner

https://www.linkedin.com/in/neal-gardner-300a1217

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How We Use Workfront at Mattel

In Marketing:

- Requests/briefs intake
- Assets/campaigns production tracking
- Metadata entry
- Proofs, proofs, proofs
- Approvals
- Asset usage tracking

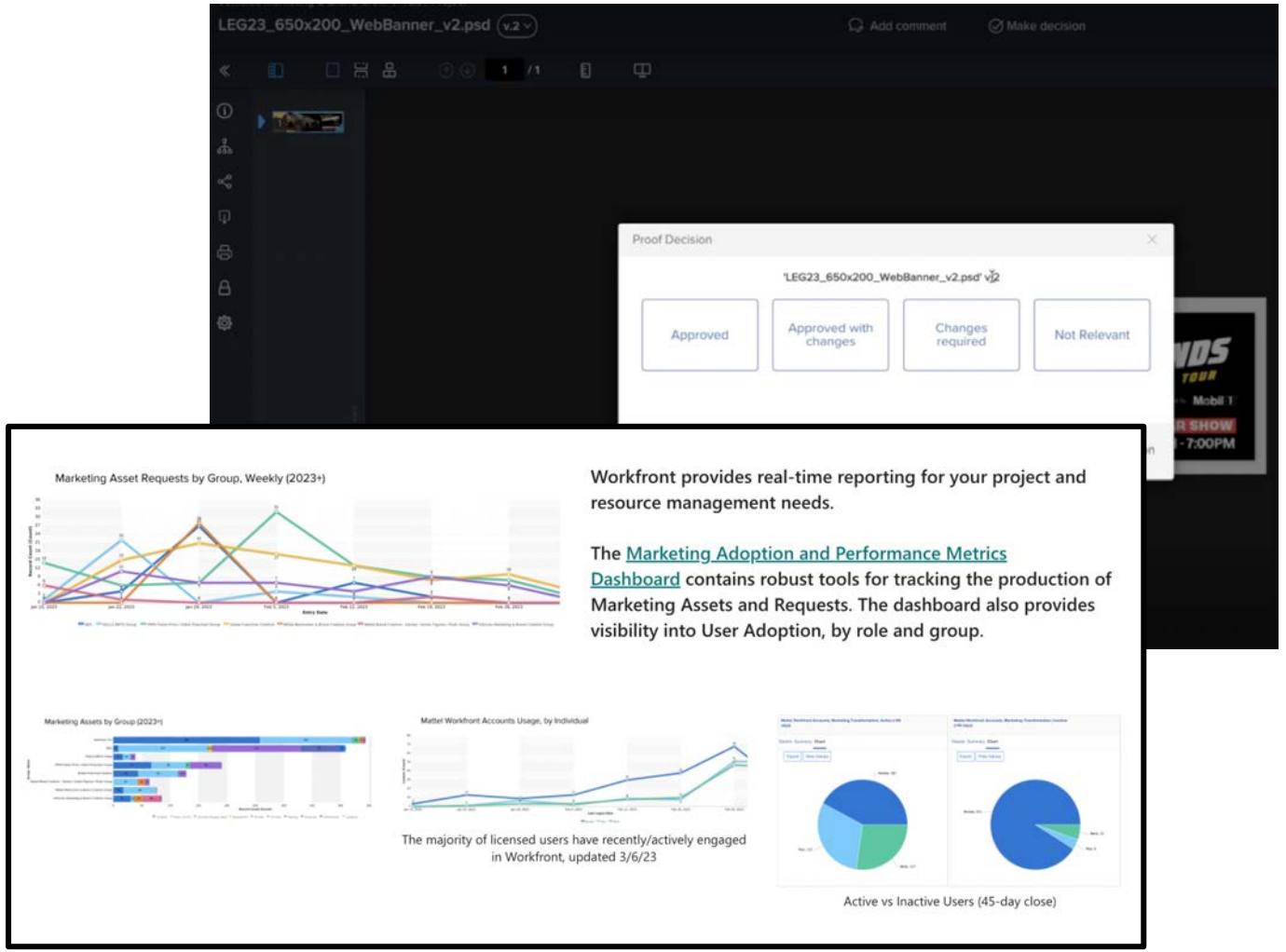
Other areas of the enterprise:

Product Development

Packaging

TV

...and more!



Mattel Marketing Transformation
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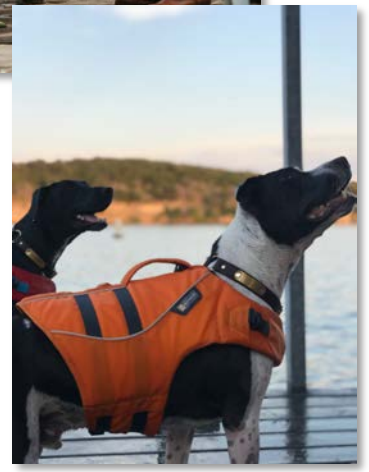
Samantha Bagley

Principal Customer Success Manager
Workfront Customer Success, Adobe

- Based in Austin, TX
- Joined Workfront/Adobe in 2020
- Passionate about operational excellence and change management
- Ask me about System Governance, Best Practices, or how to drive Adoption
- Outside of the office, I enjoy being outside, especially on the lake, and spending time with my husband, our friends, and our dogs.



Connect with me:
https://www.linkedin.com/in/samantha-bagley-07346790/

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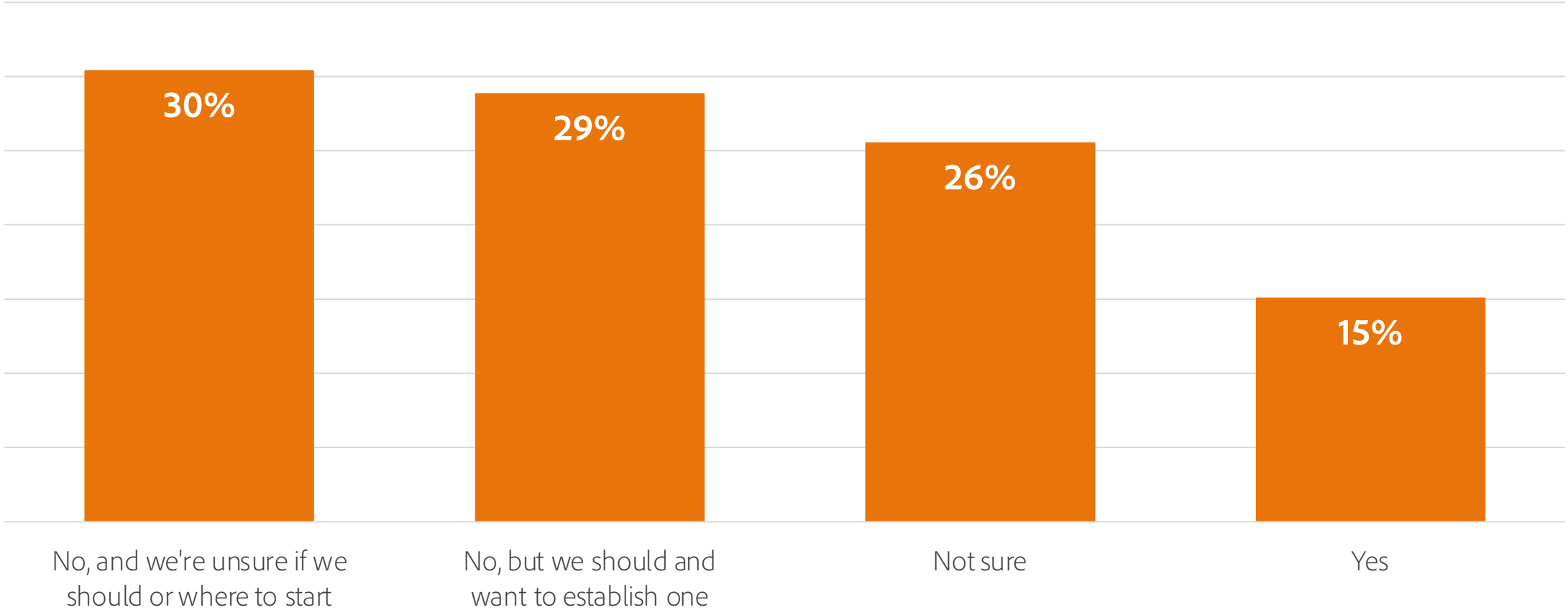
We asked…

Does your organization have a Workfront Center of Excellence?



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What is a Center of Excellence?

… CoE is **centralized governance**, **best practice**, **thought leadership**, and **organizational structure** allowing a company or institution to control scalable marketing strategy, initiatives, and processes.

It has been proven to drive **improved efficiencies**, **consistency in communications**, and **brand standards** across an entire organization.

Source: "Center of Excellence | Top 10 Questions to Ask Yourself". Adobe Experience Cloud Blog.

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Ingredients for a Center of Excellence

- **Your passion** as an Adobe Workfront Change Champion
- **Your experience** as a Subject Matter Expert (SME)
- **Your insights** as a Systems Administrator
- **Your internal network** of enablers and resources
- **A shared commitment** to your organization's success

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Neal's Starter Recipe for a Center of Excellence

1. Vision Document
2. Product Roadmap
3. Documentation
4. Governance & Oversight
5. Continuous Improvement

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Start with your Vision

About the Workfront Marketing Center of Excellence

The Workfront Marketing Center of Excellence is a group with a shared area of focus and subject matter expertise used to support our business needs. We work to standardize best practices for work management, department-wide adoption and offer advice on strategic planning, decision-making, and execution.

Read full vision document here.

MATTEL

Mattel Marketing Transformation
Center of Excellence

Example Vision Document:

Workfront Marketing Center of Excellence

Vision Document

The Workfront Marketing Center of Excellence (WF Mktg CoE) is a group with a shared area of focus and subject matter expertise used to support our teams, by providing tips, insights, and training for Workfront. We work to standardize best practices for department-wide adoption and offer advice on strategic planning, decision-making, and execution.

The role of WF Mktg CoE will support conversations about Marketing data fidelity and report-ability by providing visibility into the current state asset production tracked in Workfront. This will drive executive reporting needs and awareness.

As a Workfront subject matter expert, WF Mktg CoE will identify areas for opportunity to further educate staff on role-specific processes as they exist in the Workfront environment.

Partnering with staff, WF Mktg CoE will refine production schedule workflows and metadata capture. This will benefit asset stakeholders to work with greater efficiency.

Workfront is a technology, but it cannot thrive until the solution reaches full adoption. WF Mktg CoE needs to gain trust in staff that the technology *simply works*.

Establishing a strong, lasting Workfront Governance framework is one of the primary goals of the Center of Excellence. Governance will support innovation. It will promote Continuous Improvement, a business philosophy which promotes incremental, small-scale changes driven by empowered, engaged staff.

With a thoughtful, meaningful approach to business goals, Mktg CoE will review the current state for growth opportunities. WF Mktg CoE will forecast the future state to the best of the collective's governance ability. Leveraging leadership's holistic perspectives, and WF Mktg CoE Workfront subject matter experts' focused view on process, will foster growth and success.

The Workfront Marketing Center of Excellence will foster a climate of success by introducing processes around the how: thoughtful business analysis, agile project management, thorough QA and impactful communication, and Continuous Improvement.

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Enabling the Path to Success

Enabler	Vision
Technical expertise	One or more team members should possess the necessary skills and experience essential to support the product. This may require technical training.
Process experience	An experienced team should provide insights that can help avoid potential development pitfalls.
Communication skills	Team members should be able to convey ideas, concerns, and feedback in a concise and clear manner.
Continuous Improvement	The mindset of setting short-term, actionable goals to seek incremental change and deliverables.
Agile mindset	The team should value adaptability, making it easier to pivot, deploy features swiftly and iterate on the initial implementation.
Motivation	A motivated team ensures deadlines are met and quality standards are maintained.
Adoption	Any enterprise solution post-implementation will require a significant time commitment by stakeholders so that they can acclimate to their new environment. Regular support check-ins can drive adoption.
Governance	The team will establish a forum for stakeholders to discuss business needs and how those will translate to a product development roadmap. The meetings should occur at a regular cadence.

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Workfront for Marketing Asset Production

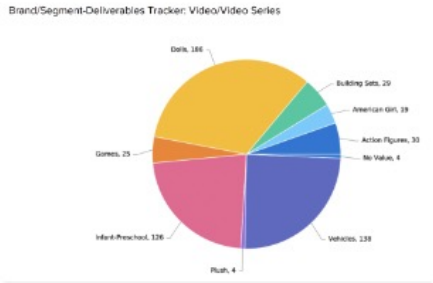
Gardner, Neal
Manager Marketing Asset Mgmt Ops

Welcome to Workfront Marketing Transformation!

Adobe Workfront is an industry-leading work management solution used across Mattel Marketing by all brands, marcom and commercial teams.

Workfront Marketing Transformation improves and expands visibility and communications about asset planning, status and acceptance.

With this initiative, Mattel adopts best practices to provide clearer visibility into the production and reporting of marketing assets supply chain.



SharePoint works well for us, but you may have other tools for organizing and communicating your Center of Excellence

News/Updates

- 5/15: 23.3 Release Overview (scheduled for July 2023)
- 5/10: Adobe Experience League June events now available to register
- 4/21: Adobe Experience League May events now available to register
- 3/28: 23.2 Release Overview (scheduled for April 2023)
- 3/23: Adobe Summit Keynotes and Sneaks now available

Mattel MT Quick Links

- Workfront
- **MT Workfront Training &**
- Adobe Workfront Upcomin Events (Free Registration)
- Workfront Release Notes (c latest updates)
- Marketing Assets and Tactics Project Dashboard

MAY 24 Templates Webinar Follow Up
Wed, May 24, 8:00 AM

JUN 21 System Admin Essentials: Establishing a Workfront Center of Excellence
Wed, Jun 21, 8:00 AM

Marketing Center of Excellence Weekly Open Office Hours

To better support our Workfront community and to foster staff opportunities for suggesting improvements, Open Office Hours are available throughout the week. Please contact Neal Gardner for series invitation and/or click link below to join meetings.

Links (Teams)

- Mon@10am PT: (biweekly) AG Mktg CoE Workfront Support...
- Tue@11am PT: (biweekly) FP Mktg CoE Workfront Support Open...
- Thu@8am PT:GFC Mktg CoE Workfront Support Open Office...
- Thu@10am PT: MEGA Mktg CoE Workfront Support Open Office...
- Mon@2pm PT: DEG Mktg CoE Workfront Support Open Office...
- Tue@11:30am PT:(biweekly) Dolls Mktg CoE Workfront Support...
- Thu@2pm PT: Mktg CoE WF Support (General topics, 1 hr)
- Fri@9:30am PT: MBC G/AF/P Mktg CoE Workfront Support Open...
- Fri@11:30am PT: VEH Mktg CoE Workfront Support Open Office...

Workfront Training and Support

Gardner, Neal
Manager Marketing Asset Mgmt Ops

Quick Links

Marketing Workfront Support Documents
Useful Workfront Support Links (Adobe Experience League)
Center of Excellence - Workfront

Upcoming Events

See all
Add event

MAY 18 Getting Started with Resource Management in Workfront
Thu, May 18, 8:00 AM

MAY 24 Ask the Experts: Foundations of Project Templates Webinar
Wed, May 24, 8:00 AM

JUN 21 System Admin Essentials: Establishing a Workfront
Wed, Jun 21, 8:00 AM

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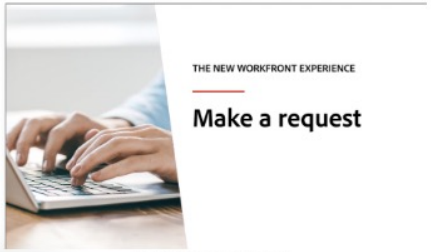
encourage you to
rt documents so that
owth and confidence

additional training,
please contact your team's Group Admin.



Via Adobe Experience League

Taxonomy and Naming Conventions

Gardner, Neal
Manager Marketing Asset Mgmt Ops

Marketing Taxonomy

Marketing assets taxonomy list here (updated April 2023)

For any support issues, questions, or to request additional training, please contact your team's Group Admin.

Taxonomy is an integral piece in the asset supply chain Marketing Transformation driveline. Well-defined taxonomy terms, and fully-tagged assets, allow for greater visibility in search and discovery.
View all new and in progress asset production via the Brand/Segment-Deliverables Tracker.

Asset File Name Conventions

Marketing asset file name conventions here

MT Naming Convention Governance is currently being organized (as of May 2023). This group will meet monthly to review current state conventions, address challenges, and work towards refining best practices. Documentation can be tracked here.

For any support issues, questions, or to request additional training, please contact your team's Group Admin.

nt part of

Comments

Statuses and Notifications

Managing your work in a timely manner allows your Project Managers, Resource Managers, and Executives accurate reporting about the work in progress and the amount of work you are tasked with.

Tutorials:
Find your work
Change Status of work
Communicate work and updates

Support Documents:
Notifications Preferences

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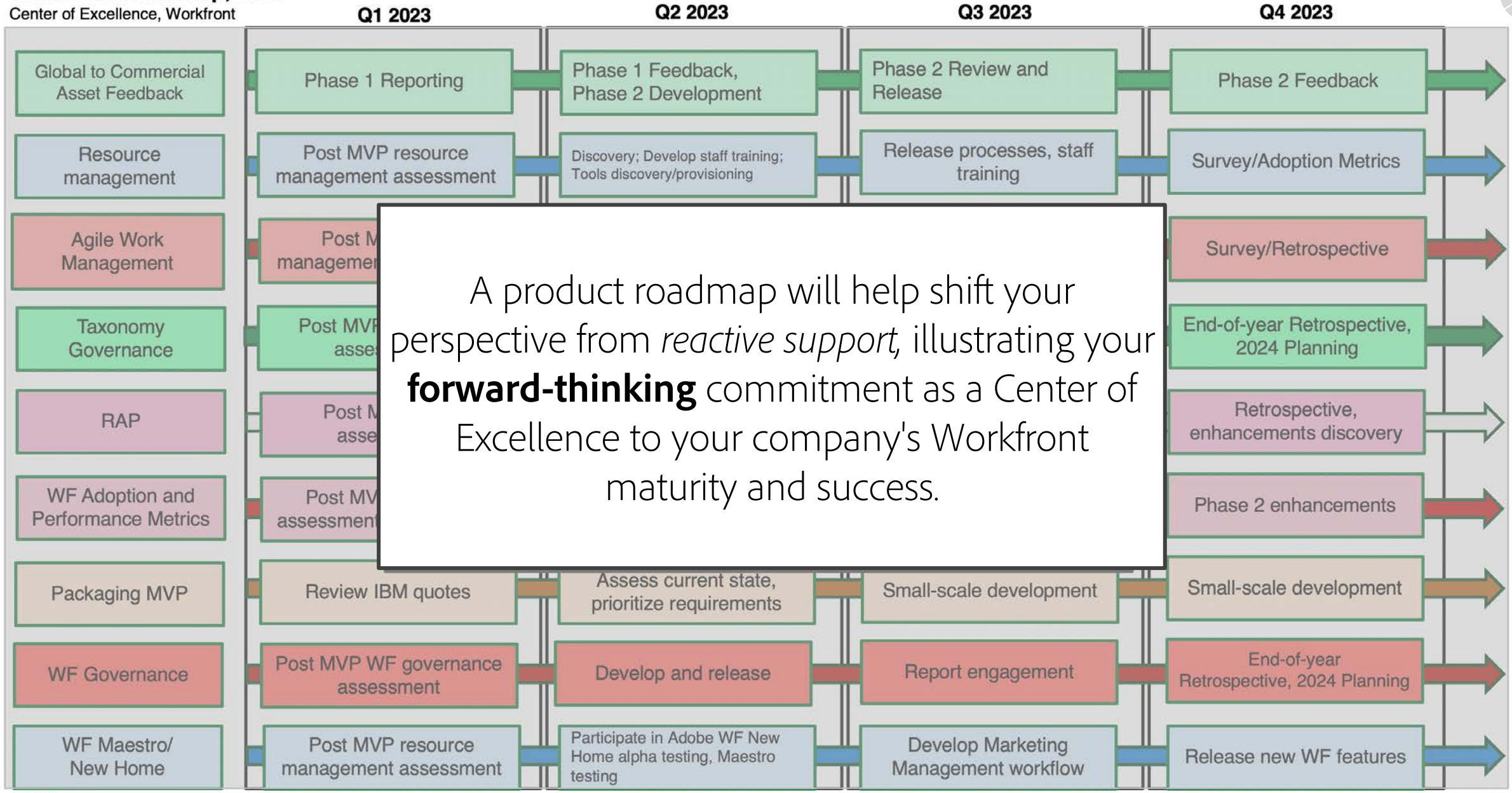
Workfront Roadmap, 2023

Center of Excellence, Workfront



A product roadmap will help shift your perspective from *reactive support,* illustrating your **forward-thinking** commitment as a Center of Excellence to your company's Workfront maturity and success.

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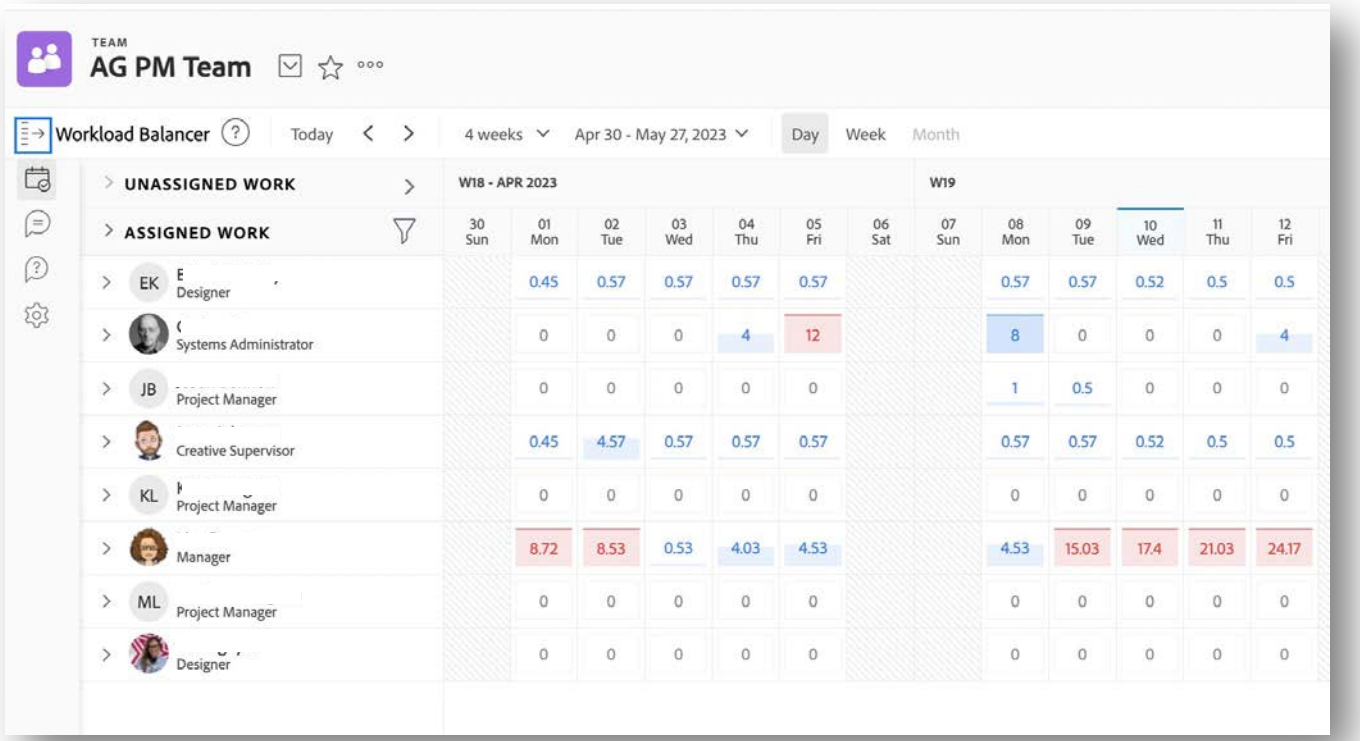
Workfront CoE Roadmap

Resource Management | Agile Work Management | Workfront Adoption and Performance Metrics | Workfront Governance

Workfront provides robust resource management tools, the heart of this is the Workload Balancer.

The tool allows visibility into **resource allocation, utilization**, and **forecasting**, essential for ensuring staff time is well-managed, and that they are being used effectively.

With effective resource management practices, projects can be scheduled and executed efficiently.



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Workfront CoE Roadmap

Resource Management

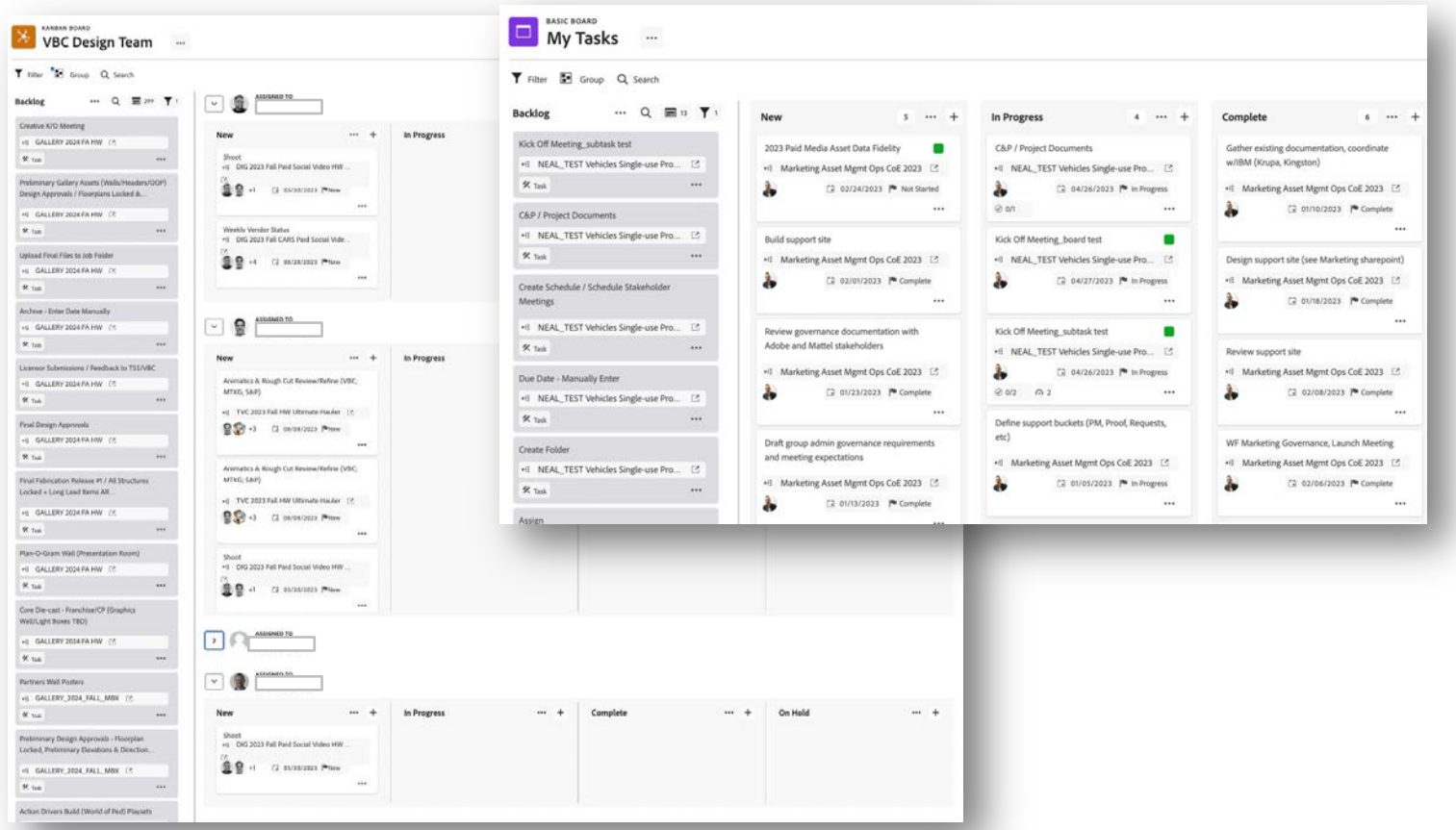
Agile Work Management

Workfront Adoption and Performance Metrics

Workfront Governance

Adopting an Agile work management methodology can enable greater team collaboration by introducing practices for responding to change. **This translates into more efficient and faster project delivery time.**

Granting team managers more visibility into work, and team members more control of the work, Workfront's built-in Agile support, through Boards functionality, makes Agile processes part of everyday work.



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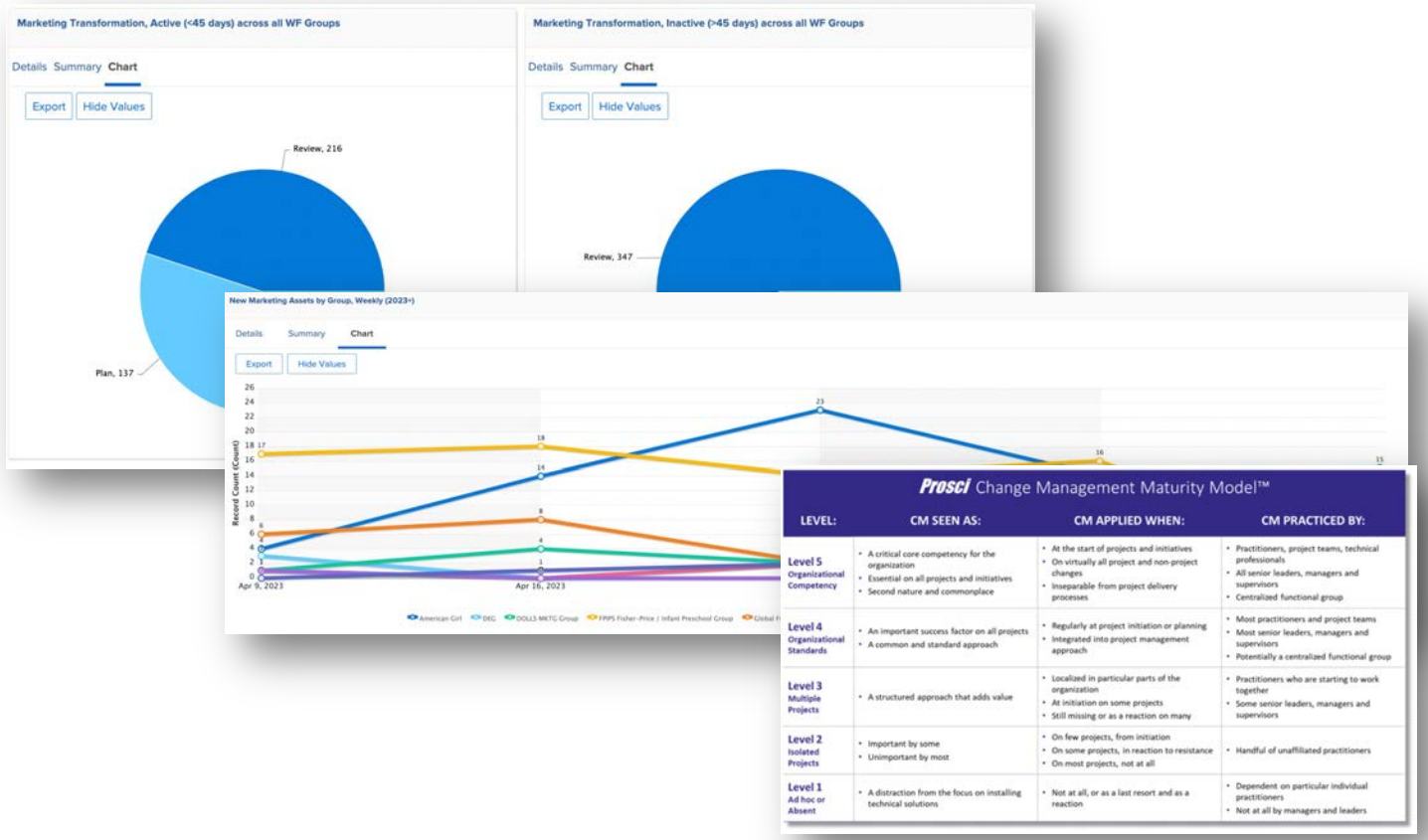
Workfront CoE Roadmap

Resource Management | Agile Work Management | **Workfront Adoption and Performance Metrics** | Workfront Governance

The Marketing Adoption and Performance Metrics Dashboard contains robust tools for tracking the production of Marketing Assets and Requests. The dashboard also provides visibility into User Adoption, by role and group.

These tools, in conjunction with leadership guidance, will enable more informed, insightful, and impactful asset production and work management practice.



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Workfront CoE Roadmap

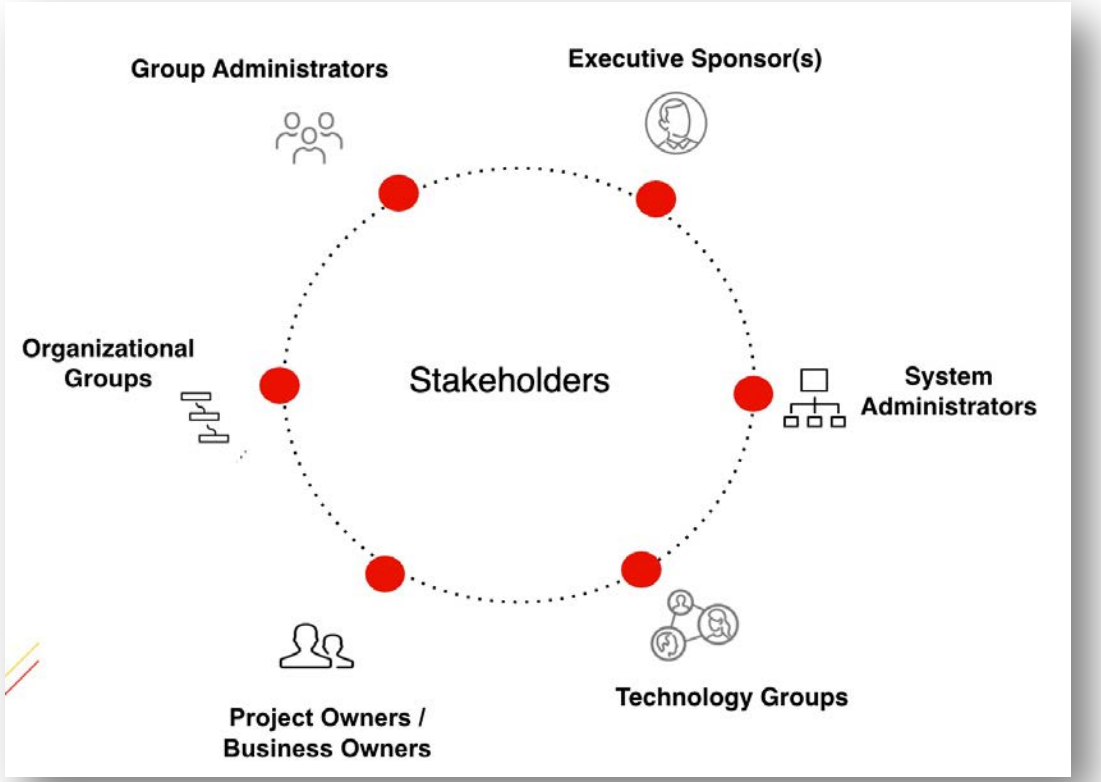
Resource Management | Agile Work Management | Workfront Adoption and Performance Metrics | **Workfront Governance**

Establishing a strong, lasting Workfront Governance framework is one of the primary goals of the Center of Excellence.

Governance will support innovation.

It will support Continuous Improvement, a business philosophy which promotes incremental, small-scale changes driven by empowered, engaged staff.

It will support actionable objectives on leadership's aspirational goals, ensuring the path to future success is clear and well-aligned with the organization.



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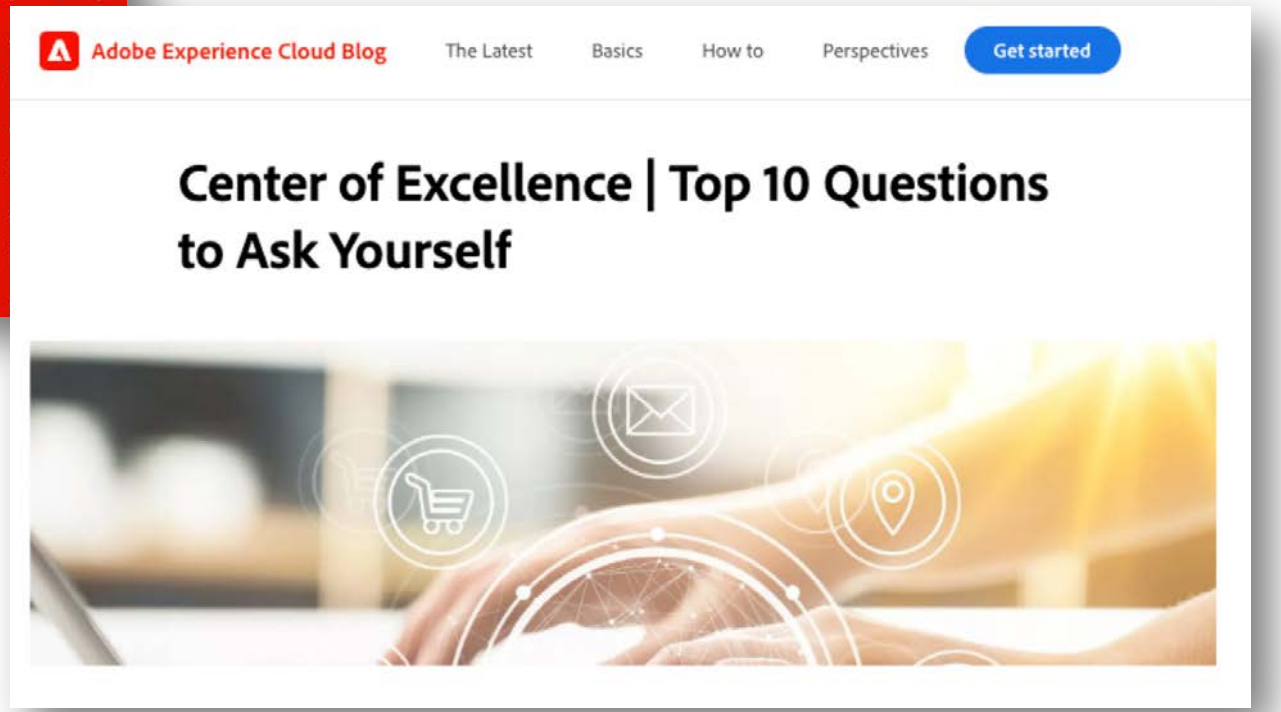
Two quick plugs...

Thank you, Danielle Nichols!
Workfront Customer Success Manager

Read this article



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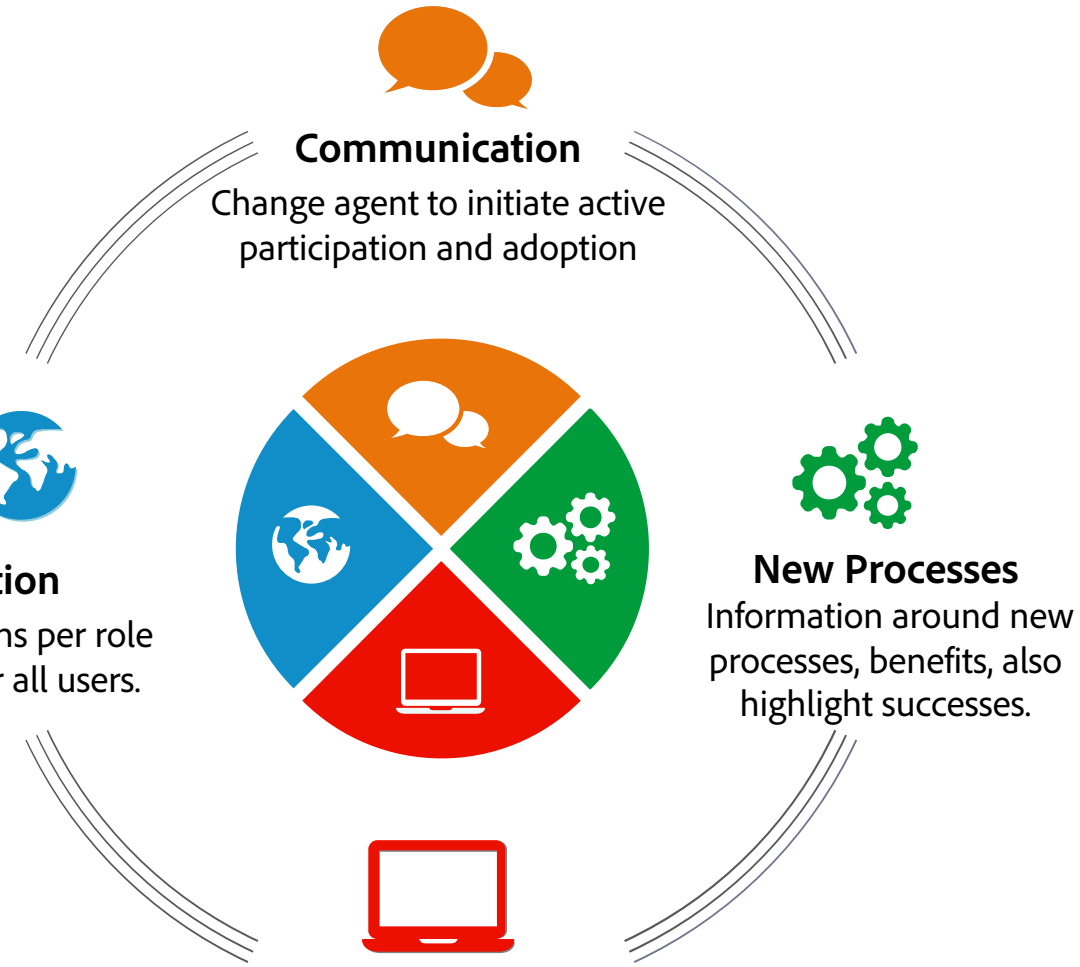
A Work Management Practice drives the right kind of change



Communication

Change agent to initiate active participation and adoption

Education

Education plans per role and scope for all users.

New Processes

Information around new processes, benefits, also highlight successes.

Roadmap

Communicate milestones, timeline, phases, and launch.

AWARENESS

Knows that change is coming. Has a high-level awareness of what is driving the change the broad vision of change. Aware of the degree to which they are impacted.

UNDERSTANDING

Understands what the overall future state (change solution) looks like along with how new ways of working will impact them. They can convey the way in which their role, responsibilities, team and tools will change as a result of the project.

ADOPTION

Has the knowledge and skill to be successful with the tool. Tries out the change, becomes familiar with its implications.

Continues to work with the tool, reaching out for help as need for greater understanding arises.

COMMITMENT

Articulates the change as the new status quo, 'the way things are done around here,' business as usual. Demonstrates personal ownership and alignment with the change. Demonstrates increased levels of competence in relation to the new ways of working.

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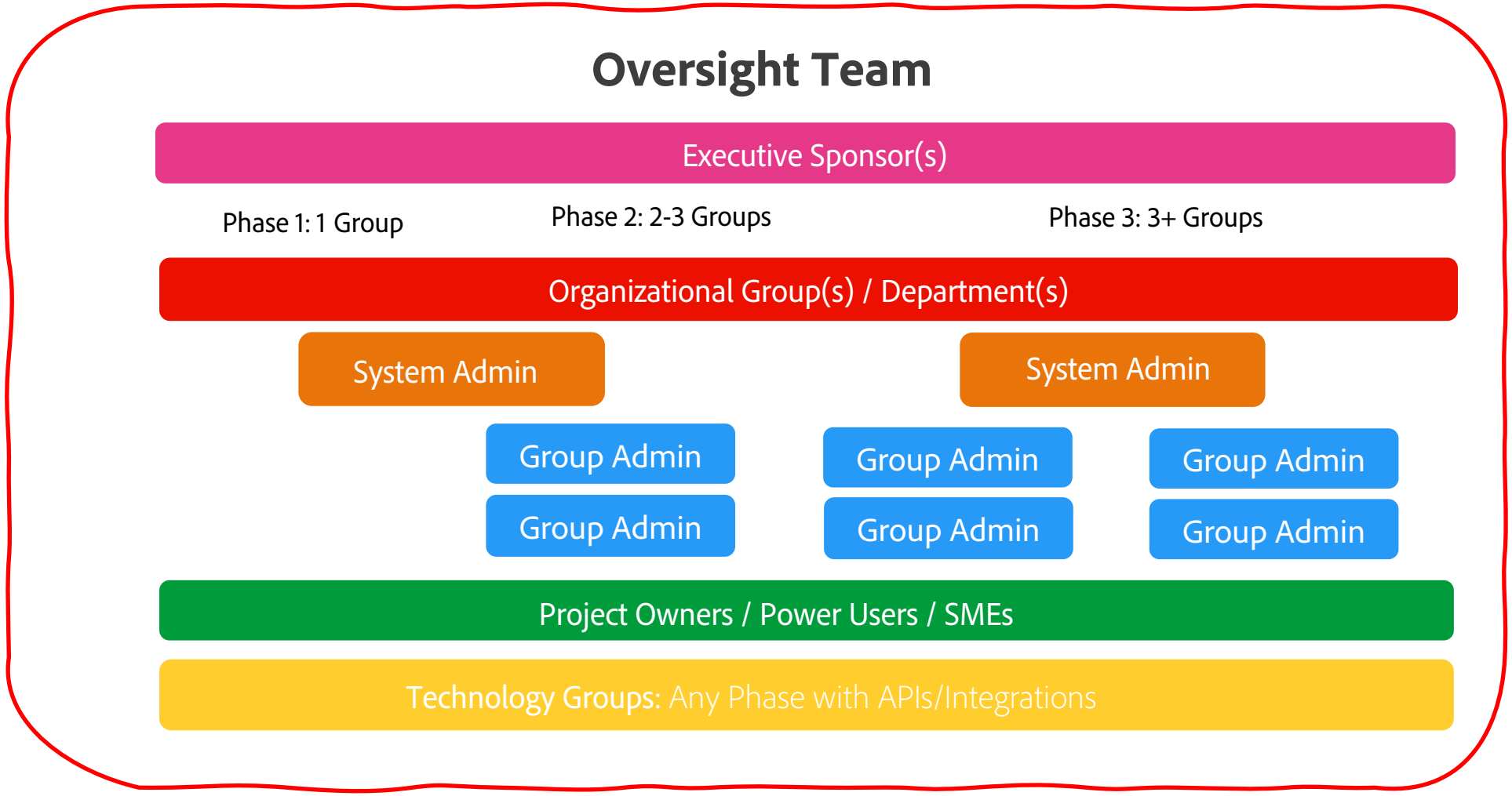
Establish and evolve structure based on your complexity and growth



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Support your teams, empower your SME's

Marketing Center of Excellence Weekly Open Office Hours

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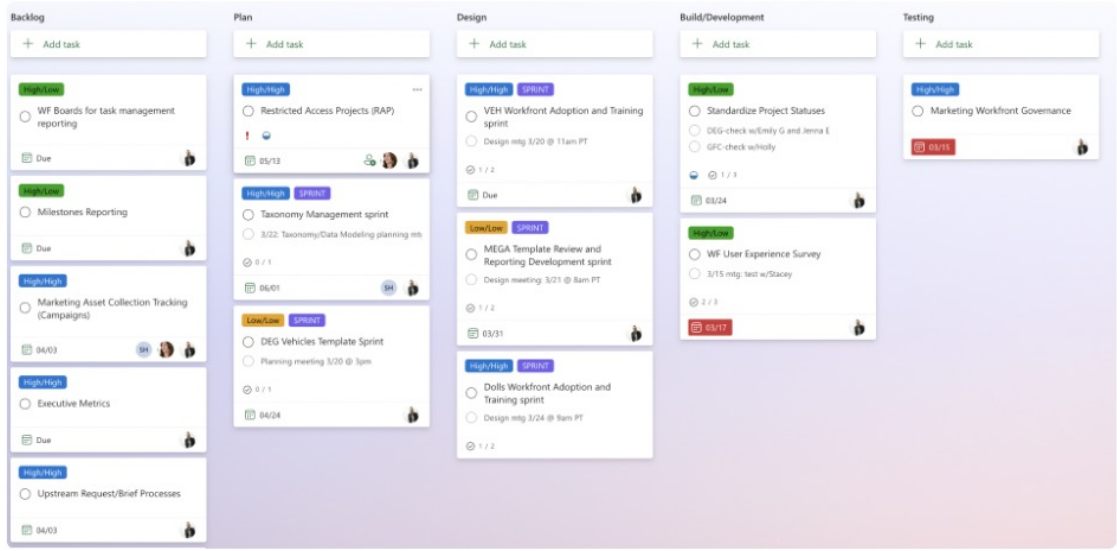
A Center of Excellence is a Team Effort

Continuous Improvement

As our business needs grow and evolve, the tools to perform our work should reflect this. The Marketing Center of Excellence strives to build a better Workfront experience through incremental change. By taking an Agile approach to development, we collaborate with stakeholders to deliver effective, timely solutions.

To view current work, see the Marketing Governance Kanban board.



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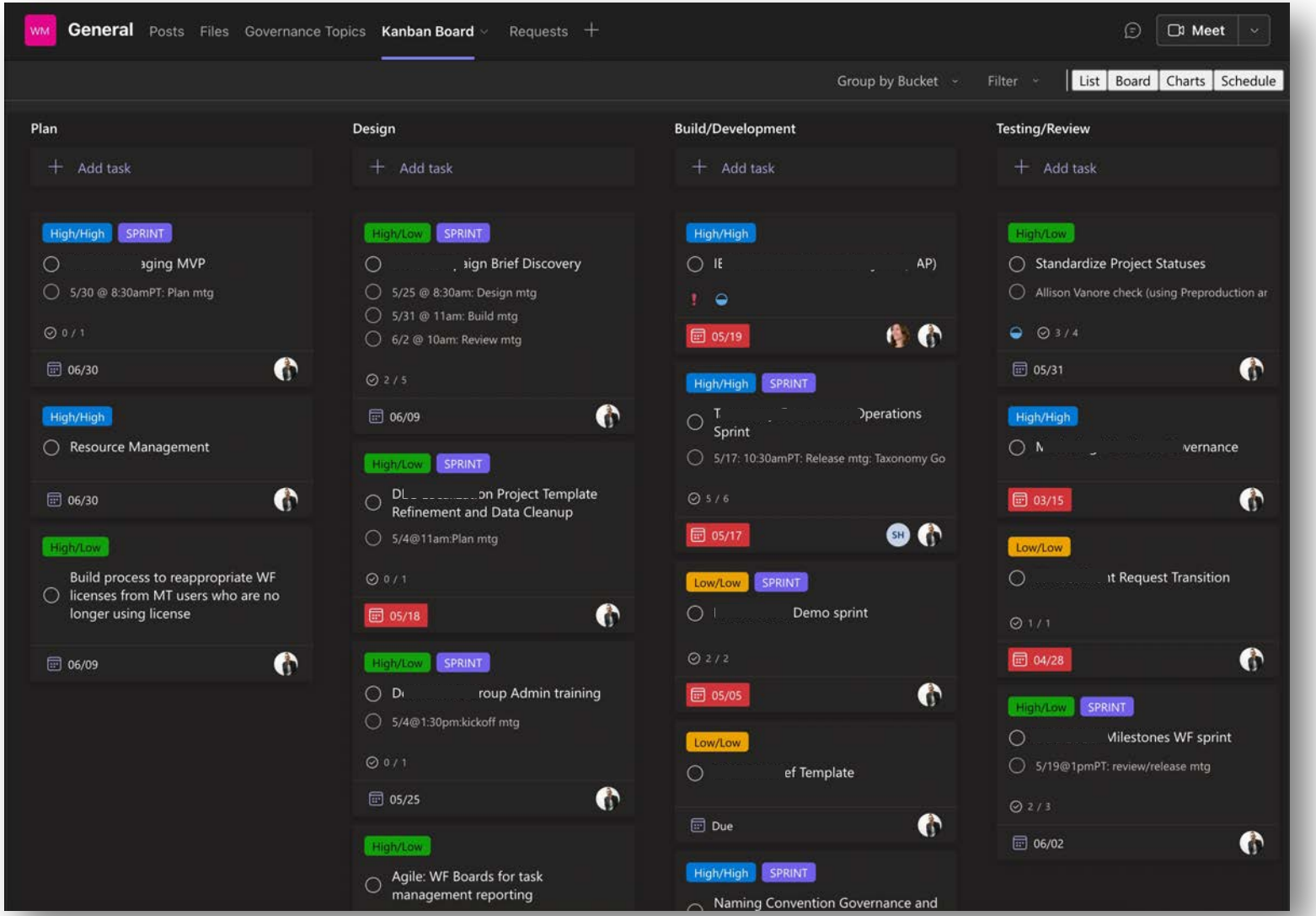
From Aspirational to Actionable

We run 2-to-4 week Continuous Improvement sprints

- "small p" projects
- 5 hours (or less) in meetings
- Track on Kanban board (we use Teams but will move to WF Boards)
- CI work drives adoption and engagement
- Outcomes can scale up across business silos



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Reduce, reuse, recycle

Sample agenda, Planning meeting

Hi all,

As discussed in _____ meeting, let's run a two-week sprint with the goal of building an adoption and training strategy to roll out to the team. The outcome of this sprint should provide us the means to effectively train staff and drive adoption.

For the purposes of this Planning meeting, we'll focus on sprint scheduling, identify stakeholders and call out some high-level objectives.

In the subsequent meetings, we'll dive into the current state challenges, how to address them through training, opportunities to improve WF, and how to support team members to build trust and adoption in WF.

For this sprint, we can run the phases as:

- Planning: 30min.
- Design: 1hr. Discuss current state challenges and future state needs, design framework.
- Build 1: 1hr. Based on findings in Design, build deliverables (in this case, training strategies)
- Build 2: 1hr. Continue build phase, refine and prepare for review.
- Review: 1hr. Evaluate deliverables to ensure they address sprint goals.
- Release: 30min. Release sprint: documentation/sprint summary, deliverables, communications, etc.

As an option, we could include a Sprint Retrospective, but for the goal of this sprint, it may not be necessary.

Sample agenda, Retrospective meeting

Hi all,

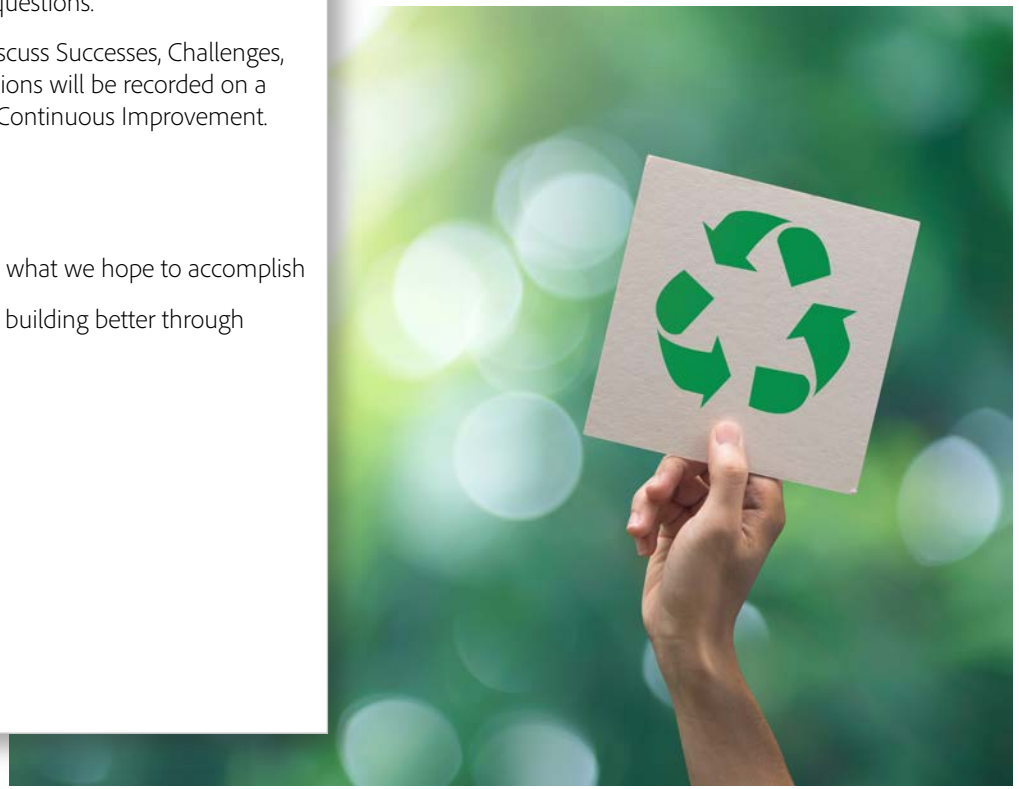
To close out the _____ work, let's get together for a retrospective.

In my retrospective meetings, *speak freely*. There should be no worry of repercussions as this is an opportunity for honest discussion.

Be deferential, *respectful of others' perspectives*, and when possible, facilitate productive conversations with topical, productive questions.

Goal: We'll review the asset tracker process and discuss Successes, Challenges, and Opportunities for improvement. These discussions will be recorded on a matrix that will provide insights with intentions of Continuous Improvement.

- Agenda:
- 1. Retrospective intro (5 min):
  - What is a retrospective, why we're here, what we hope to accomplish
  - Continuous Improvement: approach to building better through iteration and feedback
- 2. Recap of efforts (5-10 min):
  - Summary of the work
- 3. Retrospective discussion (30-45min):
  - Successes, challenges, opportunities



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Continuous Improvement Sprint Summary

___ Workfront Adoption and Training

•**Sprint duration**: 3/16-4/6/2023 (4 weeks, actual)
•**Team members**: _____

•**Goal**: build an adoption and training strategy to roll out to the team. The outcome of this sprint should provide the means to effectively train staff and drive adoption.

Launch/Planning	16-Mar	30min	Plan agile sprint to meet late March Planned delivery date
Design	20-Mar	1hr	Discovery process to capture team knowledge gaps, challenges, training gaps; design high-level requirements for training strategy; identify training audience
Build 1	23-Mar	1hr	Build training strategy based on Design findings
Build 2	27-Mar	30min	Refine training strategy based on Build 1 work
Review	28-Mar	1hr	Build phase work to be reviewed during ___ Adobe WF Task Force mtg
Deploy/Release	6-Apr	30 hr	Acknowledgement and release of sprint deliverables

Deliverables

- Training Strategy Overview
  - Audience: Reviewers and Requestors
  - Teams: Brand Marketing, Product Marketing
  - Training format(s): Pre-recorded videos, support documents, self-directed via ___ website
    Sharepoint site, future iteration can be ____
    - Workfront Training and Support
  - Trainers: Group admins, SMEs, self-directed
- Workfront Training Topics
  - WF Overview: navigating WF, reports, notifications, Tips & Tricks
  - Requests/Briefs: how to submit, collaborate, check status
  - Proofing: how to view, review/approve, comment, meeting 1-to-2-day deadlines, prioritizing work, best practices, flagging for urgent decisions.
  - Projects: how to check status
  - Notifications/Communications: Viewing and Responding to In-app, email, Teams, etc.
- Workfront Training Videos Strategy
  - Short format videos
    Adobe Experience League for existing content
    In-house for Mattel-specific content
    - Approx. 2-5 min each
    - Single topic, presented by SME
- Group Admin tools
  - Sharepoint to allow Adoption/Training metrics tracking (views, engagement, etc.)
- Support
  - Repository for training/support materials here
  - Scheduling Ongoing training with Group Admins, as needed
  - Open office hours, currently Friday's @ 11:30am PT weekly, via Teams here

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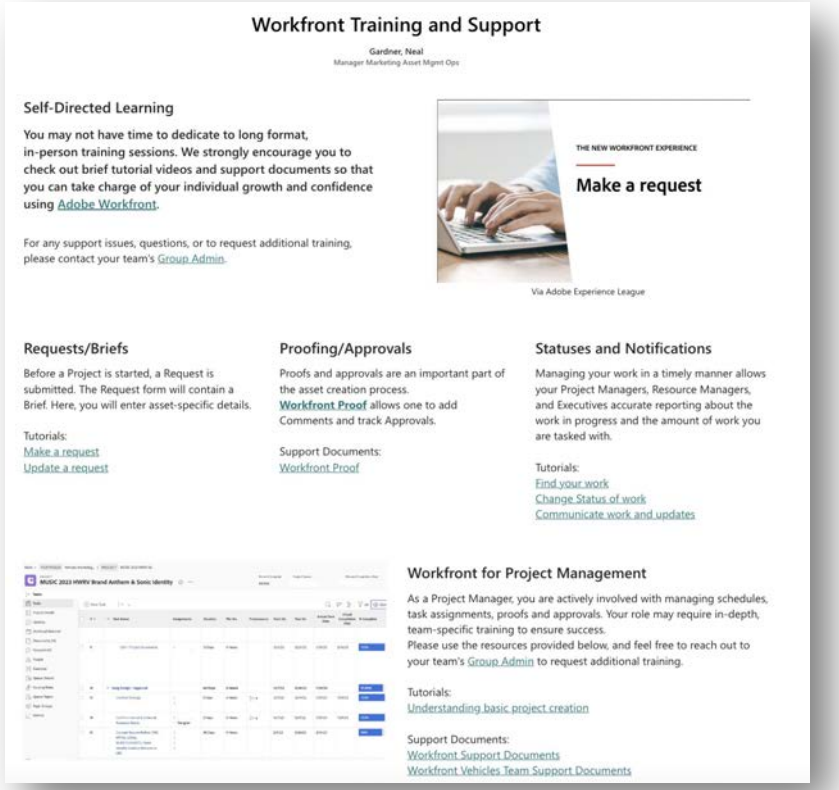
Highlight Your Team's Accomplishments

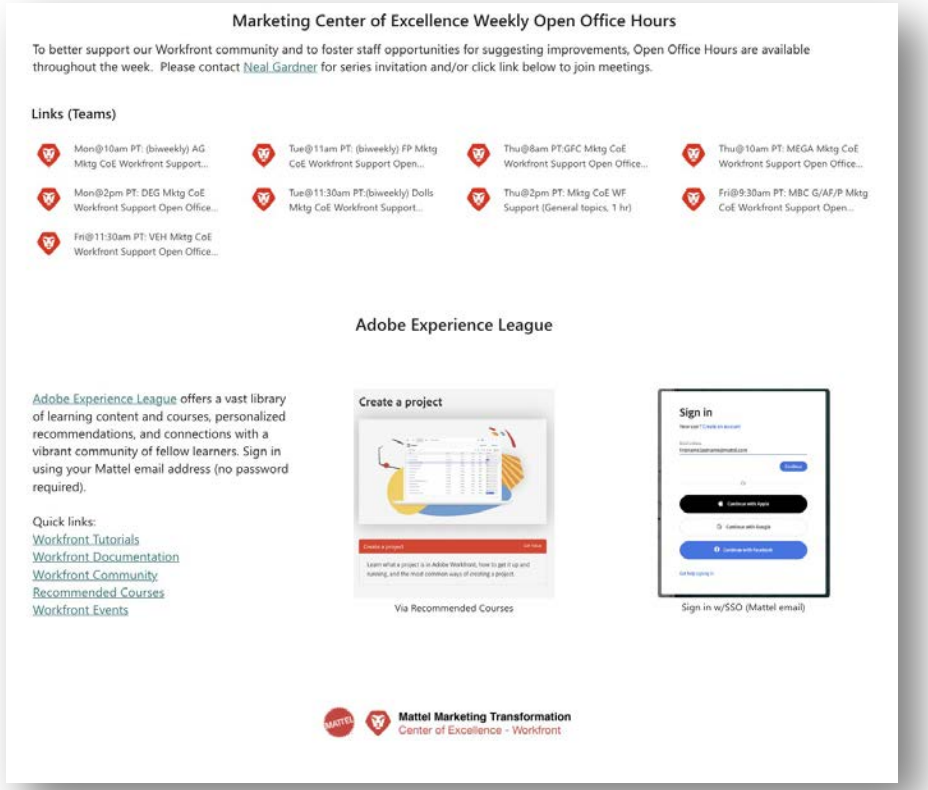
___ Workfront Adoption and Training

Was the goal met? Yes!

The team provided strategies to build a framework for effective, self-directed learning.

These strategies defined the requirements for building the Workfront Training and Support portal. This portal will serve staff as an ongoing training resource, with content being added as needed. In the spirit of Continuous Improvement, this sprint embraced the value of the iterative process by building a foundation for training resources that will grow over time, and not require a significant strain on time and resources.





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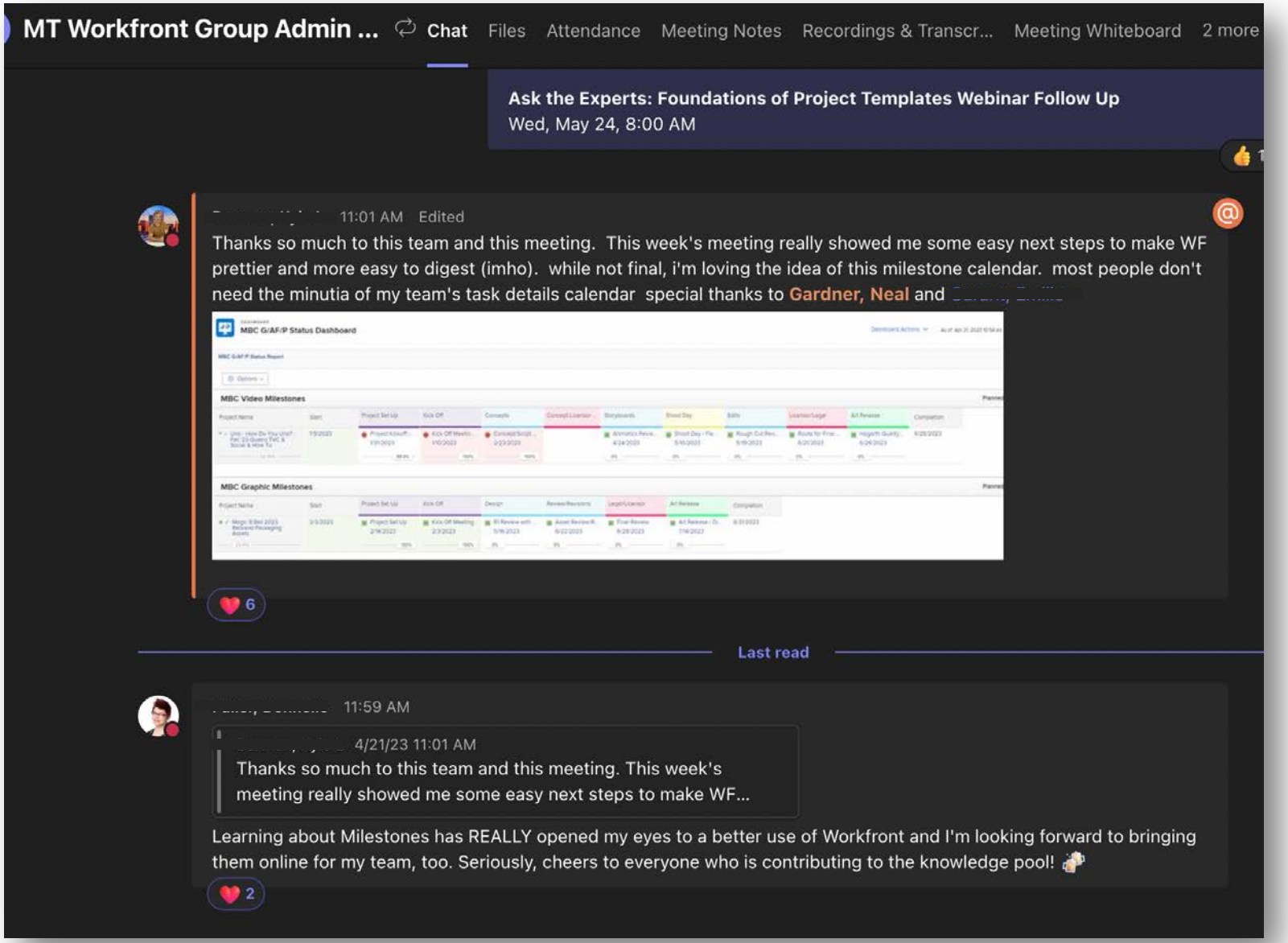
That moment when it all starts coming together...



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Benefits of a Center of Excellence

Focus

You get like minds working together, often resulting in a team that pushes each other's boundaries while focusing on the task at hand.

Economies of Scale

Better load balancing means you ultimately need fewer people to get more done.

Collaboration

Your specialists are no longer laboring in isolation. The potential upside from peer-to-peer collaboration is limitless.

Quality

You now can better enforce standards such as brand guidelines and style guides. Consistency across the organization saves time and fosters better quality output.

Single Voice

A single point of contact ensures a consistent message throughout the organization.

Source: Cain, David. "Why Centers of Excellence are No Longer Optional in the Digital Era." Adobe Marketo Engage Blog

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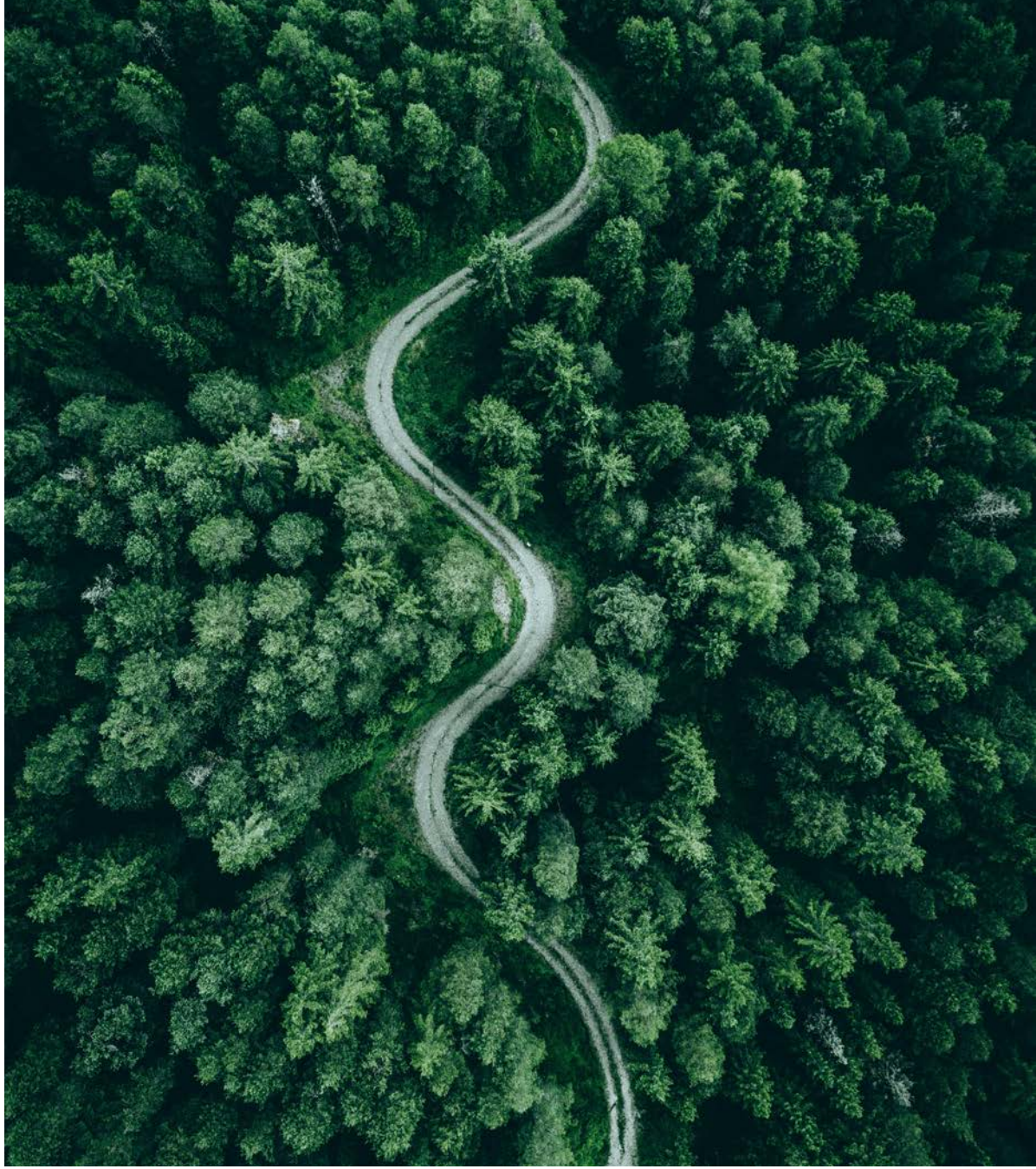
Takeaways: Where to go from here

- **Start where you are.** Incremental progress builds to have an impact over time
- **Collaboration is key.** Many hands make lighter work.
- **Look ahead.** Use your Workfront product roadmap to both educate and inspire future innovation.
- **Take the win.** Celebrate successes early and often.



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Upcoming Events

Events

- Jun 21: Adobe Experience Maker Awards

Product Release Webinars

- Jun 29: What's new in the 23.3 Release

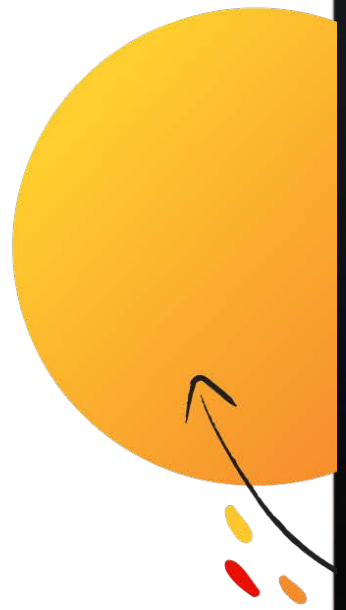
System Admin Essentials Webinars

- COMING IN JULY! Communicating with End Users

"Ask the Expert" Office Hours + Small Group Workshops

- Jun 28: Ask the Experts – CoE Follow-up with Sam and Neal

Register at https://experienceleague.adobe.com/events



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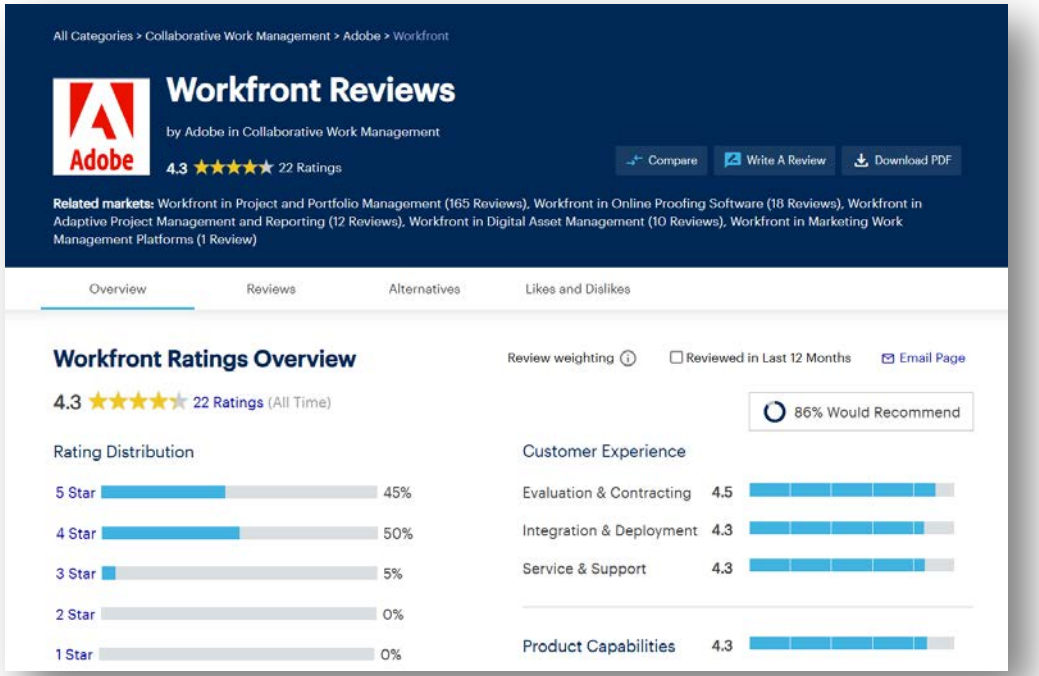
Share your Workfront Experience on Gartner Peer Insights!

Gartner Peer Insights

Gartner Peer Insights is an online IT software and services reviews and ratings platform.

- Help your peers to make informed buying decisions
- Contribute to Workfront's position in the Gartner Magic Quadrant



What to Expect:

- ~10 minutes
- **Deadline**: Thursday, June 30, 2023
- Your published review is **anonymous**
- Receive a **$25 gift card** as a thank you for your time

Start your review:
https://gtnr.io/albrWGiHE

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Thank you!

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