System Admin Essentials: Foundations of Project Templates

May 17, 2023

Agenda (Pacific)

Time	Topic
8:00 a.m.	Welcome and agenda
8:05 a.m.	**Foundations of Project Templates**
8:45 a.m.	Presenter Q&A
8:55 a.m.	Wrap-up and next steps

Kiersten Kollins
Sr. Marketing Ops Technologist
DSW, Designer Shoe Warehouse

Jen Desmond
Customer Success Architect
Adobe Workfront

Kiersten Kollins

Sr. Marketing Ops Technologist

DSW, Designer Shoe Warehouse

- Been with the DSW Marketing Ops team for 6+ years
- Workfront System Admin for 4+ years
- Buckeye for Life
- DIY Home Project Enthusiast
- Avid Pet Lover

Connect with me:

www.linkedin.com/in/kierstenkollins

About DSW

DSW is a leading branded footwear and accessories retailer offering a wide selection of dress, casual and athletic footwear and accessories for women, men and kids in the U.S. and Canada.

How we use Workfront

Workfront is the “hub” in the marketing department to track and manage all creative assets that support campaign, promotional and partnership activities.

“If it's not in Workfront, it doesn’t exist."

Jen Desmond

Customer Success Architect
Adobe Workfront

- Joined Adobe in November of 2021
- Previously a customer and system admin
- Experience with project templates beyond Workfront

Connect with me:
www.linkedin.com/in/jennifer-desmond

Why use project templates?

Control process

Standardize what you're doing

Ensure everyone working on a process is doing the same thing.

Increase adoption

Everything they need

Attaching a template to a project gives users what they need to start managing their projects.

Gather custom data

Custom forms in place

Custom forms placed on templates appear on all resulting projects so users don't need to attach them.

Facilitate reporting

Understand work

Standardization across projects allows you to compare apples to apples in reporting to better understand everything you need to know about your pipeline.

Template development

New template development

Ownership

Stakeholders and SMEs own the requirements. The system admin(s) own the implementation.

Getting started

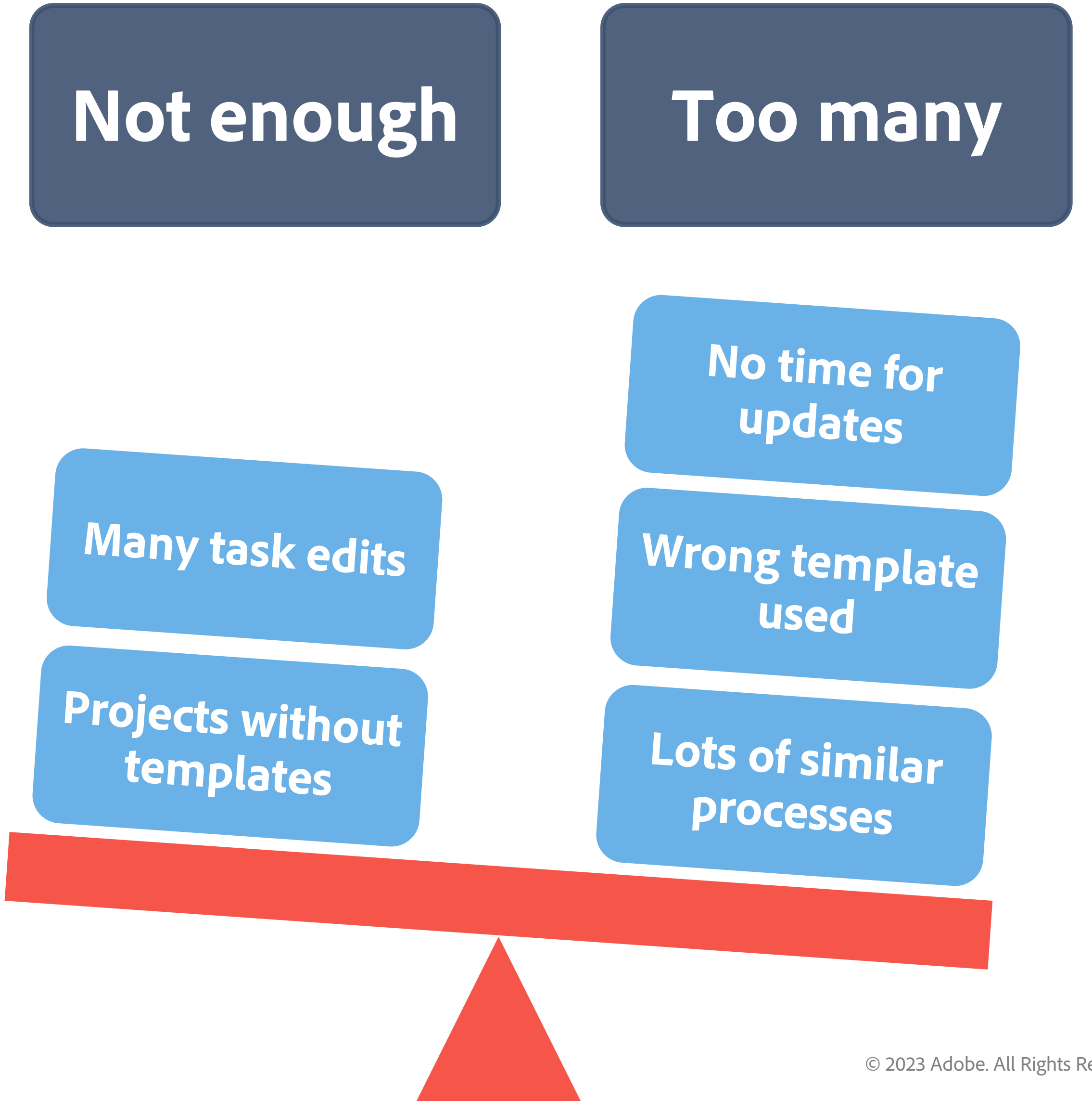
Ask ***who*** should be doing ***what*** and ***when.*** Refine after that.

Find the right granularity

Define your process at the level your organization is ready for and needs.

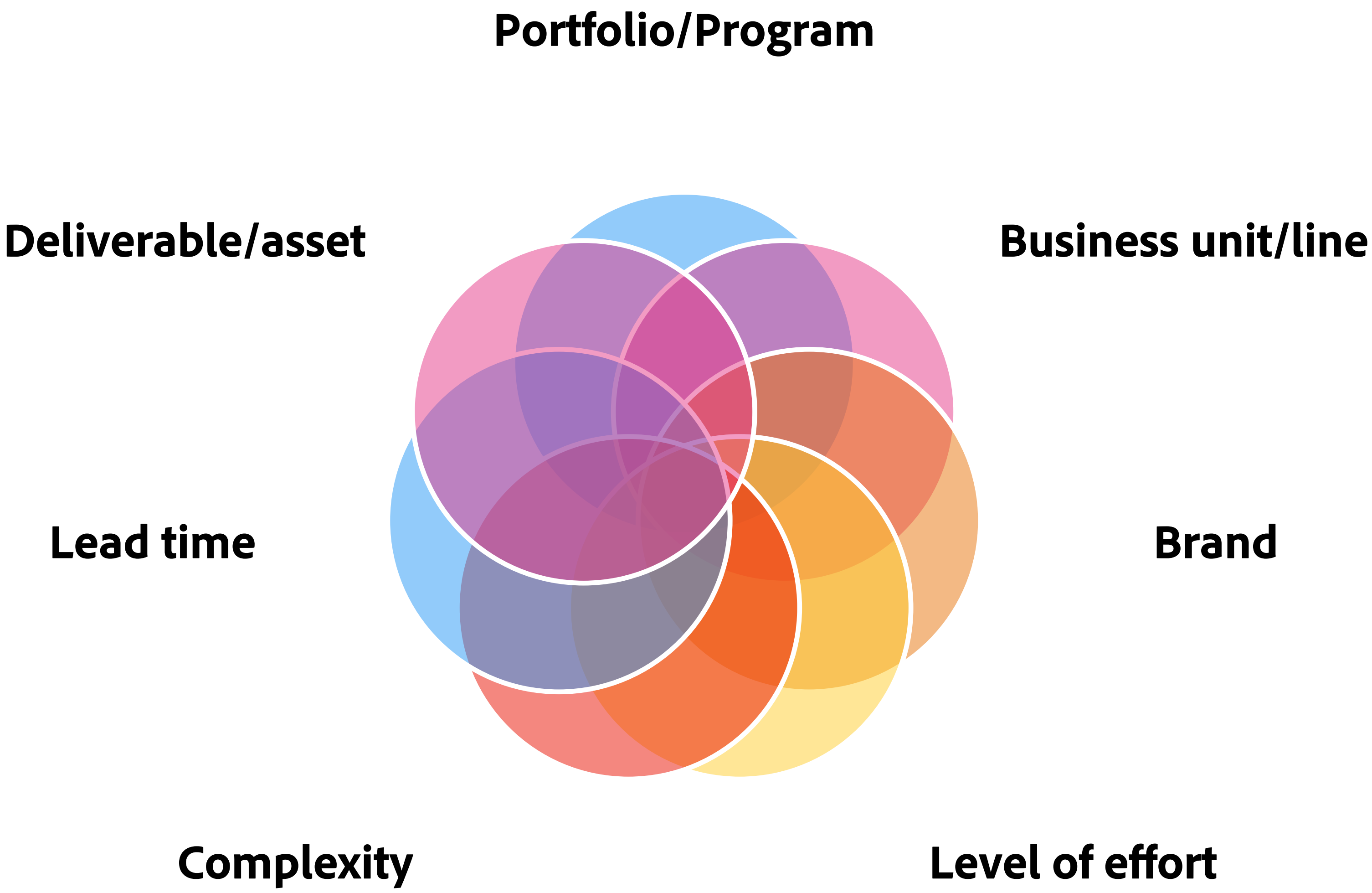
How many templates should you have?

While there's no magic number to how many templates you should have, if things feel "out of balance", it's a good sign you may have too many or not enough.



Aligning templates to your processes

How do you need to break up templates? Where can they intersect? This will help you get to the right amount of templates.



How do I develop the task list?

What's happening?

What do you need people to do?

- Handoffs
- Deliverables
- Enter data

What do you need to see in reporting?

- Progress towards milestones and/or parent tasks

Goal: Task Names

When?

In what order?

- After something else completes?
- How long will it take?
- Fixed or flexible?

Goal: Durations, predecessors, planned hours, task constraints

Who?

Individual or team?

Goal: Job roles and teams into Assignments

Why?

What is the business reason for each task? *(Remember you can have overarching tasks and include all details in the description to reduce the number of tasks)*

Goal: Task description

Template Development - Approach

Stakeholders	• Collaborated with key stakeholders that will use templates • Bring them along the journey!
Streamline Intake	• Identified processes that are repeatable & scalable
Data	• Considered data & reporting needs
80/20 Rule	• Considered what will satisfy the bulk of the team's work for both inputs and outputs
Keep it simple!	• Avoid over architecture

Template updates

Quarterly updates

More can be too overwhelming for everyone, including end users.

Decide how to handle in-flight projects

Leave as-is or edit per the changes?

Lean on governance structure

To control one-off updates.

Template updates: Managing in Workfront

1

Learn from completed projects

What were actual durations and actual hours against planned? How many tasks were manually added?

2

Versioning & change control

Recommend copying template to archive before making changes directly. Allows for consistent template IDs.

3

Try a retrospective board

Create a retrospective board and evaluate how things went in card form.

4

Use a request queue in Workfront

Users can input requested updates to be evaluated and implemented during the update season.

Recommended task report for auditing user created tasks

Use this report to identify tasks created by users to aid the template development process. How many tasks are users adding? Are there any trends?

REPORT

Task Report: Template Task, Template Task Template, & Project Template

Report Actions

As of Mar 20, 2023 9:33 am Eastern Daylight Time

Details | Summary

All | Report Default | Report Default

Name of the task in the template

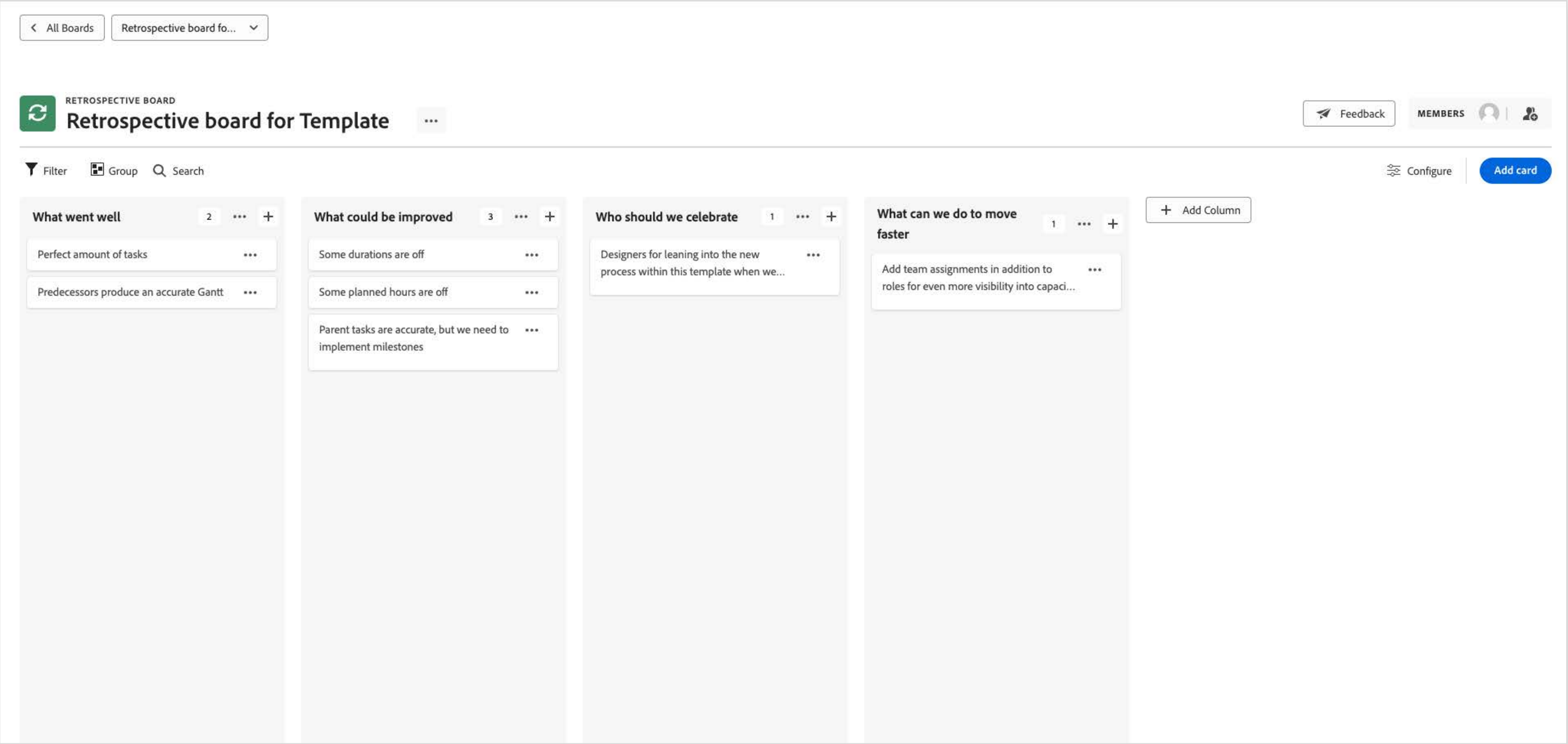
Name of template the task came from

Template attached to the project

Portfolio Name	Project Name	Owner Name	Task Number	Task Name	Entered By	Assignments	Duration	Pln Hrs	Start On	Due On	% Complete	Template Task Name	Template Task Template Name	Project Template
Portfolio Name: Marketing Portfolio (802)														
Project: Name: Fall Catalog (34)														
Marketing Portfolio	Fall Catalog	Robert Campbell	1	Create Copy & Layout	Stan Rizzo		27.38 Days	204 Hours	5/21/22	6/29/22	0%	Create Copy & Layout	Quarterly Catalog Template	Quarterly Catalog Template
Marketing Portfolio	Fall Catalog	Robert Campbell	2	Create Layout	Stan Rizzo	Designer	5 Days	40 Hours	5/23/22	5/27/22	0%	Create Layout	Quarterly Catalog Template	Quarterly Catalog Template
Marketing Portfolio	Fall Catalog	Robert Campbell	3	Recheck layout	Joan Harris		0 Days	0 Hours	5/21/22	5/21/22	0%			Quarterly Catalog Template
Marketing Portfolio	Fall Catalog	Robert Campbell	4	Final Layout	Stan Rizzo	Copywriter Designer	10 Days	80 Hours	5/30/22	6/13/22	0%	Final Layout	Quarterly Catalog Template	Quarterly Catalog Template

Blank means the task was entered manually

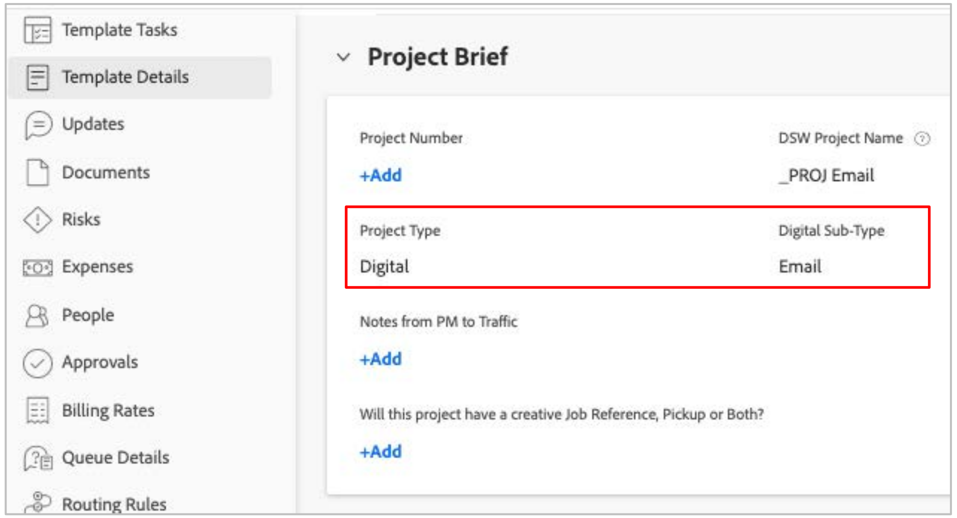
Template updates: Retrospective board



[Experience League Documentation: How to create or edit a board]

Template Updates - Approach

When do we update?	• Templates are reviewed and updated as business needs occur
Custom Forms	• Remove or add custom fields • Prefill custom fields
Tasks	• Review tasks and update accordingly • Planned Hours, Durations, Predecessors
Avoid Retrofitting Past Projects	• Only update past projects if it is necessary for long term reporting
Keep stakeholders in the know!	• Communicate changes to all impacted stakeholders



Admin Tip:

For like changes across multiple templates, batch update changes through a report to save time.

Best practices

Template settings & functionality

Functionality	Why use?
Custom forms	Ensures all resulting projects receive required custom forms and guarantees data flow from request to converted project.
Assignments	To optimize resource management capabilities, provide Job Roles for all tasks.
Durations	Facilitates project timeline; optimizes resource management capabilities.
Predecessors	Facilitates project timeline; visibility into when tasks can start based on predecessors.
Task constraints	Facilitates project timeline; visibility into flexible vs hard dates.
Planned hours	Helps you assess level of effort for each task; optimizes resource management capabilities.
Duration types	While this is also a system setting, you have the power to change duration types on tasks as needed.
Template association	Ensures all resulting projects fall into the correct portfolio, program, group, and company.
Template sharing	Gives desired access to those shared to resulting projects.

Help your users adapt to change

Bring them along	Give them details about the template development process. Explain the why and when.
Enable	Provide clear and concise training on the changes.
Listen	There will be feedback. Be transparent with your users.

Template Updates - Communication

DSW
DESIGNER SHOE WAREHOUSE®

DSW MARKETING PROCESS UPDATE

NEW! Influencer Co-Op Requested Support Fields

Effective Date: 2023-02-17

Users impacted by this update: Product Marketing & Brand Partnership Team

What's Changed: Please review the attachment(s) for details.

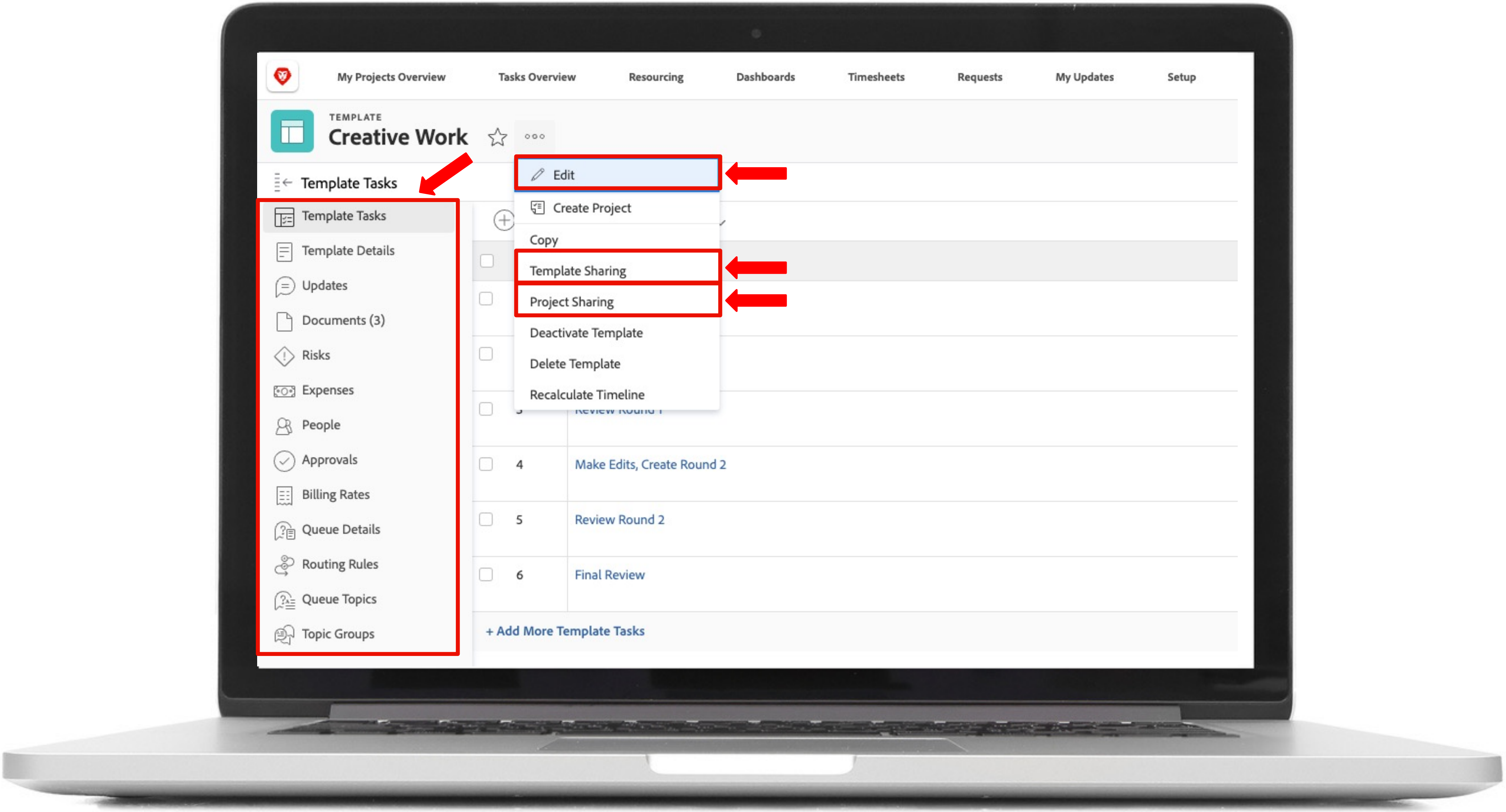
Ops Lead: Kiersten Kollins

If this email does not pertain to your work, please disregard. Please reply to this email if there are any questions.

NEW! INFLUENCER CO-OP REQUESTED SUPPORT FIELDS	
WHAT'S CHANGED	The following fields have been added to the Influencer requested support area for Co-Op Activity Briefs in Workfront. What is the What is most important for the Who is the Are Can the Yes No Does the
ACTION	Product Marketing & Brand Partnership team to utilize for new Co-Op Activities when Influencer support is being requested.
WHY WE ARE MAKING THE CHANGE	To receive additional information within the activity brief that is needed for influencer co-op channel support.

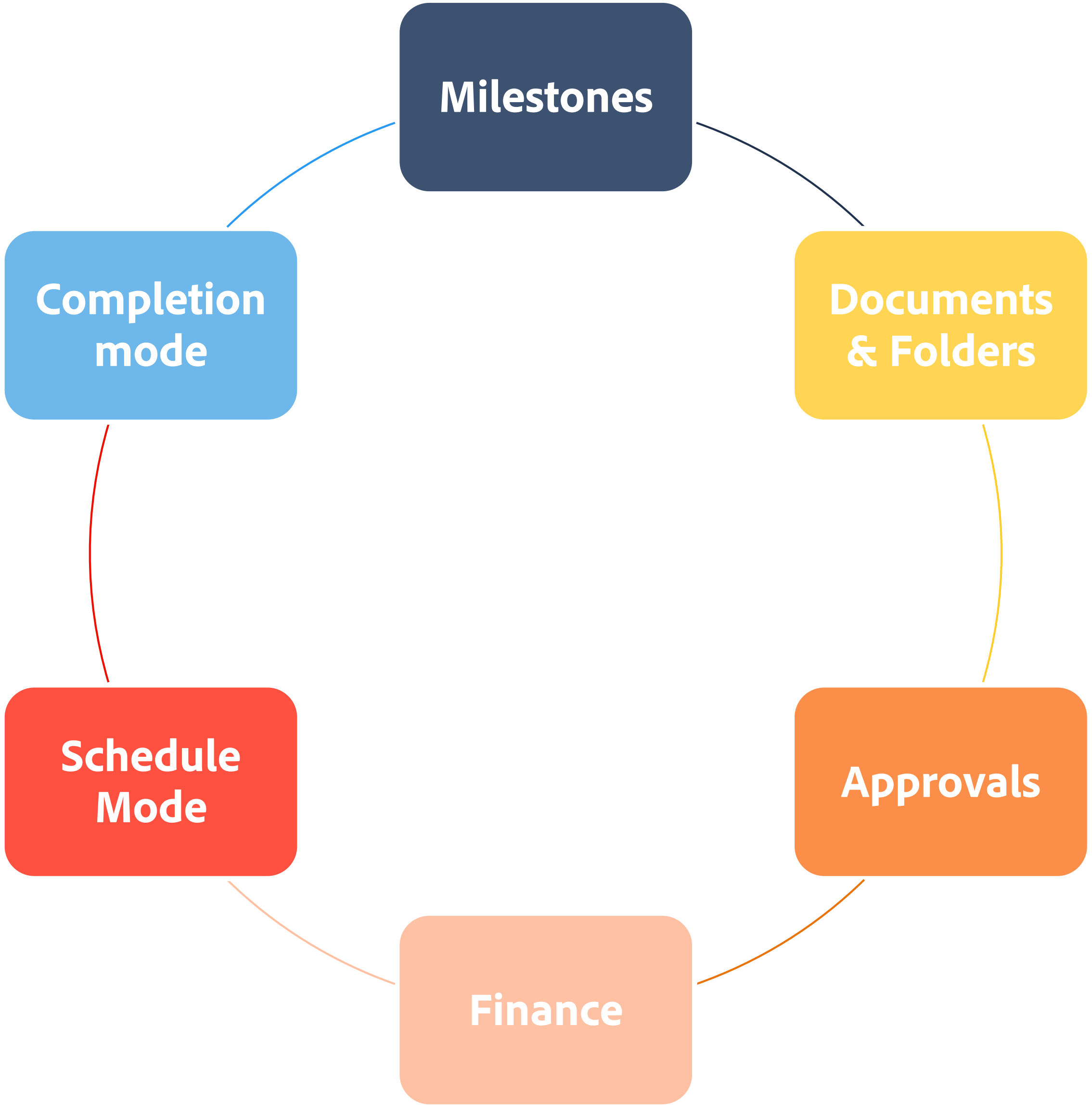
Taking it to the next level

Reacquaint yourself with all template settings



Taking it to the next level

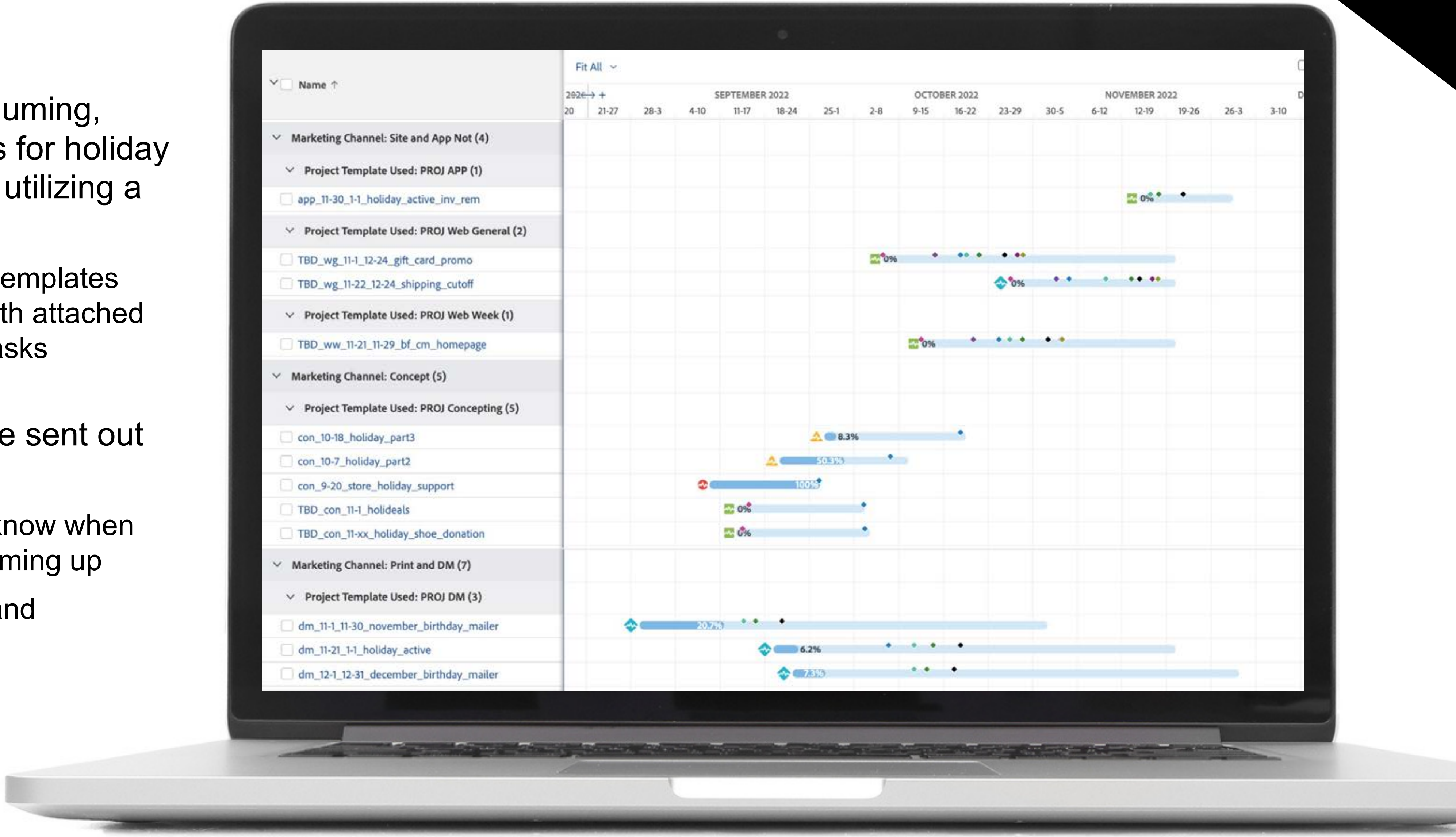
Once you have the basics in place, you can take your template management to the next level with even more template configurations.



Milestone Paths – Use Case

DSW DESIGNER SHOE WAREHOUSE®

- Replaced a time consuming, manual Excel process for holiday seasonal planning by utilizing a milestone path
  - Utilized holiday only templates with the milestone path attached to the key template tasks
- Real time reports were sent out to stakeholders
  - Easy for partners to know when critical dates were coming up
  - Leadership visibility and awareness



Adobe

Milestone Paths - Setup

1

Create your milestone path

Setup > Processes > Milestone Paths

2

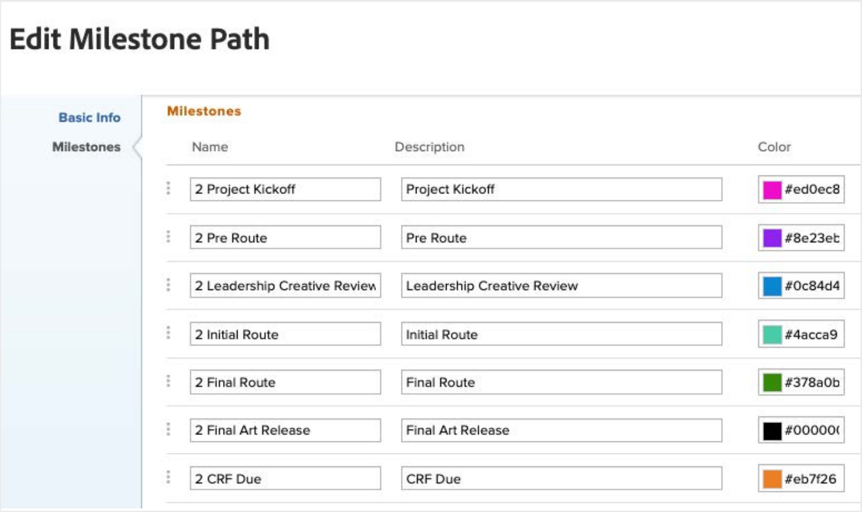
Add to template

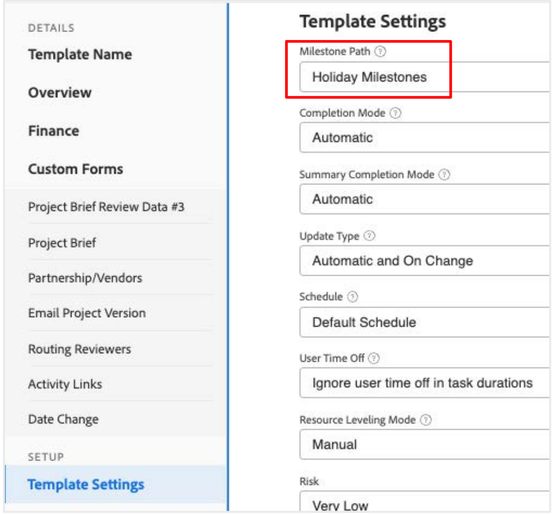
Edit > Template Settings > Milestone Path

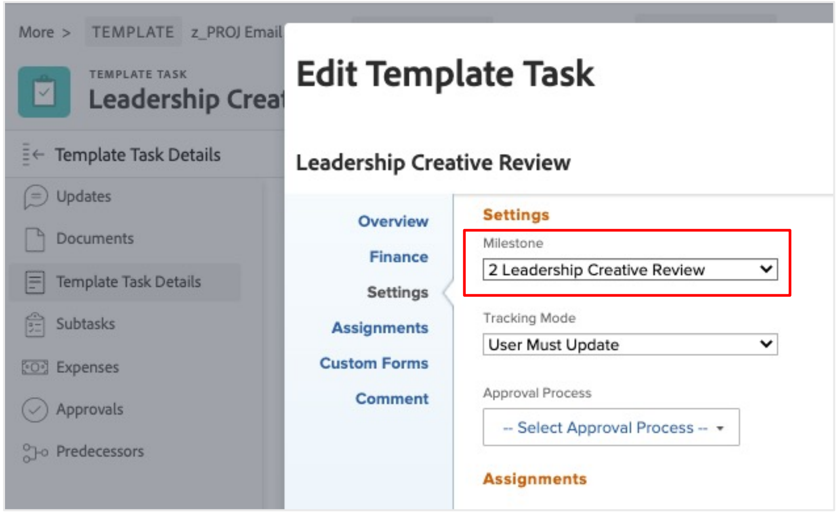
3

Attach milestone to template task

Edit Template Task > Settings > Milestone







[Experience League Documentation: Create a milestone path]()

[Experience League Documentation: Edit project templates]()

[Experience League Documentation: Edit a template task]()

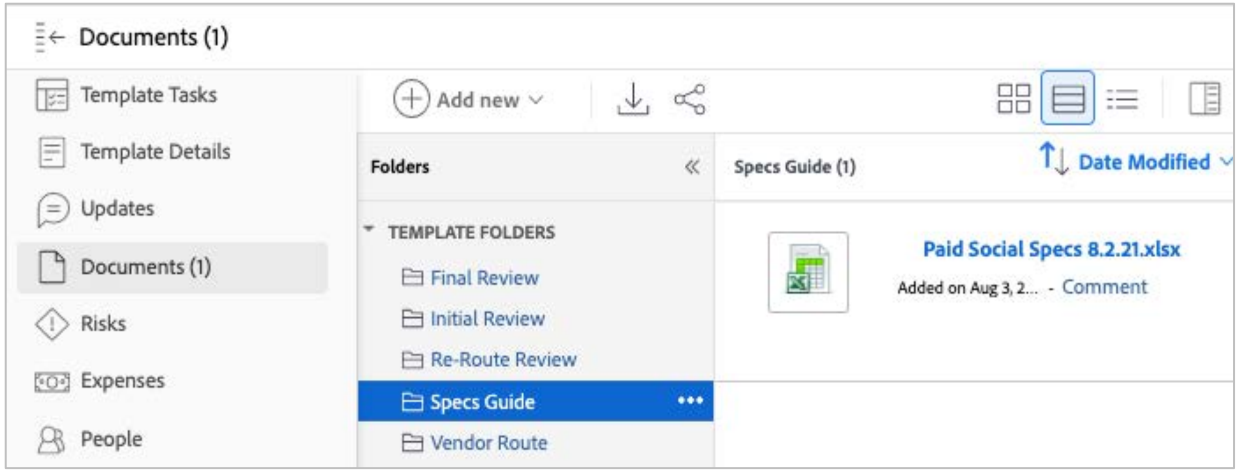
Documents & Folders

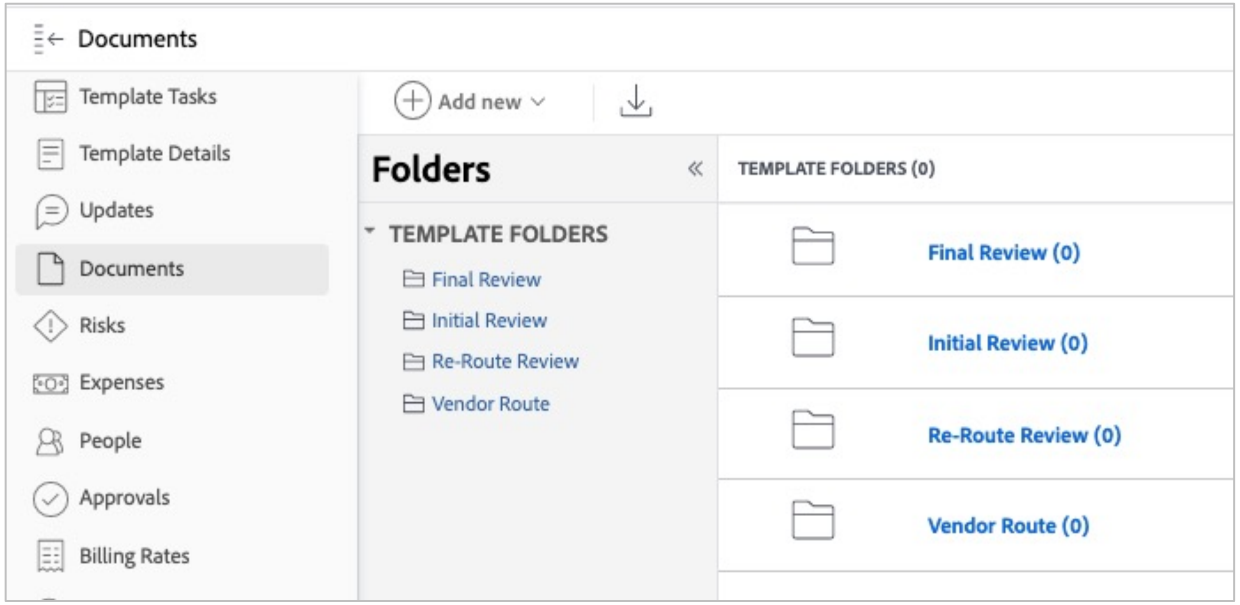
Documents

- Reference Files
- "How To" guides

Folders

- Organizes Work
- Easy for users to be able to find documents or proofs that follow the same folder structure





Other cool template ideas

Modular	Request queue setup	Custom forms alone	Forecasting	Workfront administration
• Use for a piece of a process and add it to applicable projects	• Hold your preferred queue details, topic groups, queue topics, and routing rules	• To push custom forms to projects • No tasks	• Appropriate custom forms • 1 task to hold when you think the project should start and end	• Onboarding • Training • Offboarding • Cleanup • Release readiness

Cool Template Use Cases

Admin Project Management	Standard template that is used for new Workfront projects completed by the System Admin

# ↑	Task Name	Assignments
1	Update Project Milestones and Planned Hours	Kiersten Kollins
2	Kickoff Meeting with Requestor	Kiersten Kollins
3	Discovery Session	Kiersten Kollins
4	Research Functionalities for Request	Kiersten Kollins
5	Build Process in Workfront	Kiersten Kollins
6	Demo Session to Review Build with Stakeholders	Kiersten Kollins
7	UAT Testing	Kiersten Kollins
8	Finalize Build in Workfront	Kiersten Kollins
9	Training Session with Stakeholders	Kiersten Kollins
10	Launch	Kiersten Kollins
11	Close Out Project	Kiersten Kollins

Mini Template for Tasks	Template is utilized to pick up a special set of tasks needed for vendor brand approvals

# ↑	Task Name	Assignments	Duration	Pln Hrs
1	**Initiate Vendor Brand Route/Route Review**		**15.38 Days**	**0.5 Hours**
2	Initiate Route to Vendor Brand Team	Traffic	1 Hour	0.25 Hours
3	Vendor Brand Team Route Review	Traffic	15 Days	0 Hours
4	Reconcile Vendor Brand Team Feedback	Traffic	2 Hours	0.25 Hours
5	**Vendor Brand Route Revisions**		**0.5 Days**	**1.5 Hours**
6	Vendor Brand Route Revisions - Copy	Copywriter	0.5 Days	0.75 Hours
7	Vendor Brand Route Revisions - Design	Designer	0.5 Days	0.75 Hours

Key takeaways

Take the time

Development is crucial

Spend more time than you think you need on new and existing template development.

Master the basics

Know what you need

Templatizing a task list that produces an accurate timeline unlocks doors to process standardization and forecasting in resulting projects. Attaching the right custom forms gets you the data you need.

Think about users

Don't overdo it

Remember to balance the business insights you need with usability.

Level up later

Crawl, walk, run

Change is inevitable. Get your templates to a comfortable place for the business and users alike and know that you can build from there.

Questions?

Upcoming Events

Product Release Webinars

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

System Admin Essentials Webinars

- Jun 21: Establishing a Workfront Center of Excellence
- *Coming soon! Communicating with End Users*

"Ask the Expert" Office Hours + Small Group Workshops

- May 18: Learn - Getting Started with Resource Management in Workfront
- May 23: Learn - Intro to Scrum with Adobe Workfront
- May 24: Ask the Experts - Project Templates Follow-up w/ Jen & Kiersten

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

Thank you!

Adobe