

Workfront Implementation: Adoption, Adaption & Beyond

Purpose

This document is designed to provide helpful ideas to support your Workfront Implementation.

1. Start small (or big)

- ☐ Start piloting any functionality
- ☐ Determine current state
- ☐ Identify one thing to help the team

2. Don't be overwhelmed

- ☐ Document your objectives
- ☐ Tackle one pain point at a time
- ☐ Don't be afraid of backtracking – adjustments will be required

3. Find your friends

- ☐ WF Community & Local User Groups
- ☐ WF Consultants
- ☐ Other Internal Departments

4. Listen

- ☐ Have multiple channels for questions and complaints
- ☐ Have regular standing "trainings"
- ☐ Always follow-up on feedback

5. Lead the charge

- ☐ Admit the challenges
- ☐ Add WF option to every initiative
- ☐ Incorporate WF in existing processes

6. Make it feel safe

- ☐ Remember change is difficult
- ☐ Keep an open door for all solutions and research
- ☐ Provide Sandboxes & Training

7. Experiment

- ☐ Play with all WF functionality
- ☐ Encourage new ideas from users
- ☐ Become a WF SME

8. Try what "won't work"

- ☐ Increase access – even temporarily
- ☐ Customize as much as you can
- ☐ Apply workflows to test the waters

9. Keep it light

- ☐ Maintain your relationships
- ☐ Pick your fights carefully
- ☐ Find the fun everywhere you can

10. Find your nerd

- ☐ Assigned Implementation Specialist
- ☐ Try all functionality
- ☐ Use the system to solve problems

11. Make it fun

- ☐ Give them a reason to stay engaged
- ☐ Share processes in a fun way
- ☐ Build enthusiasm for change

12. Beyond...

- ☐ Formalize what works, document it, and communicate it
- ☐ Build your Center for Excellence
- ☐ For everything else? Repeat 1-11.



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Examples:

The following images represent some examples of the ideas provided, including documented processes (Quick Reference Guides), fun emails, contests, customized dashboards, milestone reporting, short/long-term objectives, calendars, and custom forms.

Delivery Manager Process:

Step	Action
1	Initial Project Request (Ideally via Request Queue): DM requests a Product Mgr.
2	DM flips request to project in Idea status, attaches templates & deletes request.
3	The DM request is captured by the Project Mgr.
4	Project of Product Manager for review. DM will team.
5	Kick-off including all impacted stakeholders & team members.
6	Task Assignment & dates: From kick-off, DM adjusts task names & due dates, communicates risks to Product Mgr.
7	Statuses: DMs schedules status meetings as needed.
8	Project/Task Updates: DM checks-in with team for periodic task updates. Updates should include any successes, impediments, percent complete & hours. Complete: Once all tasks are

Objectives by Quarter 2016

- Project Clean-up
- Project Standards Identified
- Automated Reporting

3 Year Plan

- General Implementation & Processes
- Standardization & Training
- General Adoption
- Research API Integrations
- Integration with Adobe Creative Cloud
- Adoption moves to Adaptive
- Build Center for Excellence
- Custom Statuses & Reporting
- Onboard Stakeholders
- Automated Task & Approval Workflows
- Capacity Planning
- System Integrations (over 10 options)

UAT Milestones

Name	Start	UAT Execution	Completion
DLR - 2017 - Online Credit Application: UI Changes	11/17/16 (On Time)	4/17/17 (Late)	4/17/17 (On Time)
DLR - 2016 - Online Credit Application Phase X - Decision in Browser	1/1/16 (On Time)	1/1/17 (Late)	1/30/17 (On Time)
DLR - 2016 - Online Credit Application Phase 2.2	5/30/16 (On Time)	5/18/17 (On Time)	5/31/17 (On Time)
DLR - 2016 - Online Credit Application Phase 2.1	4/15/16 (On Time)	2/15/17 (On Time)	4/17/17 (On Time)

Training Schedule

- 22 - WF Training Activities
- 23 - Training Schedule
- 24 - Training Announcement
- 25 - Training WE 1/8: Intro to WF System & Processes
- 26 - Training Agenda WE 1/8
- 27 - Facilitate Training Sessions - WE 1/8
- 28 - Training WE 1/15: Building Templates & Identifying Tasks
- 29 - Training Agenda, Announcement & Schedule for WE 1/15
- 30 - Facilitate Training Sessions - WE 1/15
- 31 - Training WE 1/22: Logging Work & Communicating
- 32 - Training Agenda, Announcement & Schedule for WE 1/22

Team Updates

Thanks so much for attending last week's training sessions. Once I find some locations for LC and Burnett, I'll send the schedule for the course catalog.

It slices! It dices! It Julienne's!

Remember that a Task app that wouldn't be a Task app if it didn't have a Task app. Well - forget that "old and busted" and let hotness!

Workfront just released their new app, so I pushed notifications if someone tags you. Allows you to respond to the comment. List of all your pending approvals? Check! Review, comment and approve proofs? Julienne's vegetables? I haven't checked.

WF has divided across all 3 if

Want to win a \$50 Amazon Gift Card, courtesy of Workfront? Of course you do! We've collected some sweet WF gifts, so it's time to share. How can you be a winner?

Why just follow these simple steps, and watch your life instantly improve!

- Head on over to WF, and provide a fresh, new comment at the Update, Proof, or Task level.
- This is the most important part: Tag your friendly, neighborhood Delivery Manager.

Between now and 11:59pm Tuesday, December 6th, for every new "Project-related" comment where the Delivery Manager is tagged, we'll put your name into a raffle, and then ask one of our MarComm leaders to select a name from the jar.

We have some runners-up prizes, so don't fret if you don't win the first time. You are all winners!

Need more ideas? Find your friends! You are not alone.

- Attend LEAP
- Attend Local WF Functions
- View WF Webinars
- Regularly meet with WF Partners
- Schedule local WF meet-ups
- Take all WF Training Classes
- Join WF Community
- Join WF Local User Groups
- Use your WF Consultant hours
- Find WF users in your organization