Driving User Adoption

Hope you enjoyed Leap 2018! We know we covered a lot of ground in a short amount of time. A review of the key takeaways and processes you learned from the Workfront Training team can be found in this reference packet. We hope you picked up some new skills and information to help you tackle and tame your work chaos.

We would love to stay in contact! Email us at **training@workfront.com** with any questions or feedback.

Hope to see you at Leap 2019!

Sincerely,
The Training Team

Driving User Adoption

There's more to adoption than just tracking the number of users logging into Workfront, how many projects are created, how many tasks are completed, etc. Understanding your people and their processes is key to successful adoption of Workfront across your organization.

1 Know your people

Adoption is about people. Adoption is about change. And people don't always like change. Our goal is to change hate to dislike, dislike to apathy, and then apathy to understanding and liking.

- How are they going to react to change?
- Learn their processes. What are their goals? What are their struggles?
- Build trust so they'll talk to you openly and honestly.
- Be honest with your users. Honesty is a two-way street.
- Solicit feedback and act on that feedback.

How can you get to know your users?

Shadowing
Sit with users to see how they do their work.

Learn their click paths, see repetitive processes, see what data they need or share. Identify pain points, where processes can be refined/simplified, and determine if the process matches the workflow.

Lunch and Learn/Feedback sessions
Use feedback sessions to teach users about a new process, feature, or tool in Workfront. Show them how it will benefit them.

Or use the time to solicit feedback from users about the new process or feature. Let them talk about the good, the bad, the ugly.

Office Hours
Set specific hours when users can come to you with questions and ideas. This way users know when and where they can find you.

Listen without judgment
As you're gathering feedback from your users, it's important not to let preconceived ideas or emotions get in the way. After you've invested a lot of time in Workfront (learning it, setting it up, designing processes, etc.), it's hard to hear criticism and not take it personally.

But we need to let that go so we can really get to the heart of the matter and fix the underlying problem.

> "It's most important not that early adopters adopt, but that influencers adopt."
>
> — Michael C. Mankins, partner at Bain & Company

2 Cultivate influencers

Who has the biggest impact on adoption? Your influencers. These are people who affect or change the way others behave. Or, an influencer could be someone with the power to affect the decisions of others because of their (real or perceived) authority, knowledge, or relationship.

As you get to know your users, you'll identify the influencers. (And they're not always managers, executives, or even members of the core team.) Key characteristics include:

- They're good at communicating and networking.
- They understand the power of reciprocation.
- They build trust.
- They inspire confidence.
- They're able to work horizontally across the organization.

Include your influencers in planning and decision making. Give them early access to Workfront. Listen to what they say because they will have an impact on how other users react to Workfront and adopt the tool.

3 Keep things simple in Workfront

Creating processes and system setups that are as simple as possible aid in user adoption.

A few things that can help simplify the user experience in Workfront include:

- Project templates
- Dashboards
- Layout templates

4 Communication

Communicate early and often about what's coming. When users know that Workfront is coming and why it's coming, that helps with implementation and adoption.

Start communicating early in the process. And be sure to communicate why your organization is putting in Workfront. Talk about the benefits Workfront will bring to each individual user, the "what's in it for me" aspect. Without this information, users won't feel invested and won't adopt.

Ways to communicate could include:

- Teaser posters around the office, talking about Workfront
- Work Smart Day, provided by Workfront, to bring users together
- Contests and competitions where users are rewarded for doing a specific task in Workfront

"What if, and I know this sounds kooky, we communicated with the employees."

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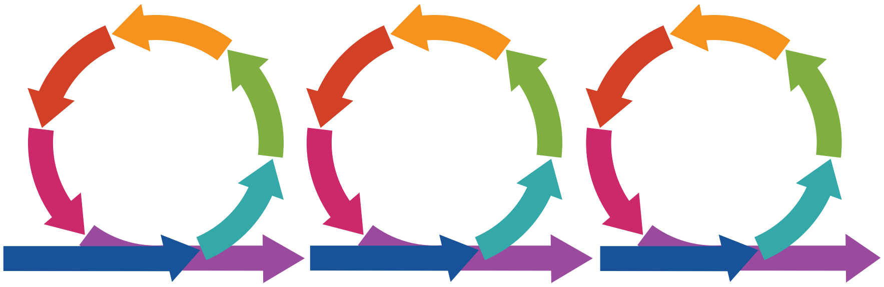
5 Reflect and repeat

Adoption isn't a one-time thing. Adoption is an ongoing process.

Continuous adoption is important because there will be new users; job changes and reorganizations; new processes within Workfront; or the need to break bad habits that people are bound to fall into.

Keep adoption going with continued communication. Cultivate new influencers. Keep soliciting feedback and acting on it.



Setups to Drive Adoption

As you set up features in Workfront to help user workflow and increase adoption, keep in mind some of these recommendations.

Dashboards

- Include reports pertinent to the user's work.
- Adjust report settings so needed columns show when the report is part of a dashboard.
- Create dashboards and assign them to users, rather than expecting users to create their own.

Custom Tabs

- Place custom tabs containing dashboards on pages frequently accessed by users.
- Reorganize tabs and subtabs into an order that makes sense with the workflow.
- Encourage users to make their own custom tabs to display other dashboards they might need.

Layout Templates

- Customize My Work to show information team members need.
- Customize tabs to hide the ones that aren't used in your workflow.
- Remove unused Filters, Views, and Groupings.
- Assign layout templates to users so everyone is viewing the same Workfront layout. This makes training and support easier.

Request Queues

- Assign routing rules so incoming requests automatically get assigned to the proper person.
- Use custom forms to gather information specific to the request.
- Make queue titles easy to understand, so requests get filed in the proper place.

Project Templates

- Update project templates to reflect process improvements.
- Include as many of the project setups as possible: durations, planned hours, predecessors, custom forms, milestones, etc.
- Set Template Sharing so the proper users have access to the template.
- Set Project Sharing so access is automatically granted to users who need access to projects made with a particular template.

Reports for Accountability

- Generate reports that track user behavior. This ensures Workfront is being used correctly and in a timely manner.
- Create other reports, such as ones to keep track of late work or tasks marked as complete this week.

2018 USER CONFERENCE

TRAINING

Monitor Adoption with Reports

Once you've decided your organization's workflows and what Workfront features you want your team to use, generate reports to track the resulting information. These reports can help you pinpoint where workflow might not be followed or areas of adoption success. Use these report ideas as a starting point, then customize with fields and charts that are relevant to your organization.

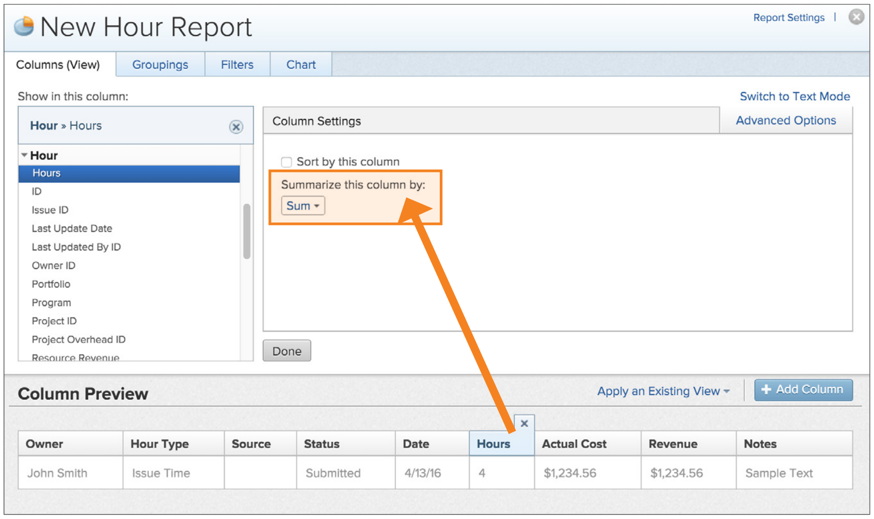
Hours logged this week by team

Report Type
- Hour

Filters
- Hour»Entry Date → This Week
- Owner»Home Team ID → Equal → (team name)

View
- Owner»Name
- Hour Type»Name
- Hour»Source
- Hour»Status
- Hour»Entry Date
- Hour»Hours
  - Summarize the column using Sum
- Other columns as desired

Grouping
- Owner»Name



TRAINING

Tasks marked as done this week

Report Type
- Task

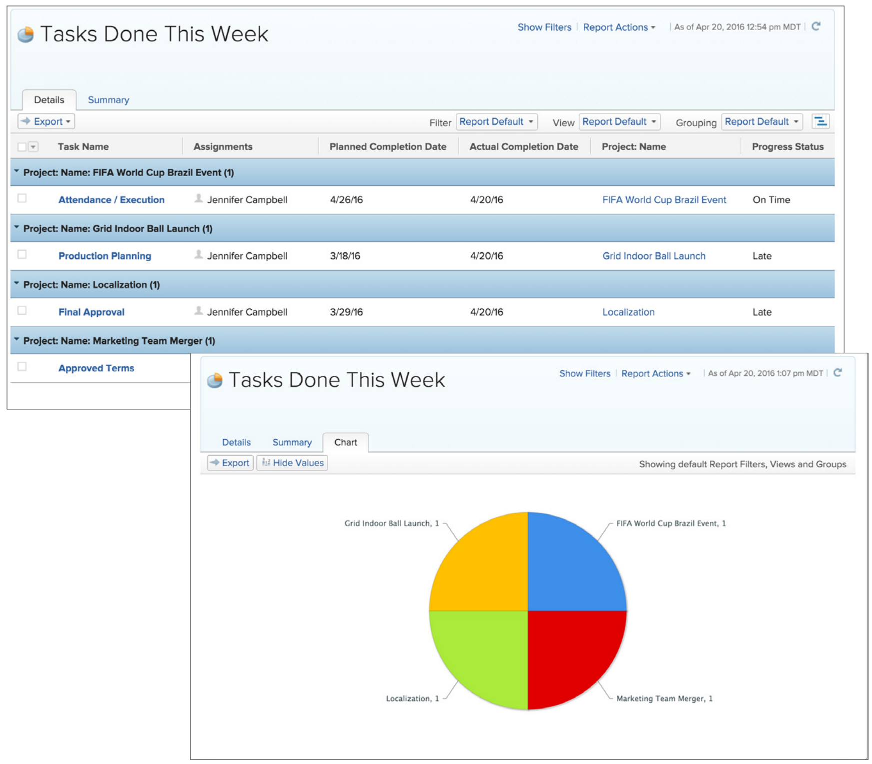
Filters
- Task»Actual Completion Date ➔ This Week
- Project»Status Equal ➔ Current, Complete

View
- Task»Name
- Task»Assignments
- Task»Planned Completion Date
- Task»Actual Completion Date
- Project»Name
- Task»Progress Status
- Other columns as desired

Grouping (optional)
- Project»Name

Option: Task»Actual Completion Date

Chart (optional)



Issues logged this week

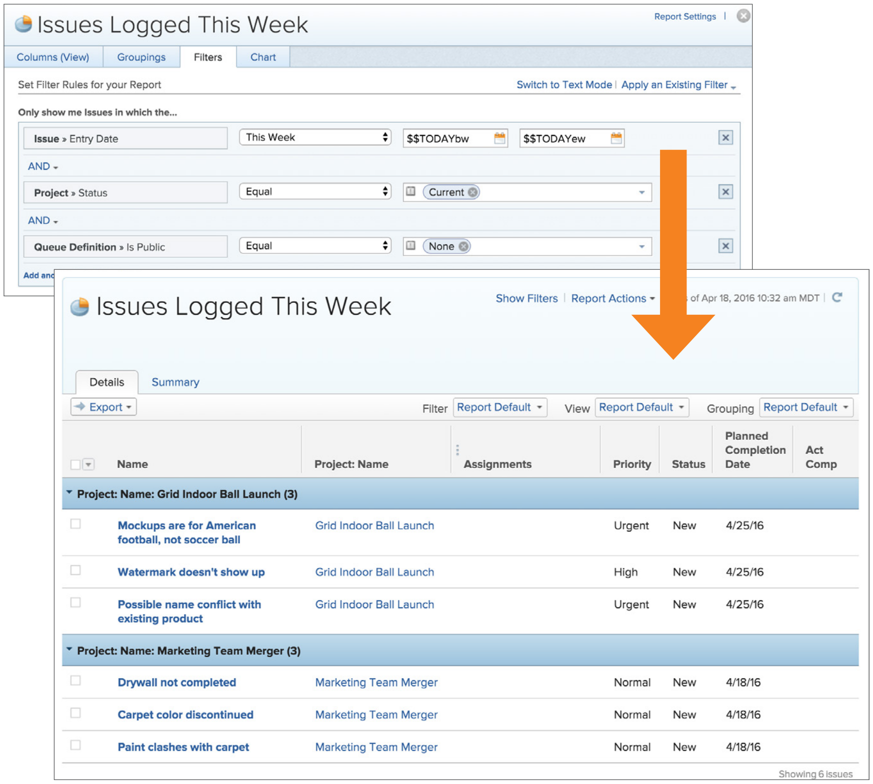
Report Type
- Issue

Filters
- Issue»Entry Date ➔ This Week
- Project»Status ➔ Equal ➔ Current
- Queue Definition»Is Public ➔ Equal ➔ None

View
- Issue»Name
- Project»Name
- Issue»Assignments
- Issue»Priority
- Issue»Status
- Issue»Planned Completion Date
- Issue»Actual Completion Date
- Other columns as desired

Grouping (optional)
- Project»Name

Option: Issue»Status



TRAINING

Track incoming requests that are converted to tasks or projects

Report Type
- Issue

Filters
- Issue»Resolving Object ID → Is Not Blank
- Issue»Status → Not Equal → Resolved, Closed

Additional option
- *Issue Request Category as a report prompt*

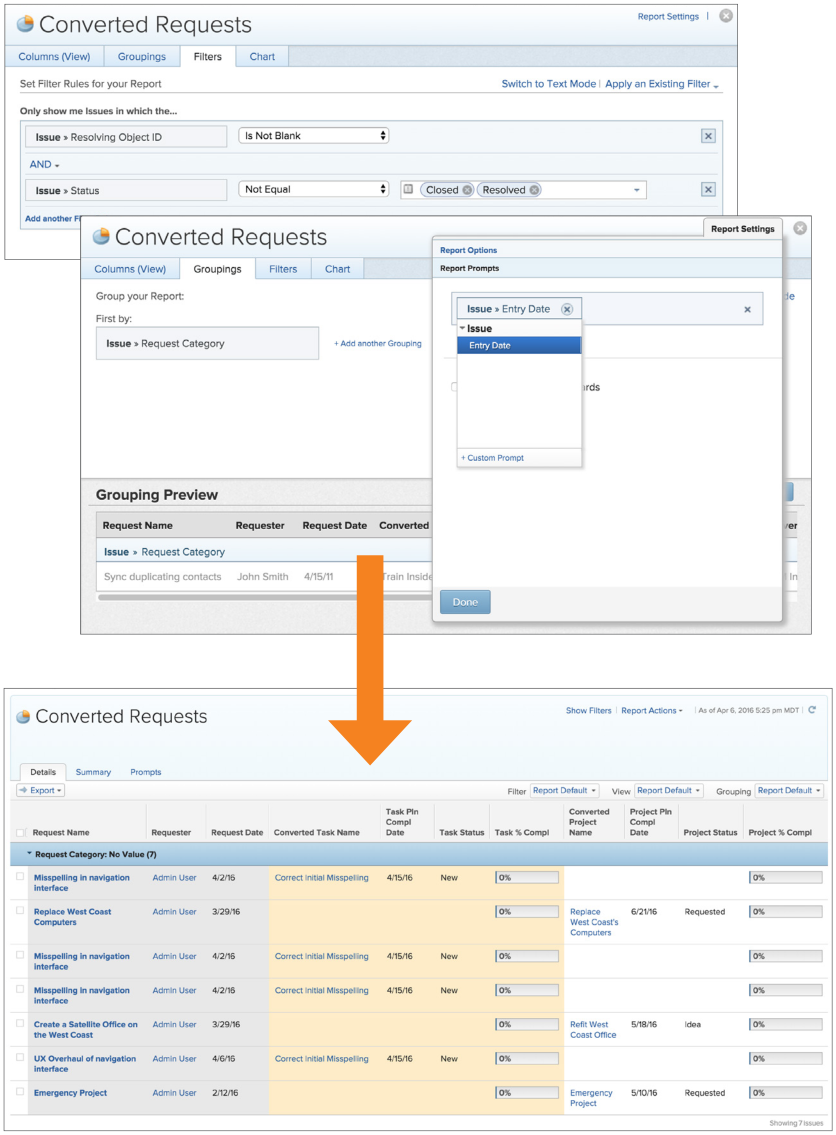
View
- Issue»Name
- Entered By»Name
- Issue»Entry Date
- Resolve Task»Name
- Resolve Task»Planned Completion Date
- Resolve Task»Status
- Resolve Task»Percent Complete
- Resolve Project»Name
- Resolve Project»Planned Completion Date
- Resolve Project»Status
- Resolve Project»Percent Complete

Rename column headers to reflect your organization's processes and terminology.

Use conditional formatting to highlight information. For example, make the task columns yellow and the original request information gray.

Grouping
- Issue»Request Category

Additional option: Queue Topic»Name



TRAINING

Track project progress

Use an existing view (rather than creating a custom report) to view what Status projects currently are in. You can also track projects using the Progress Status, which is available as a project Grouping.

Workfront Area

- Projects → Projects tab → All Projects subtab

Filters

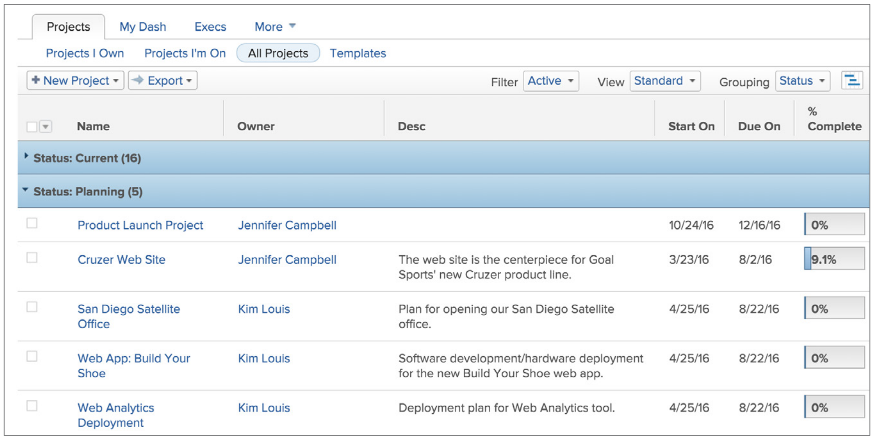
- Active

View

- Use default columns or other columns as desired

Grouping

- Status



Name	Owner	Desc	Start On	Due On	% Complete
Status: Current (16)					
Status: Planning (5)					
Product Launch Project	Jennifer Campbell		10/24/16	12/16/16	0%
Cruzer Web Site	Jennifer Campbell	The web site is the centerpiece for Goal Sports' new Cruzer product line.	3/23/16	8/2/16	9.1%
San Diego Satellite Office	Kim Louis	Plan for opening our San Diego Satellite office.	4/25/16	8/22/16	0%
Web App: Build Your Shoe	Kim Louis	Software development/hardware deployment for the new Build Your Shoe web app.	4/25/16	8/22/16	0%
Web Analytics Deployment	Kim Louis	Deployment plan for Web Analytics tool.	4/25/16	8/22/16	0%

Workfront Area

- Projects → Projects tab →All Projects subtab

Filters

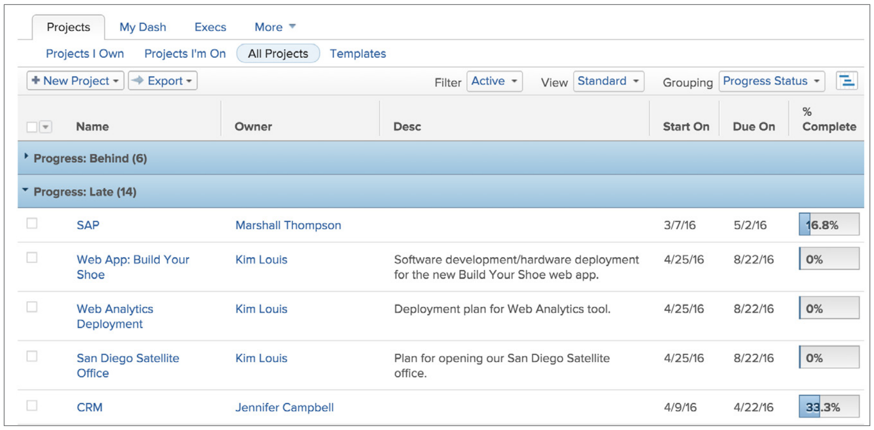
- Active

View

- Use default columns or other columns as desired

Grouping

- Progress Status



Name	Owner	Desc	Start On	Due On	% Complete
Progress: Behind (6)					
Progress: Late (14)					
SAP	Marshall Thompson		3/7/16	5/2/16	16.8%
Web App: Build Your Shoe	Kim Louis	Software development/hardware deployment for the new Build Your Shoe web app.	4/25/16	8/22/16	0%
Web Analytics Deployment	Kim Louis	Deployment plan for Web Analytics tool.	4/25/16	8/22/16	0%
San Diego Satellite Office	Kim Louis	Plan for opening our San Diego Satellite office.	4/25/16	8/22/16	0%
CRM	Jennifer Campbell		4/9/16	4/22/16	33.3%

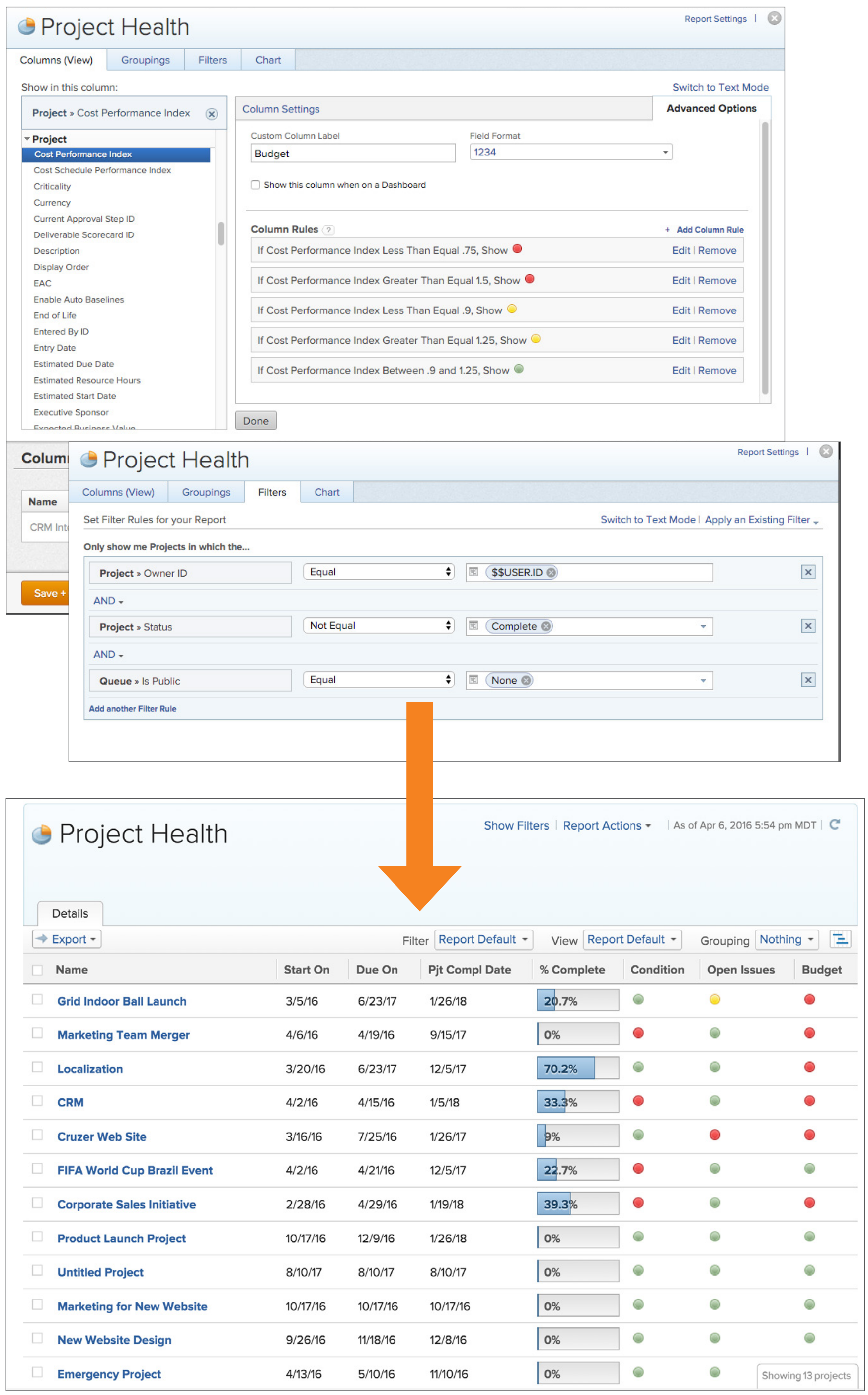
Review overall project health

Report Type
- Project

Filters
- Project»Owner ID → Equal → $$USER.ID
- Project»Status → Not Equal → Complete
- Queue»Is Public → Equal → None

View (and Conditional Formatting)
- Project»Name
- Project»Planned Start Date
- Project»Planned Completion Date
- Project»Projected Completion Date
- Project»Percent Complete
- Project»Condition
  - Equal In Trouble, show 🔴
  - Equal At Risk, show 🟡
  - Equal On Target, show 🟢
- Project»Number of Open Issues
  - Greater than Equal 5, show 🔴
  - Less than Equal 4, show 🟡
  - Between 0 and 2, show 🟢
- Project»Cost Performance Index
  - Less than Equal .75, show 🔴
  - Greater than Equal 1.5, show 🔴
  - Less Than Equal .9, show 🟡
  - Greater than Equal 1.25, show 🟡
  - Between .9 and 1.25, show 🟢

Grouping
- None



TRAINING

Incomplete tasks that are late (e.g., Progress Status is Late)

Report Type

- Task

Filters

- Project»Status → Equal → Current
- Task»Progress Status → Equal → Late
- Task»Percent Complete → Less Than → 100

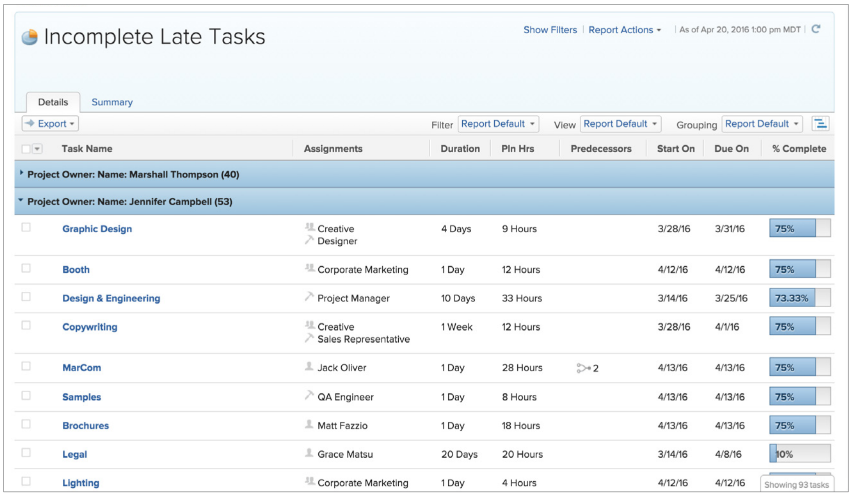
View

- Use default columns or other columns as desired
- Task»Planned Completion Date

Grouping

- As desired

Options: Project Owner»Name; Project»Name; Assigned To»Name



Incomplete Late Tasks

Show Filters | Report Actions | As of Apr 20, 2016 1:00 pm MDT

Details | Summary

Export | Filter: Report Default | View: Report Default | Grouping: Report Default

Task Name	Assignments	Duration	Pln Hrs	Predecessors	Start On	Due On	% Complete
Project Owner: Name: Marshall Thompson (40)							
Project Owner: Name: Jennifer Campbell (53)							
Graphic Design	Creative Designer	4 Days	9 Hours		3/28/16	3/31/16	75%
Booth	Corporate Marketing	1 Day	12 Hours		4/12/16	4/12/16	75%
Design & Engineering	Project Manager	10 Days	33 Hours		3/14/16	3/25/16	73.33%
Copywriting	Creative Sales Representative	1 Week	12 Hours		3/28/16	4/1/16	75%
MarCom	Jack Oliver	1 Day	28 Hours	2	4/13/16	4/13/16	75%
Samples	QA Engineer	1 Day	8 Hours		4/13/16	4/13/16	75%
Brochures	Matt Fazzio	1 Day	18 Hours		4/13/16	4/13/16	75%
Legal	Grace Matsu	20 Days	20 Hours		3/14/16	4/8/16	10%
Lighting	Corporate Marketing	1 Day	4 Hours		4/12/16	4/12/16	

Showing 93 tasks

Open issues by project

Report Type

- Issue

Filters

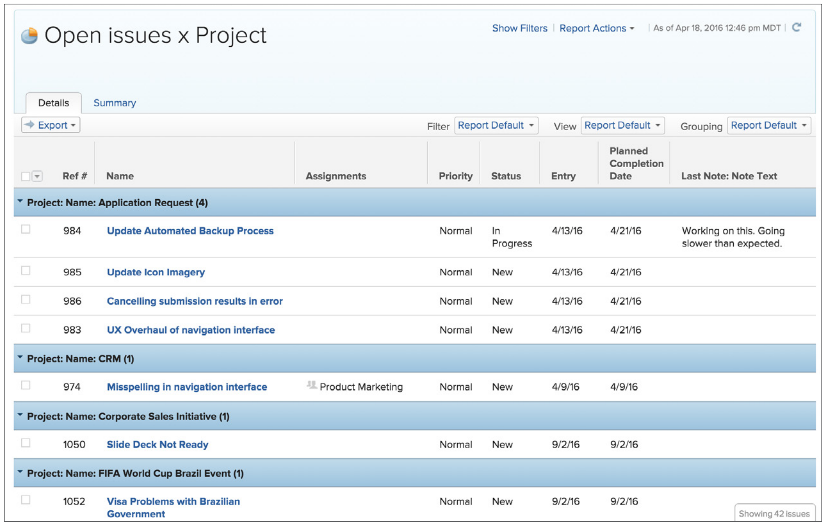
- Issue»Status → Equal → New, In Progress
- Project»Status → Equal → Current

View

- Use default columns or other columns as desired
- Issue»Planned Completion Date
- Late Note»Note Text

Grouping

- Project»Name



Open issues x Project

Show Filters | Report Actions | As of Apr 18, 2016 12:46 pm MDT

Details | Summary

Export | Filter: Report Default | View: Report Default | Grouping: Report Default

Ref #	Name	Assignments	Priority	Status	Entry	Planned Completion Date	Last Note: Note Text
Project: Name: Application Request (4)							
984	Update Automated Backup Process		Normal	In Progress	4/13/16	4/21/16	Working on this. Going slower than expected.
985	Update Icon Imagery		Normal	New	4/13/16	4/21/16	
986	Cancelling submission results in error		Normal	New	4/13/16	4/21/16	
983	UX Overhaul of navigation interface		Normal	New	4/13/16	4/21/16	
Project: Name: CRM (1)							
974	Misspelling in navigation interface	Product Marketing	Normal	New	4/9/16	4/9/16	
Project: Name: Corporate Sales Initiative (1)							
1050	Slide Deck Not Ready		Normal	New	9/2/16	9/2/16	
Project: Name: FIFA World Cup Brazil Event (1)							
1052	Visa Problems with Brazilian Government		Normal	New	9/2/16	9/2/16	

Showing 42 issues

Tasks due this week

Report Type

- Task

Filters

- Task»Planned Completion Date ➔ This Week
- Project»Status ➔ Equal ➔ Current
- Task»Percent Complete ➔ Less Than ➔ 100

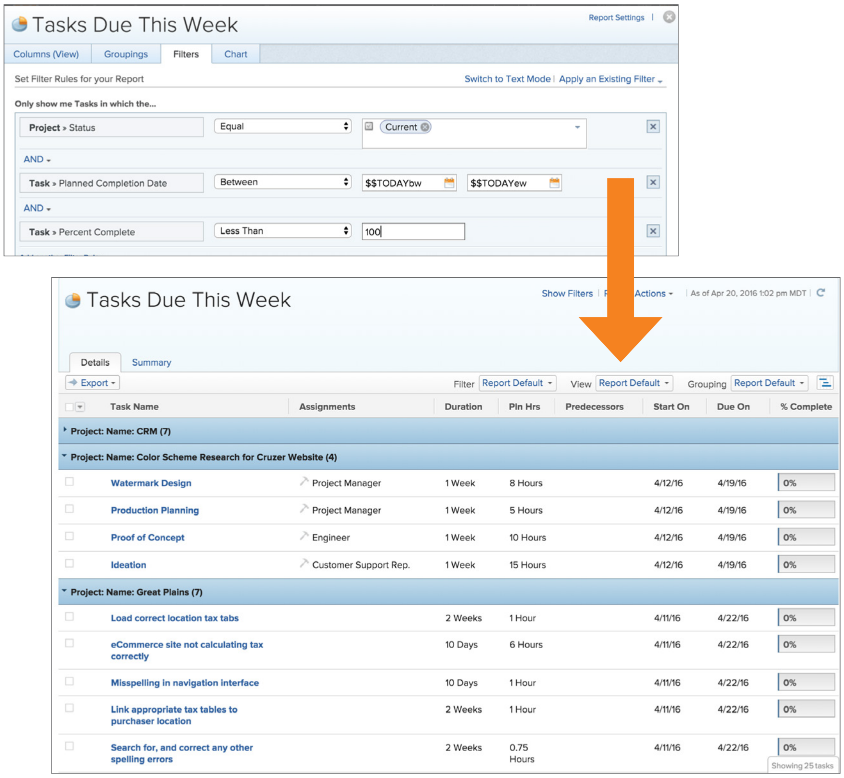
View

- Use default columns or other columns as desired

Grouping

- As desired

Options: Project»Name; Assigned To»Name



TRAINING

Workfront + Slack Commands

Workfront commands can be typed into any channel in Slack and are visible only to you. Slack commands are case sensitive. Start each command with /workfront or /wf. And remember, the commands only work if you have **the Workfront add-in** for Slack.

Log in

/workfront log in

Log out

/workfront logout

List of commands

/workfront help

Favorite items

/workfront favorites

Recently accessed items

/workfront recent

Search

You can search for the following objects: project, task, issue, report, people, template, document, portfolio, program, dashboard, company, note

/workfront search <keyword>

Access your work items

Working On, Work Requests, Approvals

/workfront work

Working On list

/workfront working on

Work Requests list

/workfront work requests

Approvals list

/workfront approvals

Create a task

/workfront add task <task name>

Create an issue

/workfront add issue <issue name>

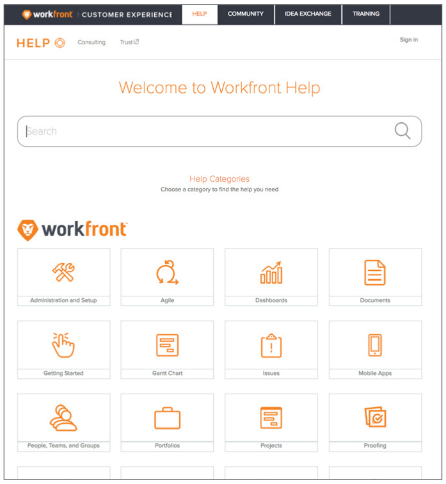
Print it, clip it, and post it at your desk!

/workfront log in
/workfront logout
/workfront help
/workfront favorites
/workfront recent
/workfront search <keyword>

/workfront work
/workfront working on
/workfront work requests
/workfront approvals
/workfront add task <task name>
/workfront add issue <issue name>

Workfront Help & Training

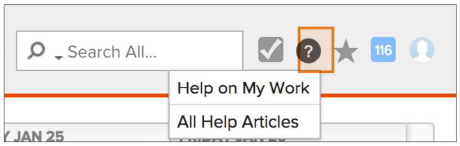
Find answers to software questions on the Workfront Help website. Complete self-paced training in Workfront Ascent and the Workfront Training Center.



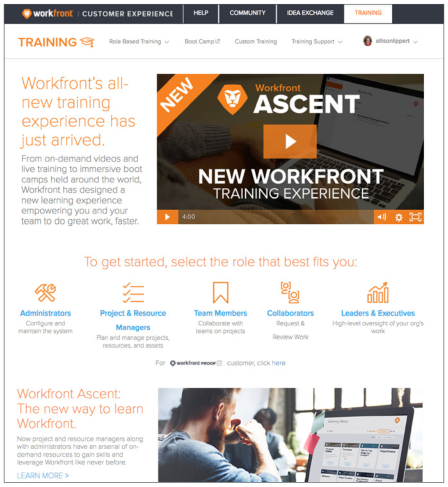
Workfront Help website

support.workfront.com

- Search for articles about Workfront software features
- View collections of articles about specific topics with the Help Categories
- Keep up with new product features in the Product Announcements area (bottom of the window)



- Click the Help icon in the global navigation bar inside Workfront to view Help articles specific to the Workfront area you're on or to access the overall Help website.



Workfront Training Center

training.workfront.com

- Project managers can find additional training in Workfront Ascent. Click the Project & Resource Managers icon to sign in.
- Team members and collaborators (request and review users) can find training through the Workfront Training Center. Click the appropriate icon to access short videos.
- Click the Training Support link at the top of the window to access a variety of articles about Workfront's training program, including a list of all courses offered.

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Workfront Training PDU Credits

Many of the Workfront Training courses offered at Leap count toward PDUs (Professional Development Units) at PMI (Project Management Institute). Project Manager Fundamentals is a prerequisite for all PDU-eligible courses.

WORKFRONT COURSE NAME	PDUs	ACTIVITY CODE
Boredom vs. Burnout: Managing Your Team's Workload	1	W-009
Driving User Adoption	1	W-013
Essential Skills for Getting Stuff Done	1	W-012
Get Strategic with People Management	1	W-008
Helpful Reports to Get You from Demand to Delivery	1	W-019
Introduction to Agile Work Management	1	W-014
Manage Reviews & Approvals in Workfront	1	W-017
Moving from Legacy to New Resource Management Solutions	1	W-011
Project Time Management	1	W-016
Queue Management	1	W-018
Review & Approval Administration, Part 1	1	000-039
Review & Approval Administration, Part 2	1	000-040
Scrum and Kanban in Workfront	1	W-015
Setting Up Workfront for Better People Management	1	W-010

Claim your PDUs

Occasionally Workfront will retire course codes at PMI. Activity codes for Leap courses will expire at the end of 2018, so be sure to claim them before then. To verify an activity code is still active or claim a credit, go to:

http://www.pmi.org/ > Certifications > Maintain Certification > Visit CCRs > Search Activities > Search for Workfront

TRAINING

Workfront Training

Ensuring users receive thorough and appropriate training on how to use Workfront is a vital part of a successful implementation and continued adoption. The Workfront Training team offers a variety of training options to fit your organization's needs throughout your Workfront experience.

THE WORKFRONT TRAINING CENTER

Team members and collaborators can access sessions in the Workfront Training Center to prepare for launch. Anyone who will be using Workfront needs to attend training.

- Included with your Workfront purchase
- No registration or login required for Workfront Training Center
- Training available for Work license users (team members, executives/ leaders), Collaborator license users, and Workfront Proof users
- Online learning and live courses available
- Print-ready resources for review and additional learning

Get started at **training.workfront.com**

WORKFRONT ASCENT

Your core team can prepare for your Workfront implementation by taking training through Workfront Ascent.

- Included with your Workfront purchase
- Online, self-paced learning focuses on the needs of project managers, resource managers, system administrators, and others with Plan licenses
- Option to take live courses to supplement online learning
- Print-ready resources for review and additional learning

Get started at **training.workfront.com/ascent**

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SYSTEM ADMINISTRATOR BOOT CAMP

New and beginner-level Workfront system administrators are invited to spend time at Workfront headquarters in Lehi, Utah. Or join us at varying locations across the country.

- Administrator-specific standard training courses
- Courses designed specifically for the system administrators attending Boot Camp, based on pre-session surveys and phone calls
- Not intended for experienced, long-time Workfront system administrators or back-end developers

For dates of upcoming sessions or to register, visit the **Boot Camp** webpage

CUSTOM TRAINING

Custom Training is a collaborative process between your organization's core team and the Workfront Training team. Our goal is to empower users with the knowledge, skills, and resources they need to get the most value from Workfront.

This collaboration leads to successful training and development of custom documentation — and ultimately a successful Workfront launch.

Dedicated Standard Course

- Dedicated course date/time for users
- Virtual or on-site course delivery
- No content customization
- Course taught with Workfront test drives

Dedicated Custom Course

- Dedicated course date/time for users
- Virtual or on-site course delivery
- Course topic selection; customer workflows can be incorporated
- Course taught using customer's live or sandbox environment

Custom Documentation

- Documentation captures your processes and workflows within Workfront's feature functionality
- Custom documentation can be added to custom training purchase or purchased separately

Train the Trainer

- Training consultation and/or working session with Workfront trainer
- Customized course training outline for team members or project managers
- Customer delivers training to end-users

Contact your Workfront sales representative for details.