

How to Empower Workfront Users through Training

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





Prepare Successful Learners

As you're preparing your training curriculum and materials, don't forget to prepare yourself and your learners.



1 Know Workfront to teach Workfront

- Get a feel for how Workfront professionals teach the classes.
- Replicate live or on-demand course layout, as needed.
- Use training videos as appropriate.



2 Know your users and what they need

- Identify your audience — by Workfront license type, role in the tool, needs, etc.
- Divide your users into groups or train as a larger group? If different users have different workflows, licenses, etc., consider multiple training groups.
 - Training a larger group can save on cost, but it can leave users disengaged when the topic isn't relevant to them.
 - Dividing your group for training can be more time-consuming, because you offer multiple classes. But it allows you to give specific information that is applicable to your audience.



3 Tailor the training plan

- Find and speak to your users' motivations.
- Determine what your users need to know to get started in Workfront instead of telling them everything all at once.
- Provide different learning methods, such as hands-on activities and discussion.
- Understand your users' click paths and workflows.
- Simplify. Avoid overwhelming your users at the very beginning. Balance general Workfront topics with click paths specific to your organization. Pick one main thing you want users to walk away from class knowing, and emphasize that.



4 Go beyond face value

- Get to the WHY behind adopting Workfront. Users need to understand why Workfront is being implemented and what they're getting out of it. If they know this, they're far more likely to adopt.
- Don't just explain the why, SHOW the why. Walk them through Workfront and show them how it makes their lives easier.
- Put yourself in the users' shoes. Practice empathy. Focus on commonalities, not differences. Share problems you had when learning Workfront. How do you use Workfront in your daily life?
- Spend time making training more of a conversation. Ask questions and listen to the answers.



5 Be positive and lead by example

- Normalize the change for your learners by reminding them that this is a growth process. Learning Workfront doesn't happen overnight.
- Stay positive, despite the emotions your users might feel.
- Create and communicate a clear vision of what work will be like once Workfront is fully implemented.

Training by license type

The Workfront training team recommends dividing users by license type for training. This keeps users with the same Workfront needs and workflows together.

Request/Review

- Trainings can be completed in 10-15 minutes
- Quick guide with instructions that you email to users might be all they need

Work

- Can do more than reviewers but still limited in what they can do in the tool
- In-person training is ideal
- Focus on the steps of their workflows
- Have quick guides to remind them what they learned

Plan

- Need a greater understanding of how Workfront works and the capabilities of the tool
- In-person training
- Have quick guides to remind them what they learned
- May also need to divide users by workflow



Logistics of Training

As you prepare Workfront training for your users, keep these tips in mind.

Prep the System

- Does your Workfront instance have sufficient data for demos and exercises?
- Do the exercises work?

Prep the Trainers

- Divide up the duties. If you're team teaching, decide who teaches which sections of the course. Divide up other training prep duties, as needed.
- Practice presenting classes to other trainers. Provide constructive feedback.

Presentation Best Practices

- Be aware of body language. Have good posture, make eye contact, and have purposeful movements.
- Be aware of your voice volume, speed, and tone. Try to eliminate um's, uh's, or other filler words.
- Facilitate conversation during training. Encourage your audience to speak up, contribute, and share. Allow your audience to guide the conversation.

Prep your users

- Get the right people in the right classes.
- Limit the class size.
- Schedule a room with enough space.
- Schedule users for classes. If you don't schedule your users and say "sign up," what do you think happens? No one signs up. Put it on their calendar and make sure they know training is mandatory.
- Take attendance.
- Plan training for the remote employees.

Prep the Equipment

- Make sure there's a projector or other way to share your screen content.
- Have workstations for users.
- Make arrangements for recording the session, if needed.
- Have handouts printed and ready to go.
- Have Workfront login instructions for everyone.

Set Expectations

- Establish training classroom ground rules.
- List class objectives.
- Make sure you know expectations and objectives from others, such as managers or executives.
- Leave mobile devices at the door.

Plan for Ongoing Training

- How will you train new hires? Company reorganizations? Expansion of Workfront across your organization?
- Plan continuous education for software releases or configuration adjustments.
- Provide a way for eager users to learn more.