



Breakout Session 1:

Enhance Performance with Visibility & Automation: Dashboards, Templates and Reporting

Dan Hartman
Account Executive



Your Wrike Team



Dan Hartman

Account Executive

+61 02 9053 4649

dan.hartman@team.wrike.com

To book time with me please use:
calendly.com/dan-hartman

Specialty:

Your productivity consultant who guides you through your journey as you trial Wrike and determine whether Wrike is the best fit for your organisation.

Hobbies: Rugby, Brazilian Jiu Jitsu, & Writing



Michael Pattison

Account Executive

+61 0424 742582

michael.pattison@team.wrike.com

To book time with me please use:
calendly.com/michael-pattison

Specialty:

Your productivity consultant who guides you through your journey as you trial Wrike and determine whether Wrike is the best fit for your organisation.

Hobbies: Golf, Fishing, Motorcycle Touring, Adventure Holidays



Agenda - Visibility and Automation

- Visibility and Dashboards
- Automation and Templates
- Wrike Reports
- Q&A



Visibility for your team

- Overcome information silos, update stakeholders with real-time information
- Focus on work that really matters
- Higher levels of accountability
- Avoid capacity-related roadblocks
- Empower your team



Dashboards



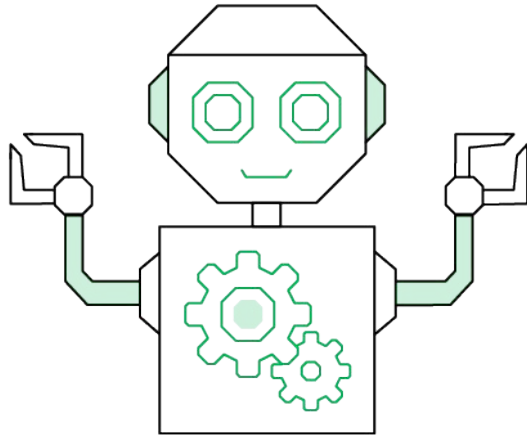
- Highly Customizable
- Dynamic Monitoring Tool
- Proactive management of work
- Provides personal and team visibility



Let's Jump into Wrike



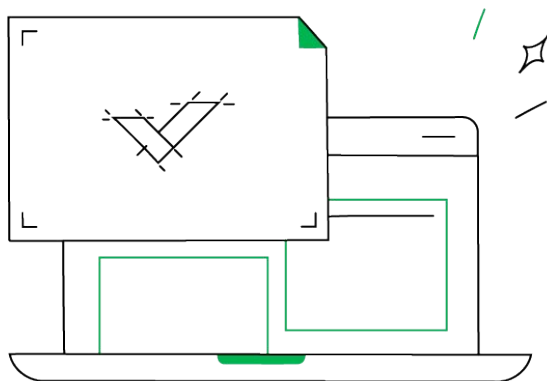
Automation



- Accenture forecasts 30% to 40% gains in employee productivity in the next three to five years as a result of automation
- Eliminate repetitive manual tasks
- Improve accuracy and execution



Wrike Templates



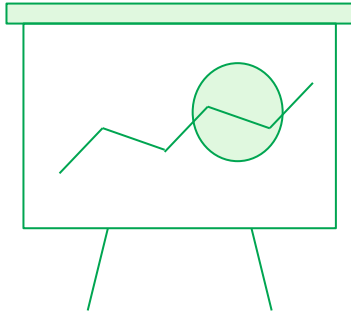
- Automate setup of repeatable processes (remember: automation is cement)
- Capture all steps in end-to-end process of planning and executing on a deliverable.
- Minimize the tasks and subtasks. Only use subtasks if there are strict dates & change in assignments.
- Add in relative durations and utilize dependencies for easy re-schedules and hand-offs
- Multiple templates for different processes



Let's Jump Into Wrike



Reporting



- Real-time visibility of overall portfolio
- Reporting on specific KPIs/Outcomes
- Granular detail on specific processes
- Highly customisable
- Easily shareable throughout org
- Automated delivery



Reporting - Some Tips & Tricks

- Use folders to hierarchically organise and categorise work
- Portfolio reporting: Custom fields are key
- Use dropdown and checkbox custom fields to group and display reporting data
- Build custom fields into templates where possible
- Set a regular cadence for pulling reports and clear internal expectations



Let's Look at an Example



Questions?



Thank you!

Please feel free to stay in touch:

dan.hartman@team.wrike.com

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