



WRIKE
PRODUCTIVITY
TOUR

New User Tips & Tricks

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Meet the Presenters

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Customer Success Manager



Specialty: Change Management Guru and Productivity Expert

Fun Fact: Avid Green Bay Packers Fan

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Customer Success Manager



Specialty: Workflow strategy and customization

Fun Fact: Master chef and cat enthusiast



Agenda

1. Operational Excellence
2. Change Management
3. Work Intake
4. Templates
5. Collaboration
6. Q&A





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Operational Excellence



Move customers from react...



Planning: Work activities, requests, plans, and assignments are unstructured and managed in an ad hoc, siloed fashion.

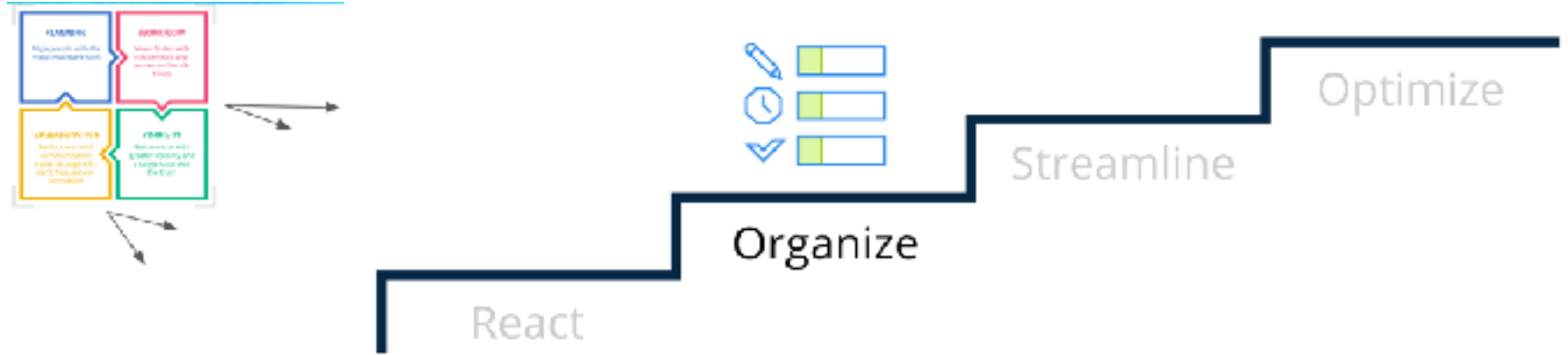
Workflow: Ad hoc intake, planning, execution methods and undefined roles lead to rework and excessive firefighting.

Collaboration: Siloed teams, crucial project information & agreements are lost in emails, with wasteful meetings spent just trying to catch up.

Visibility: It's hard to tell who's doing what, where the delays & bottlenecks are, and what the workflow is.



...to organize



Planning: Core requests and projects are consolidated into a single, shared system to be prioritized, assigned, and planned.

Workflow: Roles & workflow are clearly defined and transparent, leading to better accountability for core projects & tasks.

Collaboration: Project & task communication is in a central workspace. Meetings are more focused, with action items & agreements captured.

Visibility: Basic reports & dashboards give insight into progress and expose bottlenecks.





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Managing the Change to Wrike



The Secret to Managing the Change to Wrike



1. Communicate the Change
2. Script the Critical Moves
3. Communicate, Improve and Make Wrike Stick



Communicate the Change

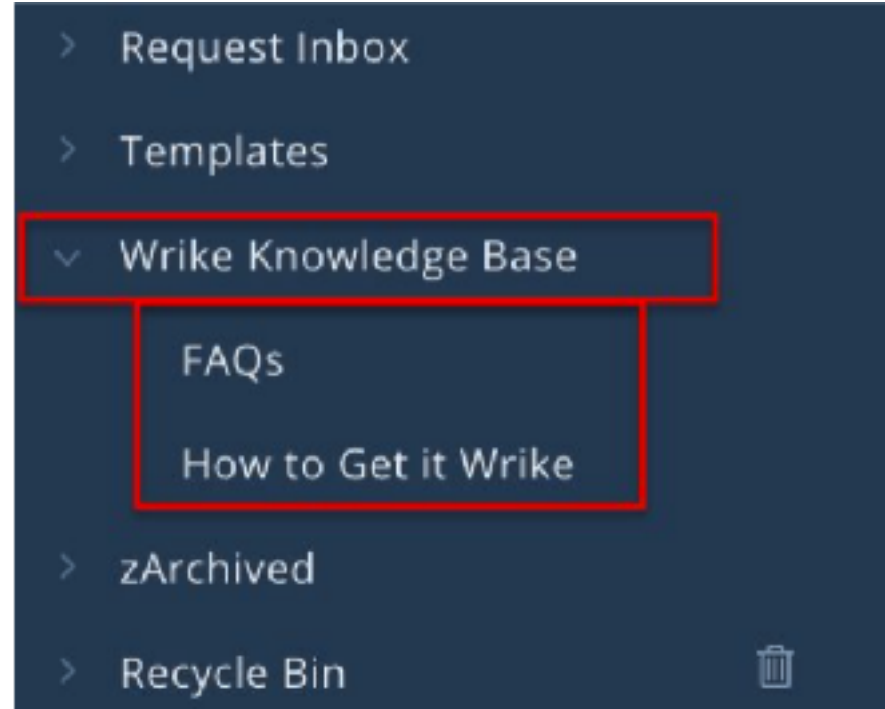
1. Create clear and compelling goals
2. Define the scope of the change



Script the Critical Moves

Create a “Rules of Wrike”

- Define the workflow and how Wrike will be leveraged by the teams
- Specify folder structures and project templates
- Determine ownership and outline general responsibilities
- Define how Wrike will work in conjunction with other tools



Communicate, Improve & Make Wrike Stick

- Build Wrike Habits
- Focus on the Bright Spots
- Set Expectations





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Work Intake



Where Does the Work Start on Your Team?

- Create a single avenue for work intake
- Methods of Intake:
 - Request forms
 - Production Schedules
 - Meetings
 - Recurring operational work
- Leverage automation to streamline work creation



Tips & Tricks for Requests



- Determine **who** will submit requests to the team and **who** will traffic the requests
- Gather all information up front with Request Forms
- Eliminate the need for status updates



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Demo





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Templates



What are Some of Your Team's Repeated Processes?

- Utilize Templates for repeatable, standardized work
- Avoid rework by pre-building a project schedule
- Create consistency in your process



Tips & Tricks for Templates

- Utilize task prefixes for easy identification and distinction between projects
- Pre-assign tasks to team members
- Pre-fill custom fields that are consistent across work
- Add descriptive text to each task





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Demo



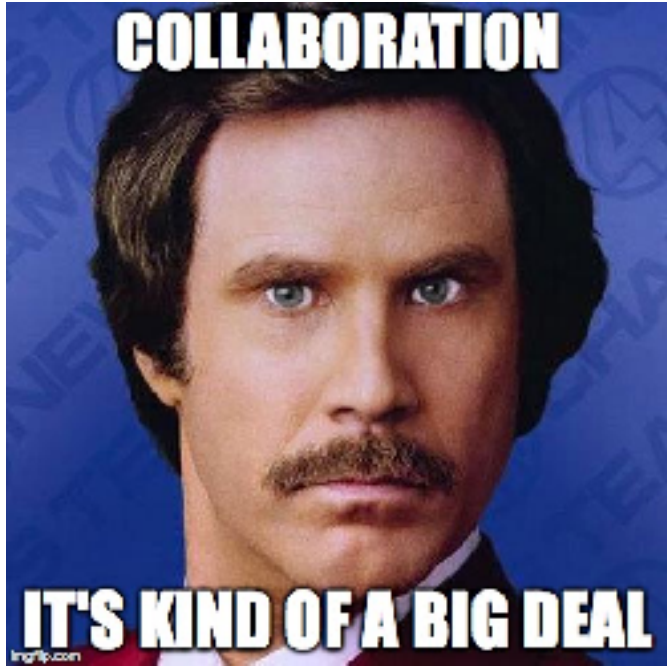


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Collaboration: Centralize & Capture



Collaboration Best Practices



- Use statuses to indicate where the task is in the workflow
- Use task assignments to specify who is ultimately responsible for the task
- Attach file versions directly to Wrike
- Utilize @mentions to replace emails



The image shows a project management application interface. The left pane displays a list of tasks for 'Paris St. Germain'. The middle pane shows the details of the selected task, 'Paris St. Germain - Campaign Live'. The right pane shows the task's history and a comment section.

Left Pane: Paris St. Germain. Tasks: All active, TO: All. A task named 'Paris St. Germain - Campaign Live' is selected.

Middle Pane: Paris St. Germain - Campaign Live. Task owner: Greg L. on May 31. Task status: Planned. Task description: Click to add the description. Task status: Change task status here.

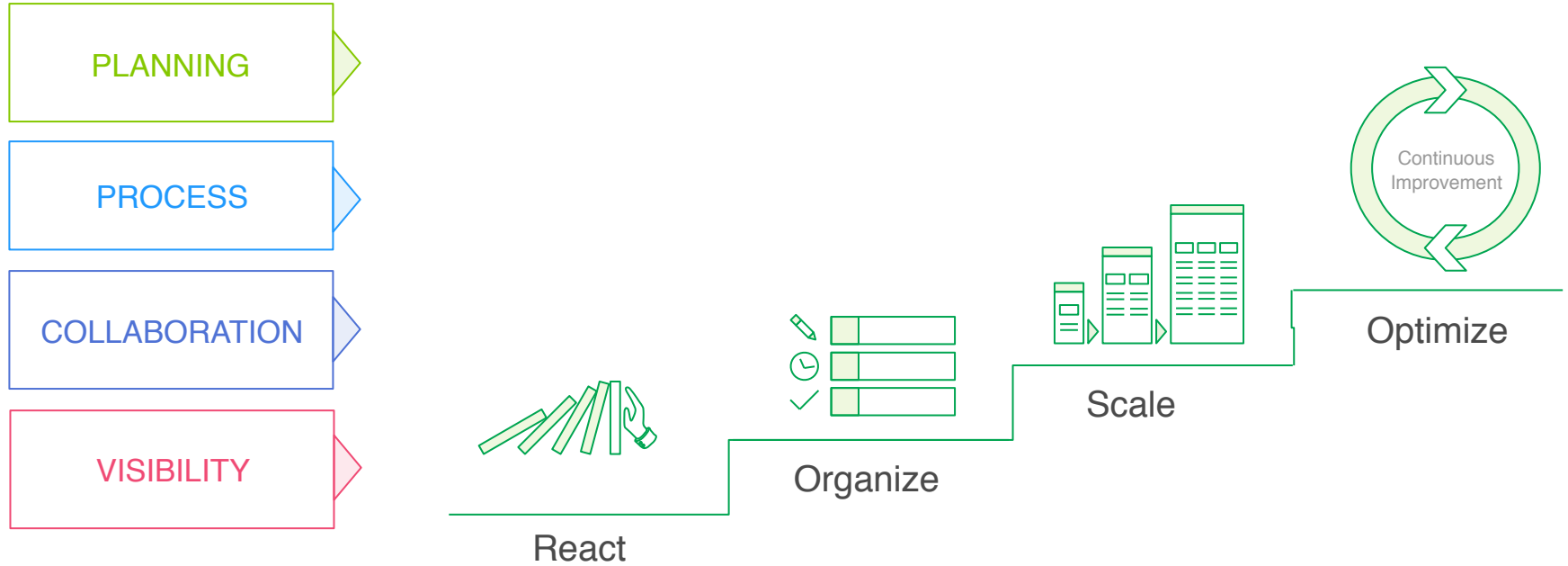
Right Pane: Task history and comments. Comments by Greg Liggett: Scheduled task for Jan 01, 2017 - Dec 31, 2017 (966d). Included task into Paris St. Germain. Two weeks ago. Included task into Campaign Calendar.

Annotations:

- The task selected in the middle pane will then appear on the right
- Task will overlay the project information screen
- Task owner will appear here
- Change task status here
- Use this section to comment and communicate with others



Bringing it all together





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Q&A





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Thank you





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Bonus! Dashboards & Reports



Individuals Have Visibility Over Their Work

MyWork for Task Assignments

The screenshot displays the 'MyWork' interface for task assignments. It is organized into four main sections based on time periods:

- TODAY (Apr 17):** A list of tasks including 'Design', 'Copyedit', 'Host a Partner Event', 'Copywrite', 'NEW TASK', 'Print', 'Canadian Project Teams', and 'Host Marketing List Lock'. Each task has a status (e.g., 'Under Review', 'In Approval', 'Not Started') and a due date.
- THIS WEEK (Apr 17 - Apr 23):** Shows tasks like 'Host Kickoff Meeting' (Apr 22) and 'Review and Approve Co...' (May 18).
- NEXT WEEK (Apr 24 - Apr 30):** Includes tasks such as 'Take it Make it', 'Design', 'Deliver Final Product', and 'Implementation'.
- LATER (After Apr 30):** Lists tasks like 'Testing' and 'Documentation'.

At the bottom, there is a 'COMPLETED' section with a count of 12.

Inbox for Notifications

The screenshot shows an 'Inbox for Notifications' interface. It features a header with 'INBOX' and 'ARCHIVE' tabs. The main content area displays a notification titled 'Marketing Report by Project' dated 'Apr 12'. The notification text reads: 'Marketing Report by Project' followed by a green checkmark icon and the text 'Wrike Bot This report you are subscribed to is ready for review.' Below this, it says 'Wrike Bot This report you are subscribed to is ready for review.'



Create Team-Based Dashboards for Managers



Best Practices for Reports

Utilize custom fields to group and display reporting data. Use folders to categorize and bucket work.

Identify the fields the team needs to fill out today for reporting. Keep it top level and simple so that it's easy to fill out.

If possible, inject the field data into templates so that it seamlessly carries over for teams.

Set a regular cadence for pulling reports to enforce the data staying up to date. Push reports in Wrike up to the management team.



Connect Wrike to the Way Your Team Works



Connect Wrike with Work
Habits



Measure the success of Wrike



Integrate with other technology
solutions

