WRIKE
PRODUCTIVITY
TOUR

New User Tips & Tricks

November 8, 2017

Meet the Presenters

Renee Olson
Customer Success Manager

Specialty: Change Management Guru and Productivity Expert

Fun Fact: Avid Green Bay Packers Fan

Brittany Soinski
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...

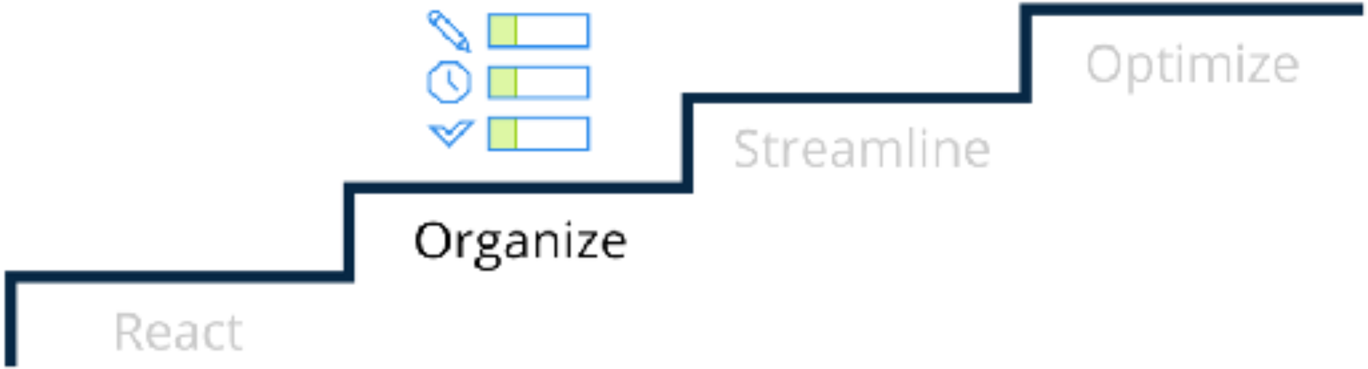
Planning: Work activities, requests, plans, and assignments are unstructured and managed in an ad hoc, siloed fashion.

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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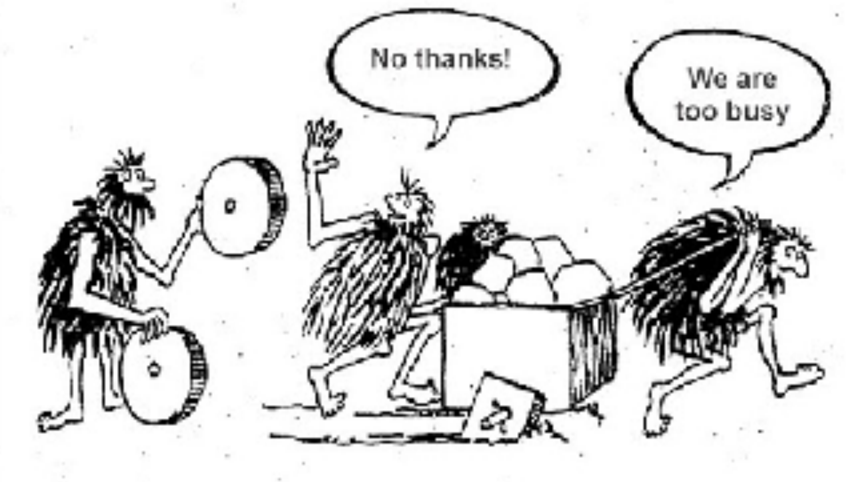
Managing the Change to Wrike

The Secret to Managing the Change to Wrike



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

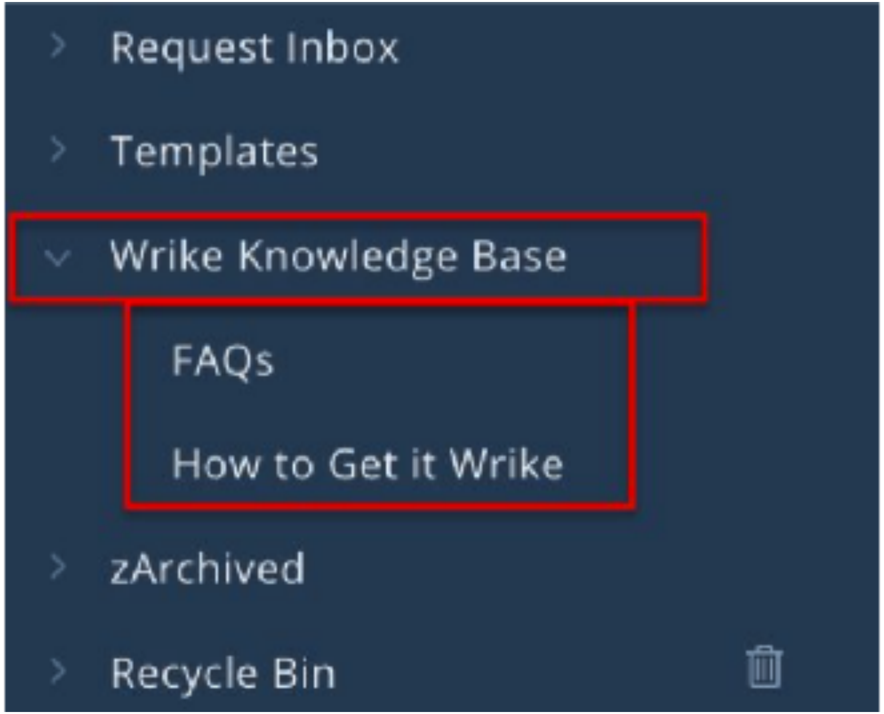
Communicate the Change

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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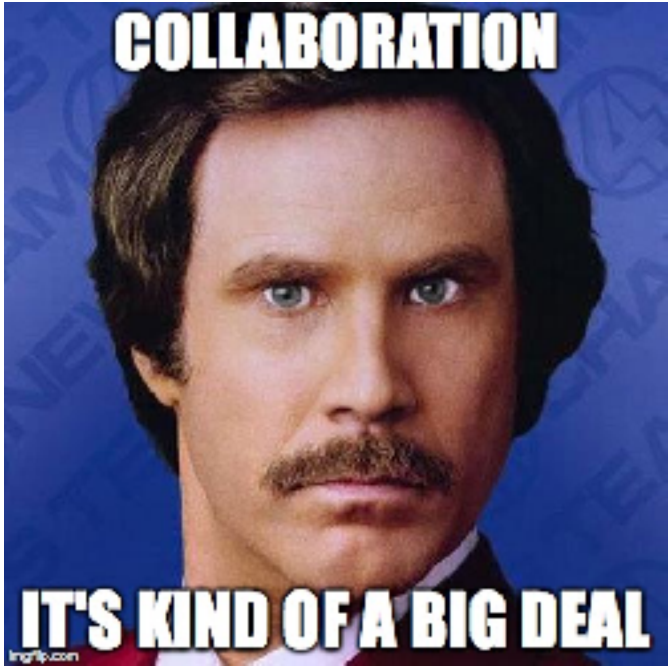
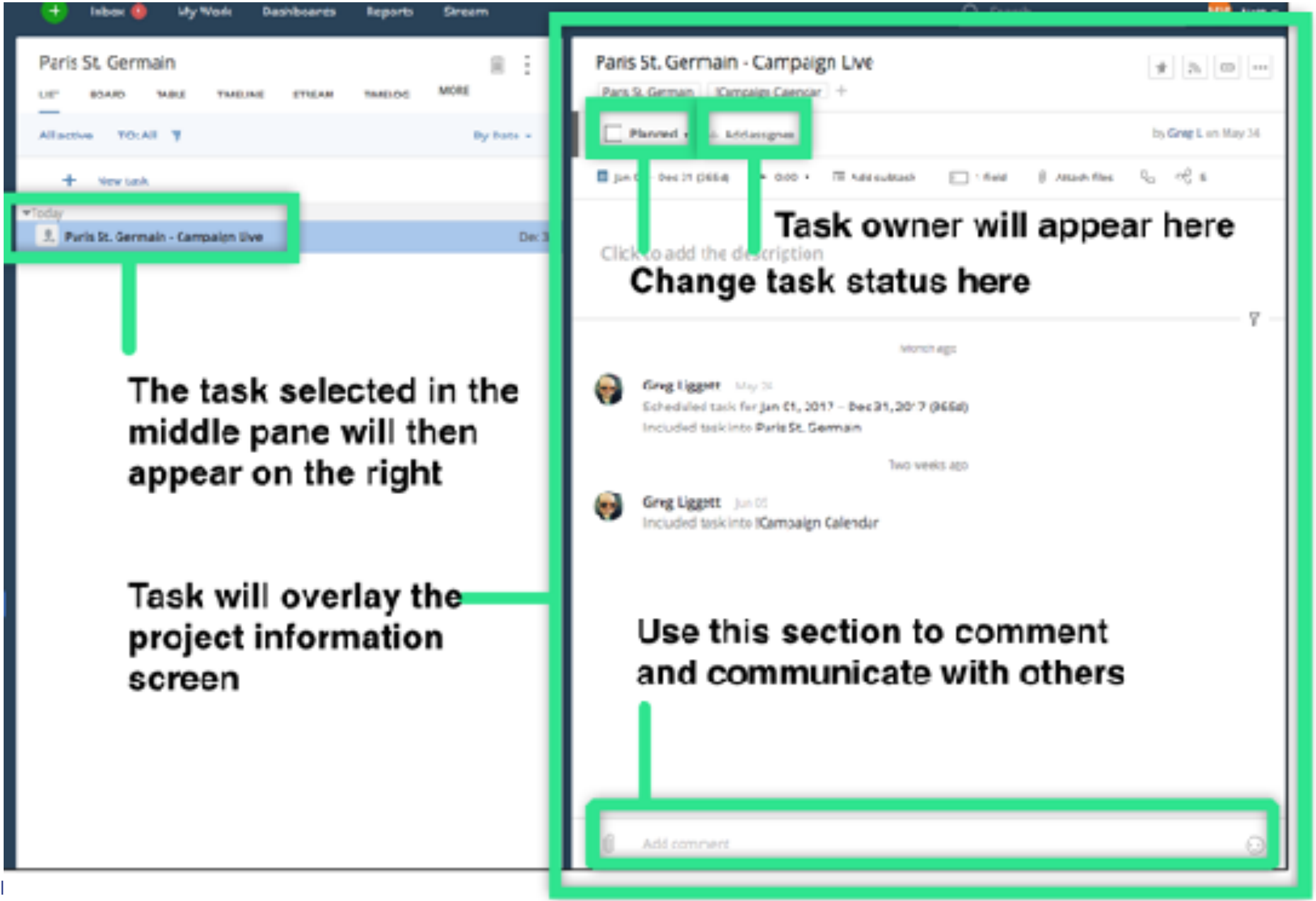
Collaboration: Centralize & Capture

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


Inbox
My Work
Dashboards
Reports
Stream
Paris St. Germain
BOARD
TABLE
TIMELINE
STREAM
TIMELOG
MORE
All active
By Date
New task
Today
Paris St. Germain - Campaign Live
Paris St. Germain - Campaign Live
Planned
Click to add the description
Greg Liggett
Included task into Paris St. Germain
Two weeks ago
Greg Liggett
Included task into !Campaign Calendar
Add comment
Task owner will appear here
Change task status here
The task selected in the middle pane will then appear on the right
Task will overlay the project information screen
Use this section to comment and communicate with others

Chicagol

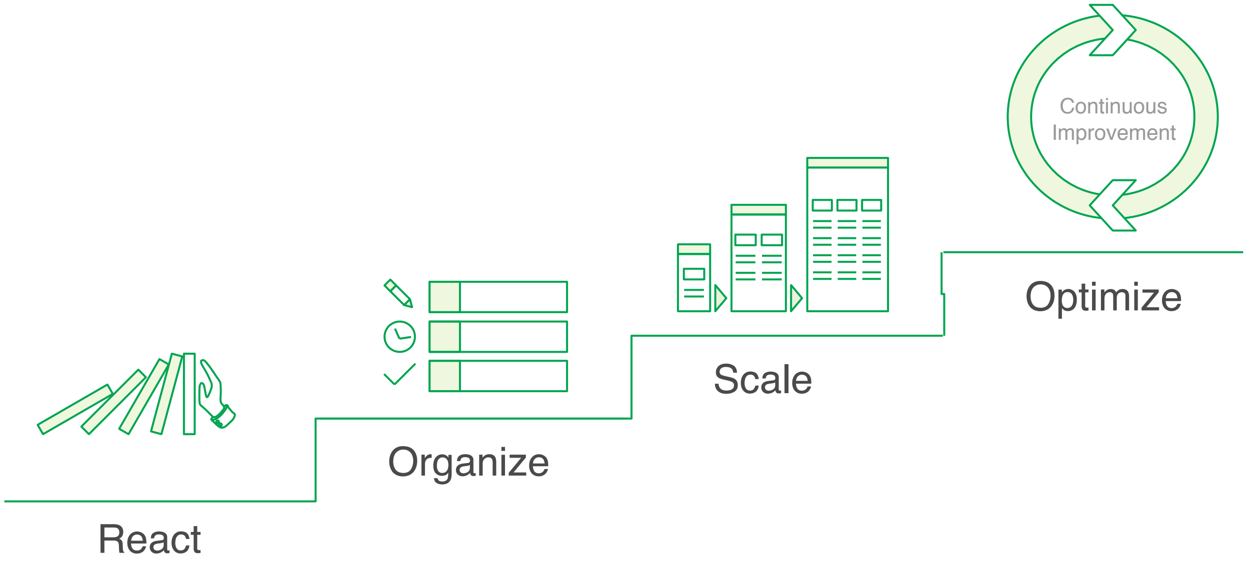
Bringing it all together

PLANNING

PROCESS

COLLABORATION

VISIBILITY



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Q&A

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Thank you

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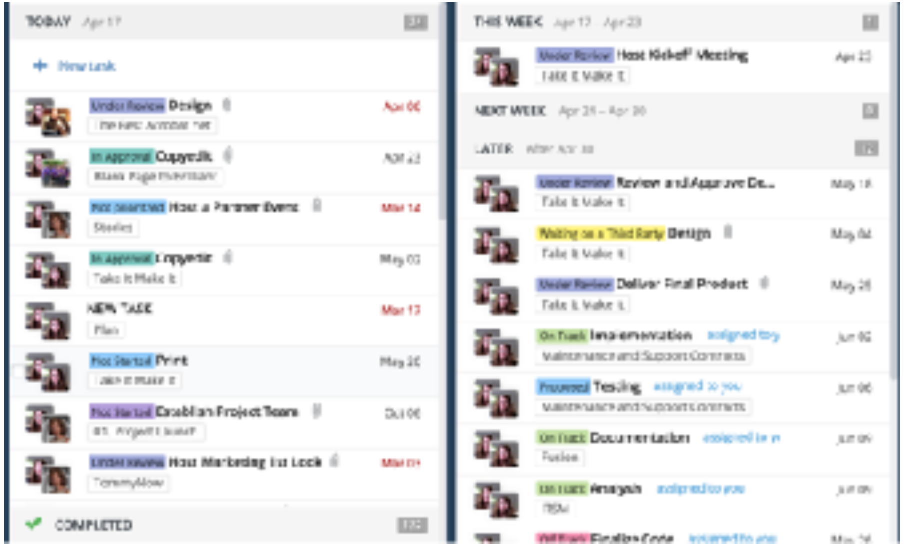
Bonus! Dashboards & Reports

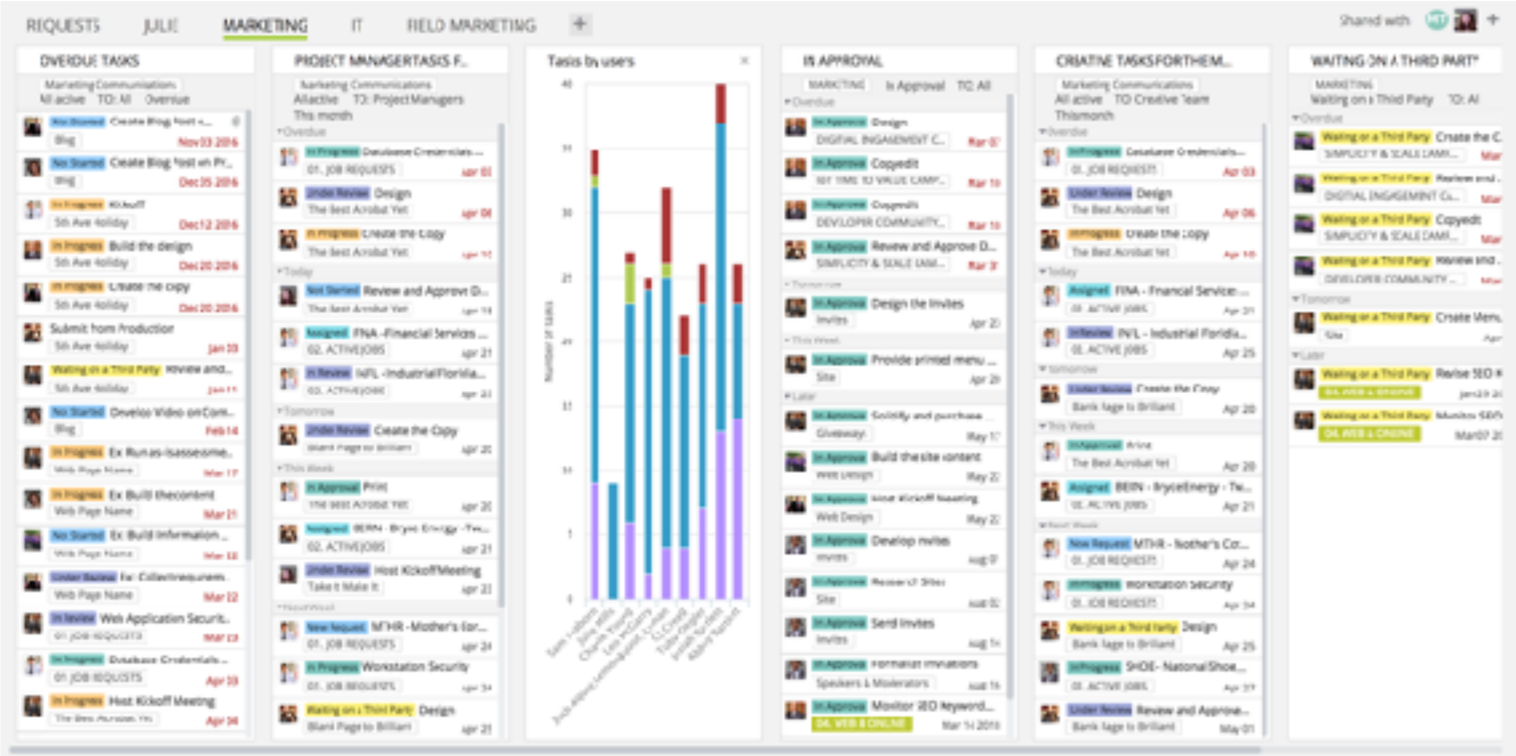
Individuals Have Visibility Over Their Work

MyWork for Task Assignments

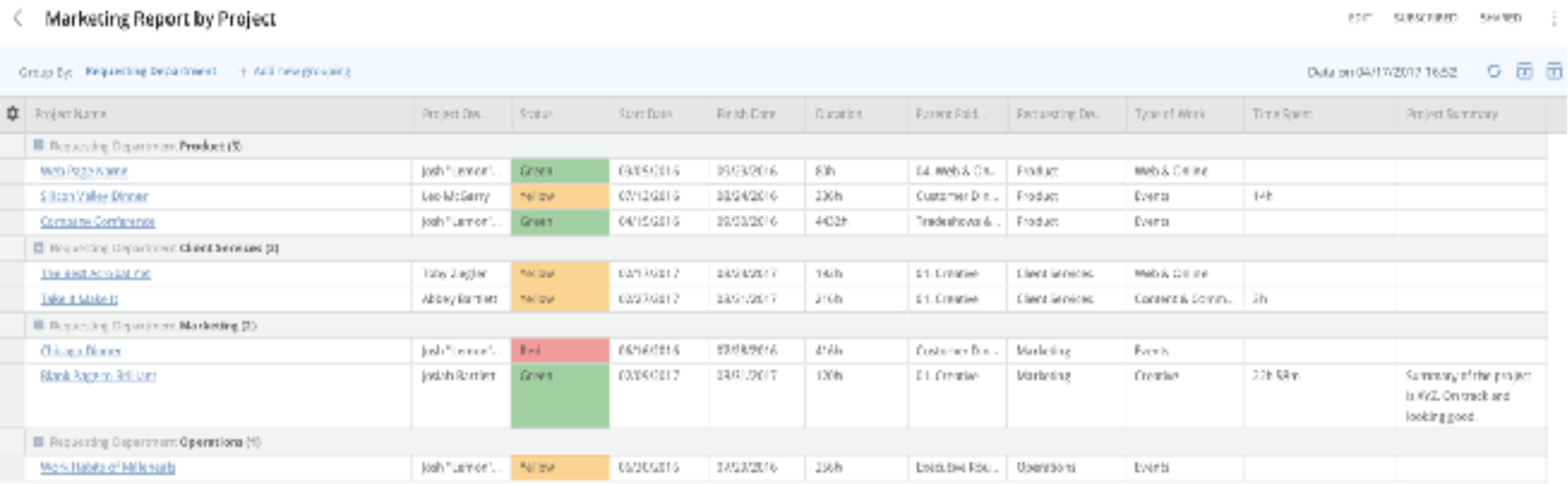


Inbox for Notifications

Create Team-Based Dashboards for Managers



Build Reports for Management



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