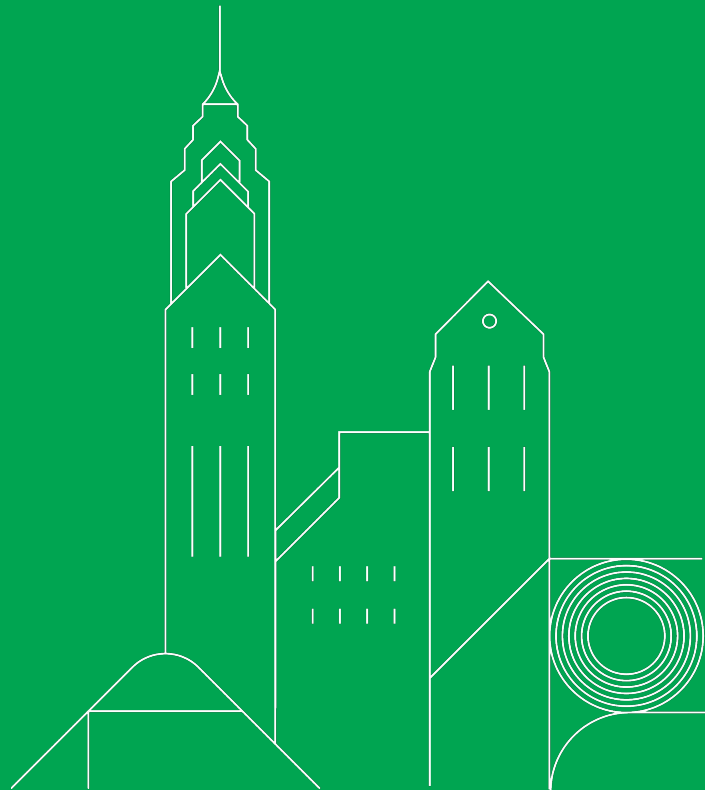
WRIKE
PRODUCTIVITY
TOUR

Chicago Productivity Tour

November 8, 2017



Agenda

Time	Topic
12:00-12:30	Registration check-in
12:30-1:00	Lunch Keynote - “Operational Excellence” & The Wrike Way
1:00-1:15	Customer Spotlight: Weaver Consultants Group
1:15-1:30	Customer Spotlight: Euromonitor
1:30-1:45	Wrike Community
1:45-2:00	Customer Spotlight: Safelite
2:30-3:30	Breakout Sessions
3:30-4:30	Networking reception

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WRIKE
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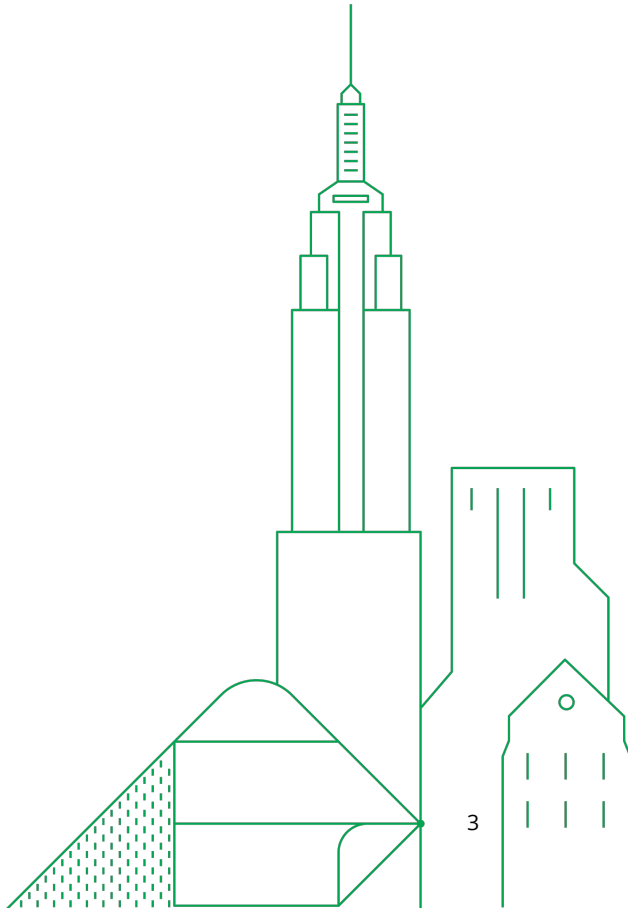
Building Operational Excellence

Frazier Miller, CMO



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Roll Call

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What We Have In Common?

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The Endeavor We All Share...

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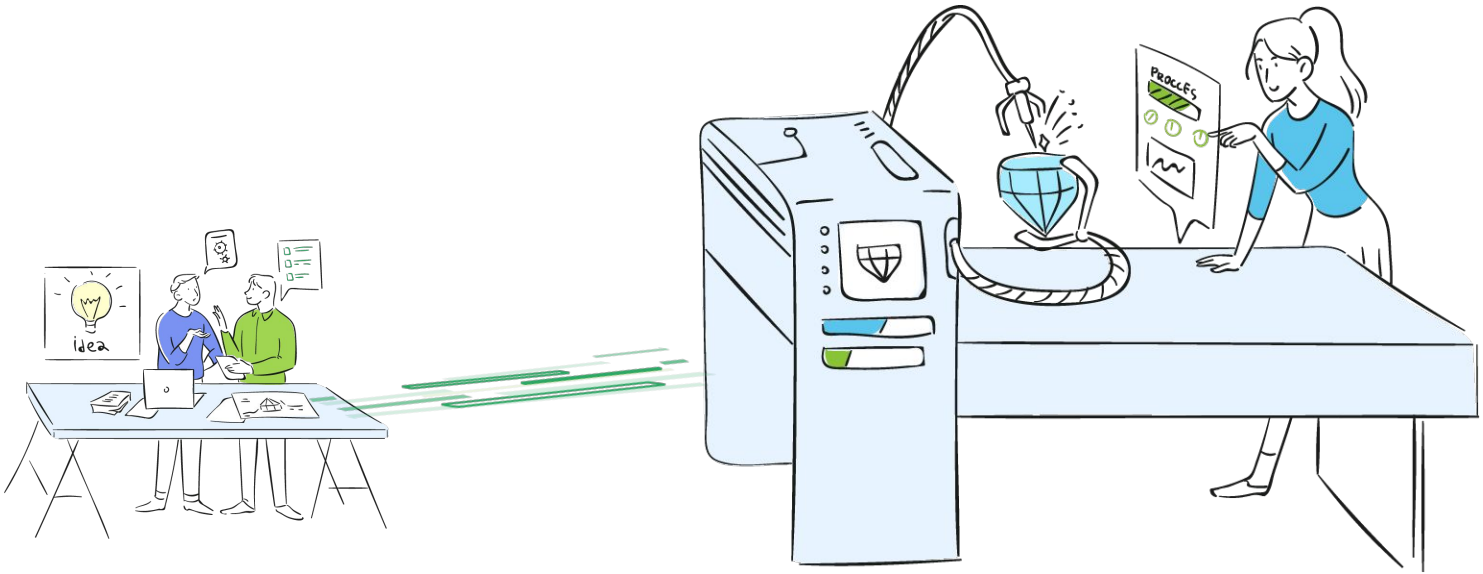
The Endeavor We All Share...



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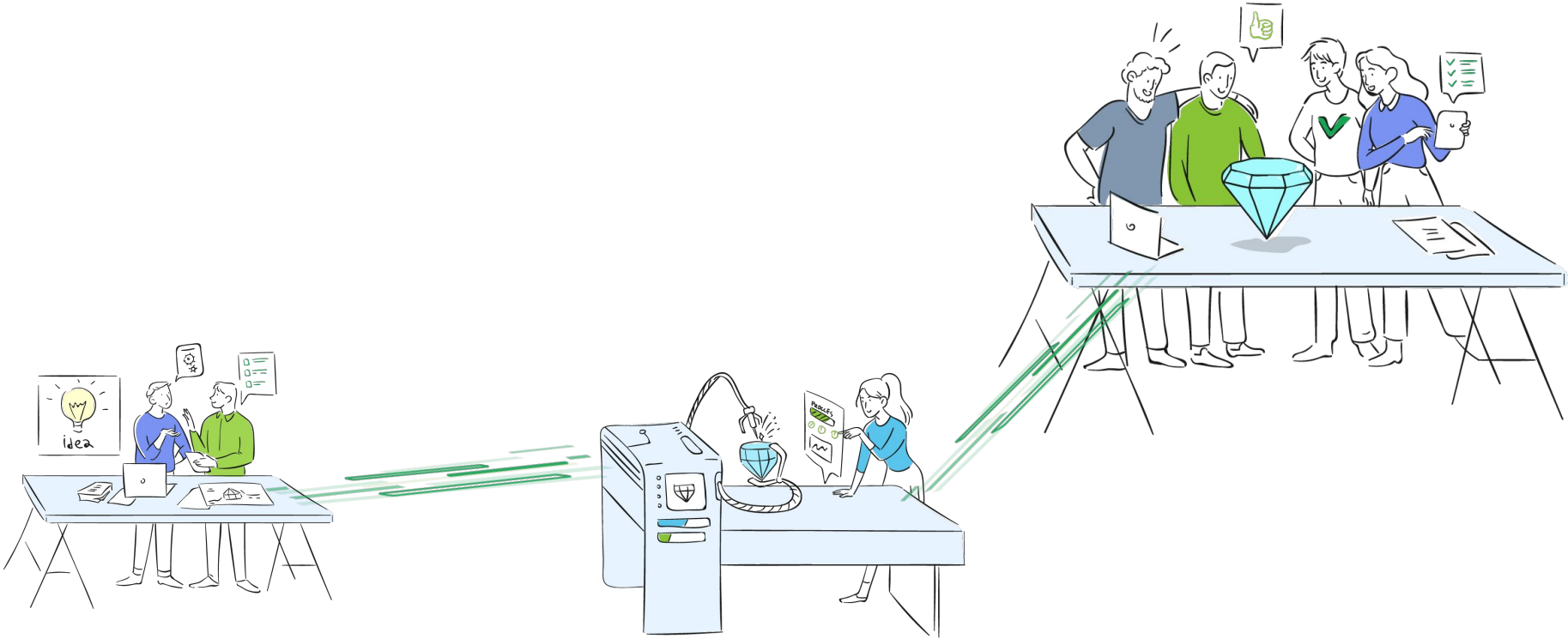
The Endeavor We All Share...



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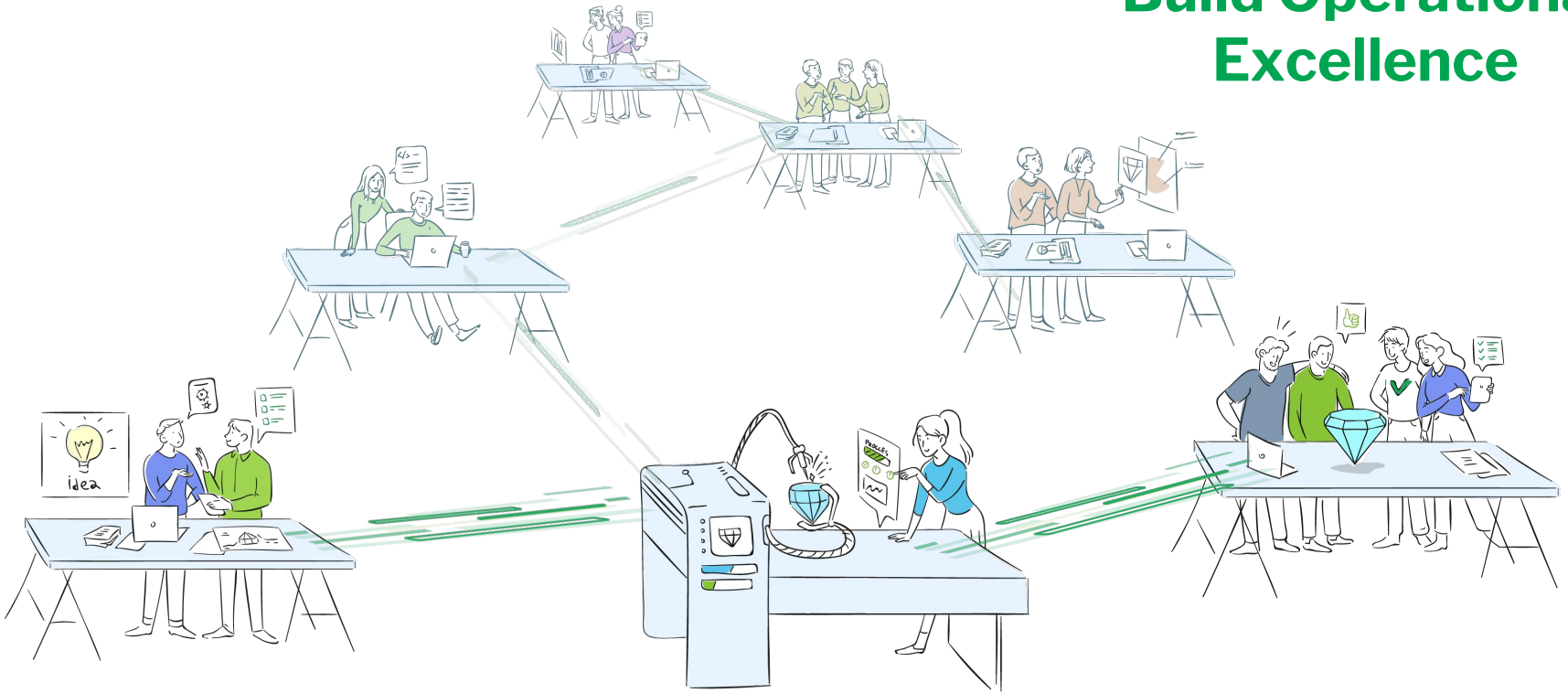
The Endeavor We All Share...

Build Operational Excellence



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Challenges To Building Excellence

1. Digital work is difficult to touch and feel
2. Proliferation of multiple systems
3. Pace of change is faster than ever

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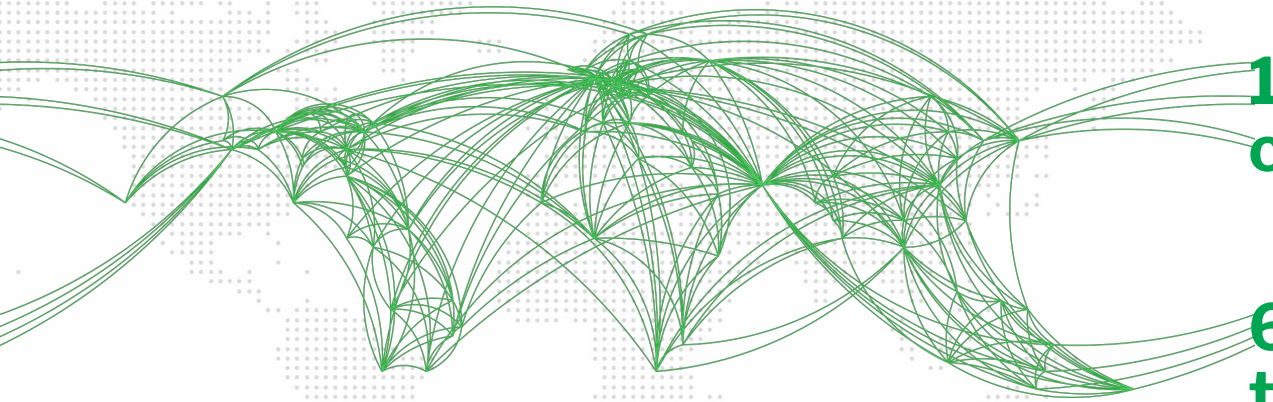
Our Mission: To Help Teams Build Operational Excellence



15,000 customers

68,000,000 tasks

airbnb

SoFi

HAWAIIAN AIRLINES.

Hootsuite®

STITCH FIX™

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Psychological safety:

Can we take risks on this team without feeling insecure?

Structure & clarity:

Are goals, roles, and execution plans on our team clear?

Impact of work:

Do we see how our work contributes to company success?

Dependability:

Can we count on each other to do high quality work on time?

Meaning of work:

Are we working on something that is personally important for each of us?

Google

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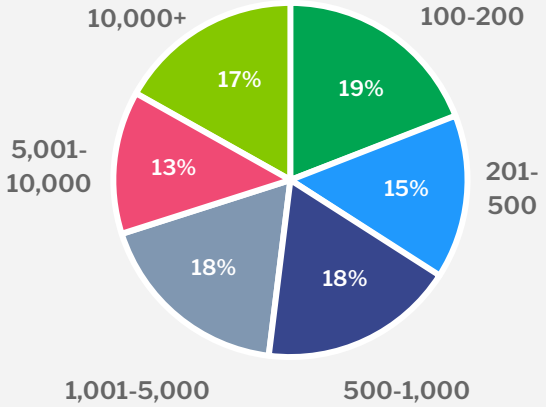
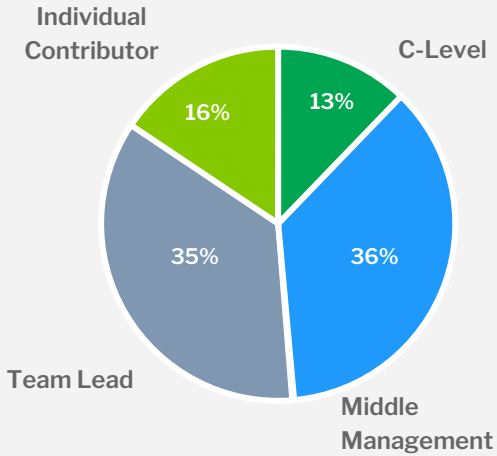
The 2017 Wrike Annual Report on Operational Excellence

Size of Company



Role



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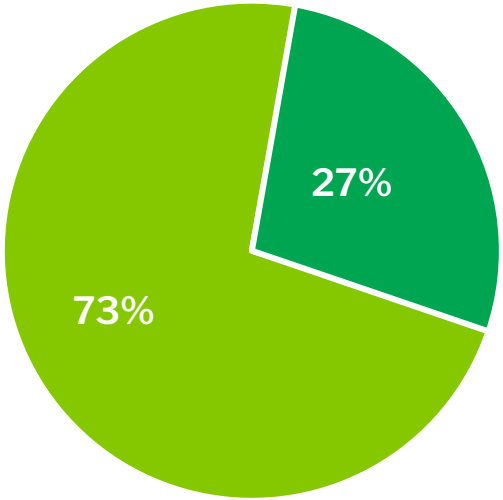
Low Self-Assessments of Operational Excellence

Almost 3/4ths of respondents felt there is room for improvement



73% of respondents were less than satisfied with their ability to plan manage and complete work

27% of respondents considered themselves “very satisfied”

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What most prevents you from executing flawlessly?

#1

Work is done across **too many systems** creating duplication of work and communication

#2

Our market / customer is **moving too quickly** for consistent, predictable delivery

#3

Lack of clarity and understanding of key requirements / objectives

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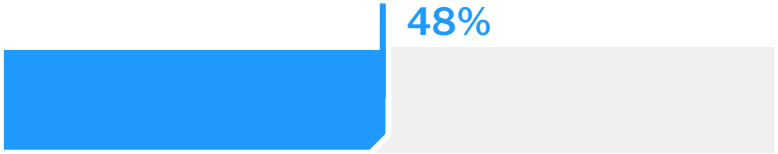
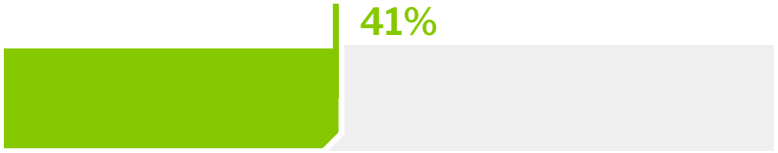
The biggest difficulties in completing projects are:

#1



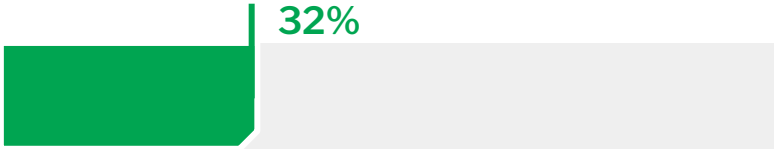
Managing the utilization of the team

#2



Having plans or requirements change midway through the project

#3



Setting accurate delivery dates

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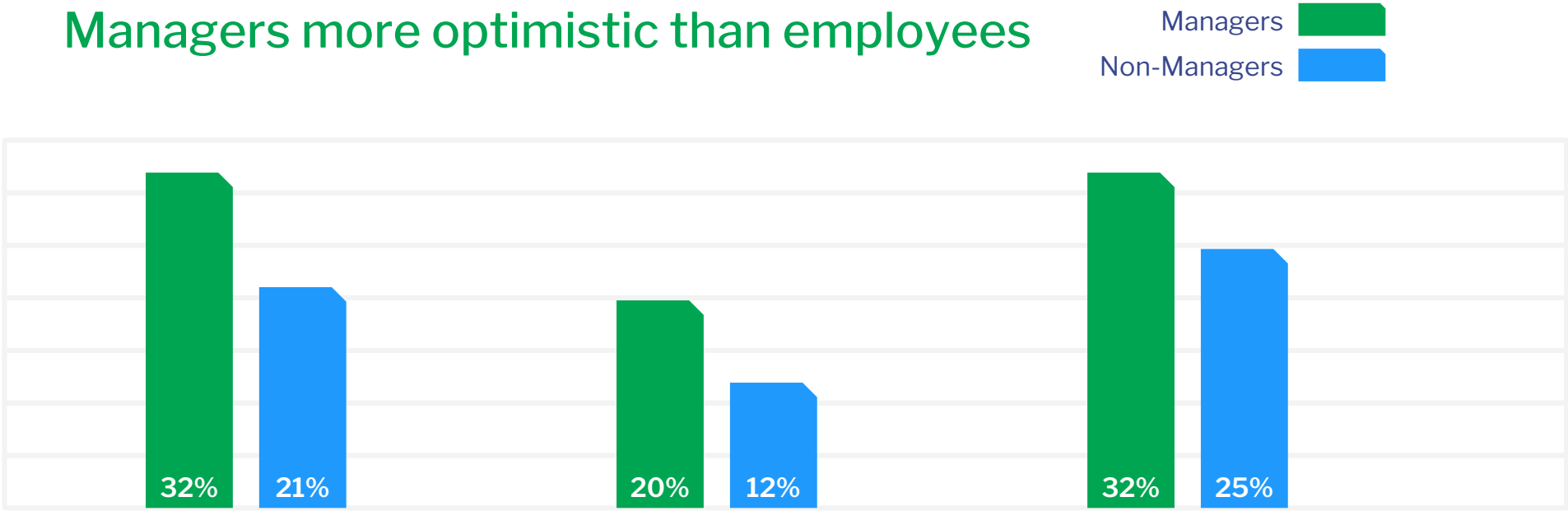
Managers more optimistic than employees



I'm very satisfied with my team's ability to plan, manage, and complete work.

Strongly agree: My current team could handle a 20% increase in workload with relative ease.

Strongly agree: My team spends more than 50% of its time on work that aligns with our company's primary business goals.

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Introducing:
The Wrike Way

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Airbnb video

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Some companies organize their work like this ...

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Others manage to do so without the chaos...

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What do they do differently?

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The Maturity Model for Work Management Success

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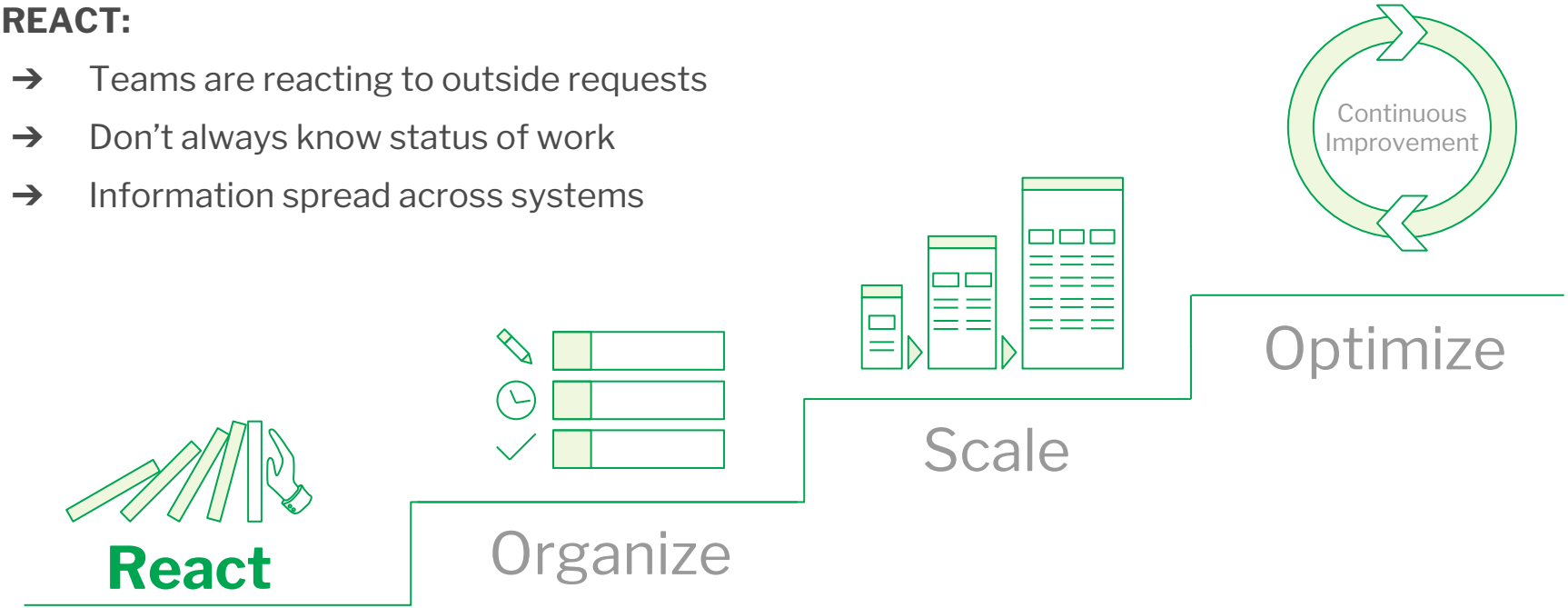
Starting Point: React

REACT:

- ➔ Teams are reacting to outside requests
- ➔ Don’t always know status of work
- ➔ Information spread across systems



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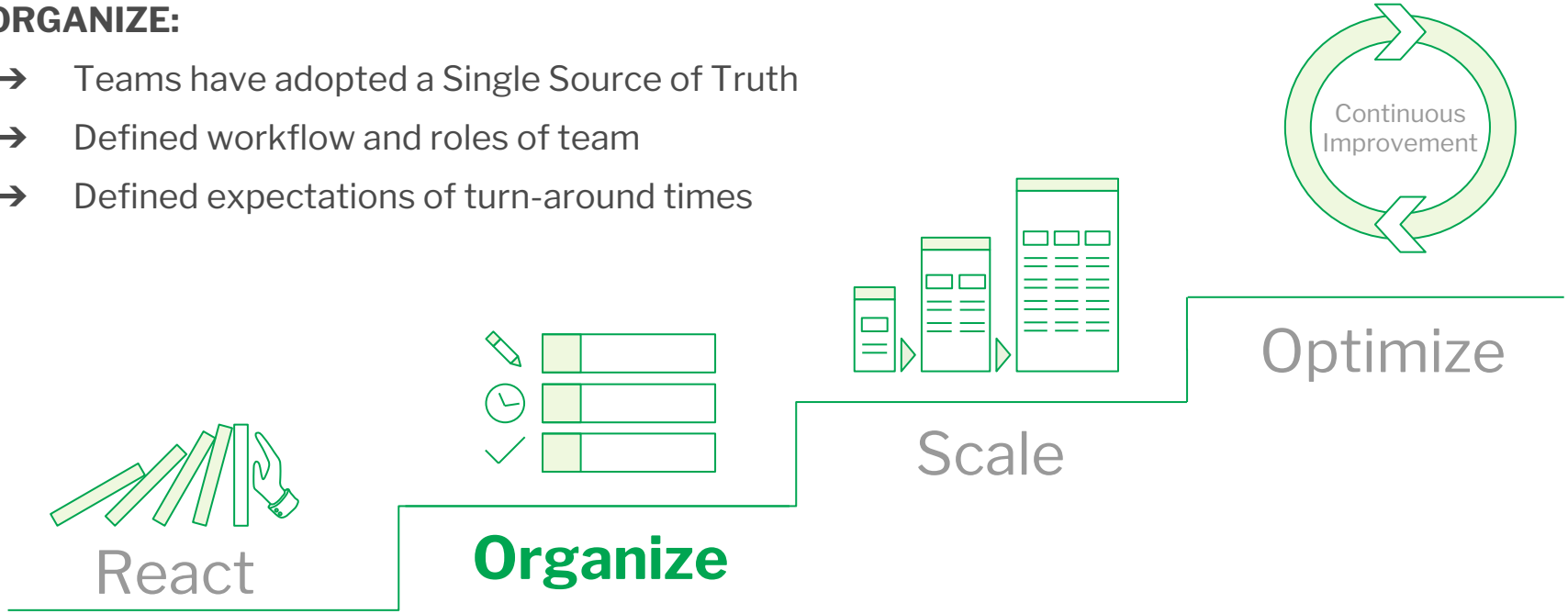
Phase 1: Organize

ORGANIZE:

- ➔ Teams have adopted a Single Source of Truth
- ➔ Defined workflow and roles of team
- ➔ Defined expectations of turn-around times



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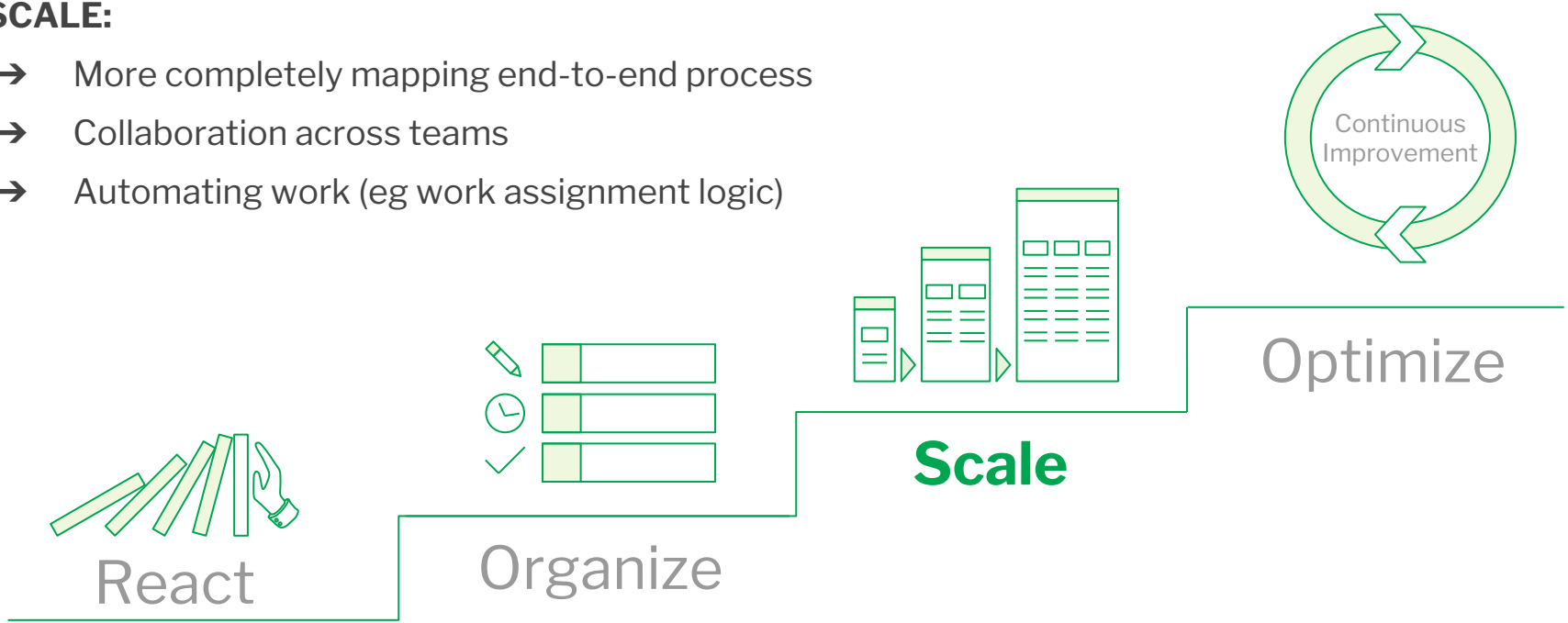
Phase 2: Scale

SCALE:

- ➔ More completely mapping end-to-end process
- ➔ Collaboration across teams
- ➔ Automating work (eg work assignment logic)



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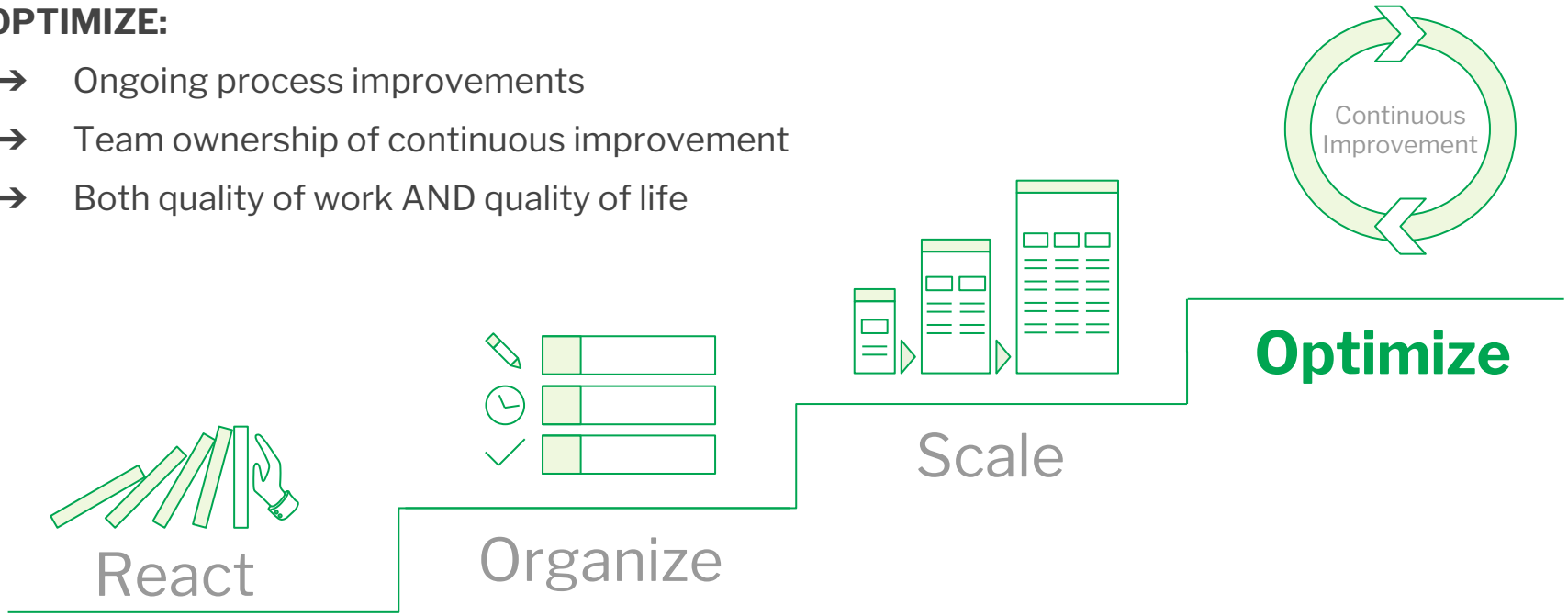
Phase 3: Optimize

OPTIMIZE:

- ➔ Ongoing process improvements
- ➔ Team ownership of continuous improvement
- ➔ Both quality of work AND quality of life



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The 4 Disciplines to Operational Excellence

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4 Disciplines and 3 Stages of The Wrike Way

	React	1. Organize	2. Scale	3. Optimize
PLANNING				
PROCESS				
COLLABORATION				
VISIBILITY				

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4 Disciplines and 3 Stages of The Wrike Way

	React	1. Organize	2. Scale	3. Optimize
PLANNING		Core work captured in one system. Goals & timelines estimated.		
PROCESS				
COLLABORATION				
VISIBILITY				

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4 Disciplines and 3 Stages of The Wrike Way

	React	1. Organize	2. Scale	3. Optimize
PLANNING		Core work captured in one system. Goals & timelines estimated.	Expanded scope of work and goals & timelines	
PROCESS				
COLLABORATION				
VISIBILITY				

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4 Disciplines and 3 Stages of The Wrike Way

	React	1. Organize	2. Scale	3. Optimize
PLANNING		Core work captured in one system. Goals & timelines estimated.	Expanded scope of work and goals & timelines	Timelines & goals set based on historical performance
PROCESS				
COLLABORATION				
VISIBILITY				

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4 Disciplines and 3 Stages of The Wrike Way

	React	1. Organize	2. Scale	3. Optimize
PLANNING				
PROCESS	Ad hoc work intake; unclear roles & responsibilities			
COLLABORATION				
VISIBILITY				

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4 Disciplines and 3 Stages of The Wrike Way

	React	1. Organize	2. Scale	3. Optimize
PLANNING				
PROCESS	Ad hoc work intake; unclear roles & responsibilities	ID and standardize key processes with clear roles/respons.		
COLLABORATION				
VISIBILITY				

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4 Disciplines and 3 Stages of The Wrike Way

	React	1. Organize	2. Scale	3. Optimize
PLANNING				
PROCESS				
COLLABORATION		Project info, dialogue is centrally located & accessible		
VISIBILITY				

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4 Disciplines and 3 Stages of The Wrike Way

	React	1. Organize	2. Scale	3. Optimize
PLANNING				
PROCESS				
COLLABORATION		Project info, dialogue is centrally located & accessible	Cross team coordination to break down silos and speed work velocity.	
VISIBILITY				

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4 Disciplines and 3 Stages of The Wrike Way

	React	1. Organize	2. Scale	3. Optimize
PLANNING				
PROCESS				
COLLABORATION				
VISIBILITY	Reliance on meetings or email to understand and report on status			

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4 Disciplines and 3 Stages of The Wrike Way

	React	1. Organize	2. Scale	3. Optimize
PLANNING				
PROCESS				
COLLABORATION				
VISIBILITY	Reliance on meetings or email to understand and report on status	Basic reports & dashboards give insight to progress / expose bottlenecks		

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4 Disciplines and 3 Stages of The Wrike Way

	React	1. Organize	2. Scale	3. Optimize
PLANNING				
PROCESS				
COLLABORATION				
VISIBILITY	Reliance on meetings or email to understand and report on status	Basic reports & dashboards give insight to progress / expose bottlenecks		Established view of work both at macro and micro levels. Triggered actions.

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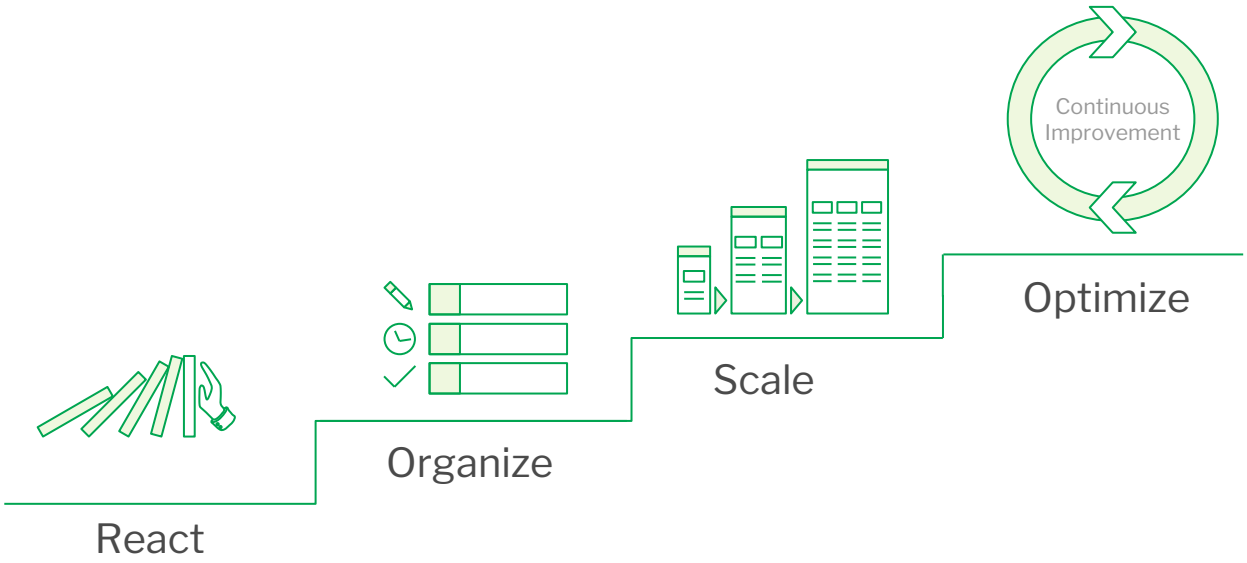
Bringing it all together

PLANNING

PROCESS

COLLABORATION

VISIBILITY



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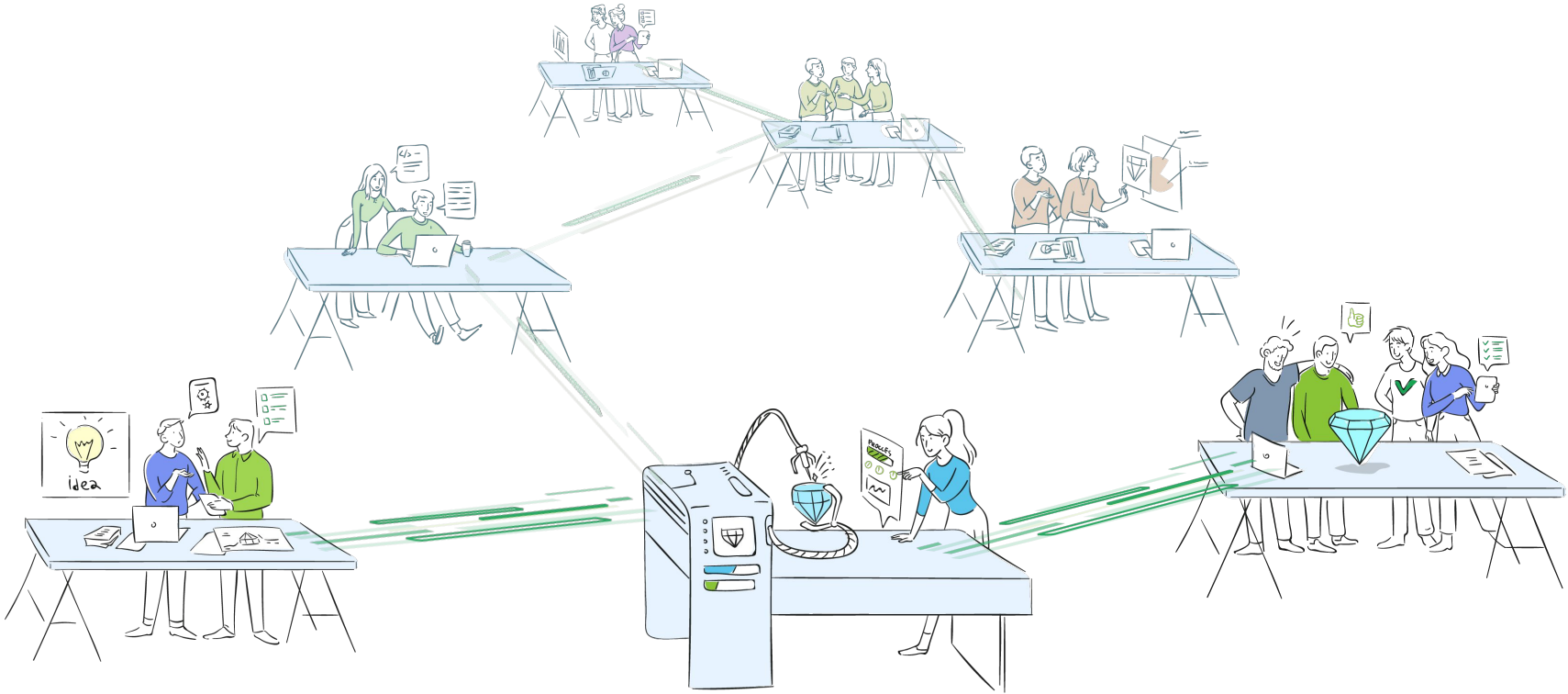
We Share Your Passion For Excellence!



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TOUR

Thank you

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Customer Spotlight Interview: Weaver Consultants Group

Genia Jacques,
VP Customer Success

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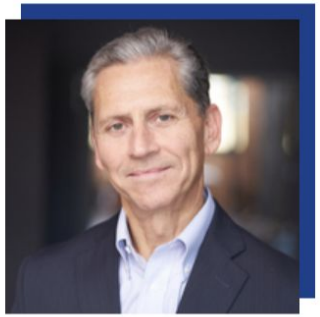
Weaver Consultants Group

Number of Employees: 200+
Number of Wrike Users: 50+



T.J. Farrentella
CFO Consultant
Weaver Consultants Group

"Wrike is probably the only change we've ever implemented in Accounting where everyone saw the immediate benefit. We no longer have tasks and projects slipping off the radar screen. We've reduced our time to close by 50% with a really great increase in reliability and accountability. We've moved from being a group of strong solo players to being a team"

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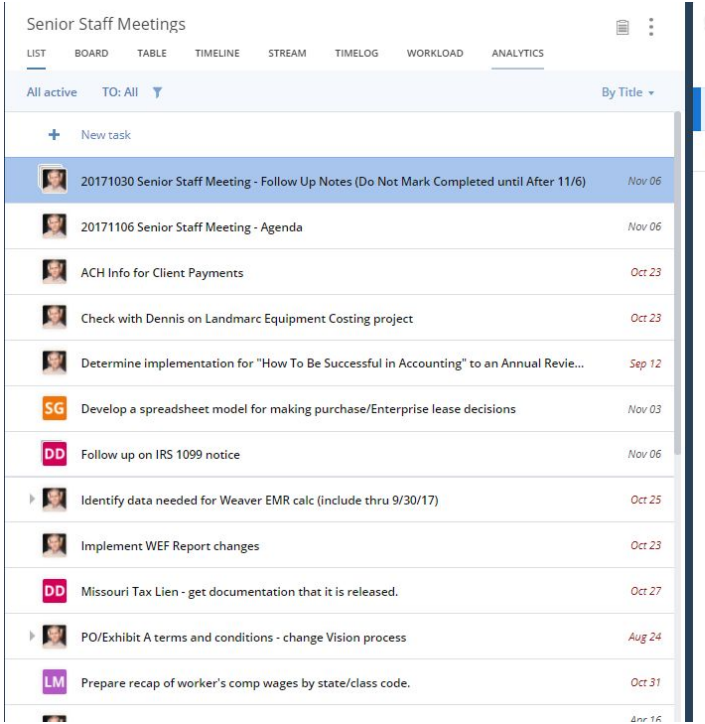
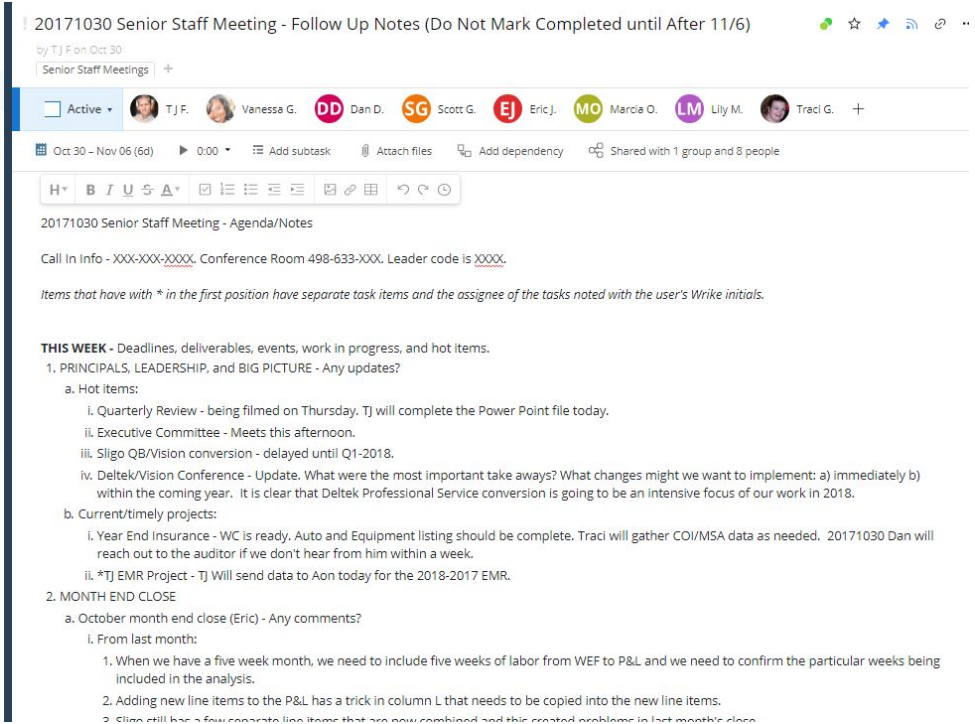
Weaver Consultants Group - Dashboard

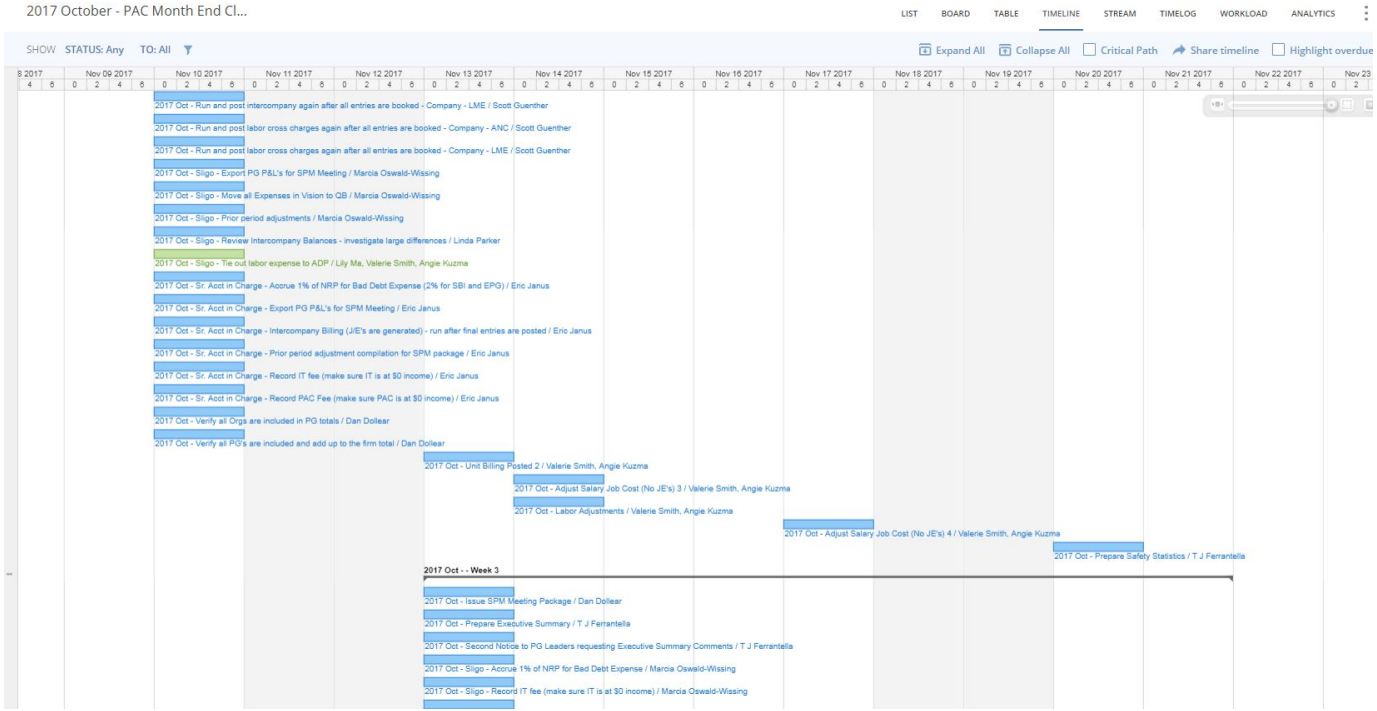
Weaver Consultants Group





Weaver Consultants Group - Dashboard

Weaver Consultants Group



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Customer Spotlight Interview: Euromonitor

Genia Jacques,
VP Customer Success

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EUROMONITOR INTERNATIONAL

Lauren Beth
Communications Director
Euromonitor International

Number of Employees: 1200
Number of Wrike Users: 100

"Wrike has changed my life as a manager. Until recently I had 15 direct reports, many of them outside of this country. Wrike gave me an overarching view without having to dig in or have a meeting about something to learn what's going on. Wrike allows me to see directly what's happening and feel more comfortable about what's going on."

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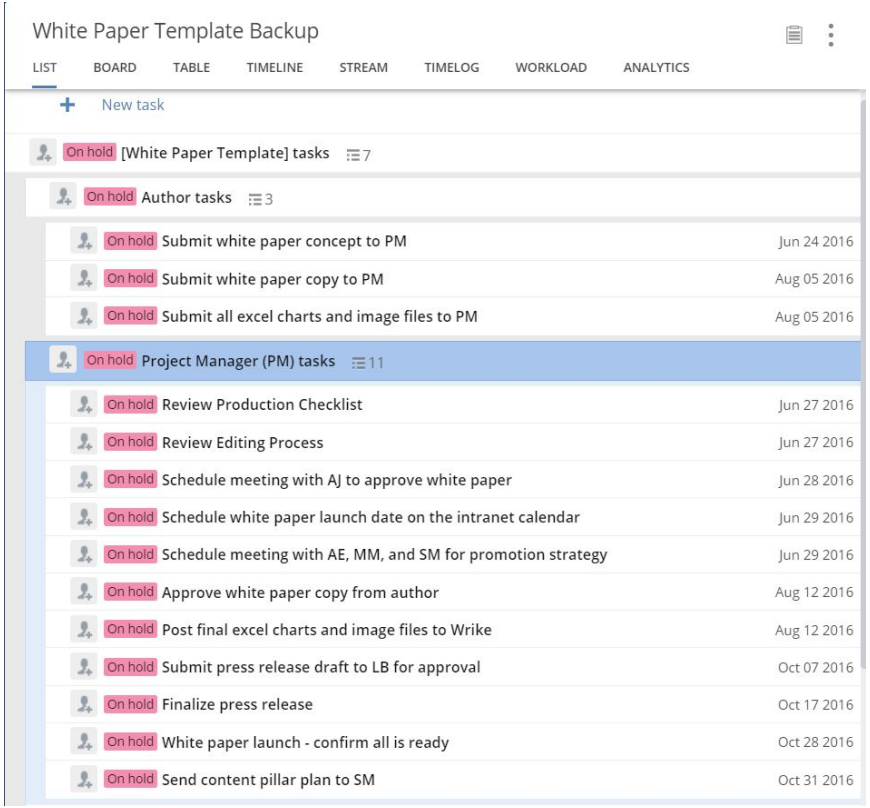
Euromonitor - Dashboard

EUROMONITOR INTERNATIONAL



Campaign request form

This area collects requests across the organisation for potential future marketing campaigns. Campaigns will be collected and reviewed with directors on a quarterly basis. If your campaign is selected for the forthcoming quarter, we will reach out to get started.

Does your manager know about this campaign idea? *

What department are you in? *

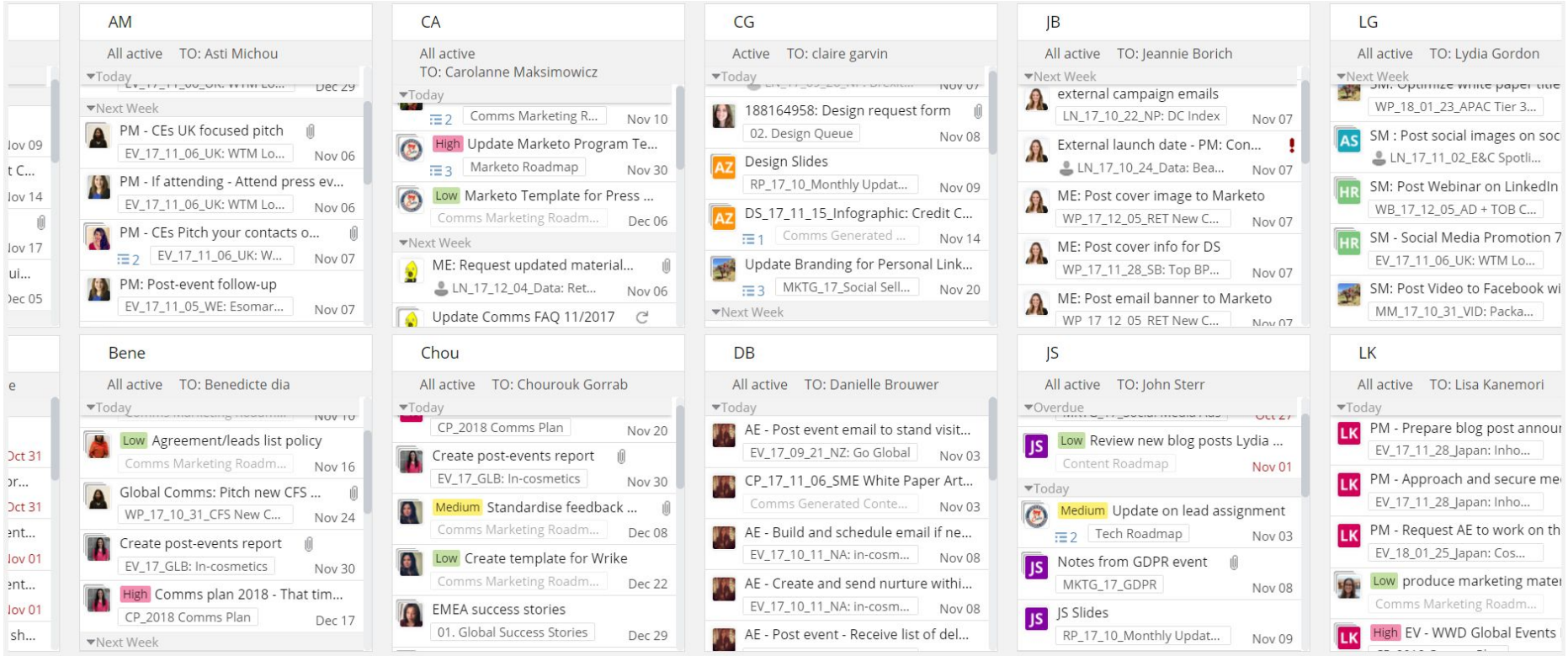
Select your office *

When would you like this campaign to be released in the next quarter? *

What products and/or capabilities should this campaign promote? *

Applications - who would this be applicable to? More than just your territory? (e.g. other offices, verticals) - We need to get the most bang for our resources! Try to shape the campaign in a way that is beneficial for you as well as other parts of the business *

Euromonitor - Dashboard



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Community, Feedback, + More

Stephanie Westbrook
Wrike Community Manager

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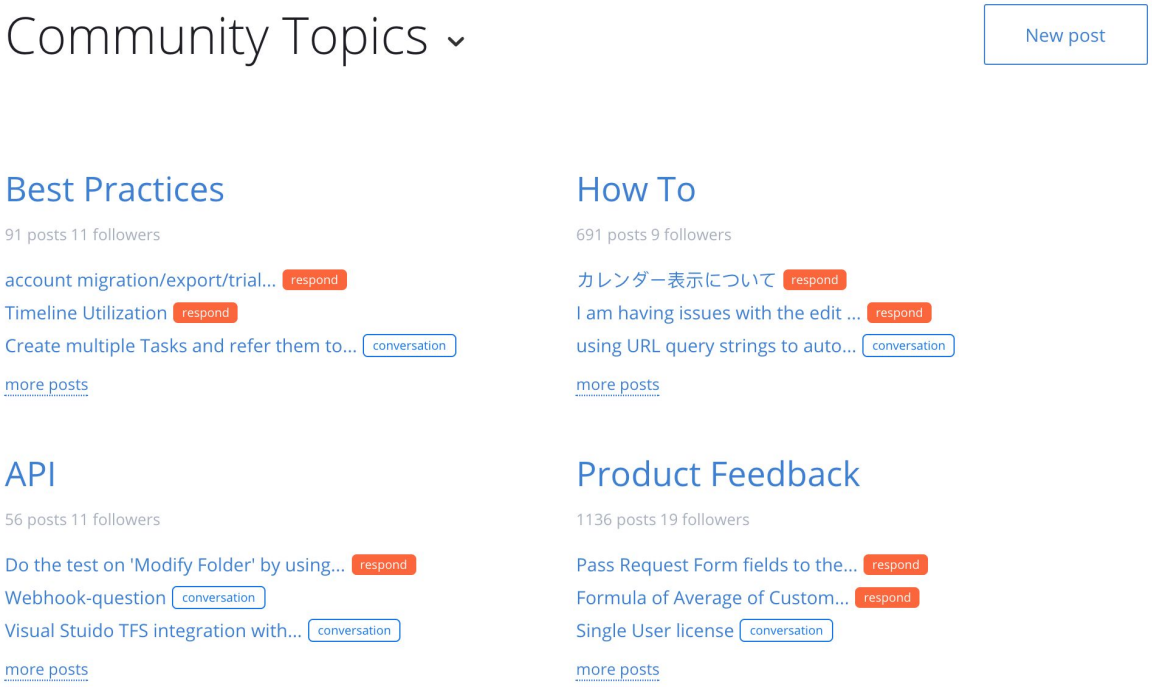
Community Forums



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What happens there?

- Questions
- Best practices
- How-tos
- Product feedback

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Your space.
Your questions.
Your use case.

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Your Resource, Your Questions, Your Use Case

I want to run a Report that shows “x”. How can I do that?

We want people to adopt the tool more.

We need our customers, not users, to fill out Requests.

What is Proofing and Approvals?????

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Tommy Boucher

Today at 13:50

How to keep people motivated when the load is very high

+ 0 −

Heiko Benke Orange Belt

Today at 14:27

...with chocolate. :-)

+ 0 −

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Don’t have questions?

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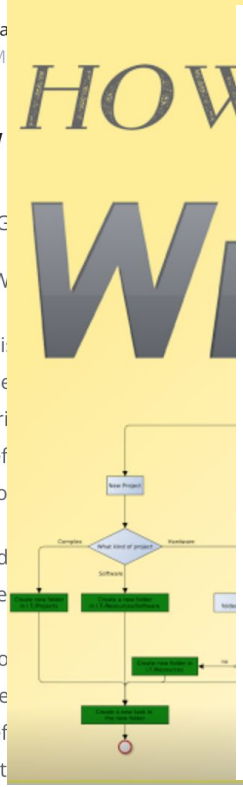

I created 4 folders for the following, giving them short names and colors I could quickly recognize

- *Critical and Immediate* | **crit-im**
- *Critical but Not Immediate* | **crit-not**
- *Not Critical but Immediate* | **im-not**
- *Neither* | **not**

	Immediate	Not Immediate
Critical	Critical and immediate	Critical but not Immediate
Not Critical	Not Critical but Immediate	Uncategorized

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More Resources

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All Getting Started Best Practices Ask the Expert
Customer Spotlight Recorded Trainings

Deliver Faster with Auto-Assigned Workflows

Next: Nov 10 (Fri), 12:00PM EST
Who might be interested

Learn how to use auto-assigned workflows to trigger assignments at each stage. Help teams by consolidating processes and eliminating wait time. Learn more

Register Now

Master the Adoption Process for Wrike

On Demand
Who might be interested

Learn the why, the how, and get real world examples of how to adopt Wrike for your team. Learn more

Watch now

Wrike Basics

On Demand
Who might be interested

Get familiar with your workspace. This session will cover key topics to help you understand Wrike so you can be productive day-to-day. Learn more

Watch now

wrike.com/webinar

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Wrike Community

Productivity Tour Chicago Community Page:
http://bit.ly/2AmXvPI

How to get your "Wrike Flare"

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Customer Spotlight Interview: Safelite

Genia Jacques,
VP Customer Success

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Safelite AutoGlass

Perrie Howes
Marketing Traffic Coordinator
Safelite

Number of Employees: 13,000
Number of Wrike Users: 24

"We use Wrike for any and all projects that need creative support from a marketing communications perspective. We've seen improvements on clarity of roles, project prioritization and ownership. This is critical for us in meeting business goals, we now have the data to show it. We also have seen a reduced number of revisions per project and increased efficiency overall by at least 20%."

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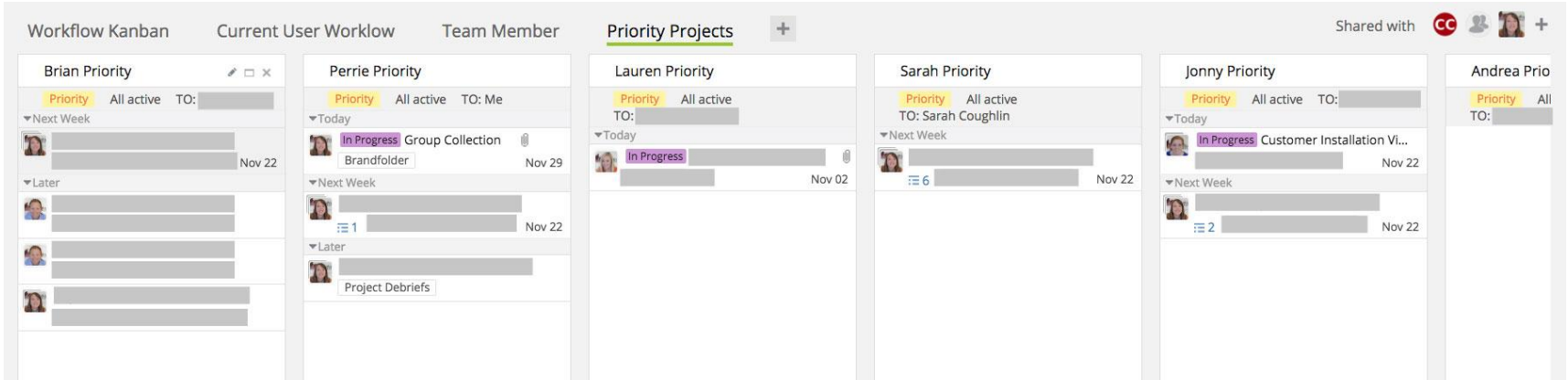
Safelite - Priority Dashboard



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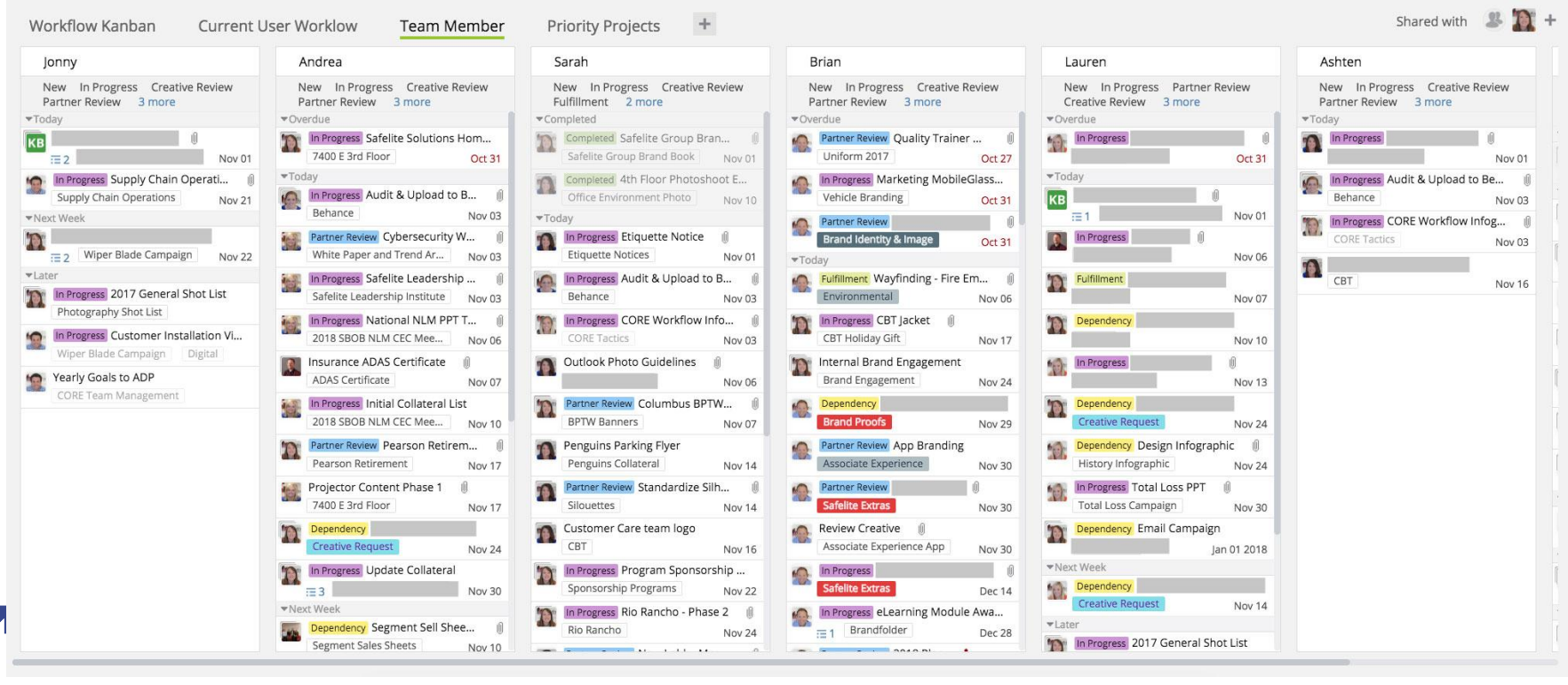
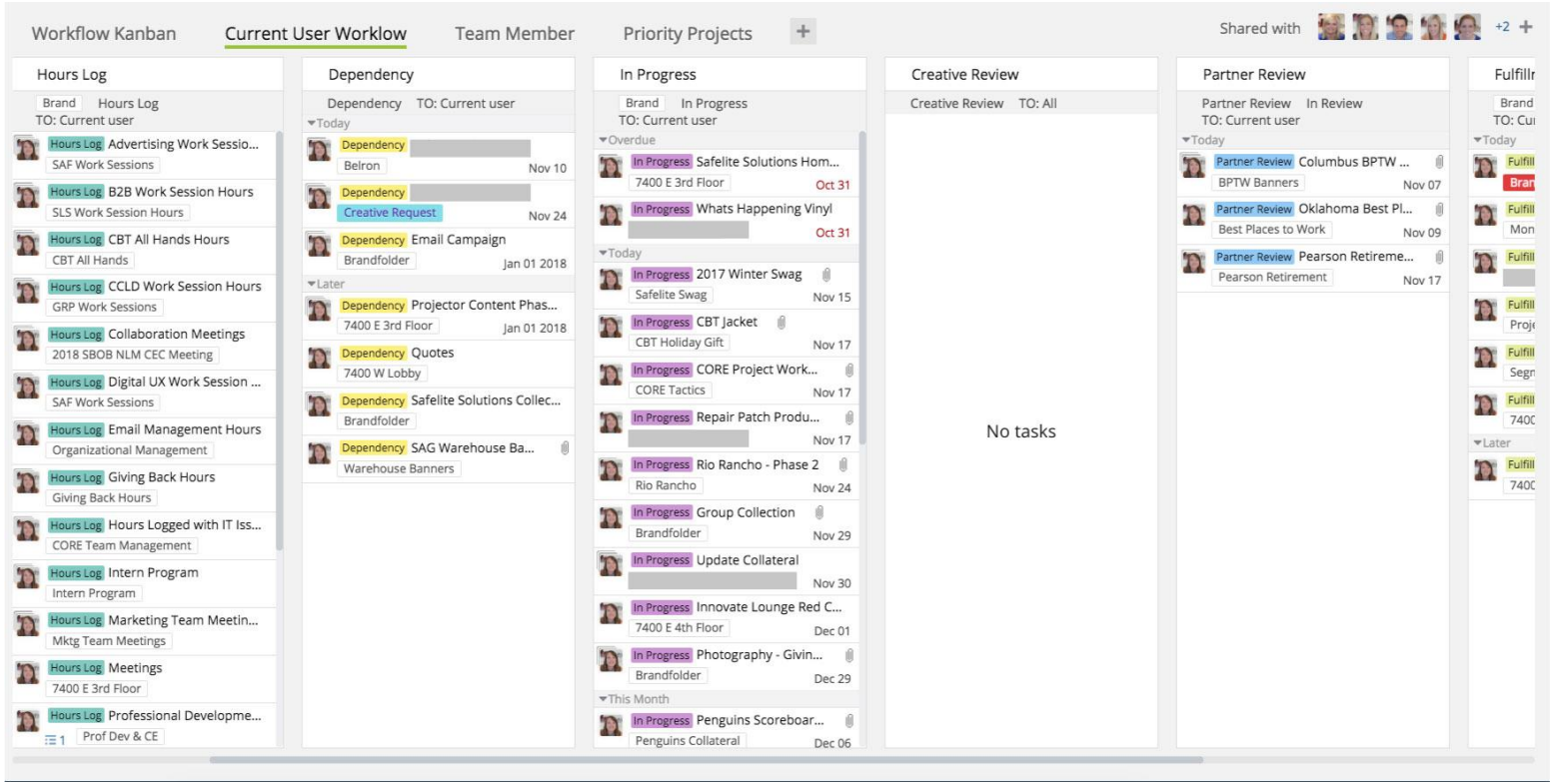
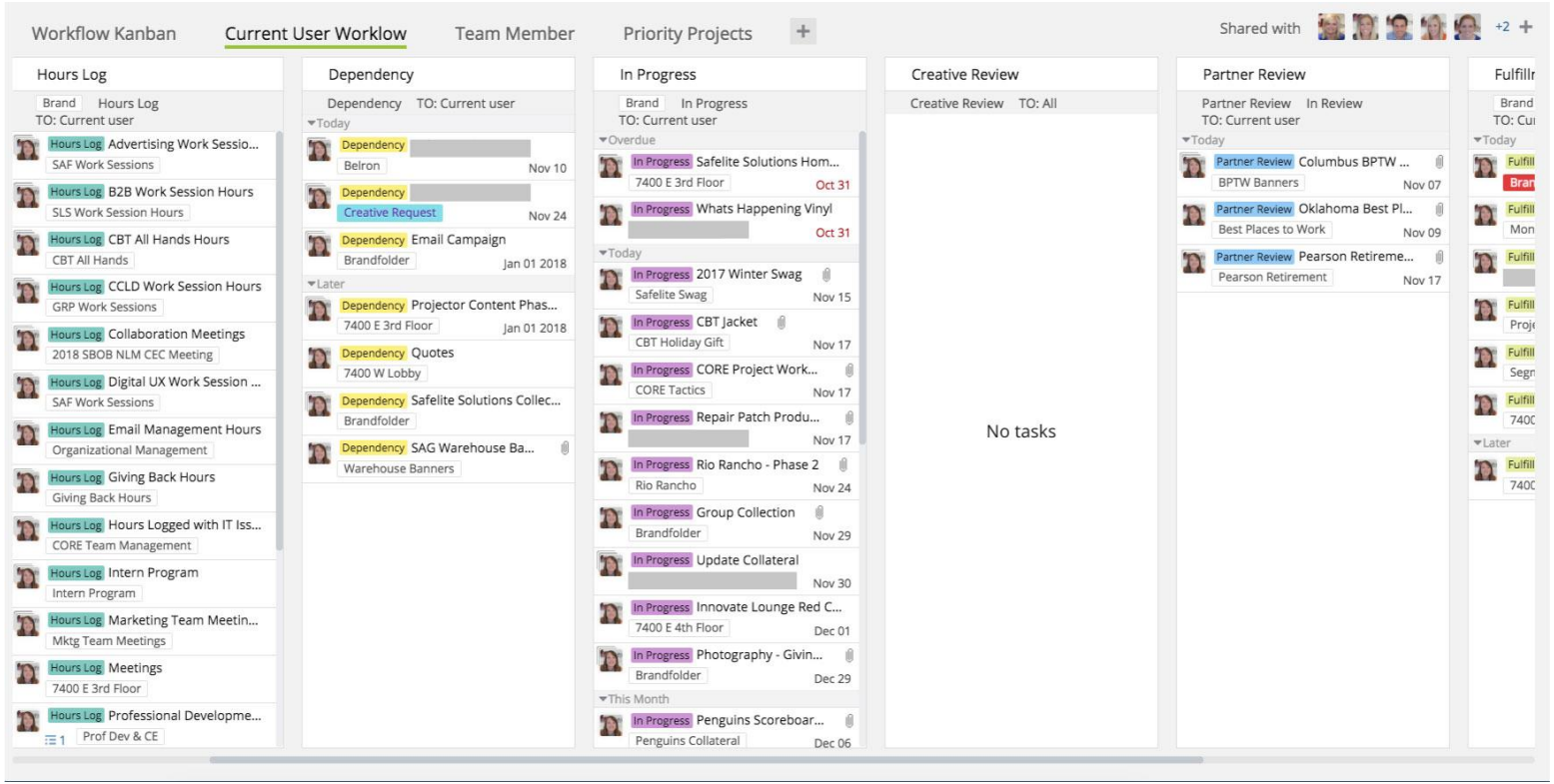
Safelite - PM Overview Dashboard



Safelite - Individual Workload Dashboard



Safelite - Individual Workload Dashboard



Safelite - Dept Project Report

B2B Weekly Task List

EDIT SUBSCRIBE SHARED ...

Group by: Parent Folder Status +

Data on Nov 1 16:28 Expand all Collapse all

	TITLE		ASSIGNEE	STATUS	DUE DATE	ID
1	7400 E 3rd Floor	20				
2	New	17				
20	In Progress	2				
21	Safelite Solutions Home Office Branded Items		[redacted]	In Progress	10/31/2017	170525241
22	Production		[redacted]	In Progress		150368972
23	Fulfillment	1				
24	Proposed Timeline		[redacted]	Fulfillment	11/17/2017	150371439
25	[redacted]	1				
28	[redacted]	4				
34	[redacted]	4				
41	Segment Sales Sheets	1				
44	[redacted]	7				
54	[redacted]	1				
57	[redacted]	1				
60	White Paper and Trend Articles	3				

Safelite - Tasks Due This Week

Tasks due this week

EDIT SUBSCRIBE SHARE ...

Group by: Status Group +

Data on Nov 1 16:26 Expand all Collapse all

	TITLE	ASSIGNEE	STATUS	DUE DATE	PARENT FOLDER
1	All active 26				
2	Marketing MobileGlassShop		In Progress	10/31/2017	Vehicle Branding
3	Safelite Solutions Home Office Branded Items		In Progress	10/31/2017	7400 E 3rd Floor, Premium Items, Staples Onboarding
4			Partner Review	10/31/2017	Brand Identity & Image
5	Whats Happening Vinyl		In Progress	10/31/2017	
6			New	11/01/2017	
7			In Progress	11/01/2017	
8	Q4 Review Prep		New	11/01/2017	Quarterly Creative Review
9			Fulfillment	11/01/2017	Brand Proofs
10	Install What's Happening		New	11/01/2017	
11	Visual Style Guide		New	11/02/2017	Environmental Style Guide
12			In Progress	11/02/2017	
13			New	11/02/2017	
14			New	11/02/2017	
15	Audit & Upload to Behance Site		In Progress	11/03/2017	Behance

WRIKE
PRODUCTIVITY
TOUR

Break Out Sessions

2:30 PM - 3:30 PM

User Group Best Practices

Track One: For People New to Wrike and Beginning/Intermediate Users

Tips & Tricks for:

- Onboarding & Change Management
- Creating Request Forms
- Creating Templates

Track Two: For Advanced Wrike Users

Best Practices

- Deploying the Wrike Way
- APIs, integrations, and other advanced use
- Visibility: dashboards, reports & workload view

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WRIKE
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TOUR

Thank you

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