



WRIKE
PRODUCTIVITY
TOUR

New User Tips & Tricks

November 14th, 2017



Meet the Presenters

Renee Olson
Customer Success Manager



Specialty: Change Management Guru and Productivity Expert

Fun Fact: Avid Green Bay Packers Fan

Steven Kearney
Customer Success Manager



Specialty: Workflow strategy and customization

Fun Fact: Former member of the Stanford Varsity Men's Golf team



Agenda

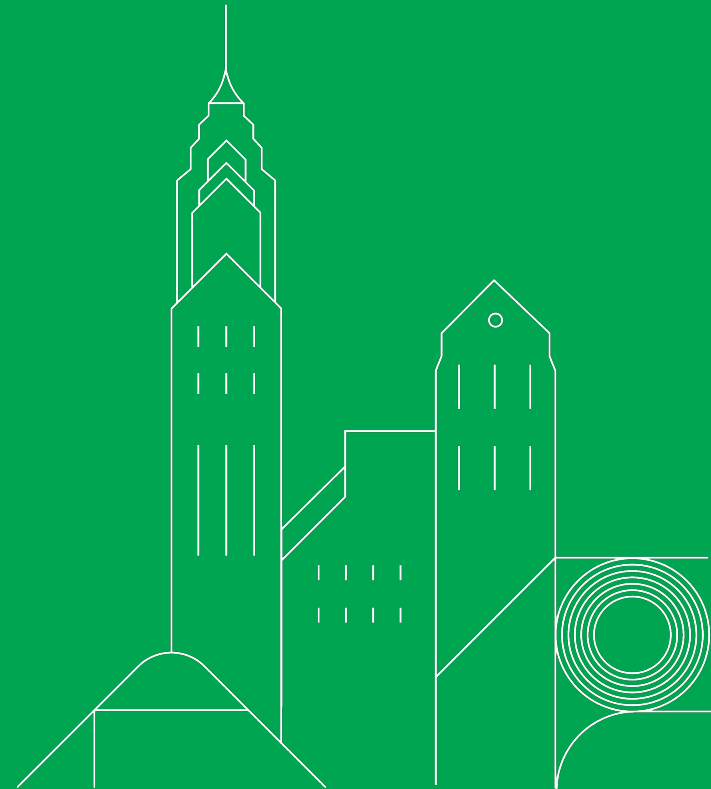
1. Operational Excellence
2. Change Management
3. Work Intake
4. Templates
5. Collaboration
6. Q&A





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Operational Excellence



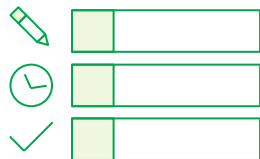
Starting Point: React

REACT:

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



React



Organize



Scale

Optimize



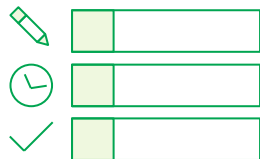
Phase 1: Organize

ORGANIZE:

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



React



Organize



Scale

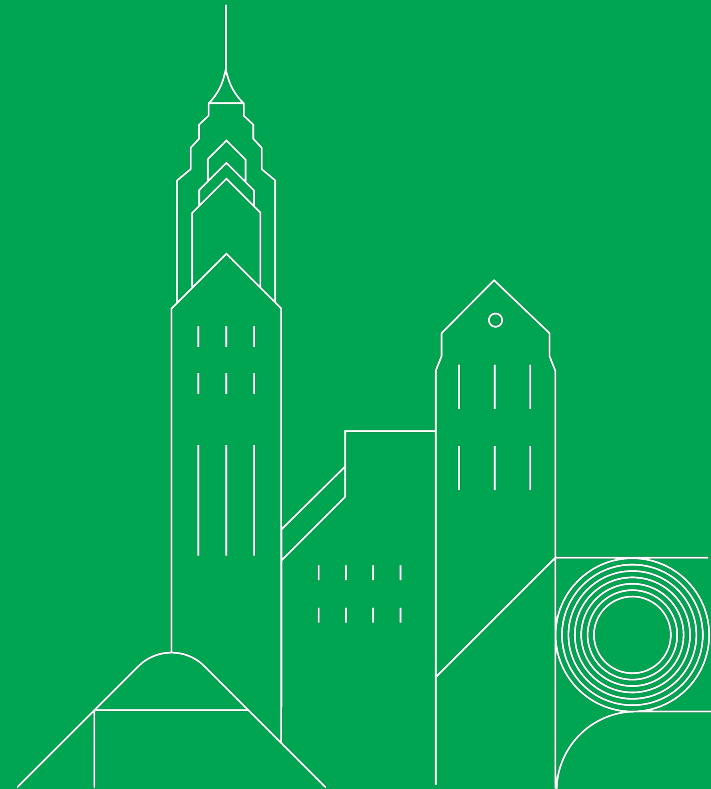
Optimize





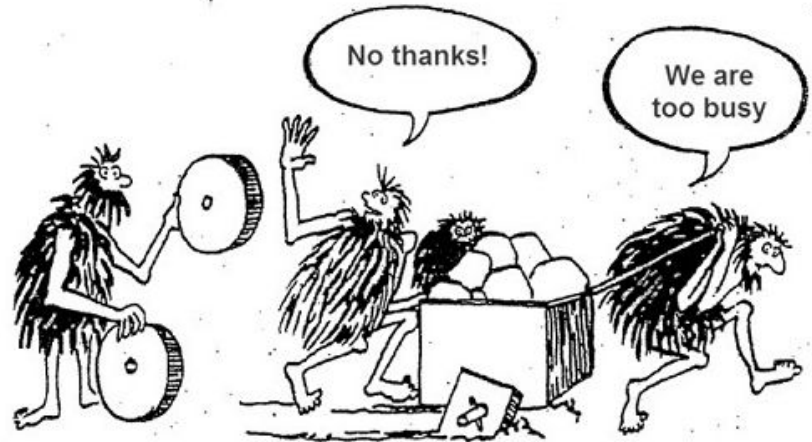
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Managing the Change to Wrike



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

BRACE YOURSELVES



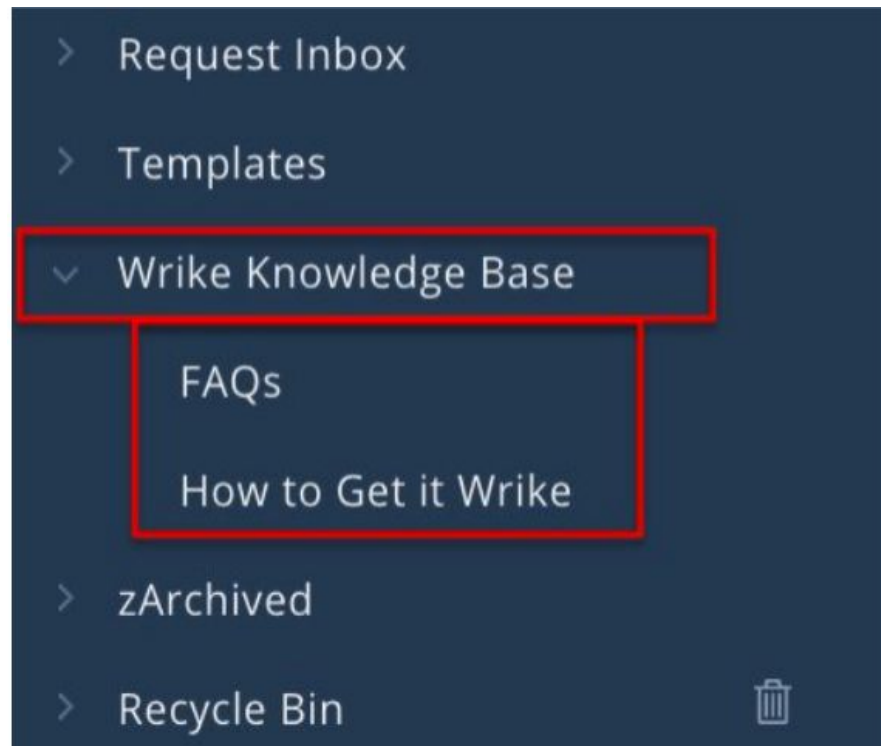
1. Give advanced notice
2. Create clear and compelling goals
3. Define the scope of the change



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

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





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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
- Examples?



Tips & Tricks for Requests



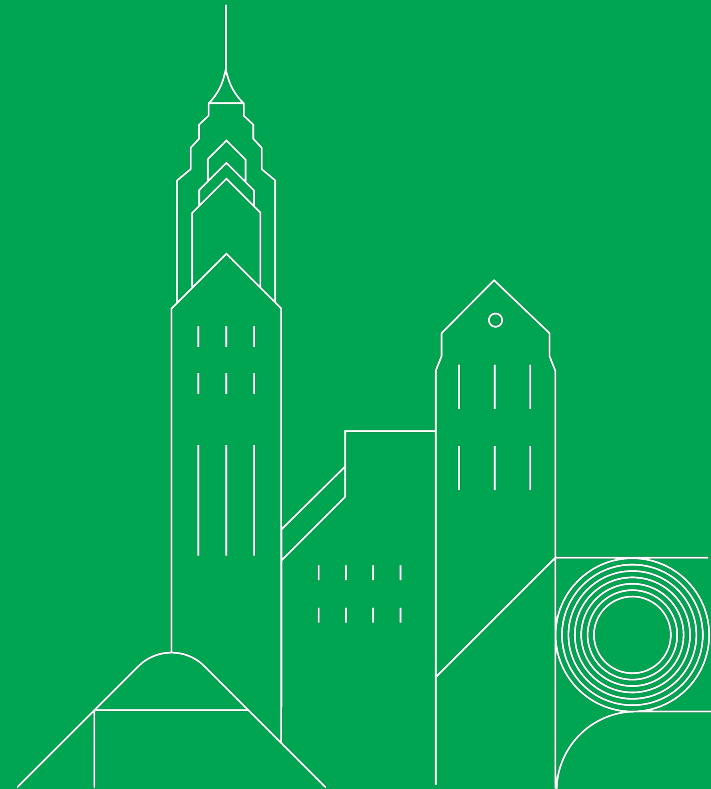
- Determine **who** will submit requests to the team and **who** will traffic the requests
- Gather all information up front with Request Forms
- Eliminate the need for status updates





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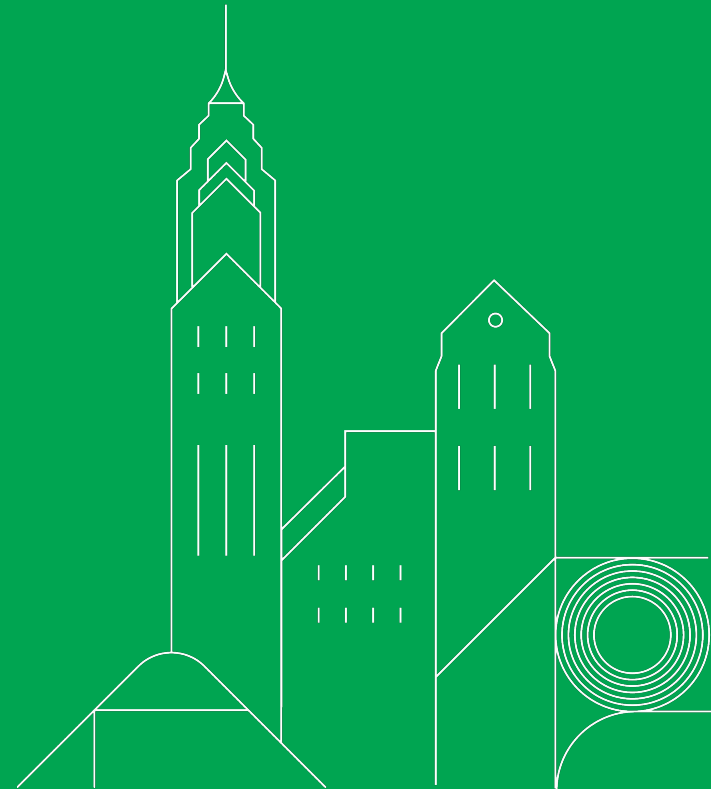
Demo





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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
- Examples?



Tips & Tricks for Templates

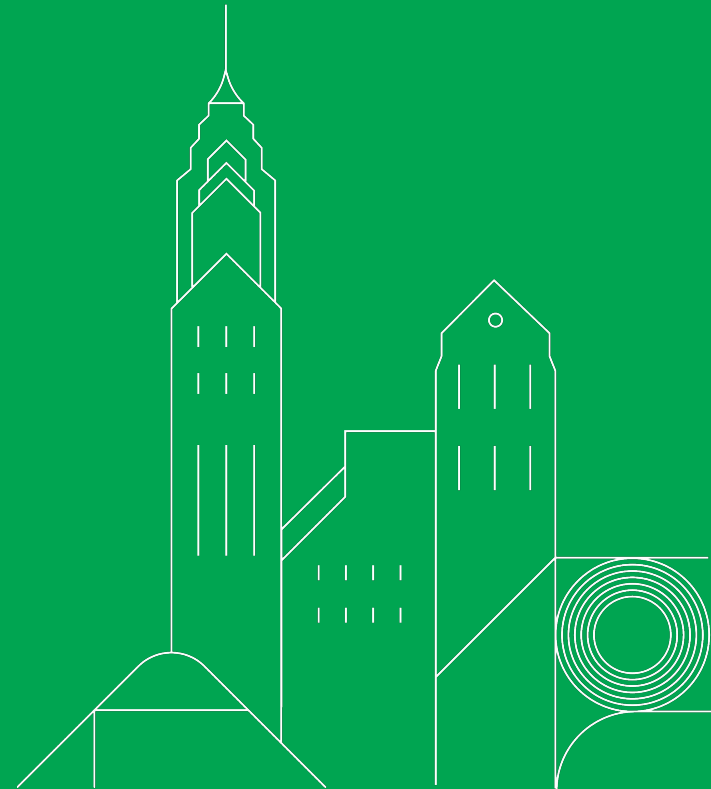
- Utilize task prefixes for easy identification and distinction between projects
- Pre-assign tasks to team members
- Pre-fill custom fields that are consistent across work
- Add descriptive text to each task





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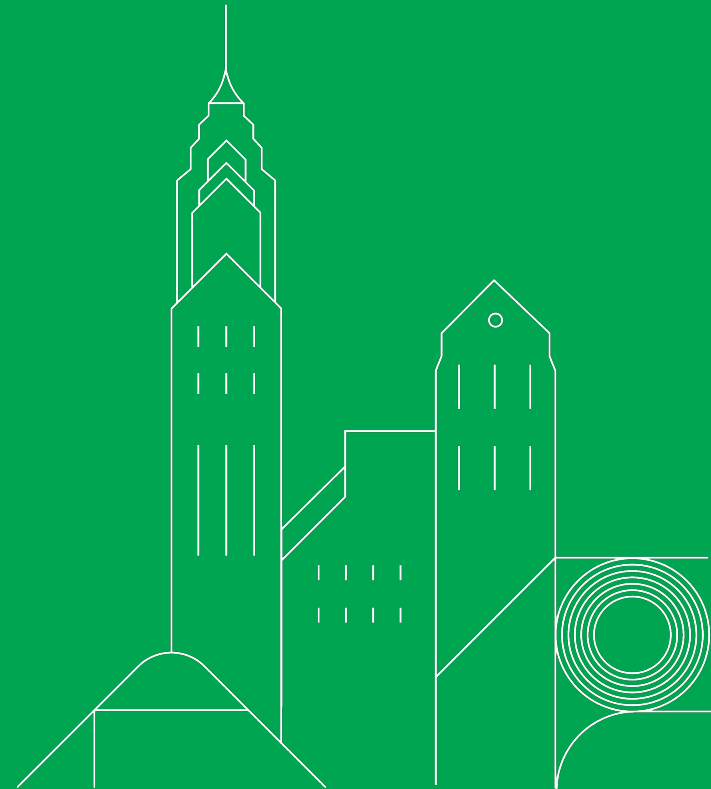
Demo



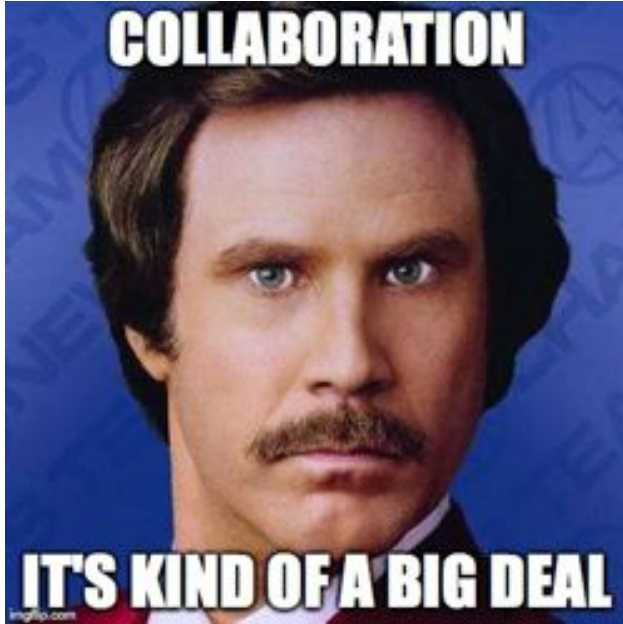


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Collaboration: Centralize & Capture



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 task management application interface. The left pane displays a list of tasks under the heading "Paris St. Germain". The middle pane shows the task "Paris St. Germain - Campaign Live" selected. The right pane displays the details for this task, including its status (Planned), assignee (Greg L), and a comment section.

Task selected in the middle pane will then appear on the right

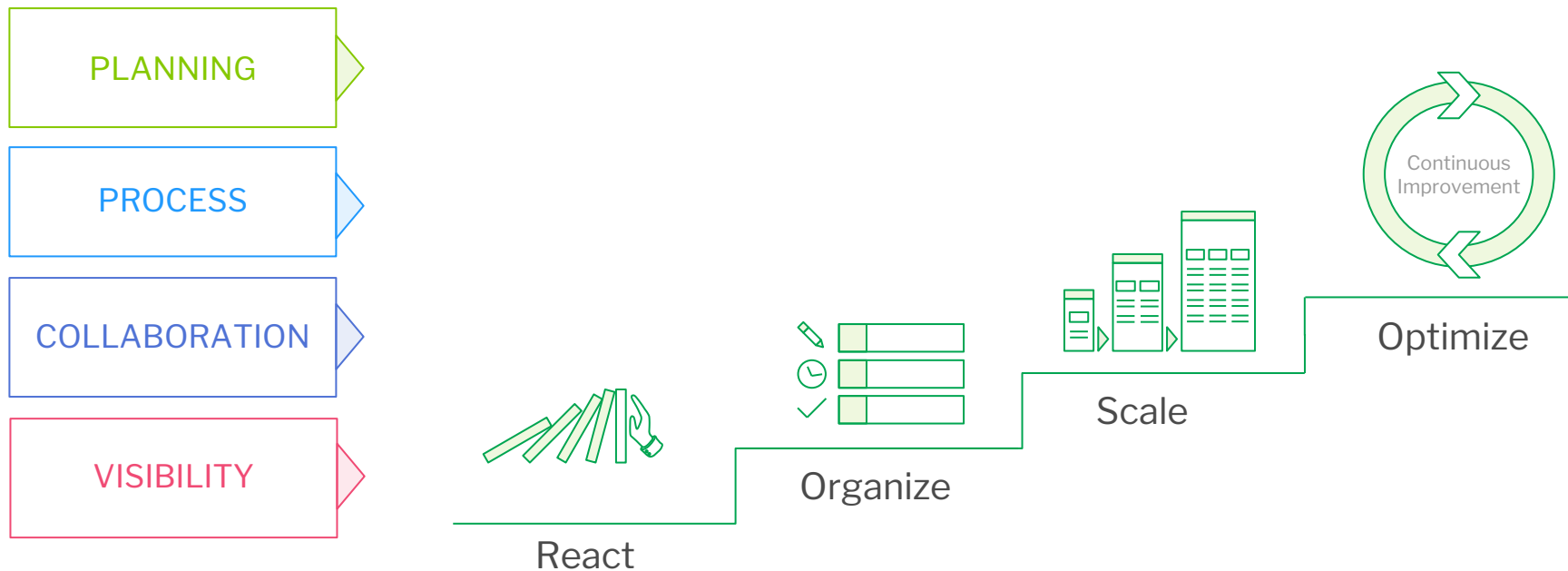
Task will overlay the project information screen

Task owner will appear here

Change task status here

Use this section to comment and communicate with others

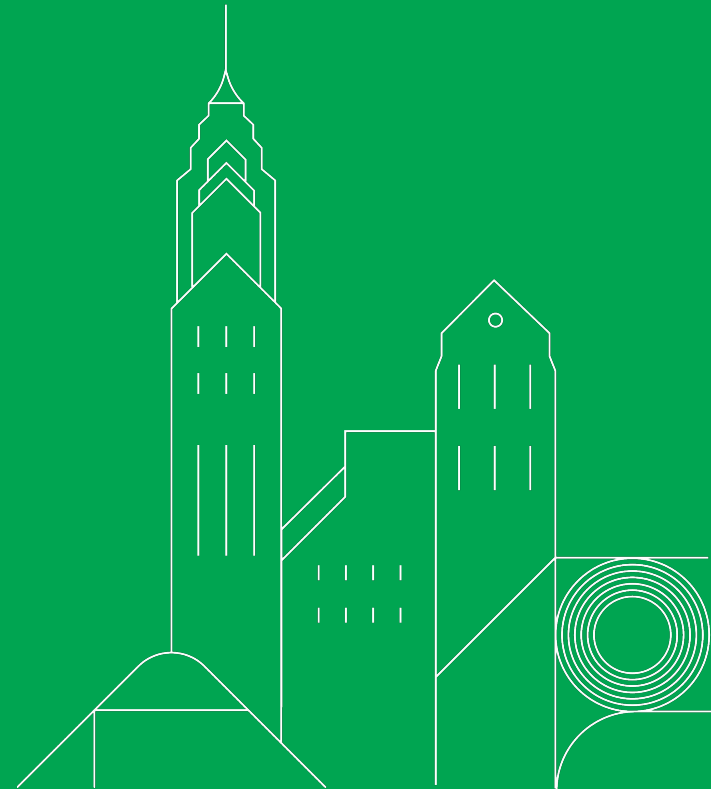
Bringing it all together





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Q&A





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Thank you



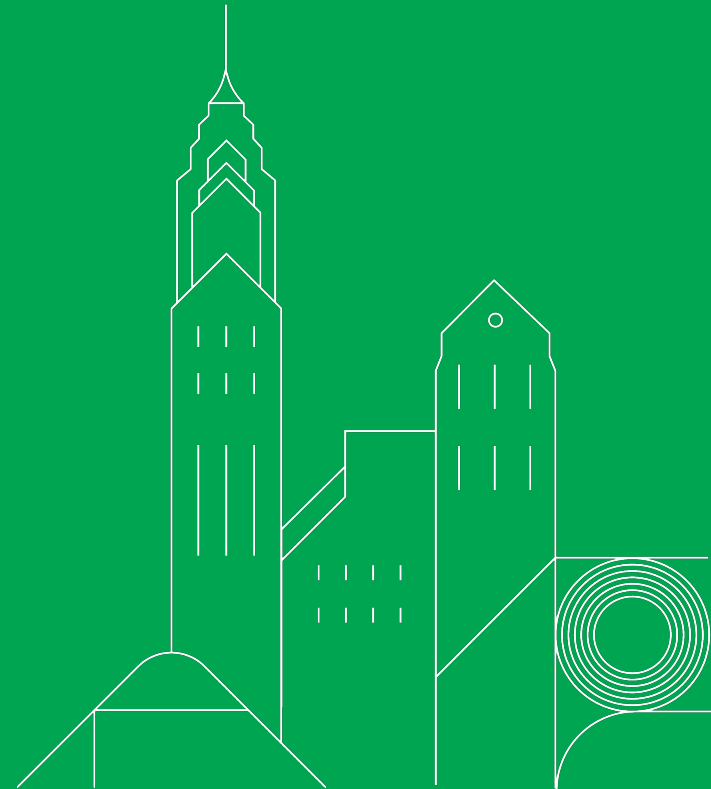


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Bonus!









Dashboards &










Reports



Individuals Have Visibility Over Their Work

MyWork for Task Assignments

TODAY	Apr 17	24
+ New task		
	Under Review Design The Best Acrobat Yet	Apr 06
	In Approval Copyedit Blank Page to Brilliant	Apr 23
	Not prioritized Host a Partner Event Stories	Mar 14
	In Approval Copyedit Take It Make It	May 02
	NEW TASK Plan	Mar 17
	Not Started Print Take It Make It	May 20
	Not Started Establish Project Team 01. Project Launch	Oct 06
	Under Review Host Marketing 1st Look TommyNow	Mar 03
✓ COMPLETED		122

THIS WEEK	Apr 17 – Apr 23	1
	Under Review Host Kickoff Meeting Take It Make It	Apr 23
NEXT WEEK	Apr 24 – Apr 30	0
LATER	After Apr 30	12
	Under Review Review and Approve De... Take It Make It	May 18
	Waiting on a Third Party Design Take It Make It	May 04
	Under Review Deliver Final Product Take It Make It	May 25
	On Track Implementation assigned to y Maintenance and Support Contracts	Jun 02
	Proposed Testing assigned to you Maintenance and Support Contracts	Jun 06
	On Track Documentation assigned to y Fusion	Jun 09
	On Track Analysis assigned to you ITSM	Jun 09
	Off Track Finalize Code assigned to you	May 26

Inbox for Notifications

INCOMING	ARCHIVE	...
Apr 12		
Marketing Report by Project		
10:01		
✓ Wrike Bot The report you are subscribed to is ready for review		
9+ Wrike Bot The report you are subscribed to is re...		
Wrike B		

Marketing Report by Project



Create Team-Based Dashboards for Managers



Build Reports for Management

< Marketing Report by Project

EDIT SUBSCRIBED SHARED ⋮

Group By: **Requesting Department** + Add new grouping

Data on 04/17/2017 16:52   

⚙	Project Name	Project Ow...	Status	Start Date	Finish Date	Duration	Parent Fold...	Requesting De...	Type of Work	Time Spent	Project Summary
■ Requesting Department Product (3)											
	Web Page Name	Josh "Lemon"...	Green	09/05/2016	09/29/2016	80h	04. Web & On...	Product	Web & Online		
	Silicon Valley Dinner	Leo McGarry	Yellow	07/13/2016	08/24/2016	336h	Customer Din...	Product	Events	14h	
	Company Conference	Josh "Lemon"...	Green	04/15/2016	09/30/2016	4432h	Tradeshows &...	Product	Events		
■ Requesting Department Client Services (2)											
	The Best Acrobat Yet	Toby Ziegler	Yellow	02/17/2017	03/24/2017	192h	01. Creative	Client Services	Web & Online		
	Take It Make It	Abbey Bartlett	Yellow	02/27/2017	03/31/2017	216h	01. Creative	Client Services	Content & Comm...	3h	
■ Requesting Department Marketing (2)											
	Chicago Dinner	Josh "Lemon"...	Red	06/16/2016	07/28/2016	416h	Customer Din...	Marketing	Events		
	Blank Page to Brilliant	Josiah Bartlett	Green	02/09/2017	03/31/2017	120h	01. Creative	Marketing	Creative	22h 58m	Summary of the project is XYZ. On track and looking good.
■ Requesting Department Operations (1)											
	Work Habits of Millennials	Josh "Lemon"...	Yellow	06/30/2016	07/29/2016	256h	Executive Rou...	Operations	Events		



Best Practices for Reports

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

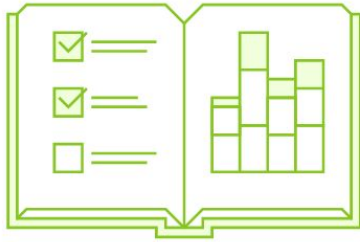
Identify the fields the team needs to fill out today for reporting. Keep it top level and simple so that it's easy to fill out.

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

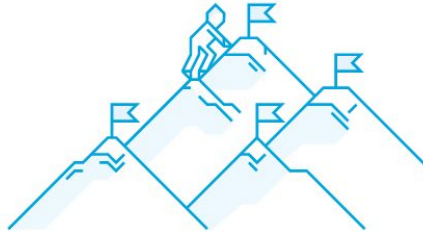
Set a regular cadence for pulling reports to enforce the data staying up to date. Push reports in Wrike up to the management team.



Connect Wrike to the Way Your Team Works



Connect Wrike with Work
Habits



Measure the success of Wrike



Integrate with other
technology solutions

