

Breakout Session 1

Best practices for more visibility: How to best create and use Dashboards & Reports

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Your Wrike Team



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To book time with me please use:

calendly.com/michael-johnston

Specialty:

Your business partner who manages the overall relationship between Wrike and your company and is the primary point of contact for billing, adding licenses, and introducing new teams to Wrike.

Secret passion:

Snooker/Boxing



Agenda

- Benefits of Dashboards and Reports
- Dashboard Specifics
- Wrike Report Specifics
- Dashboard Demo
- Wrike Reports Demo
- Q&A/Best Practices for both



Dashboard & Reporting Benefits

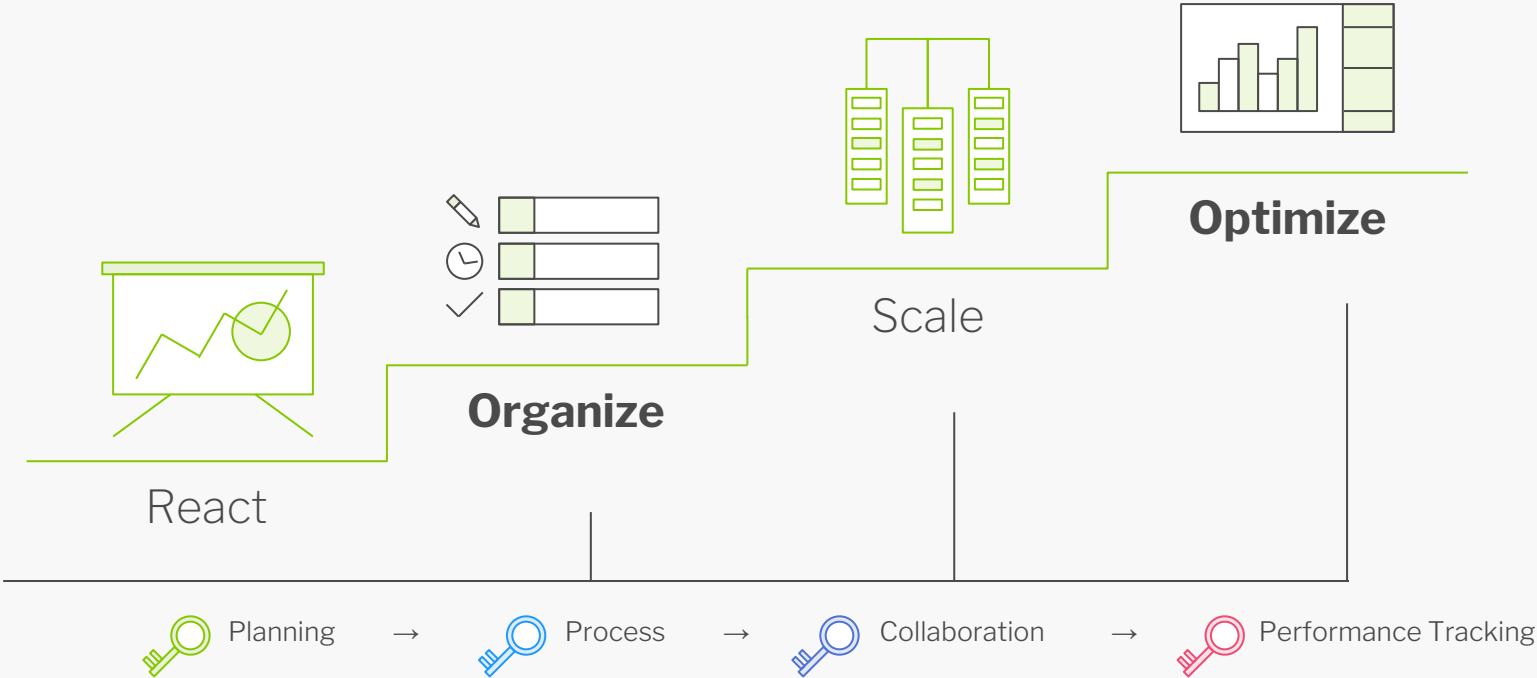


Visibility

- 10,000ft view of work
- Organised process
- Work Prioritization
- Identify bottlenecks
- Improve Communication



The Wrike Way



Dashboards

- Manage/Monitor Tasks
- Get Real Time Info
- Filter by Dept / Task Status
- View Specific Data
- Jump in and communicate
- Share Information



Dashboards

Creative Team Status Marketing Team Scrum Board +

In Progress

MarCom In Progress TO: All

▼ Overdue

- In Progress** Create Blog Post on Tea...
Blog May 24
- In Progress** Develop Video on Com...
Blog May 24
- In Progress** Infographic on Work Ma...
Q2 2016 May 30
- In Progress** Create Drone Drop Blog...
Q2 2016 Jun 08
- In Progress** Monitor SEO Keywords 1

Approved

MarCom Approved TO: All

▼ Overdue

- Approved** Change the Layout of the...
Q3 - Q4 2016 May 31
- Approved** TV Interview on the Laun...
2016 - 2017 Jun 06

Waiting

Marketing Waiting on others
TO: All

▼ Overdue

- Waiting on others** Exec Event - Final ...
Exec Event May 24
- Waiting on others** Exec Event - Order...
Exec Event May 27
- Waiting on others** Pitch the NY Time...
2016 - 2017 May 28
- Waiting on others** Exec Event - Prepa...
Exec Event May 30



Reports

- Save Time
- Gain Big Picture Visibility
- Manage Expectations
- Identify Bottlenecks
- Real Time Data
- Share & Subscribe to Reports

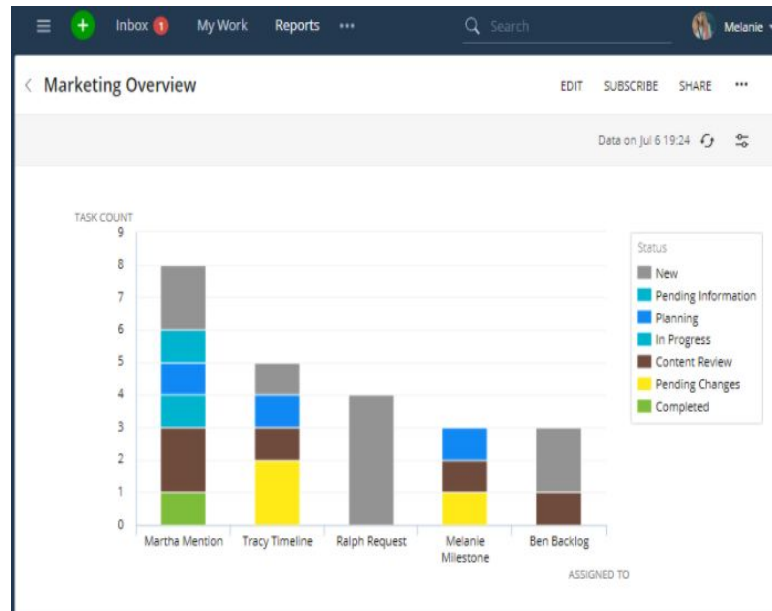


Report Views

Marketing Overview EDIT SUBSCRIBE SHARE ...

Group by: Assignee Status + Data on Jun 6 21:37 Expand all Collapse all

TITLE	ASSIGNEE	STATUS	START DATE	DUE DATE	DURATION
Martha Mention	8				SUM 440h
<ul style="list-style-type: none"> Melanie Milestone <ul style="list-style-type: none"> Planning <ul style="list-style-type: none"> Post Update on Blog 	2				SUM 48h
<ul style="list-style-type: none"> <ul style="list-style-type: none"> <ul style="list-style-type: none"> Post Feature Release Updates 	Melanie Milestone	Planning	Dec 29, 2016	Jan 2	24h
<ul style="list-style-type: none"> Content Review 	1				SUM 24h
<ul style="list-style-type: none"> <ul style="list-style-type: none"> Post Feature Release Updates 	Melanie Milestone	Content Review	Dec 28, 2016	Dec 30, 2016	24h
Ralph Request	4				SUM 16h
<ul style="list-style-type: none"> Tracy Timeline <ul style="list-style-type: none"> New <ul style="list-style-type: none"> Send Thank You Notes 	5				SUM 200h
<ul style="list-style-type: none"> <ul style="list-style-type: none"> Send Thank You Notes 	Tracy Timeline	New	Jan 9	Jan 13	40h
<ul style="list-style-type: none"> <ul style="list-style-type: none"> Planning 	1				SUM 40h
<ul style="list-style-type: none"> <ul style="list-style-type: none"> In Progress 	1				SUM 32h
<ul style="list-style-type: none"> <ul style="list-style-type: none"> <ul style="list-style-type: none"> December Blog Post 	Tracy Timeline	In Progress	Dec 29, 2016	Jan 3	32h
<ul style="list-style-type: none"> <ul style="list-style-type: none"> Content Review 	1				SUM 8h
<ul style="list-style-type: none"> <ul style="list-style-type: none"> Pending Changes 	1				SUM 80h
<ul style="list-style-type: none"> <ul style="list-style-type: none"> <ul style="list-style-type: none"> November Blog Post 	Tracy Timeline	Pending Changes	Nov 23, 2016	Dec 6, 2016	80h



When to use what?

Dashboards

- To Do Lists
- Overdue/Backlogged
- Tasks Per Department
- Favourite Tasks
- Activity Stream

Reports

- Project Status Updates
- Projects Due/Overdue
- Time Spent on Projects
- Report on Custom Fields
- Export



Best Practices

- 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.



Questions?



Thank you!

Please feel free to stay in touch:
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