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TOUR

Deploying The Wrike Way

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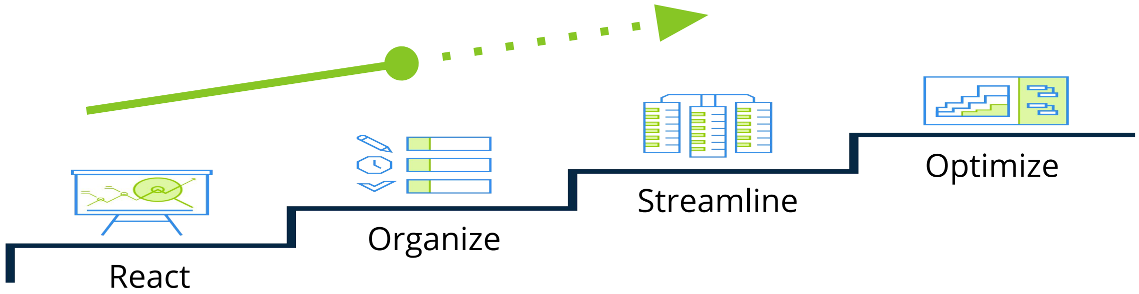
Our Scenario

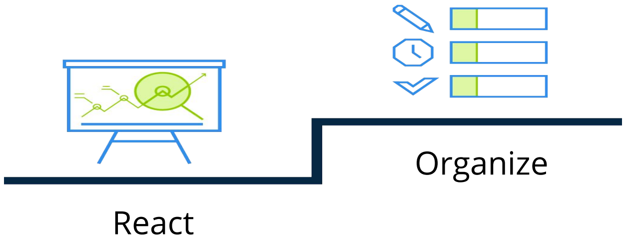
Your team/organization likely began in **React** stage

Your organization is likely now in **Organize** stage

Our goal now is to propel you to the **Streamline** stage



React → Organize Assumptions



Your project work is contained within Wrike (**planning**)

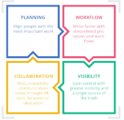
You've established project templates and/or custom workflows (**workflow**)

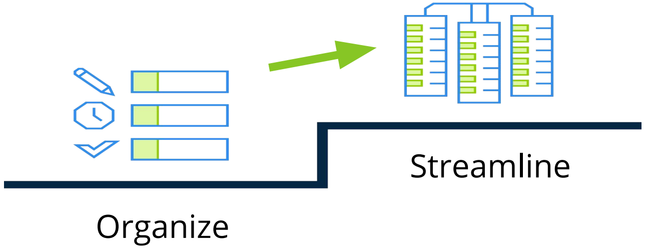
You utilize request forms for intake of requests (**workflow**)

You've organized your folder structure, allowing for a cleaner workspace (**visibility**)

You've greatly reduced the number of emails and brought project and task- specific communication into Wrike (**collaboration**)

Now on to Streamline

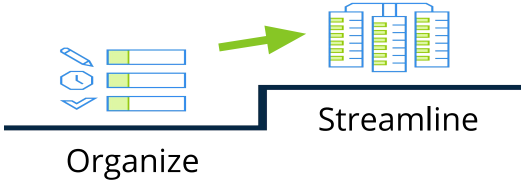




Best Practices

- **Planning** Expand the use of work management system to include a broader scope of work efforts, including work ideation & resource planning phase
- **Planning** Plan, prioritize and balance work efforts with an understanding of resource utilization and availability.
- **Workflow** Address bottlenecks, then automate and streamline processes to improve throughput and quality.
- **Collaboration** Improve individual productivity by having team members prioritize and manage their individual tasks in the work management system.
- **Visibility** Enhance and extend reports and dashboards to provide visibility to upper management, key stakeholders, and the full team.

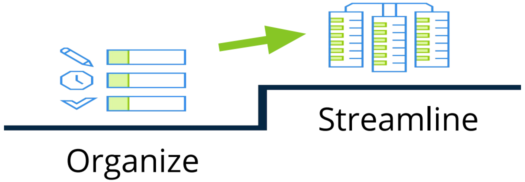
Best Practices



Workflow Address bottlenecks, then automate and streamline processes to improve throughput and quality.

Automate Workflow by utilizing Request Forms and Project Templates in tandem

Best Practices



Workflow Address bottlenecks, then automate and streamline processes to improve throughput and quality.

A **Template** is any set of Tasks that are repeatable each time you go through a specific process.

A **Request Form** is a standardized way to gather information & automatically create work in Wrike.

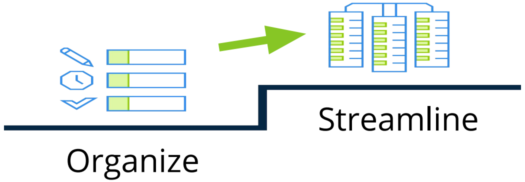
Together they can kickoff a workstream, routed intelligently based off of dynamic questions

Wrike Demo

Looking Ahead: What's Coming Next?

- Mapping Form data to custom fields
- Adding Project & Task prefixes directly from Forms
- Triggering additional templates
- Increased visibility for requestors; internal & external
- Customizing notifications
- [Recently launched] Dynamic Forms on Android Mobile App
- [Early July] Request Forms available on iOS

Best Practices



Visibility Enhance and extend reports and dashboards to provide visibility to upper management, key stakeholders, and the full team.

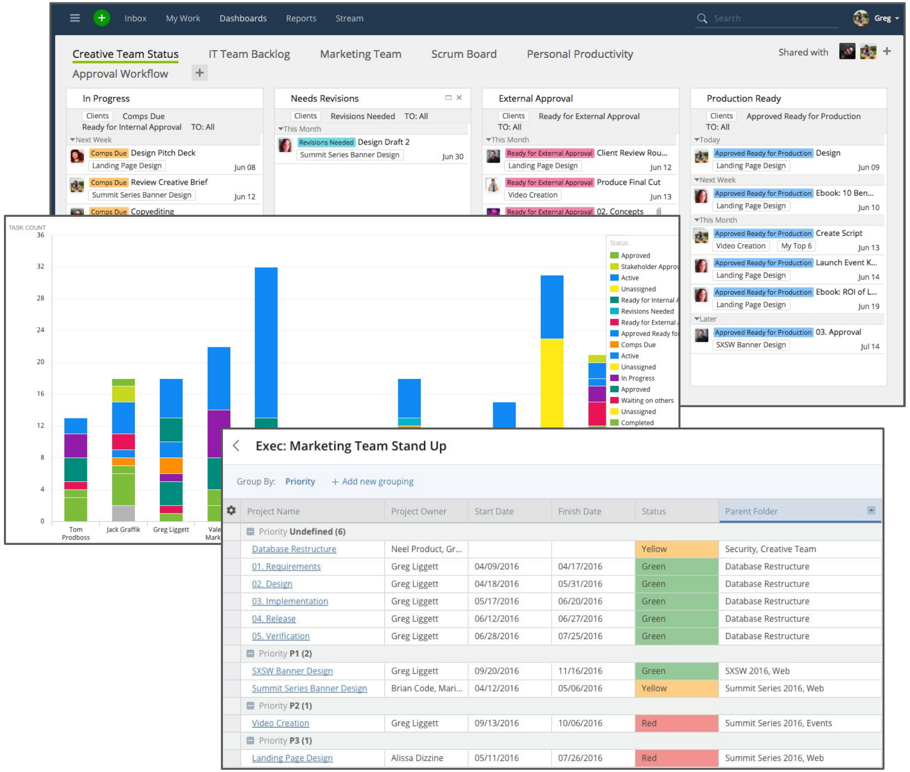
Create Dashboards to drive weekly meetings

Share Report and Timeline snapshots with anyone outside of Wrike

Wrike Demo

Dashboards & Reports

- All Dashboards & Reports are built on **Filters**
- Begin by identifying **what** you want to see, work backwards
- Build purpose-driven dashboards; Project-, team-, process-centric
- Let's see it live!



Extras

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	React	Organize	Streamline	Optimize
Planning	Work activities, requests, plans, and assignments are unstructured and managed in an ad hoc, siloed fashion.	Key project plans and ad hoc work are captured in one central system.	All work is tracked in the system and workload is balanced across the team during planning and assignment.	Strategic priorities align teams and focus work. Shared best practices optimize planning.
Workflow	Ad hoc intake, planning, & execution methods and undefined roles lead to rework and excessive firefighting.	Role & workflow are clearly defined and transparent, leading to better accountability for core projects & tasks.	Streamlined processes, templates, & approval workflow enable greater agility and increased throughput.	Roles and responsibilities are clearly defined both within and across teams. End-to-end processes and workflows are well defined, measured and continuously improved.
Collaboration	Siloed teams, crucial project/task information & agreements are lost in a sea of emails, with wasteful meetings spent just trying to catch up.	Project & task communication is in a central workspace. Meetings are more focused, with ideas, action items & agreements captured.	Collaboration focuses on setting goals and facilitating decision-making.	Collaboration is extended to include related teams, key stakeholders, clients and partners. The team/org captures best practices and is able to tap into collective intelligence seamlessly.
Visibility	It's hard to tell who's doing what, where the delays & bottlenecks are, and what the workflow is.	Basic reports, dashboards give insight into progress and expose bottlenecks.	Tailored reports and keep the team, upper management, key stakeholders, and clients aligned.	Shared macro and micro-level views of work are connected. Proactive alerts trigger action.

Planning

- There is no good, centralized system to plan complex projects and keep plans up to date as things change.
- Most ad hoc work is not captured, prioritized or tracked
- Strategic objectives are high-level and not linked to any specific work.
- Roles and responsibilities are oftentimes unclear, overlapping, and stakeholders are not always known.
- We have little to no view into resource availability when we assign work.
- Prioritization is not consistent or effective for managers and team members. Each team member manages their own to-dos in their own way.

Workflow

- Work intake is ad hoc - there is no standardized way to receive, evaluate, prioritize, and assign new requests.
- While many of our projects follow similar steps, we haven't established a "template" or "workflow" for planning and executing them.
- Reviews and approvals are ad-hoc and inefficient; too much time is spent "waiting for approval" with little visibility into the process.
- We have multiple disconnected systems for the completion of work, and cannot review the status of work in one place.

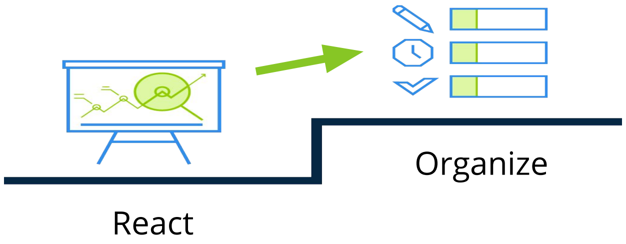
Collaboration

- We spend a lot of time in meetings to understand where things stand. When we discuss action items during meetings, they often fall through the cracks.
- Project/task-specific communication is often lost in an ocean of e-mails; there is a lot of noise that team members have to deal with.
- We do not capture or document best practices methodically, each person documents and shares these as needed.

Visibility

- There isn't macro-level visibility across projects or across our workflows
- There isn't a good close-up / micro-level view of what's being worked on, what's delayed, and detect action items that require our attention.
- We don't provide interactive, real-time reports to upper level management or key stakeholders, and reporting is inconsistent or cumbersome.
- We are not consistently measuring projects' outcomes (planned vs actual time, budget, etc.)

Moving from React to Organize



Best Practices

- **Workflow** Identify and standardize core processes for intake, execution, and delivery.
- **Collaboration** Capture work content, requests, assignments, and due dates of core work efforts in a centralized work management system that can sync with other applications.
- **Planning** Create a common How-To Guide to capture “rules of the road” for multiple teams to collaborate efficiently inside the work management system.
- **Collaboration** Use work management system instead of email and spreadsheets to collaborate, and to communicate status real-time, preserving meetings for decision-making, ideation and collaborative execution.
- **Visibility** Begin with the end in mind: Establish success criteria, and create dashboards and reports early on to give you visibility into most important aspects of your work.

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API 101: Intro to Integrations

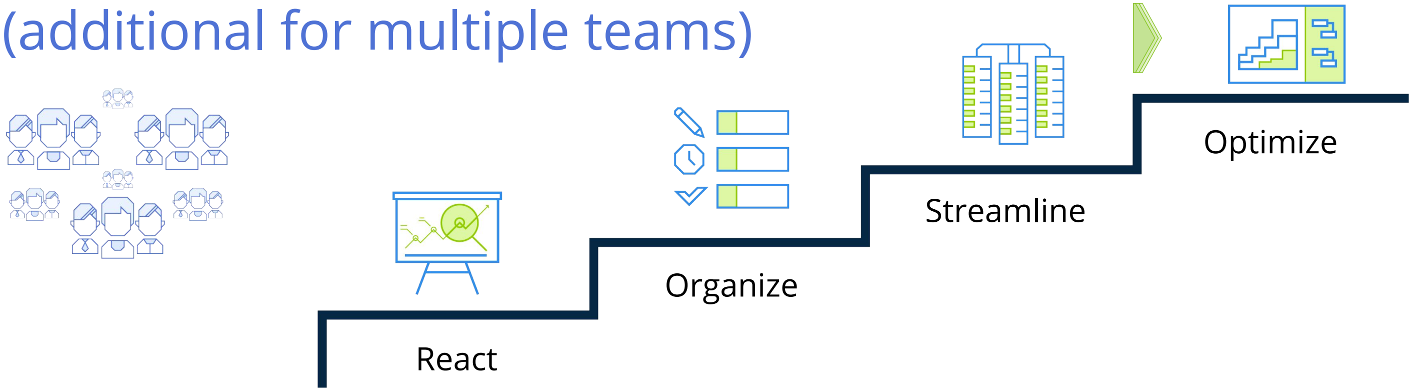
Greg Liggett

NYC Wednesday June 7, 2017

Session Agenda

1. Overview API basics & capabilities
2. Review three client use cases
3. Q&A

Best Practices For Moving from Streamline to Optimize (additional for multiple teams)



- Align cascading organizational, team, and individual quarterly goals, and the work needed to achieve them using your work management system.
- Plan proactively for entrepreneurial efforts that may accelerate or introduce new workflows to achieve objectives.
- Integrate your work management system with a broader set of key systems to facilitate a more seamless workflow and broader exchange of information.
- Prioritize and plan projects further ahead coordinating resources, timelines, and budget for maximum impact towards strategic goals.
- Empower new employee onboarding with templates and self-guided content that can be customized for each team.

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What’s an API??

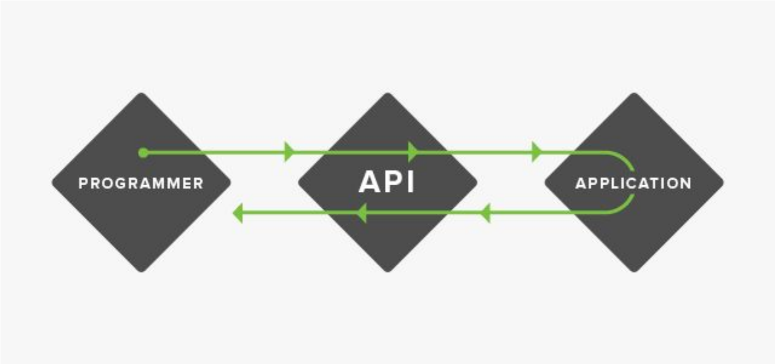
- Application Programming Interface - basically how computer programs talk to each other

- Set of rules that govern how one application can talk to another
  - Local: Moving a snippet from Excel to Word
  - Online: Embedding a Google Map on Yelp’s review pages

What is an API good for?

- To leverage someone else's pre-built functionality

- 'Integrations' connect existing functionality between programs and are **always** built on APIs
  - E.g. Wrike's Slack integration, 'login with Google+,' etc.
  - Even Wrike's mobile app is built using our API!

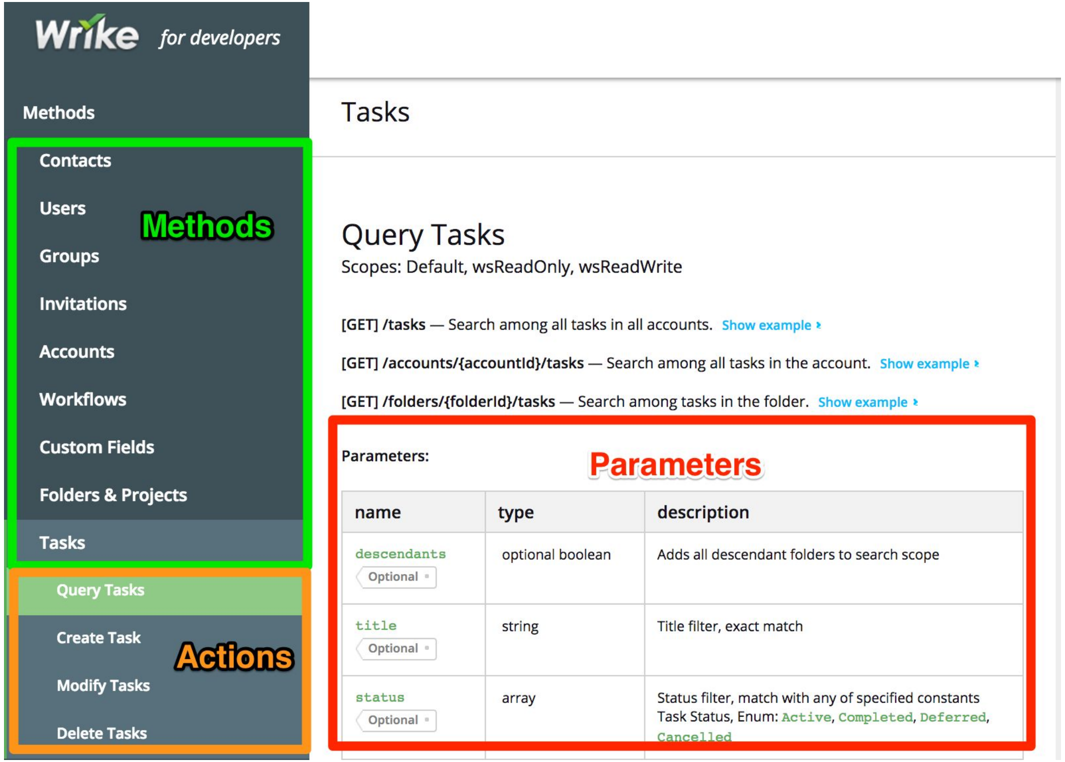


API: Calling an API

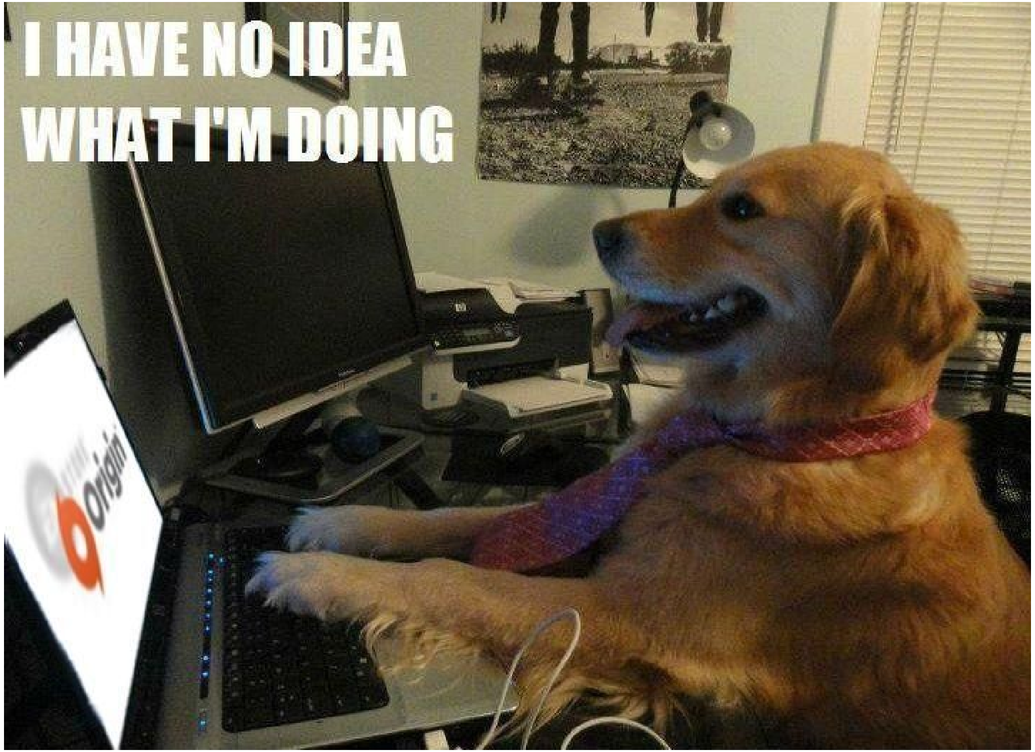
- APIs are always call & response
  - Calls must conform to defined language
  - Responses depend on the program

Action	Object	Parameters
[GET] [POST] [PUT] [DELETE]	-Depends on program- /task/ /folder/	-Depends on object- {date} {taskID} {taskStatus}

Wrike's API: developers.wrike.com/documentation



How is everyone feeling?



Client API Use Cases

- ❑ **Hospitality Software Company:** *Used a middleware service (Azuqua) to connect Wrike and SFDC so that new requests from SFDC kicked off new tasks in Wrike*

- ❑ **COMPLEX Magazine:** *Built a custom integration between QuickBase (ERP) and Wrike to auto-duplicate templates in Wrike and sync task & project statuses between both systems.*

- ❑ **Large Radio Advertiser:** *Created a custom client-facing portal powered by the Wrike API to expose review-ready audio clips and receive approval and feedback by non-Wrike users*

Integrating Wrike & Salesforce...WITHOUT PROGRAMMERS

Scenario:

- ❏ With the new creation of Experiences, creative resources & approvals need extremely close tracking

Pain:

- ❏ Huge number of Experience host requests, difficult to keep track
- ❏ Approvals from photo agencies, design agencies, lawyers, & hosts
- ❏ **They <u>broke</u> Google Sheets**

Solution:

- ❏ Using Azuqua, initiate an entire Wrike template directly from Salesforce
- ❏ Kick back and let Wrike's custom statuses organize everything from there

Integrating Wrike & Salesforce…WITHOUT PROGRAMMERS

Setup Steps

1. Create template in Wrike
2. Create Custom Workflow in Wrike
3. Create custom object in SFDC
4. Configure Azuqua; when SFDC object is created → Trigger template creation in Wrike

COMPLEX Magazine

- ❏ Already had a single company hub - QuickBase
- ❏ Creative team’s workflow was disjointed, so they bought Wrike to manage it
- ❏ Open Wrike API + Open QuickBase API = Integration!

COMPLEX Magazine

<u>Setup Steps</u>

1. QuickBase configuration already existed, including a Creative Request approval

2. Created a template in Wrike to produce & approve a Creative asset

3. Through a ‘triggering’ mechanism, linked QB and Wrike APIs
   a. Creative Request ‘Approved’ → Trigger Wrike Creative Template creation

<u>Note:</u> Integration is a two-way sync; updates are reflected in both systems

Radio’s External Spot Approval System

Scenario:

- ❏ A radio ‘spot’ is sold to a customer, each one must be individually produced, reviewed, approved, & aired by local radio stations

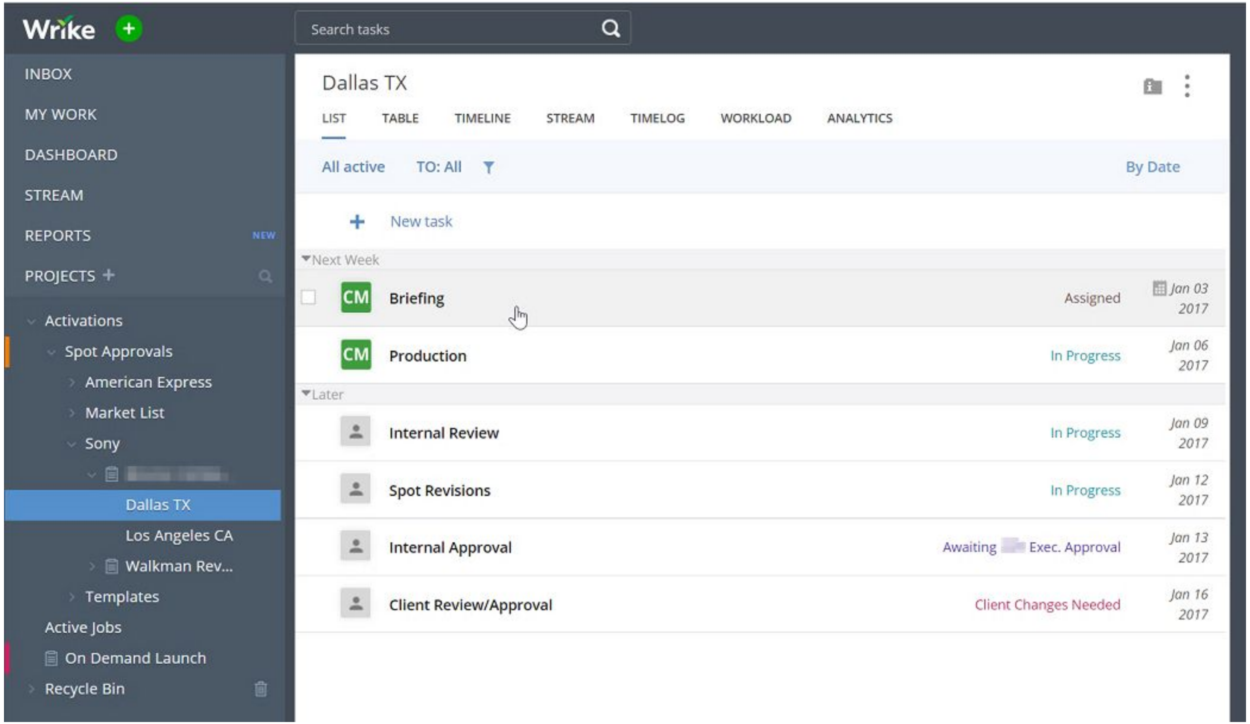
Pain:

- ❏ Hundreds (sometimes thousands) of emails back and forth
- ❏ Confusing attachments, no versioning, missed air-dates

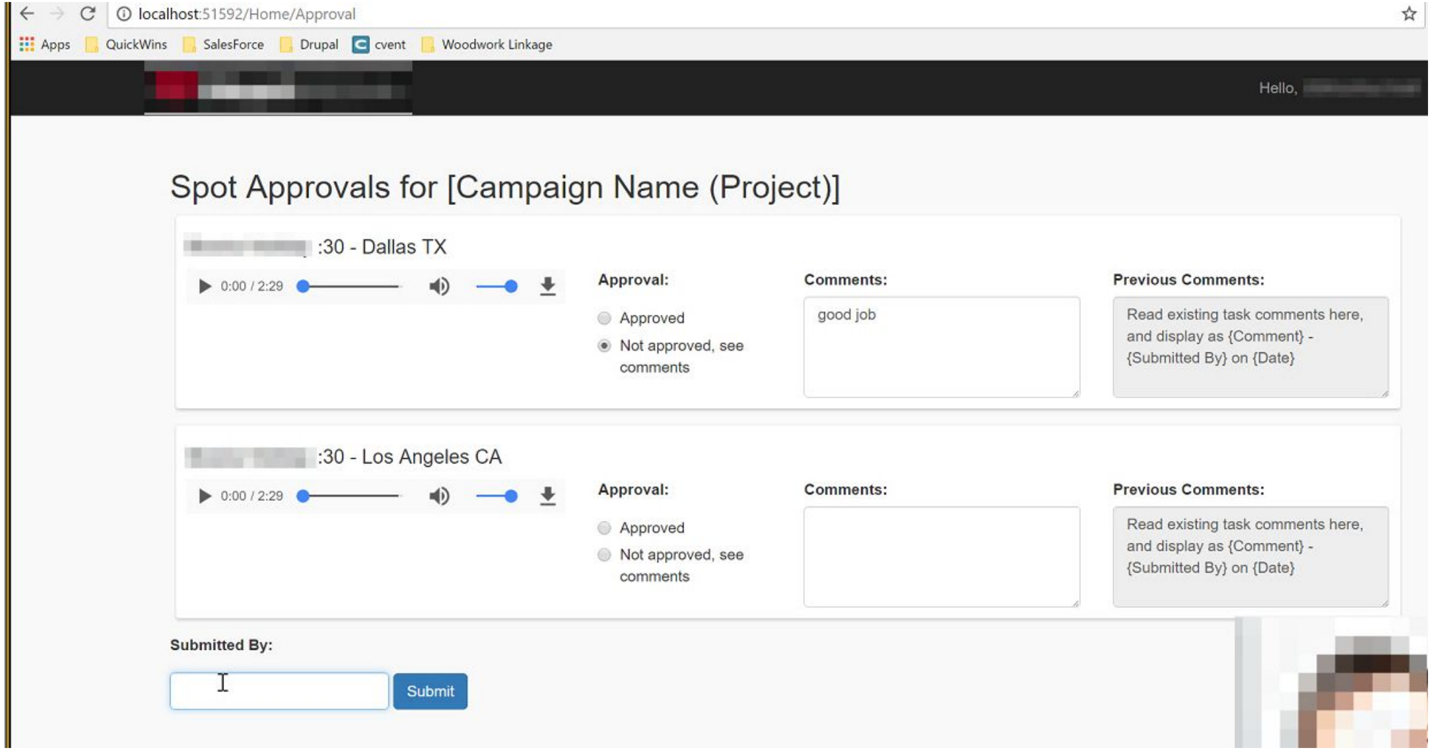
Solution:

- ❏ Wrike to track responsibilities internally
- ❏ Wrike-powered portal to enable reviews **without** email

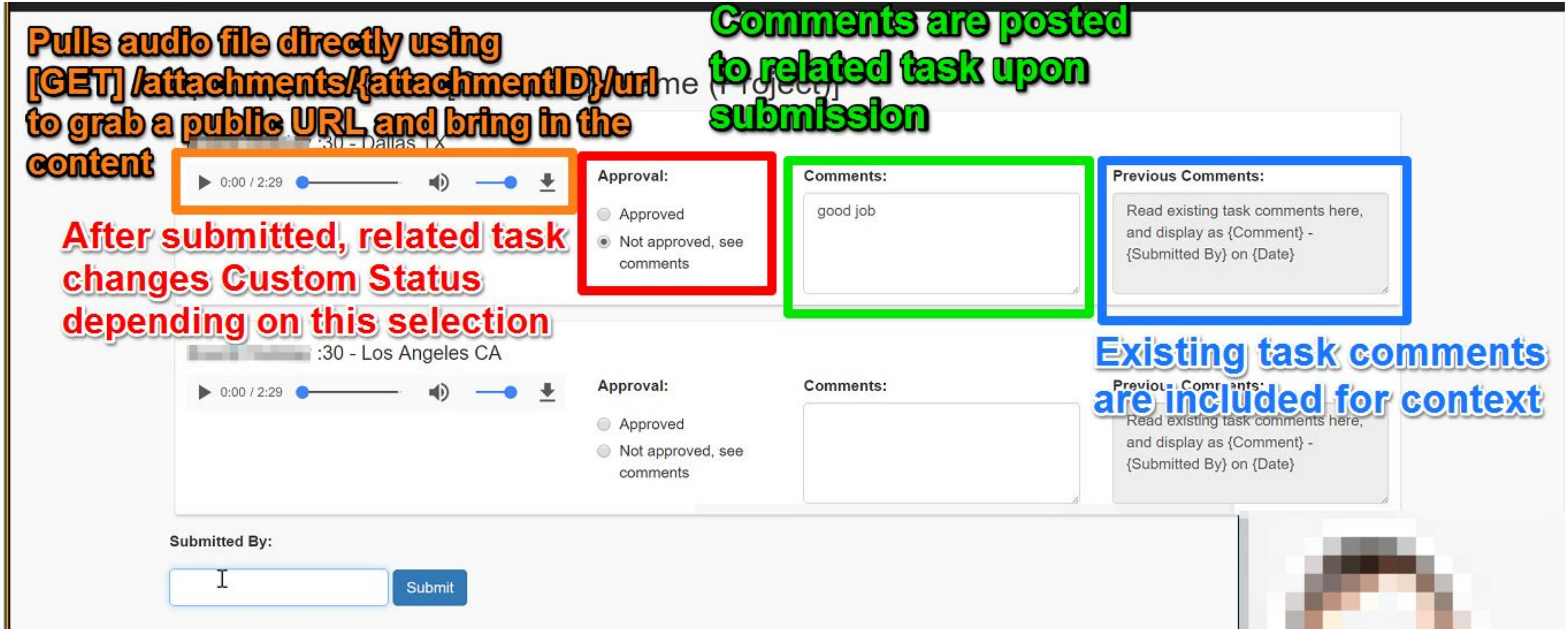
Spot Approvals: What it looks like inside of Wrike



Spot Approval Portal: What a Customer Sees



What Powers that Portal?



How are you feeling?

Building a REST API Integration

- **Custom Development**
  - **Pros:** total control over the development process, can leverage 100% of API power & functionality
  - **Cons:** higher resource needs, time-intensive, ongoing maintenance costs
- **Middleware services**
  - E.g. Zapier, Azuqua, Cloud Elements, Workato, etc.
  - **Pros**: ease & simplicity of use, support services, built-in hosting of the integration
  - **Cons:** monthly subscription fees, lack of total control, not all API functionality is supported by middleware service

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Questions?

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THE END…THANK YOU!