



WRIKE  
PRODUCTIVITY  
TOUR

# Customer Panel

June 7, 2017



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# Customer Panelists



**Mary Tek**  
Trust & Safety  
Project Manager



**Miri Blum**  
Head of Global  
Brand & Creative



**Brent Arnold**  
Director of  
Design & UX



**Phillip Hoffman**  
Program Manager  
Product Manager



# Etsy - Dashboard

Trust & Safety

Member Support

Marketplace Integrity

Insights

Member Operations

Shared with SL TL +

On Hold

Trust & Safety On Hold TO: All

On Hold

Request Nags in Shop Advisor

Reducing Concessions

May 26

On Hold

Billing/collections Workflow

Reducing Concessions

May 25

On Hold

Contact sellers in outreach groups

Reducing Concessions

May 26

On Hold

Create analysis report on results

Reducing Concessions

Aug 18

On Hold

Work on cultural sensitivities

Spotlight Launch

May 31

On Deck This Month

Trust & Safety All active TO: All This month

GMS Impact of Refusing Service to Sellers

Insights

Reducing Concessions

Jun 30

Refunding Seller Fees via Concessions

Insights

Reducing Concessions

Jun 16

Probation Funnel Analysis

Insights

Reducing Concessions

Jun 23

New Dashboard with international enforce...

International Relations

Jun 06

Identify workflow/tooling updates needed

International Relations

Jun 09

Data Hacking: Looker Dashboard Basics

Leads Monthly

Jun 02

Q2 All Hands

All Hands

Jun 15

Assigned Watchdog Proposal

Watchdog Proposal

Jun 16

In Progress High priority improvements

Takedown Tool Improvements

Jun 16

Completed This Month

Trust & Safety All finished TO: All This month

Completed Quantify the impact

International Relations

Jun 02

Completed SLS snapshot

Data Analysis

Jun 09

Completed SLS Probation Type Comparison

Data Analysis

Jun 09

New York | June

3

# Etsy - Request Form

Etsy

## Member Ops: Insights Request Form

Please submit all data requests for Member Operations Insights here. If this is a follow-up to an existing project/analysis and you have access to Wrike, please comment on the original Wrike project. We'll get back to you and let you know if we can complete the request by the deadline or if we need to set up a meeting to further clarify details. Thanks!

Name of Project \*

Which of these KPIs will this help improve? \*

- ☐ Task volume reduction
- ☐ Service quality improvement
- ☐ Productivity increase
- ☐ Customer effort reduction
- ☐ GMS contribution

What decisions or changes will this analysis help inform? Please describe potential impact in terms of one of the above KPIs. \*

# Etsy - Request Form

Description of request \*

Example of issue/question - please link an example task or user that this affects

Desired format of deliverable \*

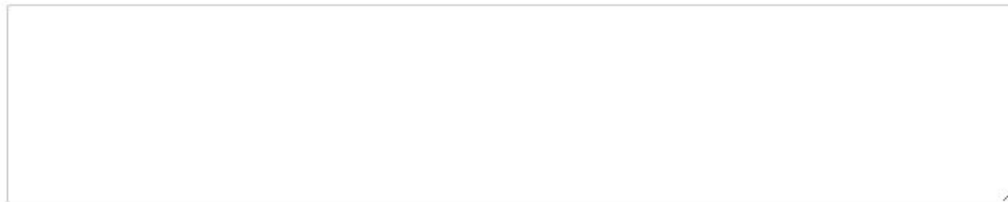
- ☐ Email response (one-time numbers that won't need to be refreshed)
- ☐ Superbit query (for numbers that are regularly refreshed, but not high level KPIs)
- ☐ Looker dashboard/updates (high level KPIs that will be regularly monitored)
- ☐ Analysis (Motherboard page/write up - for a deep dive)

Deadline \*



# Etsy - Request Form

Contingencies: Is the deadline flexible? Does this affect any other projects and what are their deadlines?



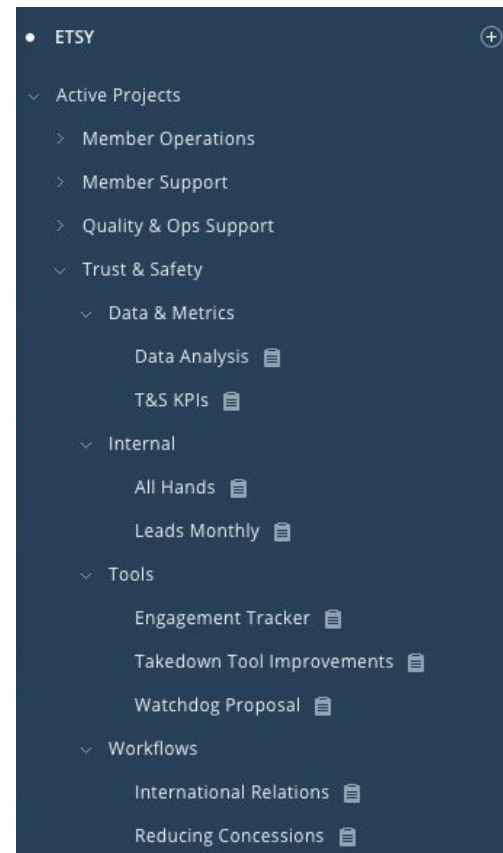
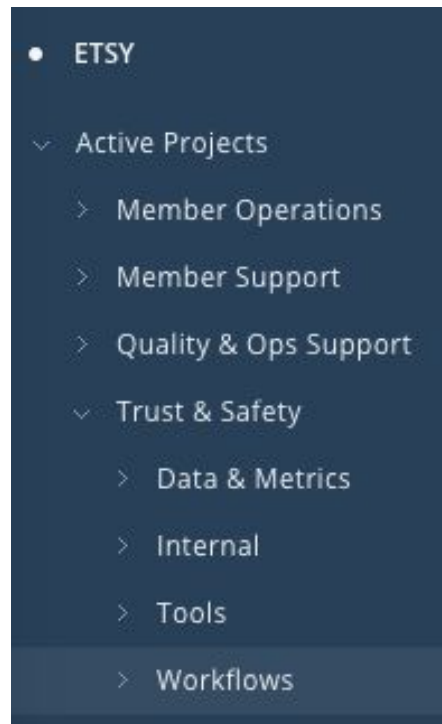
Please attach any relevant documentation here.



Next



# Etsy - Folder Structure







Q4 2016

# Project Management System

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Miri Blum  
Brand & Creatives





# Context

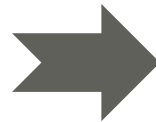
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## What is the current state

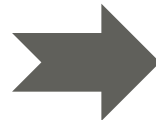
- Teams working in **silos**.
- Each team manages **their own** process, dependencies, resources.
- **Different brief templates**.
- **Different tools** are being used across the team.
- Information and owners **cross over each time**.
- **Validation process is done solely by emails**.

## What is the pain

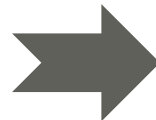
- × No global vision & project overview.
- × No global resource allocation: time and budget.
- × Duplicities, overlaps, data loss.
- × No alignment on the brief and therefore on goals and results.
- × Validation process is long, ineffective ⇒ impacts result.
- × No RACIs defined.



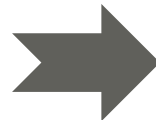
**Hindering with the ability to plan ahead**



**Hindering with the ability to achieve our goals**



**Loss of data, time and budgets.**



**Lack of efficiency, lack of process**

# More painpoints

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## Webteam's organization an process

- No clean process/ workflow
- No visibility on what's ahead from local teams
- No way to assess the volume
- Validations comes manually
- No overview of a campaign that includes a few assets.

Excising tool  
– Trello

- Doesn't provide good user experience
- Trello cards needs to be exported to excel manually.
- Doesn't give the option to prioritize
- Doesn't give an option to assign resources, like copywriting)
- In giving a feedback the document needs to be downloaded and uploaded each time.
- Notifications go to spam
- The teams are not using it and when they do they forget.

---

“

The single  
biggest **problem** in  
communication is  
the illusion that it  
has taken place. ”

*George Bernard Shaw*





# Vision

---

To be able to see, clearly, not only what's ahead, but also what is below, and above.



To be able to look at the same direction, the group gives power to the individual.

Spend budgets and resources in the right way to achieve our goals.



To get where you want to go with the least waste of time, effort or energy.

**Brent Arnold**

Director of Design & UX

**Motivate**







Me in  
50 years?



My actual  
grandfather →

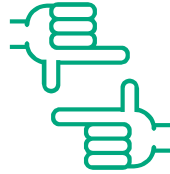
More likely.



# Teams that are using Wrike / What do they do



Creative  
Services &  
Design



Product  
Design



Strategy &  
Finance



# Teams that are using Wrike / What do they do



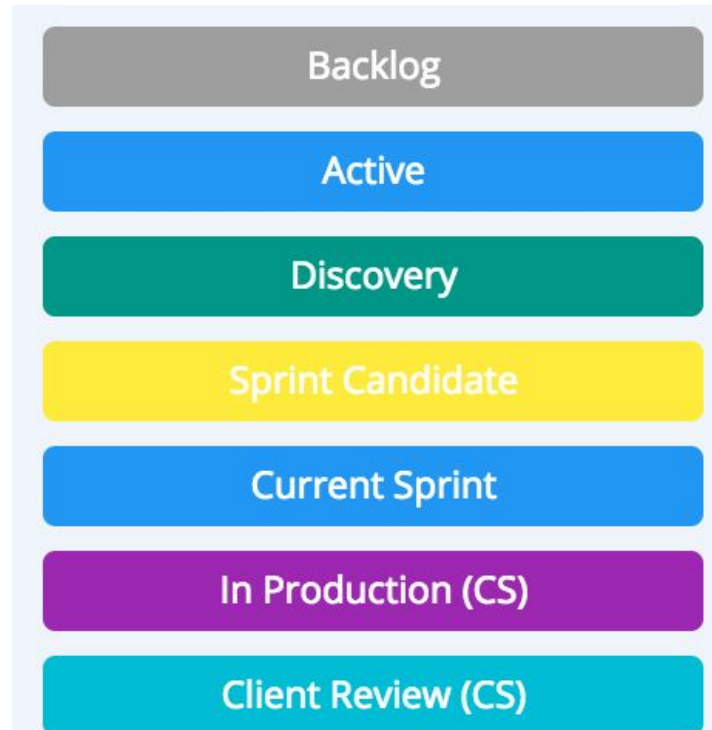
## Creative Services & Design

- Work Planning
- Creative Briefs / Requirements
- Communicating over tasks
- Reviewing and providing feedback

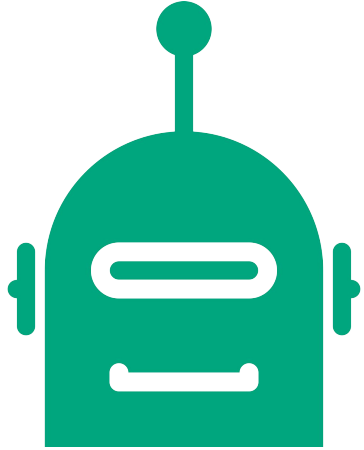
Before rolling out Wrike



# Define the scope for Wrike



# Biggest benefits of Wrike for your teams



Well-oiled  
Machine



Visibility /  
Awareness



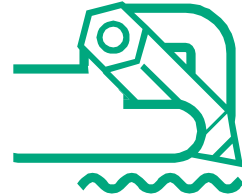
# Planning & alignment



Request  
(via Jotform)



Inbox / Backlog  
grooming



Sprint  
Planning

# Processes & workflows

Backlog

• Creative

Backlog

TO: All

Backlog

MTV - Help Center - Head...

MTV

Jun 23

Backlog

CHI - Update Last Name F...

CHI

Jun 09

Backlog

PDX - BETRUE Microsite

PDX

Jun 12

Backlog

MTV - Bike share in a box

RASCI-----Ap...

Jun 14

Backlog

XXX - Creative Brief Te...

RASCIApprover: KristyResponsible: ...

Backlog

----- SPRINT CAN...

Backlog

-----END SPRINT C...

Backlog

CHI - Quarter Page Div...

CHI

Jun 13

Backlog

COL Web - Fonts missing

COL Web

Jun 15

Sprint Candidates

• Creative

Sprint Candidate

TO: All

No tasks

Current Sprint

• Creative

Current Sprint

TO: All

Current Sprint

NYC - Bell Sticker

NYC

Jun 05

Current Sprint

CHI - Update images o..

CHI

Jun 08

Current Sprint

CHI - Add @ to Div...

CHI

Jun 09

Current Sprint

BOS - Corp Creative - ...

BOS

Jun 09

Current Sprint

BOS - Corp Creative - ...

BOS

Jun 09

Current Sprint

FGB - Bike reported d...

FGB Launch Creative

SF

Jun 02

Current Sprint

CHI - Divvy 4th Birthd...

CHI

Jun 19

In Production

• Creative

In Production (CS)

TO: All

In Production (CS)

FGB - Creative Dire...

FGB Ops

Jun 08

**Workflow:** Backlog > Sprint Candidates > Current Sprint > In Production > In Review > Approved > Sprint Complete

# Processes & workflows

! XXX - Creative Brief Template (MAKE A COPY)

Creative

+

Backlog

+

Add assignee

by Brent A on Dec 27, 2016

Set Date

▶ 0:00

Add subtask

1 field

Attach files

13

**RASCI**

**Approver:** Kristy

**Responsible:** Helen, Lynn

**Supportive:** Ryan, Rachel, Emily, Eleanor

**Consulted:** Will, Brent

**Informed:** Jules, Mark

**Project Information**

**What is it:** XXXX

**Why are we doing it:** XXXX

**Deliverables:** XXXX, XXXX

**Request Type:** New or Update

**Previous Project Link:**

**Messaging / Creative Direction**

**Messaging:** XXXX

# Processes & workflows

motivate

get going

☰

+

Inbox 2

My Work

Dashboards

...

▶

0:00 Update vday graph...

🔍 Search

👤

Brent

Filter

INDIA

New CS Requests

BOS

CHAT

CHI

COL

DC

JC

MTL

MTV

NOLA

NYC

PDX

SF

BABS Member Migra...

BABS Sales Tax

BABS Sunset

BABS Web

SF

LIST

BOARD

TABLE

TIMELINE

STREAM

MORE

All active

TO: All

By Priority

+ New task

👤

Approved (CS)

SF - Clover R3

👤

Approved (CS)

FGB - Flyer to welcome corporate partners

👤

Approved (CS)

FGB - Launch Ad Panel Teaser

👤

Client Review (CS)

FGB - Pre-launch Takeaway postcard...

👤

Client Review (CS)

FGB - Equity program take home - p...

👤

Client Review (CS)

FGB - Swag - Fun T-shirts

👤

Client Review (CS)

FGB - Swag - Launch T-shirts

👤

Client Review (CS)

FGB - Free Ride / \$10 off code card

👤

Current Sprint

FGB - Bike reported defected survey

👤

Current Sprint

Clipper reporting in DWH and beyond

👤

Sprint Candidate

FGB - Clipper Card Activation Copy re...

👤

Backlog

Alaska followup

FGB - Pre-launch Takeaway postcard (Need in Spanish & Chinese)

★

📡

🔗

⋮

• Creative

SF

FGB Launch Creative

☐ Client Review (CS)

👤 Eleanor

by Brent A on May 15

👤 Ryan

+

📅 Jun 07

▶ 0:00

⌵ 0

📄 1

📎

🔗

👤 16

Skip map. Direct to mobile app, website, focus on 542 stations, 7,000 bikes. How it works. Download the app for first ride free.

8 FILES

📎

☰

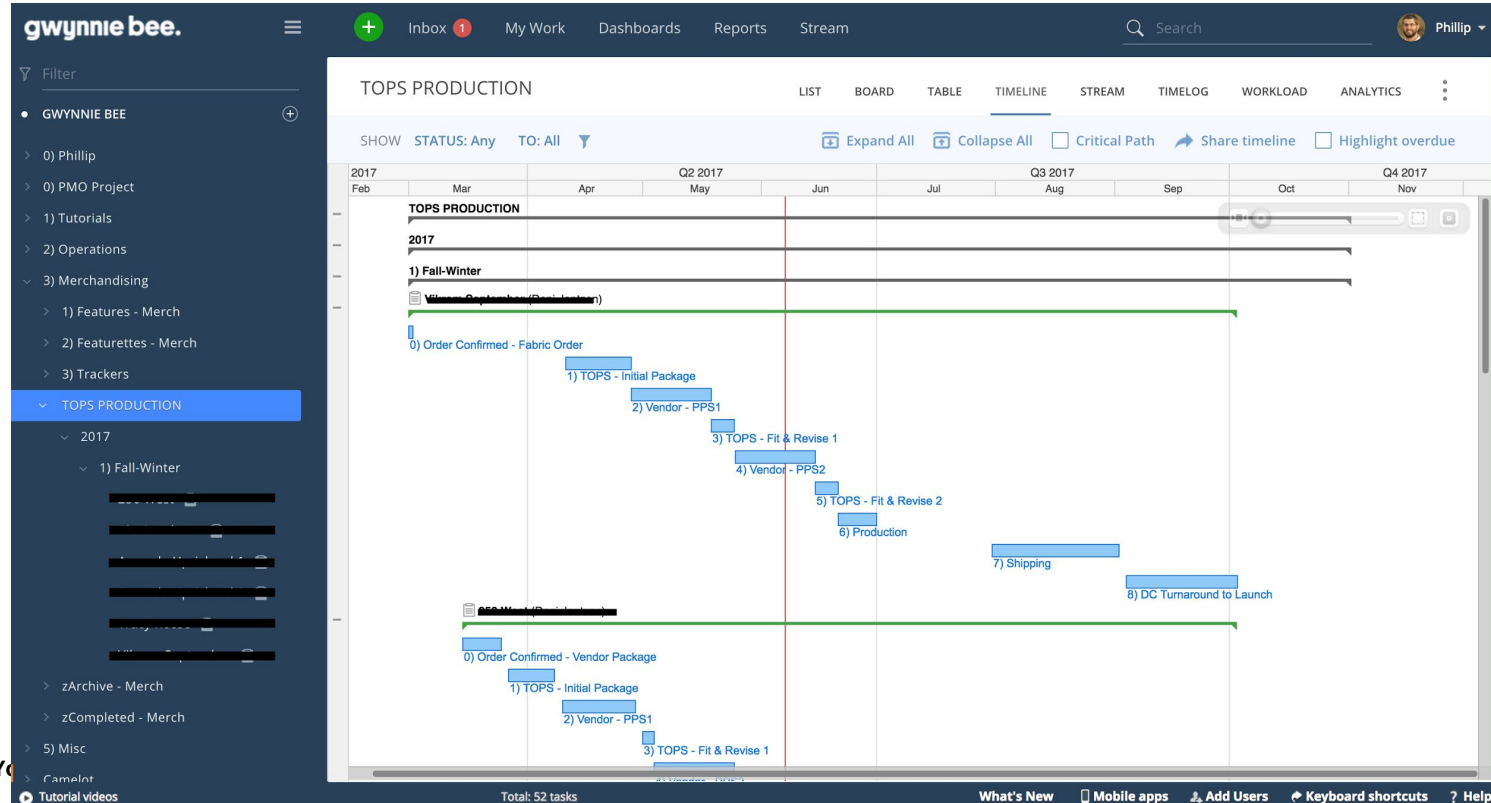
📄

Text - page 2.pptx

Laura Ruchinskas



# Gwynnie Bee - Production Planning



# Gwynnie Bee - Project Plan DRTV

**gwynnie bee.** + Inbox 1 My Work Dashboards Reports Stream Search Phillip

Filter

- GWYNNIE BEE
  - 0) Phillip
  - 0) PMO Project
  - 1) Tutorials
  - 2) Operations
    - 1) Features - Ops
    - 2) Featurettes - Ops
    - zArchived - Ops
    - zCompleted - Ops
  - 3) Merchandising
    - 1) Features - Merch
    - 2) Featurettes - Merch
    - 3) Trackers
    - TOPS PRODUCTION
    - zArchive - Merch
    - zCompleted - Merch
  - 4) Marketing
    - DRTV (Michelle)**
    - DRTV2
    - Unboxing (Courtney)
    - 5) Misc
    - Taoc
    - Tutorial videos

**DRTV (Michelle)** LIST BOARD TABLE TIMELINE STREAM TIMELOG WORKLOAD ANALYTICS

SHOW STATUS: Any TO: All Expand All Collapse All Hide empty folders

	Title	Start	Due	Durati...	Status	Assigned to	+
	DRTV (Michelle)	Apr 11, 2016	Aug 12, 2016	124d			ADD COLUMN
1	Phase 1: Pre-Shoot	Apr 11, 2016	Jul 29, 2016	110d			
2	01) Creative + Script	Apr 11, 2016	May 23, 2016	43d			
3	1) Orientation	Apr 11, 2016	Apr 15, 2016	5d			
5	2) Creative Treatment & Show Outline	Apr 11, 2016	Apr 28, 2016	18d			
14	3) Script	May 02, 2016	May 23, 2016	22d			
22	02) Testimonials	Apr 18, 2016	May 20, 2016	33d			
31	03) Budget + Payments	Apr 11, 2016	May 17, 2016	37d			
32	1) Budget	Apr 11, 2016	Apr 29, 2016	19d			
38	2) Payments	May 02, 2016	May 17, 2016	16d			
41	04) Talent	Apr 18, 2016	May 20, 2016	33d			
42	1) Host	Apr 18, 2016	May 20, 2016	33d			
49	2) Models	May 02, 2016	May 20, 2016	19d			
55	05) Production	Apr 18, 2016	May 26, 2016	39d			
56	1) Product Heroes & Styling	Apr 18, 2016	May 16, 2016	29d			
63	2) Location & Set	Apr 25, 2016	May 13, 2016	19d			
69	3) Shoots	May 16, 2016	May 26, 2016	11d			
75	06) Microsite Technical build	Apr 18, 2016	Jul 15, 2016	89d			
88	07) Analytics	May 02, 2016	Jul 29, 2016	89d			
98	08) Offline Editing	May 02, 2016	May 20, 2016	19d			
101	09) CS	Apr 27, 2016	Jun 23, 2016	58d			

Total: 187 tasks What's New Mobile apps Add Users Keyboard shortcuts Help

# Gwynnie Bee - Project Plan DRTV Detailed

**gwynnie bee.** + Inbox 1 My Work Dashboards Reports Stream Search Phillip

**Filter**

- GWYNNIE BEE
  - 0) Phillip
  - 0) PMO Project
  - 1) Tutorials
  - 2) Operations
    - 1) Features - Ops
    - 2) Featurettes - Ops
    - zArchived - Ops
    - zCompleted - Ops
  - 3) Merchandising
    - 1) Features - Merch
    - 2) Featurettes - Merch
    - 3) Trackers
    - TOPS PRODUCTION
    - zArchive - Merch
    - zCompleted - Merch
  - 4) Marketing
    - DRTV (Michelle)**
    - DRTV2
    - Unboxing (Courtney)
  - 5) Misc
  - Tape
  - Tutorial videos

**DRTV (Michelle)** LIST BOARD TABLE TIMELINE STREAM TIMELOG WORKLOAD ANALYTICS

SHOW STATUS: Any TO: All Expand All Collapse All Hide empty folders

	Title	Start	Due	Durati...	Status	Assigned to	
	DRTV (Michelle)	Apr 11, 2016	Aug 12, 2016	124d			ADD COLUMN
1	Phase 1: Pre-Shoot	Apr 11, 2016	Jul 29, 2016	110d			
2	01) Creative + Script	Apr 11, 2016	May 23, 2016	43d			
3	1) Orientation	Apr 11, 2016	Apr 15, 2016	5d			
4	1) Product Orientation Meeting	Apr 11, 2016	Apr 15, 2016	5d	Complete...		
5	2) Creative Treatment & Show Outline	Apr 11, 2016	Apr 28, 2016	18d			
6	1) Create First Draft	Apr 11, 2016	Apr 15, 2016	5d	Complete...		
7	2) Internal Review of First Draft	Apr 18, 2016	Apr 21, 2016	4d	Complete...		
8	3) GB Review of First Draft	Apr 22, 2016	Apr 22, 2016	1d	Complete...		
9	4) Internal Review of Second Draft	Apr 25, 2016	Apr 26, 2016	2d	Complete...		
10	5) GB Review of Second Draft	Apr 26, 2016	Apr 26, 2016	1d	Complete...		
11	6) Internal Review of Final Draft	Apr 26, 2016	Apr 27, 2016	2d	Complete...		
12	7) Final Draft Review and Approval	Apr 28, 2016	Apr 28, 2016	1d	Complete...		
13	8) Milestone: Treatment & Outline Completed		Apr 28, 2016		Complete...		
14	3) Script	May 02, 2016	May 23, 2016	22d			
15	1) Create Script First Draft	May 02, 2016	May 05, 2016	4d	Complete...	Joanie Laxson	
16	2) Internal Review of Script First Draft	May 06, 2016	May 06, 2016	1d	Complete...	Joanie Laxson	
17	3) GB Review of Script First Draft	May 11, 2016	May 15, 2016	5d	Complete...	Michelle K.	
18	4) Return Script First Draft Feedback		May 15, 2016		Complete...	Michelle K.	
19	5) Create Script Final Draft	May 16, 2016	May 19, 2016	4d	Complete...	Joanie Laxson	
20	6) Script Final Draft Review and Approval	May 19, 2016	May 23, 2016	3d	Complete...	Michelle K.	

Total: 187 tasks What's New Mobile apps Add Users Keyboard shortcuts Help



New York

# Gwynnie Bee - Project Planning Tutorial

The screenshot displays the Gwynnie Bee project planning interface. The top navigation bar includes a search bar, a user profile for Phillip, and tabs for Inbox, My Work, Dashboards, Reports, and Stream. A left sidebar shows a filter menu with categories like 0) Phillip, 0) PMO Project, 1) Tutorials, 2) Operations, 3) Merchandising, and 4) Marketing. The main content area is titled '6) Birdhouse Project (Phillip)' and shows a task list in 'TABLE' view. The table has columns for Title, Start, Due, Duration, Status, and Assigned to. The tasks are organized into phases: Phase 1: Research and Design, Phase 2: Development, and Phase 3: Implementation. The 'Status' column shows various states like 'Complete...', 'Active', and 'NEW TASK'. A vertical 'ADD COLUMN' button is on the right side of the table.

	Title	Start	Due	Durati...	Status	Assigned to	
	6) Birdhouse Project (Phillip)	Jun 07, 2017	Jun 30, 2017	24d			ADD COLUMN
1	Phase 1: Research and Design	Jun 07, 2017	Jun 30, 2017	24d			
2	1) Materials	Jun 07, 2017	Jun 30, 2017	24d			
3	1) Research Options	Jun 07, 2017	Jun 14, 2017	6d	Complete...		
4	0) Notes				Active		
8	1) Gather 10 options				Active		
12	2) Review Options				Active		
13	3) Finalize Options				Active		
14	2) Build Data Model	Jun 15, 2017	Jun 21, 2017	5d	Active		
15	3) Evaluate Options (KSC, PH, CP)				Active		
16	4) Finalize Options				Active		
17	5) MILESTONE: Selection Finalized		Jun 30, 2017		Active		
18	2) Size & Asthetic						
19	3) Location						
20	4) Budget						
21	5) Birds						
22	Phase 2: Development						
23	Phase 3: Implementation						
+	NEW TASK						

Total: 15 tasks

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