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New User Tips & Tricks

Onboarding and change management | Creating project templates | Building a request process

June 7th, 2017

Introductions

- Gather yourself in groups of 4-5 with people, ideally from different companies.
- Introduce yourself to the team with your name, company, and stage of onboarding Wrike.
- Share 1 fun fact about yourself

Meet the Presenters

Matt Williams
Senior Manager, Customer Success

Specialty: Collaborative change management & value acquisition

Fun Fact: Can beat Steven in a round of golf

Steven Kearney
CSM - Strategic Accounts

Specialty: Workflow strategy and customization

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

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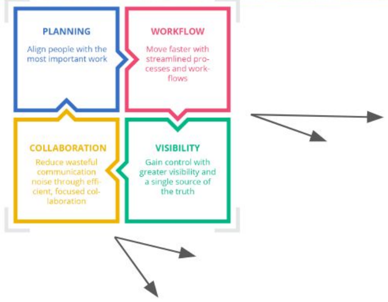
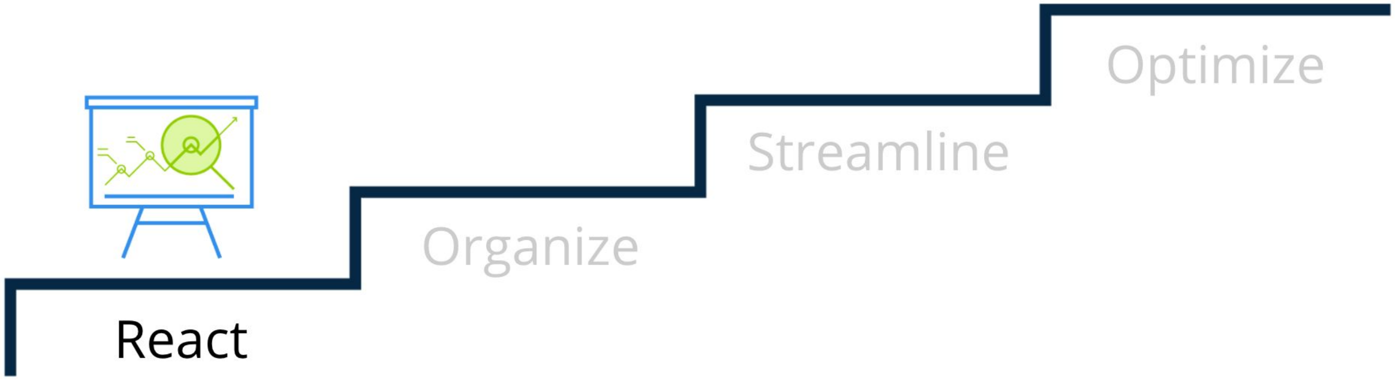
The Wrike Way & Onboarding Process

Move Customers from React….





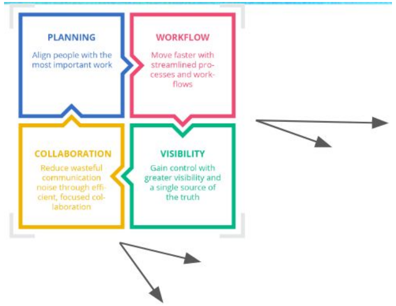
Planning: Work activities, requests, plans, and assignments are unstructured and managed in an ad hoc, siloed fashion.

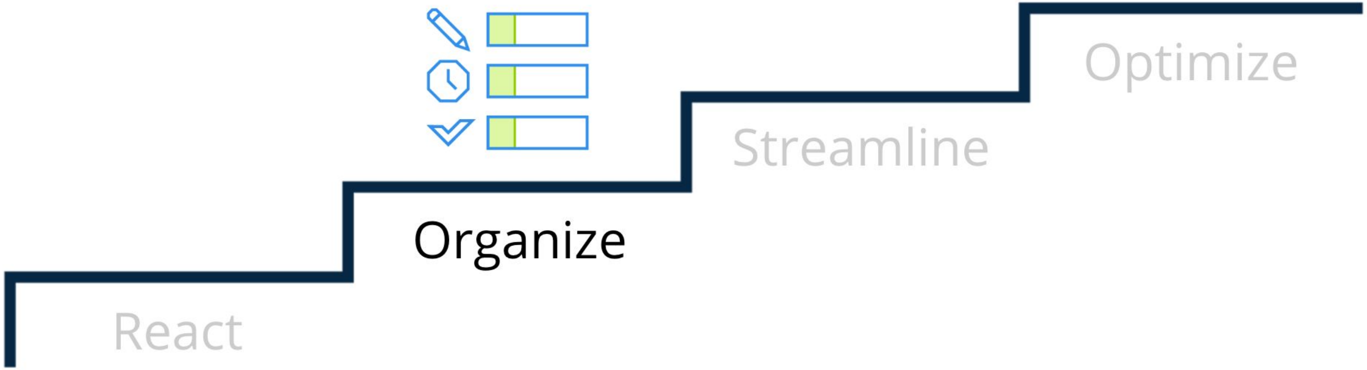
Workflow: Ad hoc intake, planning, execution methods and undefined roles lead to rework and excessive firefighting.

Collaboration: Siloed teams, crucial project/task information & agreements are lost in a sea of emails, with wasteful meetings spent just trying to catch up.

Visibility: It's hard to tell who's doing what, where the delays & bottlenecks are, and what the workflow is.

to Organize





Planning: Core requests and projects are consolidated into a single, shared system to be prioritized, assigned, and planned.

Workflow: Roles & workflow are clearly defined and transparent, leading to better accountability for core projects & tasks.

Collaboration: Project & task communication is in a central workspace. Meetings are more focused, with action items & agreements captured.

Visibility: Basic reports & dashboards give insight into progress and expose bottlenecks.

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Managing the Change to Wrike

The 6 Secrets to Managing the Change to Wrike

1. Create awareness of the change - *“Have you heard about Wrike?”*

The 6 Secrets to Managing the Change to Wrike

2. Foster desire to make the change - *"Here's what's in it for you"*

The 6 Secrets to Managing the Change to Wrike

3. Disseminate knowledge of what's changing - *"This is how we will work more efficiently"*

Clearly communicate your value proposition.

What was wrong with the previous way that you were working? Showcase how Wrike will fix that problem.

The 6 Secrets to Managing the Change to Wrike

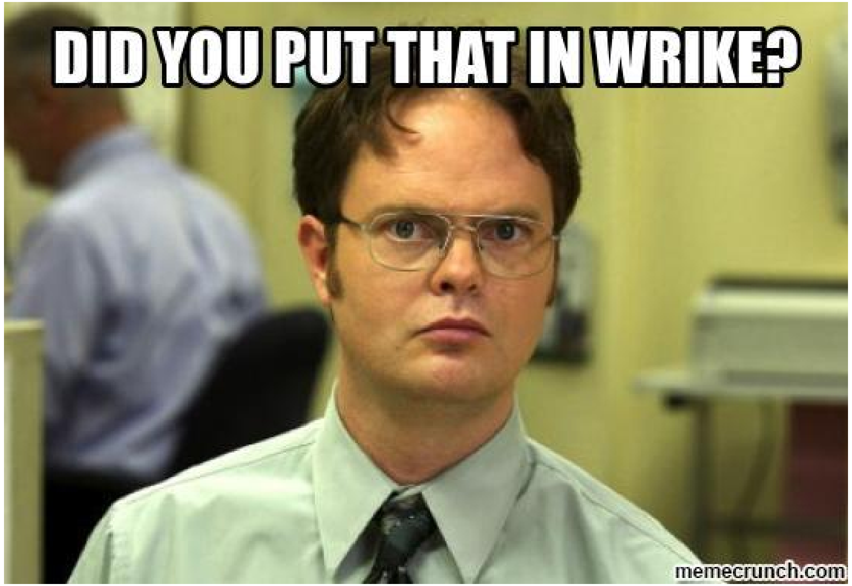
4. Recruit an army of champions - *“We’ll help you each step of the way”*

The ONE to FIVE rule:

Our goal is to get to a ratio of 1 champion for every 5 users of Wrike and to ensure that champions are distributed across the team

The 6 Secrets to Managing the Change to Wrike

5. Make it Stick - *"If it's not in Wrike, it doesn't exist"*



The 6 Secrets to Managing the Change to Wrike

6. Iterate and improve - *“The best has yet to come”*

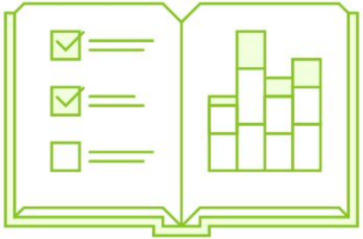
More than likely, won’t get your setup of Wrike perfect the first time. And, that is okay.

Set the expectation up front that changes will be made. Rome wasn’t built in a day, but became an empire over time!

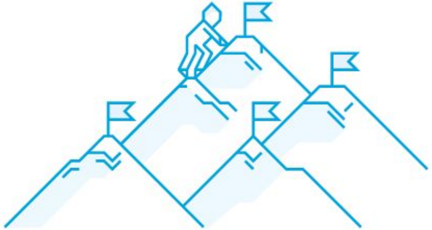
Avoid Decision Paralysis

Scripting the critical moves gives the team a clear direction on how work starts, what input is needed to complete work, and how to find their work.

Connect Wrike to the Way Your Team Works



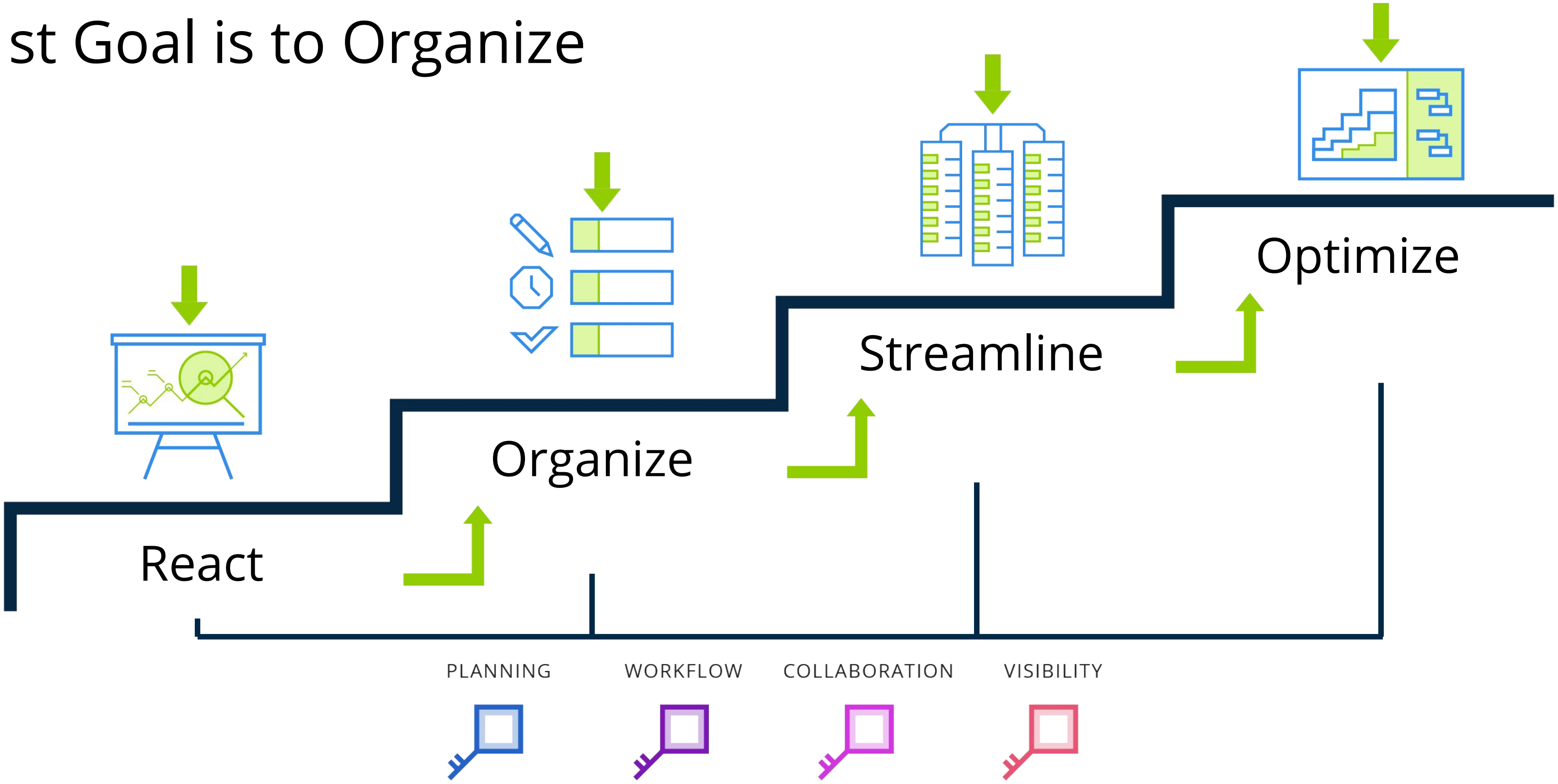
Connect Wrike with Work Habits



Measure the success of Wrike

Integrate with other technology solutions

1st Goal is to Organize



Look to the Bright Spots for the Way Forward

Rather than focus on what's not working, let's focus on what is working. Copy the success of teams and individuals who have been successful with Wrike. Start to uncover the following:

- Where do you see the positive outliers?
- What is the "normal way" things are done?
- What is different about the bright spots?
- How do we clone that method?

*Taken from *Switch* by Chip and Dan Heath

In Summary…

1. Create awareness of the change - *“Have you heard about Wrike?”*
2. Foster desire to make the change - *“Here’s what’s in it for you”*
3. Disseminate knowledge of what’s changing - *“This is how we will work more efficiently”*
4. Recruit an army of champions - *“We’ll help you each step of the way”*
5. Make it Stick - *“If it’s not in Wrike, it doesn’t exist”*
6. Iterate and improve - *“The best has yet to come”*

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Planning: Consolidate the Intake and Execution of Work

80% Factor

Work can be operational or projectized. It can be simple or complex. Hone in on work that is **collaborative**.

Look for repeatable processes to help give process definition, make it easy to start work, and build the habit to a new tool.

Teams
Share the types of work you plan to manage in Wrike

1 Avenue for Intake

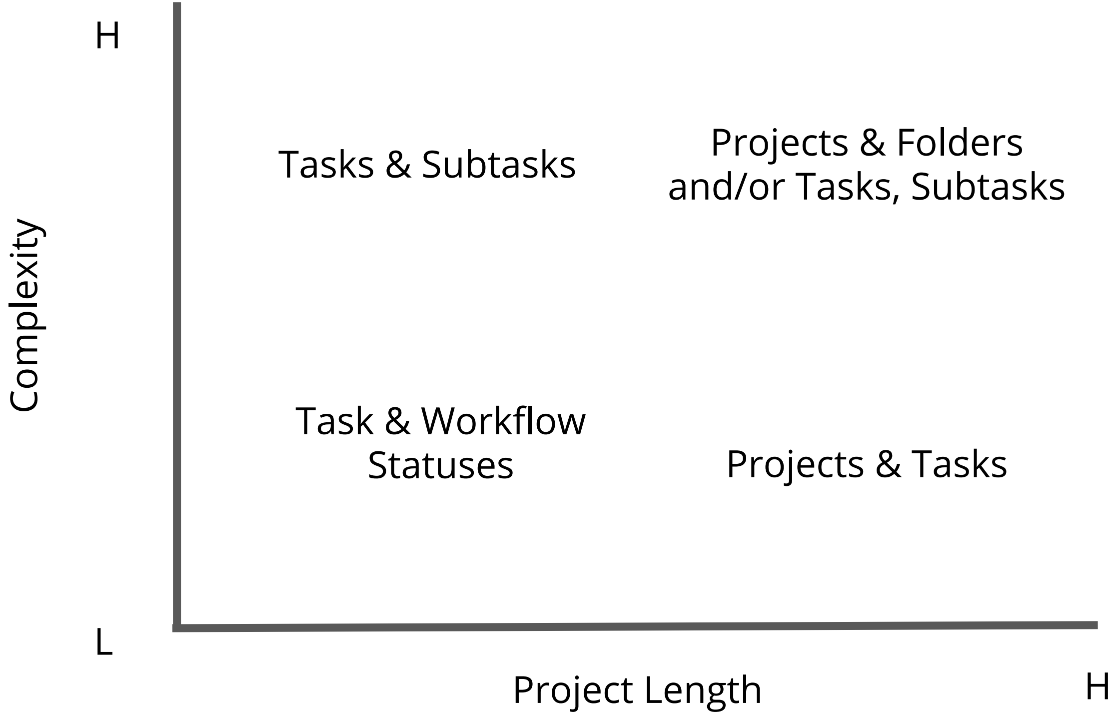
Simplify the process of starting work. Create 1 avenue to accept project or operational requests from the team.

Remove team members from the role of trafficking so they can focus on execution.

Methods of Intake: Request forms, Production Schedules, Strategic Plans, Monthly or Weekly recurring operational work

Teams Discuss the avenue you plan to use to intake work

Organize Work for Your Team



Definitions
Projects are used to run campaigns or initiatives that have a start and end date.

Folders are used to catalogue or organize work.

Tasks are used to capture actions.

Subtasks are used to break down tasks into sub-components.

Tips & Tricks for Templates

Use templates for the process taken 70-80% for initiatives

Combine inputs and outputs into a singular task. Utilize each task for the end-to-end process of planning and executing on a deliverable.

Minimize the tasks and subtasks. Only use subtasks if there are strict dates & change in assignments.

Add in relative durations and utilize dependencies for easy re-schedules and hand-offs

Tips & Tricks for Requests

Determine **who & when** requests will be submitted to the team

Use request forms to gather the information you need to effectively **plan** work

Consolidate requests into a single form, when possible.

Determine who will traffic the requests & assign out work to the team

What % of requests will your team take on?

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Workflow: Roles and Accountability

Roles in the Workflow

Team Member	Manager	Trafficker	Executive	Stakeholders
Responsible for managing tasks that are assigned to them. May be responsible for attaching documents, @mentioning for input, changing dates, and/or logging time.	Responsible for overseeing the work of the functional team and that deadlines are met, work is prioritized, and team members are appropriately allocated.	Responsible for managing the intake process, creating new initiatives, and ensuring that resources are spread across projects.	Responsible for setting the strategic direction of the organization and ensuring that teams are aligned. Manages the budget and resourcing for the departments.	Responsible for requesting, reviewing, and approving the work that the team completes. May assist with work prioritization.

Sample Workflow

Stakeholder submits a request with the requirements & approves completed work

Trafficker reviews to ensure all information is gathered. Creates a project and resources.

Team Member Creates the deliverable and includes stakeholders & managers for input. Completes the task and triggers next in line to take action.

Manager Utilizes the dashboards to run weekly meetings and 1:1s to identify risks and changes in the project(s).

Executive uses reports to visualize all projects and ensure strategic priorities are met.

Create a “Rules of Wrike”

Defines how Wrike will be leveraged by the teams

Specifies the folder structure, project templates, and reports that are extracted from Wrike.

Defines the workflow for the team

Determines who will create projects, own tasks, and general responsibility

Captures how Wrike lives within the tool ecosystem

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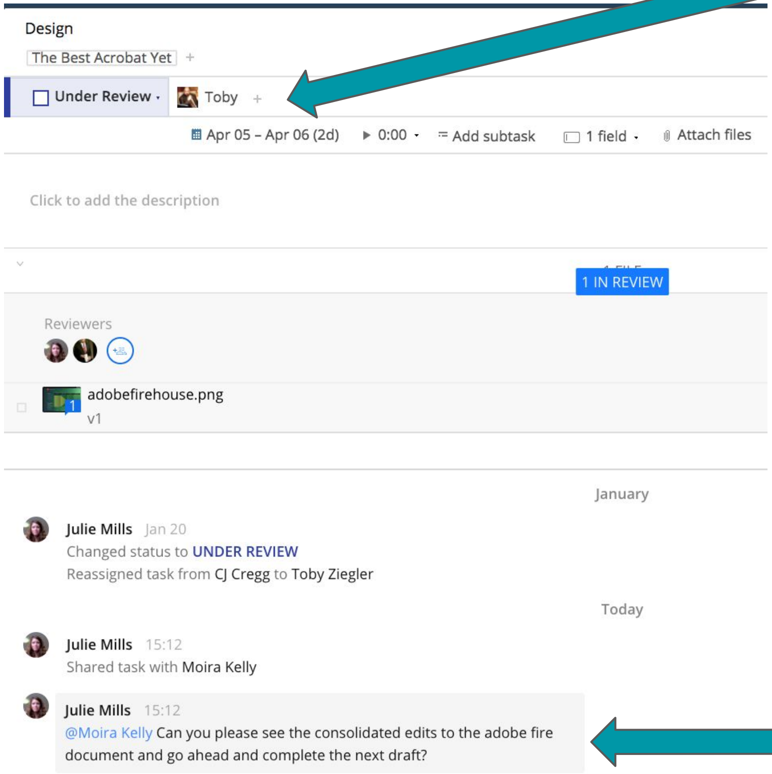
Collaboration: Centralize & Capture

Collaboration

Utilize workflow statuses to indicate the stage of the work and/or who is responsible

Use the description to give direction and collaborate on the ideation process

Assign reviewers and approvers to mark up changes to the document



Assign an owner who is responsible for the work

Sync files to have all documentation in 1 space

@Mention team members to centralize communication and progress

Collaboration Best Practices

Add all documents in progress to Wrike for collaboration.

Utilize @mentions to replace email updates and ping for input

Use task assignments to specify who is ultimately responsible for the task. The assignee changes the dates, marks the task complete, and ensure that it is on track.

Use statuses to indicate where the task is at in it’s lifecycle

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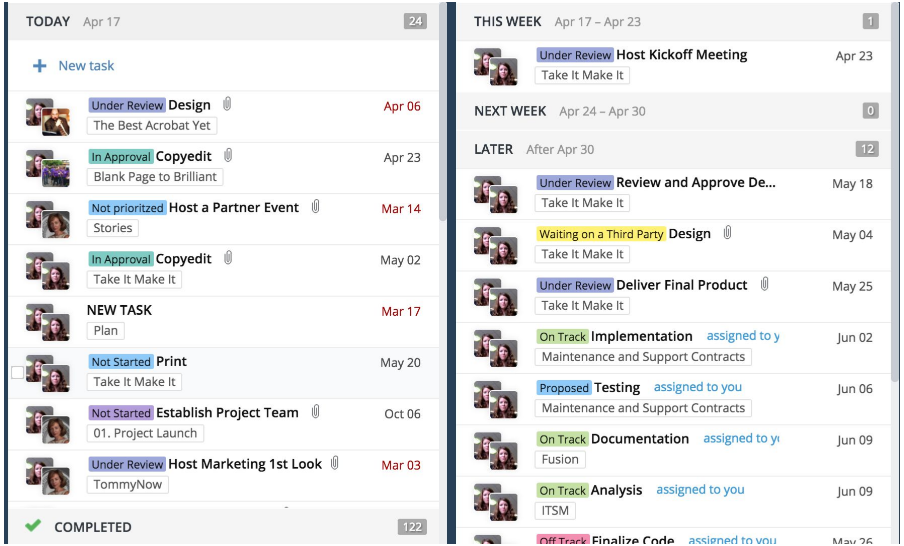
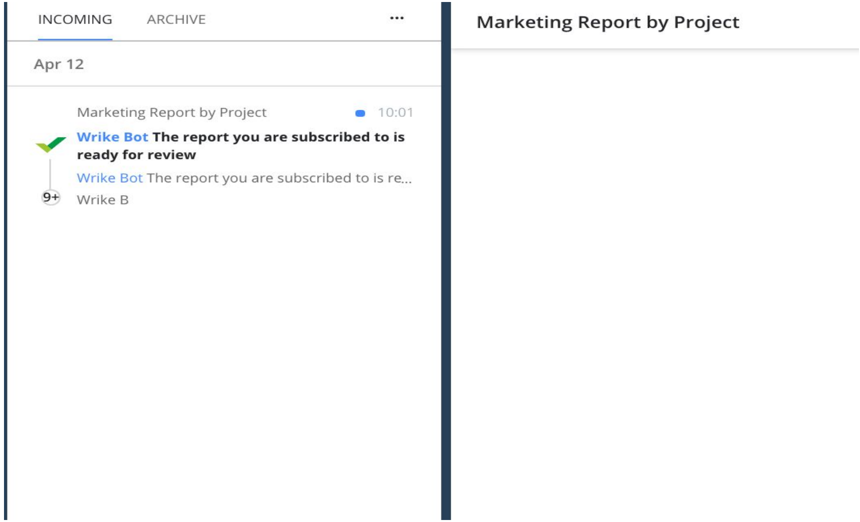
Visibility: Dashboards & Reports

Individuals Have Visibility Over Their Work

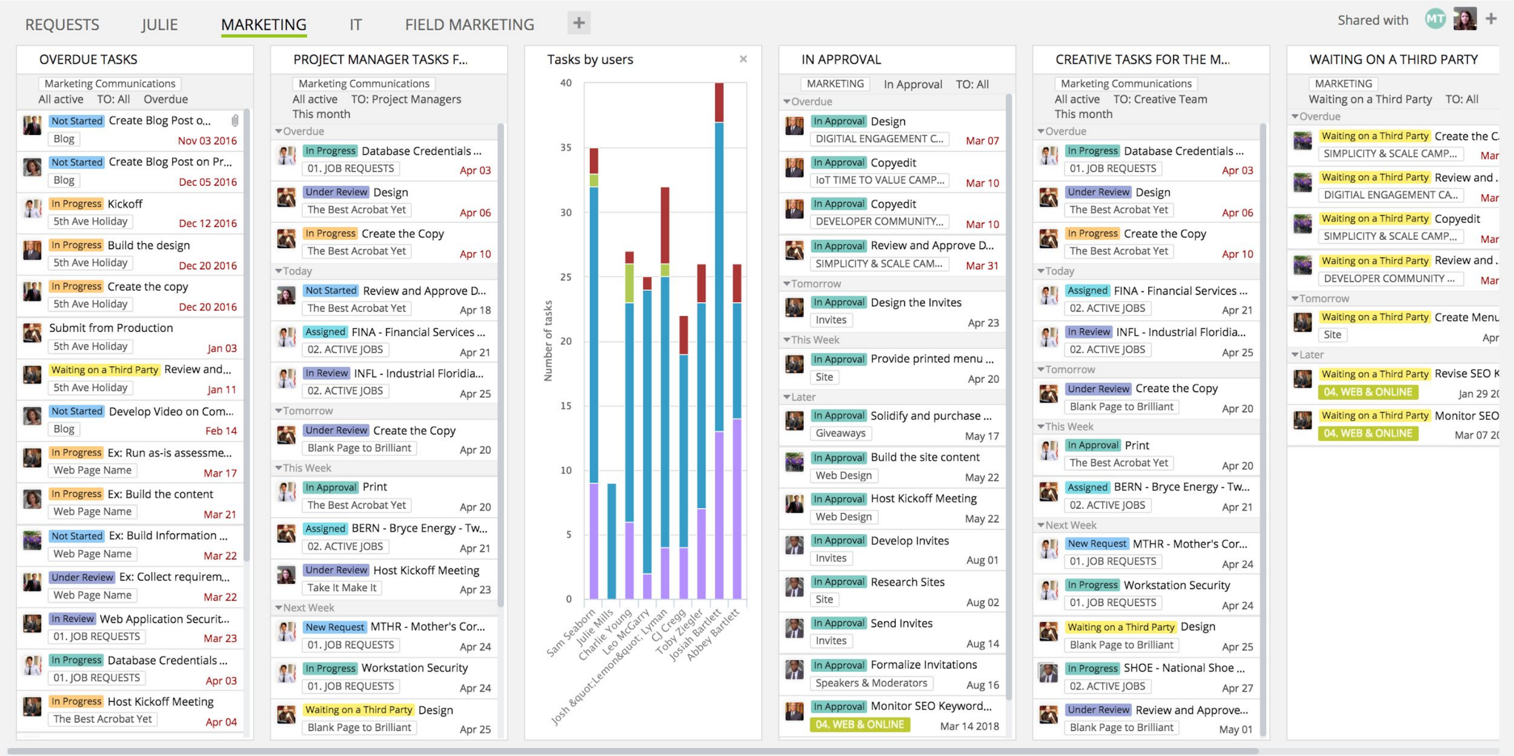
MyWork for Task Assignments



Inbox for Notifications



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 Milleneals	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.