Mastering the Adoption Process of Wrike

Oct 4, 2017

Who am I?

Dury Bell (doo - rhee)

Enterprise, Customer Success Manager

Headquarters: San Jose, CA

Specialties:

- Wrike Expert
- Change Management Guru
- Helping customers achieve operational excellence
- Converting brand new users into product experts

Mastering the Adoption Process of Wrike

Agenda

- The Why of Wrike & Effective Communication
- The How: “How to Get it Wrike”
- Real client SOP examples
- Implementation - Wrike Knowledge Base Folder

The Why

The Why: What's in it for me?

End User Perspective:

- Why should I use a tool like Wrike?
- Why was this decision made?
- What am I supposed to do with this?
- How does my piece fit into the larger puzzle?

Executive Management Perspective:

- Do the end users understand why Wrike is necessary to utilize?
- Do the end users understand how their piece fits into the larger puzzle?
- Do the end users understand what the intended goals are with Wrike?

Reasons why customers purchased Wrike

"need top down visibility not just into my own work but all department work"

"ability to assign tasks or projects to multiple users across different teams"

"need a one stop shop for all work and collaboration"

"help identify where bottlenecks occur in our processes"

"better gauge available resources and who can or cannot take on more work"

Communication: What's in it for me?

Bad Communication	Great Communication
"You must update task statuses to all work being assigned to you. Effective tomorrow everyone *must* login daily to Wrike"	"Wrike is going to help prioritize our work and give us greater visibility into our available resources. This can be accomplished with everyone's participation by logging in daily to Wrike.
"It is mandatory to check your Inbox notifications before you start your day and before you leave for the day"	"By logging and completing your work in Wrike, we will have greater visibility on what each other is working on, identify how to better allocate resources, and have a one stop for collaboration. This will help our work no longer be siloed."
"All your projects and tasks must be entered into Wrike, and statuses must be updated on a daily basis"	"Wrike will help you to better prioritize work and reduce wasted time on weekly status meetings"

Communicating the Wrike Way

How frustrating is it to not have visibility into each other's work, pinpoint where a project stands in it process, and waste time in status meetings?

With everyone's participation in Wrike, we will have visibility into all work which will greatly reduce meetings and siloes.
This can be achieved if all users update their statuses in Wrike and check their Inbox notifications daily.

Communicating the Why

How is “the why Wrike” being communicated?

- Email communication
- Team or department wide meetings
- Lunch and learn
- Chat (Hangouts, Slack)
- Mass login email

The How

“If you want people to change, you must provide crystal-clear direction”
- SWITCH

“What looks like resistance is often a lack of clarity”
- SWITCH

How to Get it Wrike

Your simple playbook for success.

1. Why Wrike? – It's essential to communicate your goal to end users. Often times users feel your pain points as well.

a. ex. *Our goal for using Wrike is to unite disparate teams in a central workspace, hit project deadlines, and report project statuses out to management. This will help resolve over allocation and budget constraints by painting a clear picture for management.*

---

2. How often should users log into Wrike? – What is the expectation for Wrike usage?

a. ex. *Wrike should become the main platform for users to work on tasks and to check for any upcoming work. The collective success of the team will revolve around using Wrike as a single source of truth.*

---

3. How is work initiated? – Let your end users know what triggers work. Is it a request that comes in via email? Initiatives that trickle down from management? Client requests? Where can users request work?

a. ex. *All projects in Wrike are initiated based on client requests that are sent via email into the New Project Requests folder. I will create a project based on this request and tag to the appropriate folders and utilize a template to build out projects. Work will be assigned out from there.*

---

4. Are users responsible for creating tasks and projects or is an admin? – Identify which users are responsible for creating what. This helps prevent chaos and disorganization within the folder structure which will ensure long term success. If you prefer that an admin create projects and tasks, specify that from the beginning to set expectations.

5. Is there a specific naming convention? – If users are able to create tasks and/or projects, is there a specific naming convention they should stick to?

a. ex. *When creating tasks within projects, be sure to add the name of the region as a prefix to keep the workspace organized.*

---

6. Where do I go to see my tasks? – Some folks recommend using My Work, which allows users to set their own prioritization and some direct their users to a personal Dashboard, which gives hard deadlines based on the due date of the task. It's important to specify where users can find their work. Wrike will also send out daily To-Do emails with a list of all tasks due that day.

a. ex. *In addition to the daily To-Do automated email from Wrike, use the personal Dashboard to see all upcoming and overdue tasks assigned to you. You can organize your workload within the My Work section, but be sure it aligns with the personal Dashboard.*

---

7. Where is work done? – Outline the location of work to mitigate any confusion. Should users be working out of their department folders or any specific folders? Should users log their work into the task description? Should users track their time?

a. ex. *All work should be documented in the task description. There is a team specific folder that you can check for the list of projects. Once work is ready for review in the task with attachments uploaded, @mention your manager for review and mark the task Complete upon sign off.*

8. Run team meetings out of Wrike – As a best practice, we recommend all team meetings are run out of Wrike. Have a specific folder for Meetings and have a task per meeting. Put the agenda in the task description and take notes on that meeting. Any follow up items can be immediately turned into tasks to prevent items slipping through the cracks and increase adoption of Wrike for the team.

a. ex. *Our Monday morning all-team meeting will be run out of Wrike. A task with the meeting date will be in the Meetings folder and an agenda set by Friday afternoon. Jan will take notes from the meeting in Wrike and include any follow up items as subtasks with assignees. These may be moved to the appropriate department folder afterwards.*

---

9. Where can users go for additional questions?

a. Contact the champion
b. Wrike Help Center: www.wrike.com/help
c. Email Support at support@team.wrike.com

Client Example:

Standard
Operating
Procedures

1. Why Wrike?
   - This is your one stop shop, all of your work will be centralized in Wrike. It will streamline our discussions and work. All you need is an internet connection to be able to work on a computer or your mobile phone.
   - Wrike will help you sleep at night.
   - Before Wrike, work was spread out over many different tools such as email, shared drive, etc.
   - This will help us be accountable and meet our ND Voice goal.
   - Workloads are transparent in Wrike so managers can reallocate work and team members can offer assistance.
   - If used to its fullest potential, Wrike will help us reduce meetings and emails thereby increasing our overall productivity and prioritize our work in a way that is not currently feasible.

2. How often should users log into Wrike? – What is the expectation for Wrike usage?
   - Every morning - start your day with Wrike.
   - Before you leave work - organize tomorrow's day and check for changes.
   - **If it is not in Wrike, it does not exist.**

3. How is work initiated?

- New events must be submitted via Wrike request form.
- Tasks will be pushed out by event leads and pod managers

4. Are users responsible for creating tasks and projects or is an admin?

- Event leads are only responsible for creating tasks and projects.
- All new projects must be created using project templates.

5. Is there a specific naming convention? – If users are able to create tasks and/or projects, is there a specific naming convention they should stick to?

- Projects: “Project Name - Event Lead - Event Date”
  “Jenkins Hall Dedication - Cristi- 10/20/17”
- Tasks: Begin task with action verb

6. Where do I go to see my tasks?

- All tasks assigned to you should live within My Work. (The My Work tab is on the left hand panel.)
- For example, What do I need to do today? What should I be working on this week? What can I put off until later? My Work will help you prioritize your tasks.
- You can take control of your work and move tasks as you see fit.

7. Where is work done?

- Projects = Events, they have specific due dates and owners. All projects for SES live under the parent folder "SES Events". Specific tasks live within each project.
- SES Team contains folders that organize tasks that have been tagged to specific pods. For example, EO Briefings live within events but they are also tagged to the Executive Pod - EO Briefing folder so that their team can see all briefings in one view.

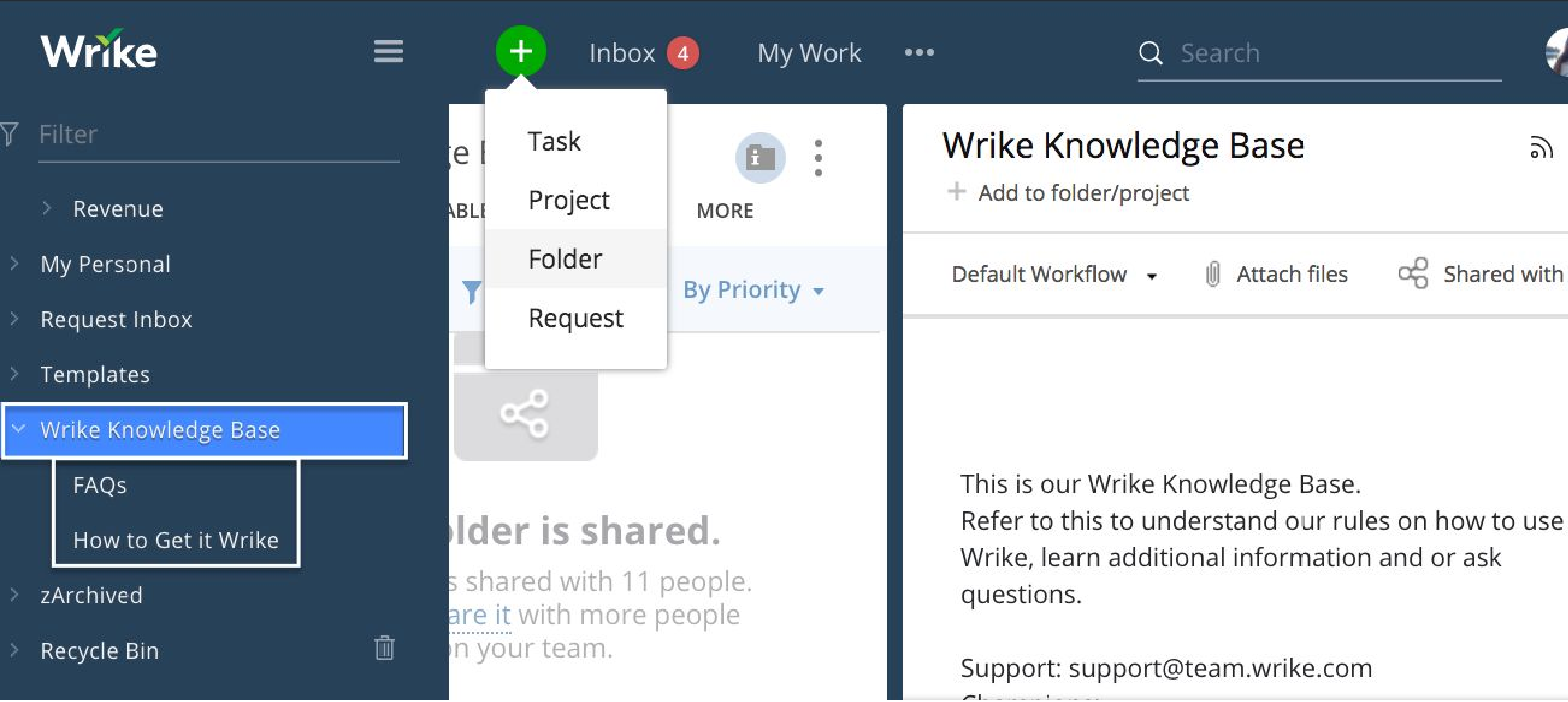
8. Run team meetings out of Wrike.

- All meeting information should live within Wrike. For example, agendas, meeting notes, action items should live within the meeting task.
- All action items can be listed in the description box but the task itself needs to be placed inside the appropriate project.
- If there is an action item, the note taker is responsible for at mentioning the individuals who have an action item that results from the meeting.

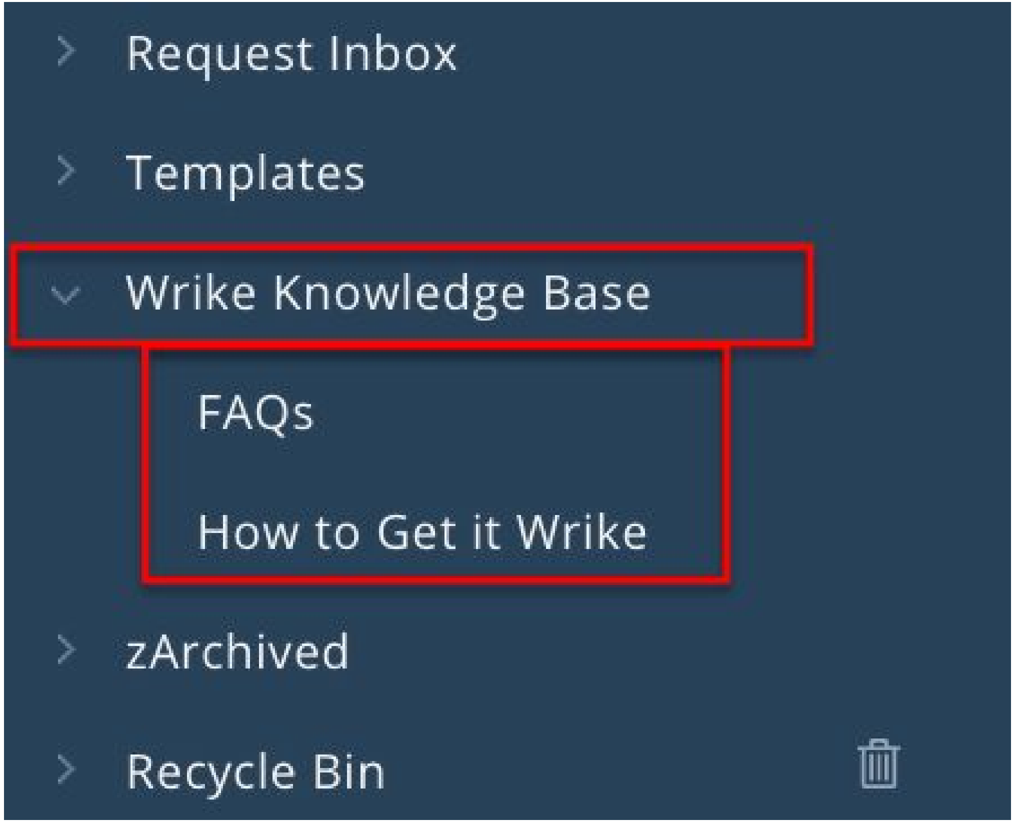
Implementation

Wrike Knowledge Base

Wrike Knowledge Base Folder



Wrike Knowledge Base Folder



- Create a parent folder titled “Wrike Knowledge Base”
- Create a subfolder titled FAQs
- Create a subfolder titled “How to Get it Wrike”
- All questions will be submitted into the FAQs folder
- Store SOP in “How to Get it Wrike” folder
- Share Knowledge Base with MyTeam group

Keys to Successfully Adopting Wrike

Make Wrike the single source of truth on work

Create clear and compelling goals

Why Wrike? Why now? What's in it for me?
Connect to business goals people care about.

Script the critical moves

How does work get into Wrike?
Who must do what? How often?

Build your key processes in Wrike

Use templates for any repeatable work
Capture work origination inside Wrike

Plug in Wrike into your regular team rhythms

Use Wrike to run better meetings and track all action items
Capture quarterly goals in Wrike and link to initiatives

Master personal productivity

Encourage your team members to manage their master to-do lists in Wrike

Add a human touch

Create a Wrike Champion team
Jazz up your launch
Celebrate early wins
Cultivate team identity

Thank you

Resources: Want to learn more?

How to Get it Wrike (template): How To Get it Wrike
Wrike Community: https://help.wrike.com/hc/en-us/community/topics
Wrike Help Portal: Introduce Your Team to Wrike
Wrike Support: support@team.wrike.com

Book recommendations: