Wrike

Breakout Session 1:

Wrike for Beginners: Folders, Dashboards,Templates, Request Forms and Reporting

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Your Wrike Team

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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.

Favourite Hobby: Cycling

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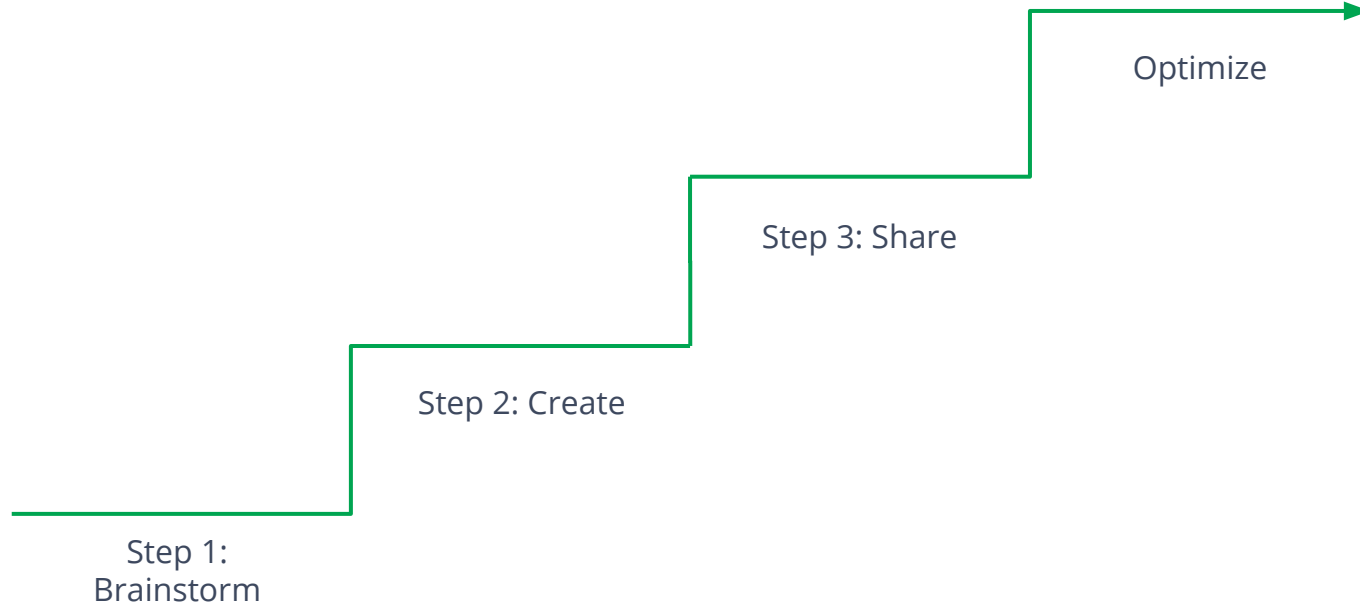
Favourite Hobby: Skiing

Folders

Folder Structures

- Be Intuitive
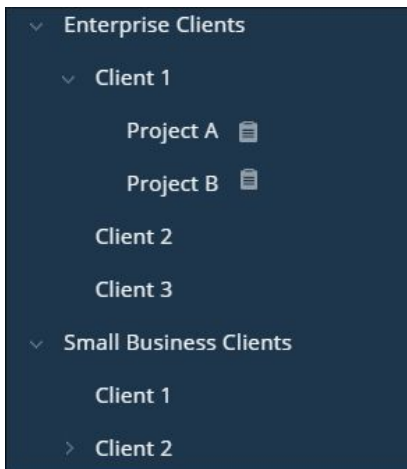- Include the Basics
- Be Scalable

How to Create Your Structure

Optimize

Step 3: Share
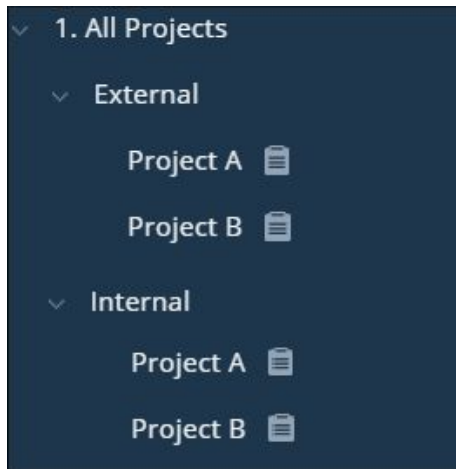
Step 2: Create

Step 1:
Brainstorm

Types of Folder Structures

1. Client Based

```
∨  Enterprise Clients
   ∨  Client 1
         Project A  📋
         Project B  📋
      Client 2
      Client 3
∨  Small Business Clients
      Client 1
   >  Client 2
```

2. Department Based

```
∨  2. Departments
   >  Administration
   >  Design
   ∨  Development
         Team A (UX)
         Team B (Dev)
   ∨  Marketing
         Team A (Creative Ser…
         Team B (Opeartions)
```

3. Project Based

```
∨  1. All Projects
   ∨  External
         Project A  📋
         Project B  📋
   ∨  Internal
         Project A  📋
         Project B  📋
```

Dashboards

Visibility for your team

- Overcome information silos, update stakeholders with real-time information

- Focus on work that really matters

- Higher levels of accountability

- Avoid capacity-related roadblocks

- Empower your team

Dashboards

- Highly Customizable

- Dynamic Monitoring Tool

- Proactive management of work
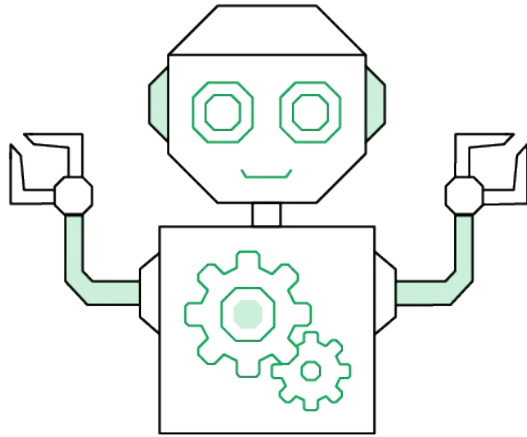
- Provides personal and team visibility

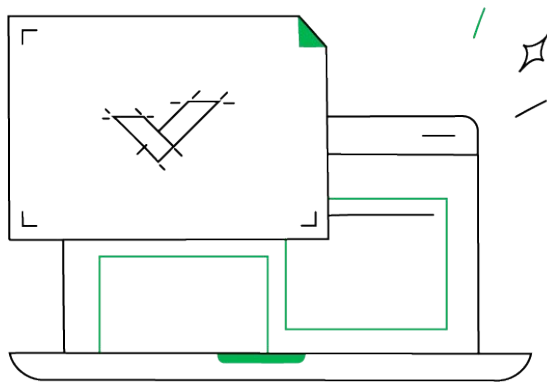# Let's Jump into Wrike

Templates

Automation

- Accenture forecasts 30% to 40% gains in employee productivity in the next three to five years as a result of automation

- Eliminate repetitive manual tasks

- Improve accuracy and execution

Wrike Templates

- Automate

- Capture all steps

- Minimize the tasks and subtasks

- Add in relative durations and utilize dependencies

- Multiple templates

Let's Jump Into Wrike

Request Forms

Wrike Request Forms

- Prioritize, manage and track work requests in a central location

- Available for non-Wrike users, no authentication required

- Simplify gathering project requirements while improving visibility for your stakeholders
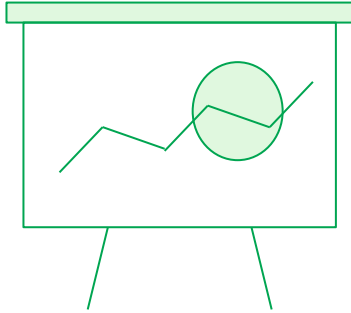
Let's See How They Work in Wrike!

Reporting

Reporting

- Visibility

- Specific KPIs/Outcomes

- Granular

- Customisable

- Easy to Share

- Automated delivery

Reporting - Some Tips & Tricks

- Use folders to hierarchically organise and categorise work

- Portfolio reporting: Custom fields are key

- Use dropdown and checkbox custom fields to group and display reporting data

- Set a regular cadence for pulling reports and clear internal expectations

Let's Look at an Example

Thank you!

Please feel free to stay in touch:

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