How Window Nation's creative department leverages Wrike's AI features

Window Nation is a leading provider of high-quality windows, committed to delivering unmatched expertise and exceptional products to homeowners across the nation. With a focus on innovation, sustainability, and customer satisfaction, Window Nation continues to set the industry standard for excellence.

Organizing project details and streamlining collaboration

Before Wrike, the creative team at Window Nation was using an ad hoc collection of tools, including Trello boards, to track projects and tasks. However, when Creative Director De Lisa Patterson joined the team, she found that the existing system left her with more questions than answers.

"I had no way of anticipating how long something would take … a team member would submit a task, but I wouldn't get notified," she says. She added that "there was no real system to control and have oversight of who's working on things," which made task management especially difficult. "We struggled with scattered project details, multiple communication channels, and difficulty in monitoring progress across various tasks."

Upon starting in her leadership position, De Lisa immediately recognized that the piecemeal system wasn't working for her team or allowing them to succeed as she knew they could. She explains, "When your role is crucial for the company's success, it's important to prioritize the most critical tasks." De Lisa began researching other work management options, ultimately choosing Wrike for its automation, visibility, and AI capabilities.

SUCCESS STORY FACTS

Increased
efficiency using automation tools

Seamless
communication within the team

Coherent
project tracking

Improvement
in team's productivity

High-quality
creative work

Enabling a single source of truth powered by time-saving AI

Since switching to Wrike, Window Nation's creative team has been able to better track their work, capture details in a single place, and capitalize on the visibility Wrike provides into project progress. "We now have a unified platform where all project-related information, tasks, deadlines, and communications are consolidated," De Lisa reports. This centralized approach has vastly improved the team's ability to stay organized, ensuring that everyone is on the same page and aware of their responsibilities.

In transitioning to Wrike, Window Nation's creative department has been able to improve overall efficiency and interdepartmental collaboration. "Wrike's collaborative features, such as real-time updates, @mentions, and file sharing, have facilitated seamless communication within the team, eliminating silos and fostering a more transparent and collaborative work environment," says De Lisa.

With project details in a reliable, visible location, and the team better able to collaborate, De Lisa was able to turn her sights to Wrike's Work Intelligence solution, which includes innovative AI features to further improve her team's efficiency. "Recognizing the potential of artificial intelligence to automate repetitive tasks, I took the initiative to explore Wrike's AI capabilities and integrate them into our workflow," she says. She started by enabling Wrike's automation features. "I created custom rules and workflows that automatically sorted and organized projects based on predefined criteria such as status, priority, or deadline." The result was significant savings in time and effort for the small team, as well as increased consistency and accuracy in project management across the board.

De Lisa was also able to significantly improve her own project management processes by harnessing Wrike's AI capabilities. "Before the integration of AI, I often found myself spending a considerable amount of time manually analyzing project timelines, assessing task dependencies, and determining the optimal sequence of tasks and then following up with staff members," she says. The process was time-consuming and prone to human error.

Wrike's workflow automation and AI-recommended tasks help Window Nation enhance productivity and ensure projects are completed on time and within budget. De Lisa reports, "Wrike's AI tools ultimately drive better outcomes for our team and the organization as a whole."

CASE SUMMARY

Customer
Window Nation

National Headquarters
Fulton, Maryland

Industry
Residential window replacement

# of Users
20

Wrike Products and Services
Business Plus

Top Challenges
Lack of insight into project progress and task responsibility that caused problems with interdepartmental collaboration and efficient project completion

Why Wrike
Wrike's technology allows for coherent project tracking and seamless collaboration, featuring automation tools that have enabled our Creative Department to become more efficient

Improved visibility and enhanced productivity

As a small creative team that directly supports a nationwide window replacement company's many varied needs, from HR and internal communications to external artwork and assets, De Lisa's department has been able to use Wrike to supercharge capacity. "Overall, Wrike's ability to streamline project tracking and enhance team collaboration has significantly benefited our creative team, leading to improved productivity, efficiency, and, ultimately, the delivery of high-quality creative work."

Wrike's toolbox of AI features has also propelled efficiency and productivity across the creative team, allowing them to focus on more high-value work as Wrike takes care of the time-consuming administrative tasks. "The streamlined workflows and automated recommendations enabled us to focus our efforts on high-impact activities, driving the overall success of the marketing campaign," says De Lisa. Tasks were completed more quickly and accurately, and project milestones were achieved ahead of schedule, all of which have had a positive impact on Window Nation's bottom line.

Resources that encourage easy adoption

What bolstered De Lisa's choice to move from ad hoc tools to Wrike was her past experience with Wrike's ease of adoption and supportive customer service. "What I appreciate most about Wrike is its user-friendly interface and intuitive design, which make it incredibly easy to learn and use the tool effectively," she says.

"From the moment I started exploring Wrike, I found the platform's layout to be clear and organized, allowing me to navigate seamlessly through its various features." De Lisa also appreciates the straightforward workflows and well-defined functionalities. "Those meant that I could quickly grasp how to create tasks, set deadlines, assign responsibilities, and track progress without any steep learning curve."

Based on previous experience, De Lisa made sure to request onboarding and training help from Wrike upon Window Nation becoming a customer and appreciated being able to ask questions and getting to know Wrike through working with it. "It was just a fun, great experience," she explains.

De Lisa and her team have also taken advantage of Wrike's wide range of resources, from tutorials to webinars and everything in between, in order to quickly grasp all that the platform has to offer. "Overall, the ease of learning and mastering Wrike has not only expedited our team's adoption of the platform but also significantly boosted our productivity and collaboration, making it an invaluable asset in our project management toolkit."

Feature Highlights
- AI-recommended tasks
- Automated approval prediction
- Generative AI
- Comprehensible task management
- Configurable blueprints
- Collaboration features
- Resource and capacity planning

Website
www.windownation.com

"Wrike has become the lifeblood of our day-to-day operations – helping us achieve our important mission of bringing new therapies to patients more efficiently than ever."

"Wrike's AI features have become indispensable in my daily workflow, enabling me to accomplish more in less time and with greater accuracy."

De Lisa Patterson,
Creative Director
at Window Nation

Supporting employee professional development and preventing burnout with Wrike

The ability to track each team member's capacity has also proven helpful to De Lisa in her managerial role as creative director, providing the concrete analysis to support additional staffing needs based on capacity. "Now I'm able to see data, so if I ever needed to have the conversation and tell my boss maybe having one copywriter isn't enough, I can say, here's what the data is showing."

De Lisa is also able to visualize each team member's workload to better understand how she can develop their skills. She uses tagging within Wrike tasks to categorize each team member's work. "Now, I'm able to tag things and say, 'Wait a minute, 80% of this person's work is print, maybe we need to shift some digital work so they can learn and develop their skill set.'" The ability to visualize individual workloads and capacities from a bird's-eye view has improved De Lisa's success as a people manager at Window Nation.

In addition to helping her team develop skills, De Lisa can also take pressure off individual roles when their workload surges with the help of Wrike's generative AI.

For low-stakes tasks, she appreciates having a starting point to tweak, "Starting with AI-generated copy gives me a foundation to work from." This saves De Lisa and her team considerable time and alleviates bottlenecks, "If I had to write everything myself, it would be a lot more challenging, it's definitely a helpful tool for us."

"It seems like using AI is also a bit of an insurance policy, especially considering concerns about burnout on the team," she explains, "If our copywriter is unavailable, things can still keep moving forward."

"I'm very particular about customer service, and I just remember how helpful the Wrike rep was in walking us through our project management tools."

"We experienced a noticeable improvement in our team's productivity and were able to focus more time and energy on value-added tasks."

De Lisa Patterson,
Creative Director
at Window Nation

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