Managing Repetitive Projects in Wrike

Benefits of using templates

1. Speeds up repetitive work.
2. Reduces human error.
3. Documents all project-related details.
4. Ensures consistency.

Two approaches for building templates

Create a “Templates” folder

How to:

1. Create a folder and call it “Templates.”
2. Create a template from scratch or duplicate an existing project into the Templates folder.
3. Change the status of all the tasks in a template from deferred to any status.

Use Blueprints

Why use Blueprints:

- Blueprints don't trigger notifications.
- Blueprints aren't included in reports.

How to use Blueprints:

1. Activate Blueprints in Wrike Labs.
2. Create a Blueprint from scratch or save an existing project as a Blueprint.

6 traits of a good template

1. All tasks are scheduled.
2. Tasks are interconnected with dependencies.
3. Key tasks are converted into milestones.
4. Tasks are assigned (whenever possible).
5. Comments and tips are added to the task descriptions.
6. The correct workflow is applied to the template by default.