# Best Practices

To help you get started, we collected the most efficient ways our customers deal with common work management challenges.

## 1. Set Up

- Organize Your Work
- Granting Access to Information
- Consolidate Work Intake
- Understand and Create Statuses
- Integrating Wrike
- Team Onboarding
- Change Management
- Admin Superpowers for Account Champions

## 2. Plan

- Identify Repeatable Processes vs. Unique Work
- Standardizing Delivery With Templates
- Distribute Work to the Team
- Setting Clear Expectations for Your Team
- Get a Clear View of Your Project in Gantt Charts

## 3. Execute

- When to use Which Work View
- Help Team Members Understand Their Priorities
- Organize Work-Related Communications
- Review, Approve, and Share Work Assets
- Make Your Meetings More Actionable
- Build Trust with Your Clients

## 4. Monitor

- Gain Visibility into Your Team's Work
- Understanding Project Priorities
- Understanding Workload and Capacity
- Make Sure Nothing Falls Through the Cracks
- Visualizing Information on a Calendar
- Monitoring Allocated Time vs. Time Spent

## 5. Report

- Build a Report Based on Project Statuses
- Track Production Costs
- Analyze Team Performance
- Analyzing What Your Team Worked On

## 6. Develop Habits

- Add a Human Touch to Online Collaboration
- Develop New Management Habits
- Typical Day in Wrike for Team Members
- 10 Signs You're Making the Most of Wrike

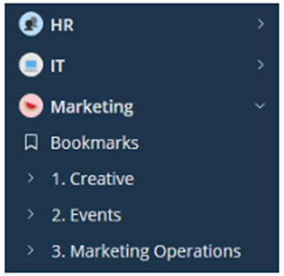
# Organize Your Work

## Challenge

Large volumes of work are scattered across emails, spreadsheets, and personal to-dos.

## Solution

Create a Wrike Workspace focused on visibility and collaboration, so it's easy for everyone on the team to find, add, and report on work.

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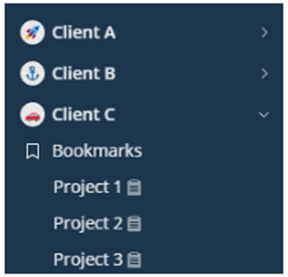


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### Space

Reflects how your organization is built and categorizes work.

• **Department**: Multiple teams are joining Wrike and your company is organized by department.

• **Client**: Your work is primarily based on work requests.

• **Line of business, brand, or product**: You organization is mainly divided by the line of business, brand, or product.

### Folder level

Lives under Spaces and reflects how work is done.

• **Project**: You work mainly on projects with defined endpoints.

• **Region**: Your need to see work organized by region and on different views (e.g., a timeline, board, list, etc.)

• **Status/sprint**: Your team works on a sprint cycle or primarily thinks about work as active, backlogged, or completed.

## Build It

1. Create a Space for each department, client, etc. Learn more about sharing.
2. Create folders for each project, region, etc.

Find out which Folder structure is for you.

## Important elements to add

**Templates**: Add complete Folder and Project templates here. Create a Subfolder to store individual Task templates. If multiple departments are using Wrike, keep things organized by creating department Subfolders first.

**Archive**: Create a Folder archive that mimics the way your department, client, etc. Folders are organized. Move completed or outdated items to the archive.

### Wrike tips

**#1** If you need department, and also client or line of business Spaces, create department Spaces first, and then add clients/line of business as folders.

**#2** Folders are sorted alphanumerically. Try naming your archive zArchive.

**#3** You can create multiple template and archive Folders. For example, each department could have their own archive.

# Granting Access to Information

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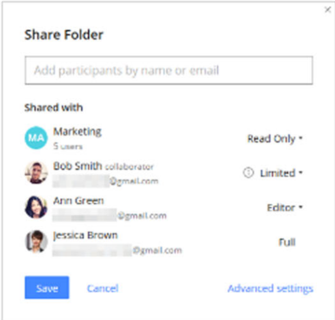
## Challenge

Building visibility by providing access to relevant, complete, and up-to-date information can take a lot of time and effort.

## Solution

Facilitate transparency by creating an org-wide public Spaces structure and share additional items as needed.

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## Sharing Tasks, Folders, and Projects

1. If your whole workspace structure can be shared, then make all your Spaces public, that way all folders/projects are automatically shared.
2. Share directly from the Task, Folder, or Project's Share dialogue box.
3. @mention users or user groups in a comment. Mention @My Team to share a Task, Folder, or Project with all regular users in the account.
4. Add someone to a user group to give them access to all items shared with that group.*
5. Tag your item (Task, Folder, Project) in a parent item. Your item will be shared with anyone who has access to the parent item.

## Sharing Reports, Dashboards, Calendars, and Request Forms

1. Request forms are visible to everyone in your account by default while reports, calendars, and dashboards are private by default, but can be shared with users and groups.*
2. When you need to share with someone outside your Wrike account, create external Request Form or Calendar links, or use Report or Gantt Chart snapshots.*

## Limiting access

- License types like Collaborator and External User let you limit a person's ability to share information with others.*
- Access roles limit a person's ability to share a specific Folder or Project (or set of Folders or Projects).

*Modifying settings requires admin rights.

### Resources

- Webinar: 5 Secrets of Successful Sharing
- Quick tutorial: Sharing and Tagging
- Advanced training session: Mastering Collaboration and Sharing

### Feature how to

- Sharing Folders and Projects
- Access Roles
- User Groups
- Types of Licenses

### Sharing is top down

If you share a folder or invite person to a Space, all subfolders, projects, and tasks are automatically shared.

Sharing doesn't work bottom-up. For example, if you share a Task, the parent Folder is not automatically shared.

Users on Enterprise can share information bottom up when they need to.

# Consolidate Work Intake

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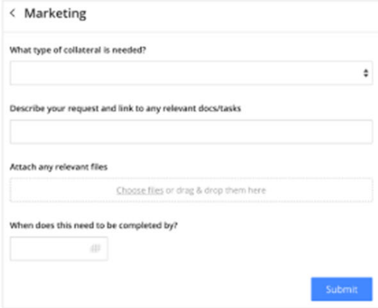
## Challenge

Requests scattered across emails, calls, and meetings are a mess.

## Solution

Use Wrike Request Forms to consolidate asks that are easy to submit, process, and report on.

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## Killer capabilities

- Trigger template campaigns automatically
- Assign Individuals and roles automatically
- Create conditional questions
- Monitor and report on traffic

## Popular use cases

Creative briefs, Marketing ops request, IT ops

## Sample questions

- Name your request: Request title <Action><Asset> <Name>
- Select your office/department
- Provide an overview
- Upload references
- Specify the deadline

## Feature how-to

- Dynamic Request Forms
- Custom Fields
- Project Templates
- Tutorial Video (10 min)

## Resources

- Webinar: Best Practices for Internal and Company-wide Request Forms
- 10 Request Form Templates
- 5 Best Practices for Managing Incoming Work Requests

## Regular use

- Always require a formal submission for all requests. Is someone asking for something? Give requesters a link to the relevant Request Form.
- Convey the mutual value of creative briefs to other departments, ensuring that requested projects are done right and on time.
- Collect feedback on Request Forms once a quarter to make them shorter and more consistent.

## Basic setup tips

- Make forms easy to submit: Focus on dropdowns and checkboxes over open questions. Keep it short.
- Make forms easy to access: Share external links or embed them on a website.

## Advanced setup tips

- Create a Folder with campaign templates, have relevant templates triggered via a Request submission.
- Map Request Forms to specific Folders *(e.g, Online, Offline)*. That way you can analyze the workload and team performance for each request type.
- Map fields—*like Asset type, Client name, Office location, Requesting department*—to Project Custom Fields, and build Reports for higher-level management.
- If your team consists of several subteams, auto-assign new Requests to team leads so they can distribute work.

Create a Dashboard with widgets by status to monitor incoming work and assign it in a timely manner.

# Understand & Create Statuses

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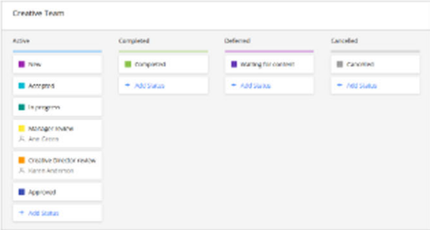
## Challenge

Understanding how work is progressing and knowing its status requires asking for an update.

## Solution

Create a Custom Workflow to see exactly what stage work is in.



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## Custom Statuses also help you...

• Identify work you need to assign. Use a status to create a hub from which to assign work.
• Create Reports based on what's being worked on, what's been done, and what still needs to be started.

### Wrike tip

**#1** Set this workflow as the default workflow for the Folder where requests come in (via Request Form) or that you work out of.
**#2** Use in combination with an **Incoming Work** Dashboard to monitor work which has not yet been assigned.

### Feature how-to

• Custom workflows
• Advanced custom workflows
• Change a Folder's default workflow

## Regular use

Change Task statuses as you work. For example, when new work comes in and you assign it to a team member, change the status to **Assigned**. When the team member starts working, they can change the status to **In Progress**.

## Build it

First, you'll need admin access in Wrike or an admin who can help create the workflow.

## Advanced setup tips

1. Think about the stages your work goes through. For example, it begins in the Not Started phase. But what happens next? Someone begins working on it? Or is the scope of work reviewed before it gets assigned?
2. Write out the different stages. Make sure each one is distinct and necessary.
3. Create the workflow in Wrike.
4. Use the workflow and make updates as you learn more about what statuses you do or don't need.

**Already created for you**

• Workflow with approval - If a project needs to be approved before it's assigned.
• Workflow without approval - If all projects get assigned to be worked on.

# Integrating Wrike

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## Challenge

Teams that work out of different tools without any synchronization between those tools.

## Solution

Integrate Wrike with your work and create a cohesive work ecosystem that allows each team to continue working in their tool, while keeping all updates and progress in a centralized Wrike hub.

## Apps + Extensions (not integrations)

- Desktop App
- iOS App and Android App
- ToDo Extension

## Resources

- Complete list of integrations
- Wrike + Adobe Creative Cloud Integration
- API discussion: Wrike Community

## Use API

Create your own custom integrations with Wrike's open API.

## Integrations

**Adobe add-in**

*Great for: designers*

- See all Wrike task and inbox notifications in Adobe tools, keep track of versioning, and complete tasks.

**Document Editor**

*Great for: copywriters*

- Edit files online in Wrike without downloading them to your computer.

**JIRA two-way sync**

*Great for: developers*

- Map JIRA issues and projects to Wrike projects, tasks, and subtasks.

**G Suite**

*Great for: anyone*

- Take advantage of single sign-on and make it even easier to attach files from Google Drive.

**Zapier**

*Great for: anyone*

- Create a system of triggers and actions to sync information between Wrike and another tool.

**Slack**

*Great for: anyone*

- Use Wrike from within Slack. Create tasks, find information, and get notifications.

**Wrike Integrate**

*Great for: anyone*

- Wrike + the tool you use. We can help connect Wrike with more tools than the ones listed above.

# Team Onboarding

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## Challenge

Using a new tool can be complicated. You need to ensure that everyone is on the same page, knows what's happening, and why.

## Solution

Communicate that a new tool will be used, make sure everyone knows what the processes are, and teach everyone how to use the tool.

### Initial Rollout

- **Plan ahead**. Let the team know that a new tool will be rolled out and get them excited.
- **Designate Wrike Champions**. Assign Wrike experts who can help other teammates with how-to questions.
- **Hold a training session**. Hold a 1-time session to roll out Wrike to the team. You'll cover why Wrike is being used, how to use it, and what's expected of them.
- **Record a training session**. Not everyone will make the training meeting, and some people may need a refresher. A recording gives you something to share.
- **Follow-up**. Talk to the team to make sure Wrike is being used and find out what can be improved.

### New Team Member, Existing Account

- **Follow a template**. Create a presentation tailored to why and how your team uses Wrike. Include Wrike resources like webinars, the Help Center, and Community.
- **Create a Blueprint in Wrike**. Create a Blueprint with onboarding info and duplicate it for each new team member.
- **Assign a Wrike Champion**. Pair new employees with a Wrike expert who can help answer questions as they come up.

### Ongoing Training

- **Monitor new releases**. Read Wrike's weekly release notes and use any new functionality that helps your team.
- **Chat with other Wrike Champions**. Meet with Wrike Champions once a quarter to see what's working and what isn't.
- **Update training materials**. Update your recorded training and/or training deck to reflect current practices.
- **Host lunch and learns**. Offer quick refreshers on how to do things in Wrike and provide the opportunity for people to share what they've learned.

### Wrike tip

Create a "Knowledge Base" Folder. It's great for storing the house rules of using Wrike and making sure documentation of processes is easily accessible for your team. Share it with My Team.

# Change Management

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## Challenge

Implementing a new tool or process can be difficult. Teams (or individuals) may prefer to keep things as they are — even if it's not working.

## Solution

Adopt best practices to implement change management. Set up the account so that it's easy to find what you need. Remember that not everything has to be perfect right away.

## Develop Habits

• **Adopt the mantra "If it's not in Wrike it doesn't exist."** Ensure that all of your team's work is in Wrike — that's the only way to prioritize all work.
• **Communicate and work in Wrike**. From here on out, all projects should reside in one place — and that place is Wrike. Have a question? @mention your colleague.
• **Lead by example**. Make sure you follow the new rules and use the systems you've built out. If you tell people to use Request Forms, then you should only complete work if a request is submitted.

## Help the Team Work with Confidence

• **Competence**. Ensure individuals feel confident in their abilities. Along with product training, teams should understand exactly what's expected of them.
• **Autonomy**. Give people control. People are much more likely to follow a new process when they're involved in creating it.
• **Support**. Your team should have someone they can go to for help if they get stuck, want to know how to do something better, or need to undo something.

## Resources

• Getting 7 Personalities on Board
• Change Management: Unpacked (webinar)
• Change Management: Unpacked Vol. 2 (webinar)

## Wrike tips

• **Be open to feedback**. Regularly touch base with your team and ask for their input, listen to their concerns, and look into whether there is a better way to organize work or to carry out processes.
• **Be patient**. Understand that adopting a new tool takes time, but continue to monitor progress and make sure usage is improving.
• **Use incentives**. Set up a reward for the first completed project, most tasks created, or whatever works for you.

# Admin Superpowers for Account Champions

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## User Management

1. **Assign user licences** to team members and stakeholders so they have access to relevant information and functionality: Internal Users, External Users, Collaborators. Additionally, admins can limit invitations from regular users to specific domains. Learn more about User Management.
2. **Grant and revoke admin rights** to ensure account champions have access to user, account, and process management functionality.
3. **Create and manage User Groups.** They're great for easy @mentioning when you need to frequently notify the same several people or the entire team.
4. In case of emergency, **edit users' names and emails.** On a regular basis, make sure everyone updates their contact information in case any changes occur.

## Account Management

1. **Customize Wrike look and feel**. Add your company logo, change account name, choose a date format, and edit the workweek so your team feels at home in Wrike.
2. **Manage work schedules**. Adding public holidays, vacations, and PTO increase the accuracy of your project schedules and estimates, and helps maintain your team's reliability. Learn more.
3. **Manage Access Roles** to control what users (or User Groups) can do within a shared folder or project. Learn more.
4. **Permanently delete items** from the Recycle Bin to keep your account clean and save storage space. Learn more.
5. **Perform account backups** to add an extra layer to data safety. Learn more.

## Process Management

1. **Create and edit Custom Workflows**. They help you understand how work is progressing and see status updates. Learn best practices.
2. **Create request forms.** Forms are great for collecting work requests in a single place, so that it's faster to prioritize, process, and report. Read best practices.
3. **Create Timelog Categories** so that people can categorize how they're spending time. (E.g., "Working on deliverables," "Review," "Meeting," "Call") Learn more.

## Account Owner

1. Has all admin rights
2. Can manage subscription:
   - Edit payment information
   - Choose a billing plan
   - Access invoices
3. Cancel the account

## Admins on Enterprise Subscription

1. Manage advanced security settings (password policy, 2-step verification, setup SSO with SAML).
2. Manage cloud storage.
3. Manage Network Access Policy settings.
4. Log in as another user.
5. Create user activity and access reports.

*Important! On Enterprise plan, admin permissions may be limited by account owner*

## How to Grant Admin Rights

1. Click on your profile image in the upper-right corner of your Workspace.
2. Select "Account Management."
3. Click on the "Users" tab.
4. Click on the user you would like to make an admin.
5. Click "Edit settings" on the right panel.
6. Click the dropdown under "Role" and select "Administrator."
7. Click "Save changes."

# Identify Repeatable vs. Unique Work

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## Overview

There are two types of work: work you do repeatedly and unique work. Identifying repeatable processes helps you:

• Understand what to do with repeatable work so you can create standardized processes.

• Know what to do with different types of work depending on its complexity and frequency.

### Frequent and simple work

Create a Task and use custom workflows.

**Example**: When you need a simple design element (like creating an icon), create a Task, apply the creative team's custom workflow to it, and move the Task through statuses as work progresses.

### Frequent and complex work

Create templates. Templates can be Tasks or Projects with Tasks. Project templates are fantastic to use in conjunction with a Request Form.

**Example**: You run a quarterly customer event and have a monthly newsletter. Create a Project template for the quarterly customer event and create a Task template for your monthly customer newsletter.
Get started with the process mapping template.

### Infrequent and simple work

Create unique Tasks. Add subtasks for smaller action items if you need them.

**Example**: The IT team needs to create a communication plan for a security change. They prepare the draft in a Task, and discuss it in comments to finalize everything before communicating to the team.

### Infrequent and complex work

Create a unique Folder or Project with Tasks inside.

If you have a lot of this type of work, make sure there's a place in your Folder structure for items to be stored.

**Example**: You're closing down a year-long program. Create a new Folder and begin adding tasks based on what needs to be done.

# Standardizing Delivery With Templates

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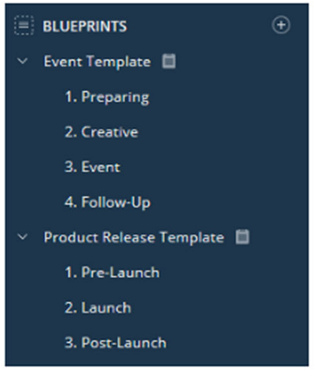
## Challenge

There's some work that needs to be done on a regular (even frequent) basis. Starting that work from scratch every time is a waste of time and results in inconsistencies.

## Solution

Creating templates will help you...

- Standardize repetitive work
- Get started on work faster
- Scale more efficiently
- Minimize human error

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### Wrike tips

**Allow for some flexibility.** Don't add too many details or subtasks. List tasks that indicate key milestones and deliverables and let your team adjust the template by adding information relevant to each project. You can populate the descriptions of the items in the templates to provide tips to the users.
**Optimize:** Update your templates as processes change or as improvements are introduced.
**Keep your team in the loop:** Store helpful information related to templates in the Knowledge Base folder.

### Use Cases

• Purchase Orders
• Implementations
• Marketing Campaigns
• Product Releases
• Client or Employee Onboarding

### Feature Deep Dives

• Templates
• Process Mapping Template
• Blueprints
• Blog: How to Create Project Templates
• Webinar: Using Templates to Work Smarter

## Types of Templates

**Project Templates** – for complex repetitive processes.
**Task Templates** – for simple frequent work and campaigns.
**Blueprints** (in Labs) – a dedicated set of functionality for managing templates.
**Wrike Templates** – pre-configured projects and workflows for most frequent use cases. Can be accessed by account admins via Wrike Assistant.

## How to Build a Project Template

**Step 1:** Create a folder and call it "Templates."
**Step 2:** Create a project for each template.
**Step 3:** In the project, add tasks, task descriptions, and assignees if applicable.
**Step 4:** Select all tasks with Mass Edit function and change their status to "Deferred" Now they won't show up in anybody's to-do lists.
**Step 5:** Schedule tasks and add task dependencies if required. (You can use the Gantt Chart.)
**Step 6 (optional):** Make the last task in your template a milestone, as it will serve as a firm deadline for your project.

## How to Start a Project From a Template

**Option 1:** Map it to a relevant request form. Learn how
**Option 2:** Duplicate your template.
Step 1: Right-click on the template you want to use and select "Duplicate."
Step 2: In the dialogue pop-up, specify the destination folder and settings: duplicated task descriptions, assignees, custom field values. Then reschedule the new project.
Step 3: Assign the tasks.

# Distribute Work to the Team

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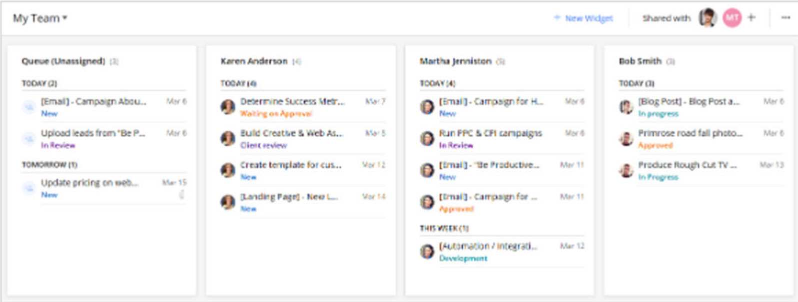


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## Challenge

Understanding who is available for new Tasks and who is overloaded may take several status-update email threads or meetings. And several more syncs on newly assigned Tasks.

## Solution

Use Wrike Request Forms for consolidating asks that are easy to submit, process, and report on. Visualize your team's workload so you can distribute incoming tasks based on availability. Your team automatically gets notifications about new work assigned to them.

### Feature how-to

- Workload Charts
- Dashboard widgets

### Wrike Community tip

Analyze timelog for previous projects, and adjust your work template schedules based on your research.

## Manual work distributions

1. Create a new **My Team** Dashboard.
2. Add a separate widget for Tasks assigned to each team member.
3. Add an **Unassigned Tasks** widget that shows a list of unassigned Tasks sorted by priority.
4. Assign Tasks by dragging and dropping Tasks between widgets.
5. Share the Dashboard with your team and review it weekly.

## Automate (some) work distribution

• Automatic assignment by task status change (e.g., tasks marked In Design will be assigned to your designer).
• Launching Projects from templates (keep all your template Tasks assigned and in a deferred status).
• Use request submission (e.g., assign submitted requests to team leads for further work distribution).

## Advanced tip: assign work by role

What if there are several people with the same set of skills on your team?
**#1** Instead of assigning Tasks in your templates, use a **Role** custom field and fill it out with the corresponding assignees' titles: Design, Content, Development, etc.
**#2** When you plan your next Project:
a) Filter Tasks by this custom field in the task list.
b) Use mass editing to assign to a particular person.

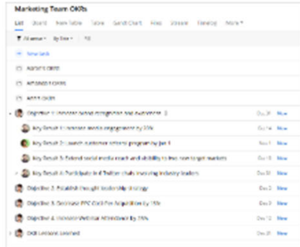
# Setting Clear Expectations for Your Team

PDF

## Challenge

Ensuring that your team knows what you expect of them helps make sure there aren't any surprises on their end or yours when the end of the quarter or year comes around and you need to present key deliverables.

More features key for communication: Description fields, @mentions, Task assignee.



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### Project Objectives

**Solution**

Build out a Project plan in Wrike.

**Build It**

• Create a Project in Wrike and add Tasks for individual action items that need to be completed. Make sure Tasks that need to be completed be a certain time have scheduled dates.
• Assign responsible parties to Tasks.
• @mention your team on the project info panel to see if they have questions.
• If Project details change, update information in Task descriptions or in the Project info panel. Make sure to use @mentions in conjunction with updates.

### Weekly Objectives

**Solution**

Hold regular team or individual meetings and keep a meeting agenda with notes and action items in Wrike.

**Build It**

• Create a **Meetings** Folder in Wrike.
• For each team member or regular meeting: Create a recurring Task in your **Meetings** Folder. Format the description field so that you have space for: questions from your team members, things that you want to bring up, metrics (or anything else) that should be reviewed, and post-meeting action items.

### Quarterly/Yearly Objectives

**Solution**

Create a Folder for team objectives.

**Build It**

• Have each team member add their key deliverables as Tasks (try keep this under 7 per person).
• Make sure everyone schedules the Task's end date for the expected completion date.
• Add any expectations you have as comments and @mention the person.
• Review the Tasks during your regular 1-1 and update Task data/dates as needed.
• Repeat this with all members of your team and share the Folder with the team.
• Learn more about Wrike for OKRs.

# Get a Clear View of Your Project in Gantt Charts

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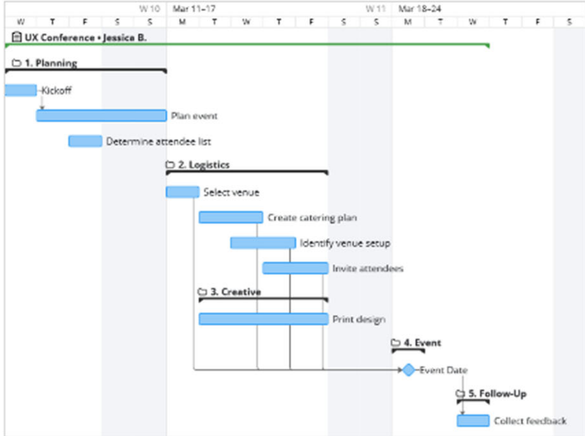


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## Challenge

If you plan your projects in Excel, it's difficult to quickly understand how work is progressing, visualize dependencies, and make the necessary changes.

## Solution

Use Wrike's Gantt Chart to get a complete view of the work scope and its dependencies. It's easy to view, share, and adjust.

### Feature how-to

- Milestones
- Task dependencies
- Print timeline
- Gantt Chart snapshot
- Date constraints
- Critical path

## Use cases and routines

1. Gantt Charts help you provide up-to-date status reports to managers and stakeholders in a flash. Print one out to include it in your presentation, or share external links to Gantt Chart snapshots.
2. If you create your project plan from scratch, first create Tasks from the Table portion of the Gantt Chart. Then adjust Task durations and create dependencies from the chart's right side.
3. If you create a Project from a template, Gantt Charts help you review and adjust your schedules by dragging and dropping.
4. If you're managing multiple projects and want to see all of them on the Gantt Chart, create a **My Projects** parent Folder, add your Projects there, and switch to the Gantt Chart.
5. Create a PDF of the snapshot and send it to external stakeholders.

### Wrike tips

**#1** Dependencies show you how Tasks are related. Reschedule one Task in a dependency chain to automatically reschedule all Tasks in the chain.
**#2** Use milestones as a reference point to mark a major event or a branching decision point in a project (e.g., conference date, release date).
**#3** Add a pre-built Conflicts Monitor widget to your Dashboard. It displays all milestones shared with you and with a scheduling conflict.
**#4** Use date constraints to designate the earliest date that a Task can begin. Once a date constraint is in place, the Task cannot be automatically rescheduled to begin prior to the designated date.

# When to use Which Work View

PDF

## List

• You need to change the order that you see Tasks in.
• You need to see a list of Tasks and a particular description field side by side.
• You want to edit multiple Tasks at a time.

List View

## Gantt Chart

• Task dates are the most important piece of information you need to see and easily change.
• You want to add or delete dependencies to see how action items relate.
• You want to view critical paths.

Gantt Chart

## Board

• You need to see Tasks by status.
• You have to quickly change Task status via drag and drop.
• You want a simpler/cleaner view with less data.

Board View

## Files

• You're looking for a particular asset.
• You need to see all the files related to a Project.
• You work primarily with images and/or files.

Files View

## Table View

• You need to see more data, particularly information from Custom Fields.
• You want to quickly edit Custom Fields (and other) Task information without having to open the Task.
• You're used to working in a spreadsheet format.

Table View

## Timelog View

• You need to audit your own (or your team's) entries.
• You need to run a Report on how much time has been spent on a particular Project.
• Friendly note: This is probably not a view you work out of, but one you check when you need particular information.

Timelog View

## Stream

• You need to see what changes have happened since a particular date.

Stream

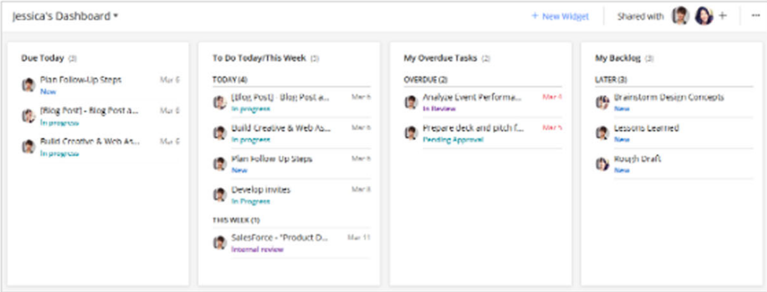
## Analytics

• You need high-level metrics around Project or Folder activity (e.g., Tasks completed within a specificed time frame).

Analytics View

# Help Team Members Understand Their Priorities

PDF

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## Challenge

• Letting team members know what their priorities are.

• Creating a convenient place for people to monitor their work.

• Providing an easy place for team members to start the day.

## Solution

Create one Dashboard that shows each team member what they need to see.

### Wrike tip

**#1** Create a User Group for your team, then share the Dashboard with that group. Now as people join the team, they automatically have the Dashboard.

**#2** If your team appreciates it, get a little fun and creative with widget names.

### Feature how-to

• Building a Team Dashboard
• Create a Dashboard
• Dashboard widgets
• User groups

### Share

Share the Dashboard with each of your team members.

## Routines for your team

• Let your team know to start the day on their Dashboard and jump into work from there.
• Have team members block off 1 hour per week to clean up items on the Dashboard and make updates they may have missed before (e.g., reschedule tasks or update statuses).

## Build it

First, create a new Dashboard. Keep it empty — don't add any widgets to it yet.
For each widget: Click **+ New Widget** and select **Custom Widget**. Always name your widget. Don't designate which Folder or Project to pull Tasks from, but check the box next to "Include tasks from subfolders".

1. Create a **Due Today** widget: Sort Tasks by priority and filter for all active Tasks assigned to **Current User** that are due today.
2. Create a **Due This Week** widget: Sort Tasks by date and filter for all active tasks assigned to **Current User** that are due this week.
3. Create an **Overdue Tasks** widget: Sort tasks by date and filter for active Tasks assigned to **Current User**. Under **Tasks to Do**, select **Overdue**.
4. Create a **My Backlog** widget: Sort Tasks by priority and filter for active Tasks assigned to **Current User**. Under **Task Type**, choose **Backlogged**.
5. If your team needs to review files, create a **Needs Review** widget: Sort Tasks by date and filter for all active Tasks assigned to **Current User**. Under **Review**, choose **Pending** (Wrike Proof add-on).
6. Add each widget to the personal Dashboard.

# Organize Work-Related Communication

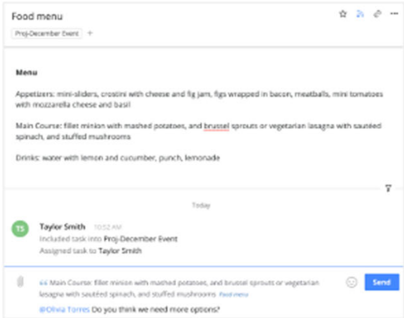
PDF

## Challenge

When communication is scattered across chats and emails, it can be hard to make and trace back decisions, share and implement feedback, seek help from teammates with expertise, and involve new contributors.

## Solution

Connect discussions, requirements, and asset versions to relevant tasks and requests.

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### Resources

- Collaborate with teammates
- Q&A session: Mastering collaboration and sharing
- Blog: 6 challenges to team collaboration

### Feature how-to

- Comments
- @mentions
- Permalink
- Inbox
- Snooze Inbox notifications

## Quote and @mention

• If you have an opinion or a question, leave a task comment with an @mention instead of sending a random message in an instant messenger. Quote text from the task to clarify your thoughts.
• When you @mention someone, they receive a notification in their Wrike Inbox.
**Important!** If you @mention a person or group in a Task comment, then the Task is shared with them.

## Answer requests in a timely manner

Dedicate time in the morning and at the end of your day to deal with incoming mentions and Tasks in your Inbox. Use the 2-minute rule:
• If it takes less than 2 minutes to complete a Task, answer a question, or delegate work, do it right away.
• Otherwise, snooze notifications or reschedule the Task.

## Teach your team to share progress

Teams appreciate time saved on reporting and an easy way to show off their achievements. With Wrike, they can:
• Update a Task status as things change (In Progress, Completed, etc.).
• Clarify requirements by @mentioning the requestor or task author.
• Submit assets to review and assign reviewers.
• Capture meeting notes, agreements, and action items in subtasks.

## Appreciate work being done

• Use comments and @mentions (for groups and individuals) to show gratitude when someone does a great job.
• Leverage emojis in comments and reactions to reinforce your words.

# Review, Approve, and Share Work Assets

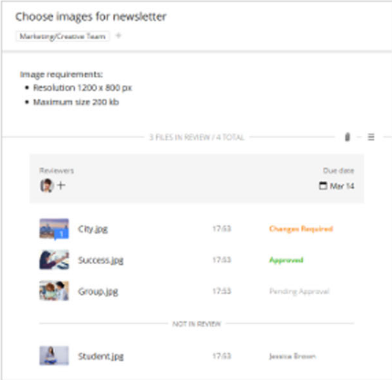
PDF

## Challenge

"What's the last version of the file?" is a question that comes up frequently in team communication. Trying to find the "final last version" can become a real quest.

## Solution

Attach files to Tasks and track version history to reduce miscommunication and maintain a single source of truth for your files.

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## Tracking review progress

• Use a single Task with workflows (**Editing**, **Pending Approval**, **Approved**) if steps strictly follow each other (e.g., banner approval).
• Use different Tasks if work requires input from different individuals and steps don't necessarily follow each other (e.g., webinar production).

## Review and approve assets

Use the built-in Proofing and Approval feature for files and videos (part of the Wrike Publish add-on).
• Assign reviewers (ideally 1-2 people) to approve assets.
• Set up due dates for approvals to keep reviewers accountable.
• Use file versioning and refer to previous versions and discussions to avoid misunderstandings.

## Identifying review bottlenecks

• *Traffic managers*: Identify bottlenecks in the review process by creating a Review Dashboard with widgets: **Pending review**, **Completed reviews**, **Unassigned reviews**.
• *Managers*: Don't be a roadblock for your team — keep track of all files assigned to you for review. Just add a **Pending My Approval** widget to your Dashboard.

## Share files attached to tasks

• When you share a Task with a user or a User Group, you provide access to all files attached to it.
• If your clients are not ready to join Wrike, use **Guest Reviews** to invite them to collaborate on creative assets.

### Resources

• Quick tutorial: Proofing and Approvals
• Webinar: Wrike for Marketers - Execution

### Feature how tos

• Attachments
• Proofing
• Approvals
• Guest reviews

### Wrike tips

**#1** Attach files from your computer or external file storage system to view them in a work context and easily share them with your team.
**#2** Use file versioning instead of attaching a new file to reduce miscommunication.
**#3** Use the File View to see all files in a particular Folder.
**#4** Add a **File** widget to a Dashboard to get an overview of Project assets.

# Make Your Meetings More Actionable

PDF

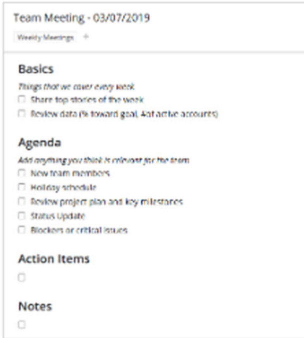
## Challenge

• 90% of meeting attendees admit to **daydreaming** in them.

• 73% acknowledge they **do other work** during meetings.

• 25% of meetings are spent discussing **irrelevant issues**.

Source

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## Solution

Organize and manage meetings in Wrike to keep attendees **accountable** and leave the meeting with a list of **actionable items** at hand. additional items as needed.

## Wrike Tips

Add a "Meeting" category to your timelog to analyze time spent on meetings.

## Resources

• Blogpost: Lead Effective Weekly Meetings in Wrike
• Infographic: Should We Have This Meeting?
• Infographic: 9 Proven Strategies to Make Your Meetings Highly Actionable
• Success Story: Kelly Services Optimizes Its Processes With Wrike
• Video: Lead Effective Weekly Meetings
• Community: Meeting Agendas/Minutes

## Organize Your Meetings

**Get ready for your meetings:**
• Prepare a task with meeting agenda: Add goal, discussion topics, attendees.
• Add the meeting date to the task title for reference (*Kickoff Meeting 08/29/2019*).
• Assign a meeting driver and schedule the meeting.

**Run your meetings:**
• Share your screen to display the task with agenda, and record meeting notes and action items.
• Use dashboards for discussing team priorities.
• Open the project Gantt chart to track project progress.
• Refer to reports to analyze team performance or project status.

**End your meeting:**
• Make a 10-minute recap of the list of action items: Who will do what by when?

**After the meetings:**
• Make a deferred "Meeting Notes Task" so it won't show up in overdue tasks but is still available for further reference.
• Turn action items into tasks in relevant projects, and assign and schedule them.

## Add Value to Your Meetings

• For **brainstorm meetings**, create a task or folder where everyone can submit their ideas and then discuss them in the comment section.
• Start **status update meetings** with a dashboard displaying work progress.
• Supplement **lessons learned meetings** with a task where everyone records their roadblocks and hiccups.
• **Do you really need this meeting?** When in doubt use this decision tree to figure it out.

# Build Trust With Your Clients

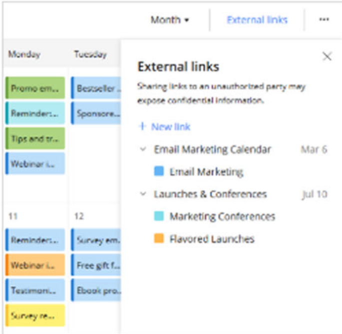
PDF

## Challenge

Clients often lack visibility into work progress.

## Solution

Collaborate with your clients by making it easy to submit creative briefs, track Project status, and provide feedback. Even without a Wrike license!

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## Killer capabilities

- External links and snapshots as monitoring and feedback tools
- Free Collaborator licenses for more hands-on collaboration
- External User licenses with limited-access functionality
- Selective sharing for customized data access

### Feature how-to

- Gantt Chart Snapshot
- Report Snapshot
- External Request Forms
- Guest Reviews
- Share Calendars
- Types of Licenses

### Resources

- Creative Agencies, Want to Win & Keep Clients? Be the Lobster

### Rule of thumb

To structure your work around clients, create a Folder for each client and build a Calendar, Dashboard, and Report for each.

## Collaborating on small, one-time projects

If you work with multiple clients on one-time projects, it makes sense to generate external links and share them with your clients instead of granting them Wrike licenses.

### Work intake

Generate creative briefs with Wrike Request Forms and give your clients the external Form link.

### Roadmap

Share a bird's-eye view of deadlines or repetitive tasks (like SMM plans or email blasts), with external Calendar links. To show a detailed campaign plan with Task duration and dependencies, share a Gantt Chart Snapshot.

### Feedback

Reduce miscommunication and shorten the feedback loop with Guest Reviewers. Guest Reviewers allow you to invite customers to discuss mock-ups and refer to previous discussions and file versions in Wrike.

### Outcomes

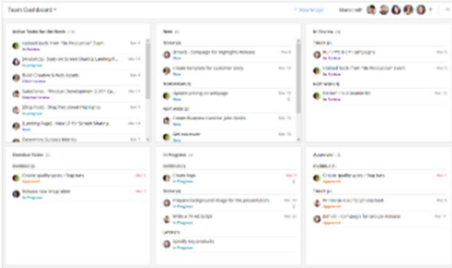
Show the status of multiple campaigns for one client by creating a Project Report and sharing the external link.

### More advanced collaboration

If you need to provide clients with access to all Project data, including Tasks and discussions, grant your clients Collaborator or External User licenses.

# Gain Visibility Into Your Team's Work

PDF



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## Challenge

You have information you need to check regularly, but gathering it all takes a while and everything is in different places.

## Solution

Create a central hub (a Dashboard) to view all the information you need to see.

## A Dashboard helps you

• See if a Project is falling behind schedule.
• Check what team members are working on or what they have planned, without having to continually ask.

### Wrike tip

These are our suggestions, but Task filters give you a lot of flexibility. Use them to create widgets that make the most sense for your team.

### Feature how-to

• Create a Dashboard
• Dashboard widgets
• Filters

## Routine

Start your day by checking the Dashboard. If anything looks out of place (e.g. Tasks/Projects are overdue), you can start a conversation around that action item. Reallocate resources if you see that someone is overwhelmed and needs help to finish something on time.

## Build it

First, create a new Dashboard.

For each widget, click + New Widget, select Custom Widget, and name your widget. Don't designate which Folder or Project to pull tasks from, but check the box next to "Include tasks from subfolders".

**1.** Create an **Active Tasks for the Week** widget: Sort Tasks by date, filter for all active Tasks, select one of your team members under **Assignee**, and select **this week** under **Tasks to Do**. Repeat for each team member.
**2.** Create an **Overdue Tasks** widget: Sort Tasks by date, filter for all active Tasks, check the boxes next each of your team members under **Assignee**, and choose **Overdue** under **Tasks To Do**.
**3.** Create widgets for each status: Sort Tasks by date, filter for a particular status you want to monitor, and check the boxes next to each of your team members under **Assignee**.
**4.** *For traffic managers*: Create a widget and pull Tasks from the Project or Folder where incoming work lands (normally work is generated via a Request Form). Filter for all Tasks with the default settings of a new Request (e.g., **Active** and **Assigned to you**).

# Understanding Project Priorities

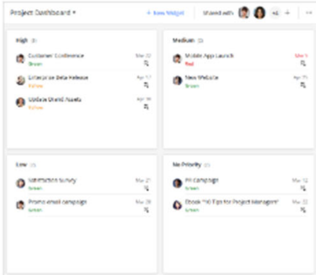
PDF

## Challenge

Understanding how your team's projects are prioritized in relation to one another and sharing that information.

## Solution

A Project Dashboard shows you what's important.



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## A Dashboard will help you...

• See which of your team's projects are high, medium, or low priority (or designate priority if it hasn't been specified).
• Reprioritize if there are too many high-priority projects.
• Be transparent with your team about what's most important without having to constantly give updates.

### Wrike tip

A Dashboard is only helpful if the information on it is accurate. Make sure team members keep tasks up to date.

### Share the Dashboard

Share with Project owners and with team members assigned to help on projects.

### Feature how-to

• Create a Dashboard
• Dashboard Widgets
• User Groups
• Custom Fields

### Webinar

• Get Clear Visibility for Your Team

## Routine

• Review the Dashboard once a week and reprioritize Projects as needed.
• On Monday, have all team members look over the Dashboard to see what the focus will be and understand where things stand.

## Before you start, you'll need

• A new Dashboard named something like Project Priority dashboard..
• A dropdown Custom Field applied at the project level with High, Medium, and Low options (or whatever your team uses to designate priority).
• All your team's Projects stored within one top-level Folder, which has the priority custom widget applied.

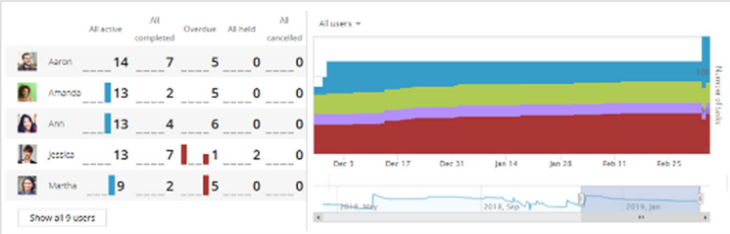
## Build it

For each widget, start by clicking + New Widget. Hover over the Project widget and select Configure. Name your widget, under **Location**, choose the top-level Folder where your Projects are stored, check the box for **Include Projects from Subfolders**, and leave sorting by date.

1. From the **Filters** panel click **Add more filters**, select your priority Custom Field, and check the box next to one of the priority options. Add the widget to your Dashboard.
2. Repeat for each of your priority options and create an additional widget for Projects where the field is blank. At the end, you should have one widget for high-priority Projects, one for medium, one for low, and one for not prioritized.
3. If you want to dig in at the Task level, add one or two Task-based widgets to show a subset of Tasks. For example, filter your team's Projects for all overdue Tasks.

# Understanding Workload and Capacity

PDF

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## Challenge

You need a better understanding of how your team is performing over time and you want to know if workload is increasing.

## Solution

Create graphs to monitor drastic changes in workload or other data.

## Analytics graphs will help you...

• See your team's workload over time.
• Understand how your team is coping with incoming work and identify potential problems.
• Monitor drastic changes in production or requested work.

### Wrike tip

If you do see drastic changes in active or completed work, build a Report to see where work is coming from. It can tell you if someone (or a particular department) has started making more requests.

### Feature how-to

• Create a Dashboard
• Analytics View

## Routine

Check the analytic's Dashboard widget every other week to see if there's a sharp increase or decrease in the amount of work that your team has completed, the amount of overdue work, or the amount of active work.

## Before you start, you'll need

• A personal dashboard that you check daily.

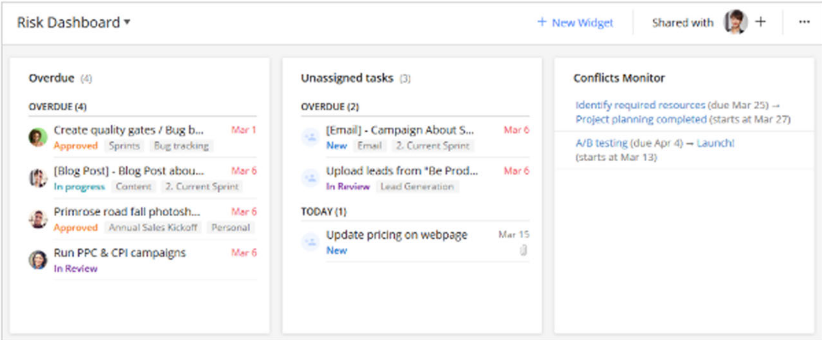
Ideally this should be a Dashboard where you monitor data points related to team workload or work progress. Create a new Dashboard if you need to!

## Build it

1. Select the (parent) Folder/Project which your team primarily works out of, or where requests come in to.
2. Switch to the **Analytics View** and add a **Work Progress** chart.
3. Include Tasks assigned to and created by everyone. (These are the default settings.)
4. Show Tasks that are active, finished, and overdue.
5. Save the Report.
6. Click the Report's menu, hover over **Add to Dashboard>Add Chart**, and select the appropriate Dashboard.
7. Click the Report's menu, hover over **Add to Dashboard>Add Users List**, and select the appropriate Dashboard.

# Make Sure Nothing Falls Through the Cracks

PDF

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## Challenge

Sometimes key actions (e.g., Tasks) are overlooked, schedule risks are not addressed, and the Project deadline is missed.

## Solution

Create a **Risk** Dashboard to keep track of scheduling conflicts, as well as overdue and unassigned Tasks.

### Help articles

- Dashboards
- Dashboard Widgets

## Build a Risk Dashboard

1. Create a new Dashboard.

2. Add an **Unassigned** widget: Filter for all active, unassigned Tasks in your team's Folder (include Tasks from Subfolders) and sort by priority.

3. Add an **Overdue** widget: Include Tasks from subfolders and filter for all active, overdue Tasks assigned to your team and sort by due date.

4. Add a **Conflict Monitor** widget: Select this widget from the pre-built options. For Tasks to appear on the widget they must be 1) linked to a milestone Task via a finish to start dependency and 2) scheduled to finish after the milestone.

## Use a Risk Dashboard

• Share the Dashboard with your team and refer to it during team meetings.

• Review this Dashboard daily and take the appropriate actions:

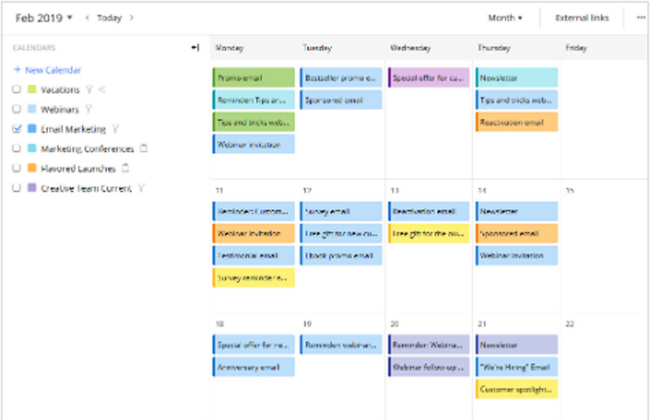
- (Re)assign Tasks or let your team volunteer for unassigned tasks. Depending on your team style, you can either do this during your weekly meetings or on a first-come, first-served basis.

- Ask for status updates on overdue Tasks or reschedule them.

- Pay special attention to the **Conflict Monitor** widget: Investigate why a conflict exists and take the appropriate steps to resolve it.

# Visualizing Information on a Calendar

PDF

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## Challenge

• Having an intuitive and up-to-date place where the team can see what's planned for when.

• Seeing how Tasks are scheduled is important, but you don't need to see dependencies between Tasks.

## Solution

Create calendars to increase clarity and transparency.

## Routine

Review the Calendar during your weekly meetings so everyone is aware of updates and understands what the focus will be for the next week.

## Build it

1. Go to the Calendars tab and click **+ New Calendar**.
2. Select **Smart based on Projects** and include Tasks from all of the Folders/Projects where your Projects are stored (specifically the ones you want to see on the Calendar).
3. Check the box next to **Include projects from Subfolders**.
4. Aplly Filters: Under **Status**, check Green, red, yellow. For **Project duration** select Full Duration.
5. Share the Calendar with members of your team (share with a user group if you have one set up for your team).

### Wrike tip

Create multiple Calendars and then overlay them (view items from multiple Calendars) as needed. Make sure to color code your Calendars so it's easy to differentiate items. Overlaying Task and Project-based Calendars helps you get a granular and big-picture view side by side.

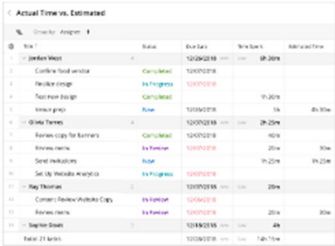
**Features** Calendars User Groups

# Monitoring Allocated Time vs. Time Spent

PDF

## Challenge

Understanding how much time your team is actually spending on things, compared with how much time they (or you) planned to spend on it.



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## Solution

Create a Report to monitor the amount of time you planned versus how much time something actually took.

## This will help you...

• See how accurate your time estimate was.
• Generate a Report to show customers where time was saved or under budgeted.

### Wrike tip

• Schedule your Report so you get Inbox reminders to look at your Report.
• Create a calculated field to automatically calculate the difference between estimated time and actual time spent.

### Feature how-to

• Report Overview
• Schedule Reports
• Create a Custom Field
• Calculated fields

## Routine

• Check the Report every other week to see how the team is progressing compared to the original plan. It's a great time to congratulate the team if things are ahead of schedule, or to check in if things are stalling.
• Monitor to see if a particular team member regularly struggles with a certain type of Task.

## Before you start, you'll need

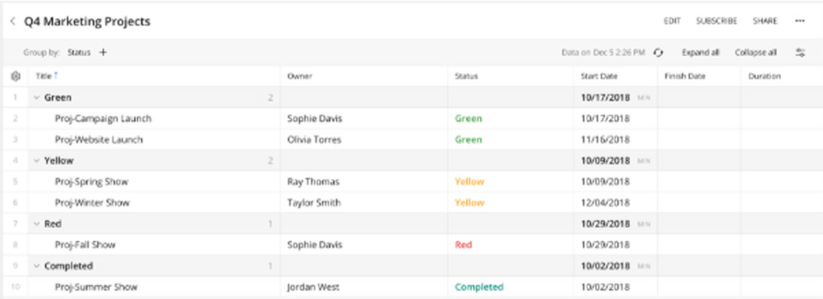
An existing Custom Field for your team to add the estimates for how long they think a Project/Task will take.

## Build it

1. Select **New Report from Scratch** from the **Reports** tab.
2. Report type: Tasks (or Projects if you want to report at a higher level).
3. Source data: Choose the Projects or Folders your team primarily works out of.
4. Filters: For **Status** check all active and completed Tasks. Under **Assignees**, add all the people on your team. Limit the due date to this quarter, so you see more contemporary data. Select **Add more filters** and add your **Estimated Time** Custom Field.
5. Layout: Select **Table** and group by **Assignee**.
6. **Save and View** your Report. Click the gear icon, check the box for **Time Spent,** and uncheck any items you don't need to see on the Report.

# Build a Report Based on Project Statuses

PDF



Q4 Marketing Projects

EDIT SUBSCRIBE SHARE

Group by: Status

Data on Dec 5 2:26 PM Expand all Collapse all

| | Title | | Owner | Status | Start Date | Finish Date | Duration |
|---|---|---|---|---|---|---|---|
| 1 | **Green** | 2 | | | **10/17/2018** | | |
| 2 | Proj-Campaign Launch | | Sophie Davis | Green | 10/17/2018 | | |
| 3 | Proj-Website Launch | | Olivia Torres | Green | 11/16/2018 | | |
| 4 | **Yellow** | 2 | | | **10/09/2018** | | |
| 5 | Proj-Spring Show | | Ray Thomas | Yellow | 10/09/2018 | | |
| 6 | Proj-Winter Show | | Taylor Smith | Yellow | 12/04/2018 | | |
| 7 | **Red** | 1 | | | **10/29/2018** | | |
| 8 | Proj-Fall Show | | Sophie Davis | Red | 10/29/2018 | | |
| 9 | **Completed** | 1 | | | **10/02/2018** | | |
| 10 | Proj-Summer Show | | Jordan West | Completed | 10/02/2018 | | |

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## Challenge

Collecting status updates when there are multiple Projects running for multiple clients across multiple teams. Time spent gathering those updates.

## Solution

The Project status Report helps you:

- Quickly check the progress of all Projects across your team/company
- Analyze Project owner performance
- Provide visibility of Project status to clients
- Give a high-level Project status analysis for exec meetings

## How to build it

1. Create a New Report from Scratch.
2. Report type: Projects.
3. Source data: Select the (parent) Folder where your active work lives. If you move completed work to a dedicated archive Folder, select that Folder as well.
4. Filters:
   - Status: Green, red, yellow, and completed.
   - Start date: Beginning of the month/quarter/year, or last day of the month/quarter/year.
5. Layout: Table.
6. Group data by assignee, Project status, or client (parent Folder or custom status, depending how you tag your client to Projects).

### Resources

Webinar: How to Use Wrike Request Forms and Reports

### Help articles

- Reports Overview
- Report Table Charts
- Report Column Charts
- Share a Report

### Wrike tip

If you'd like to share the Project status Reports with your clients, make sure it only includes Projects relevant to them.

# Track Production Costs

PDF

## Challenge

Manually tracking production costs in spreadsheets can be inaccurate and time consuming.


*Hover over image to zoom*

## Solution

Use Wrike's built-in Time Tracker and run Reports to analyze production costs by client or by Project. Then share Reports with your clients for billing purposes.

### Sample questions

- Task Title
- Assignee
- Status
- Time Spent (from Time Tracker or Custom Fields)
- Cost per Hour (custom field—Value entered at the client Folder level)
- Total Cost (calculated field—Time Spent multiplied by Cost per hour)

### Feature how-to

- Time Tracking
- Custom Fields
- Report Table Chart
- Calculated Fields

## Regular use

- Have designers use the time tracker when they begin working on a Task or start a call with a client.
- Create a weekly Report reminder to track if Projects are within budgets.
- Use data from Reports to bill your clients.

## Basic setup tips

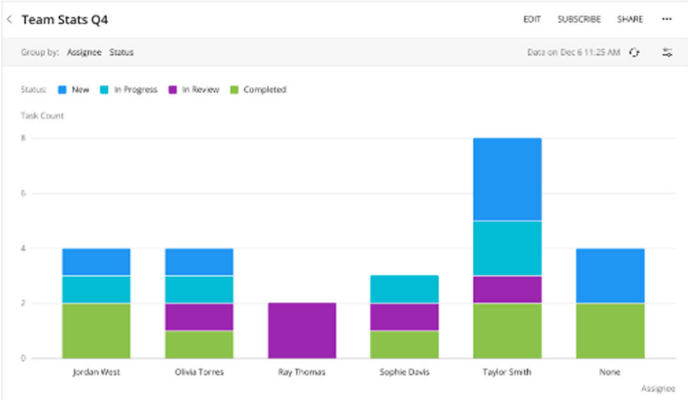
- Create a Custom Field **Cost per Hour** (currency type) from the Table View in your client Folder.
- Create a Task Report **Costs for [Project] Name**. Check out sample columns.
- Create a calculated field **Total Cost** (Time Spent multiplied by Cost per Hour) in the Report.
- Share the Report with your client by creating an external link or exporting the Report to Excel.

## Advanced setup tips

- If your team already uses an external time-tracker, use API to match time spent to a Custom Field.
- In your Project Request Form, create a **Budget** field and map it to the corresponding Custom Field (i.e., **Currency type**). It will help you make sure that you deliver the Project within budget.
- Add categories to your time entries (e.g., **Meetings, Reviews, Drafting, Working on Asset, Polishing**) to track activities using the Timelog.
- To track overall production costs per client, create a Project Report and include columns: **Total Cost**, **Budget**, and **Remainder**.

# Analyze Team Performance

PDF

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## Challenge

You need to understand who did what last week/quarter/month without spending hours on meetings or status-update email threads.

## Solution

Team performance Reports help you:

- Identify work distribution imbalances.
- Manage team workload.
- Report on team performance.
- Justify headcount if the ratio of work to be done vs. team members is skewed.
- Identify top performers

### Webinar

How to Use Wrike Request Forms and Reports

## Routine

- Have your team update Task statuses and scheduled dates by Friday.
- Mondays, review the Report to see team performance and plans. Go over the Report during a meeting or have people review individually.

## Build it

1. Create a **New Report from Scratch**.
2. Choose **Report on Tasks**.
3. Source data: Check the boxes next to the Folders and Projects your team works out of. If you move completed work to a dedicated archive Folder, select that Folder as well.
4. Filters:
   Status: **All Active** and **All Finished**.
   Start date: Beginning or end of a quarter/month.
   Assignee: Choose all members of your team.
5. Select Column as the layout for a bird's-eye view of your team's work. Use the Table View if you need to drill down to check Task details.
6. Group data by assignee.

### Wrike tip

**#1** Schedule **Report Reminders** to receive email and Inbox notifications on a designated schedule.
**#2** Share the Report with your team to build trust and transparency.

### Help articles

- Reports overview
- Report table charts
- Report column charts
- Share a Report
- Calculations on Reports
- Scheduled reminders

# Analyzing What Your Team Worked On

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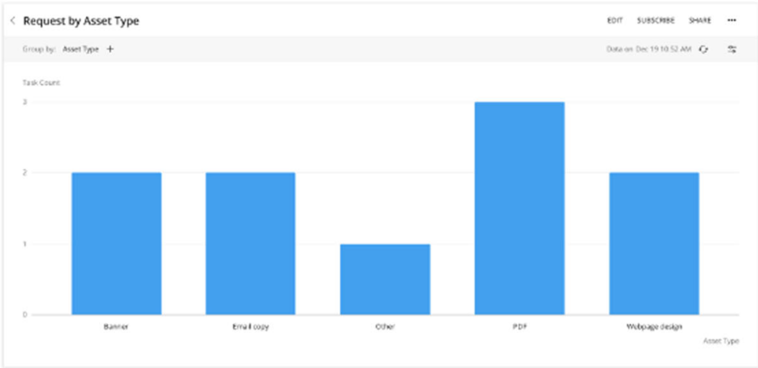


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## Challenge

You're unsure what type of work takes the most effort from your team.

## Solution

Build an Asset Report.

**An Asset Report will help you**

• Evaluate what's taking up your team's resources

• Justify increased headcount

• Analyze and reallocate how resources are distributed

## Example Asset Types

**Creative teams**

• Banners
• GIFs
• Leaflets

**IT/Helpdesk teams**

• Software
• Hardware
• Network

**Marketing teams**

• Emails
• Landing

## How to build it

**Before you start you'll need...**

1. An **Asset** dropdown Custom Field and a Request Form with a question whose reponse maps to the asset field.
2. One main (parent) Folder where incoming work lands and/or a dedicated archive Folder where completed work is stored.

**Build It**

1. Choose **New Report from Scratch** from the Reports tab.
2. Report on Projects or Tasks (whatever format requests come in as).
3. Source data: Select the (parent) Folder where your active work lives. If you move completed work to a dedicated archive Folder, select that Folder as well.
4. Filters: a) Status: Green, red, yellow, and completed. b) Start date and End date: Beginning of the quarter — Last day of the quarter. c) Add more filters, select your asset type filter and select all options.
5. Select **Column** as the layout.
6. Group data by **Asset**.

### Resources

Webinar: How to Use Wrike Request Forms and Reports

### Help articles

• Reports Overview
• Share a Report
• Scheduled Report Reminders
• Report Snapshots

### Wrike tip

1. Schedule Report reminders to receive an Inbox notification on a preset schedule.
2. Share your Report with stakeholders to add visibility to your workload.

# Add a Human Touch to Online Collaboration

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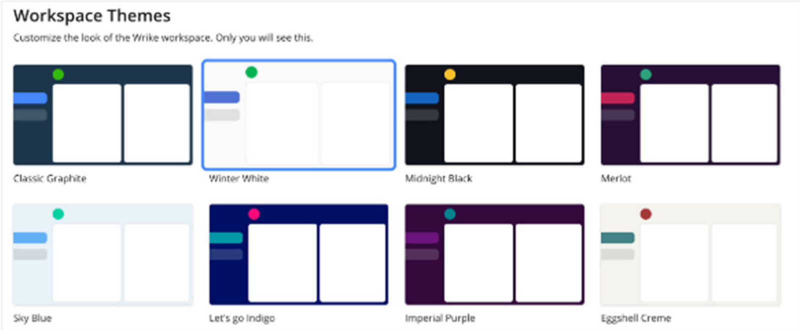


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## Challenge

Work management and virtual collaboration can become impersonal and maybe dull. If there's too much focus on getting work done, your team may feel they are lacking time for creativity.

## Solution

Add a creative touch to your work and personalize the experience!

**Features** Dashboards Custom Fields Reports

## Tips and tricks for inspiration

### Customize your Wrike experience to fit your team spirit:

• Want a new Wrike feel every day? Change your Workspace's theme depending on your mood, project, or the weather outside.

• Be creative with titles for Folders, Dashboards, and Reports. *(E.g., A "Grab Bag" widget for unassigned Tasks, "Oh, we're late" for overdue Tasks, and "Hall of Pride" for user Reports.)*

• Instead of plain text, use emojis when commenting and reacting to other people's comments (unless it's inappropriate in your company culture).

• Gamification: Create Custom Field Points (Number Type) and distribute points based on a task's complexity. Then create a user Report to track and praise champions. Set weekly reminders for this Report and celebrate your team's successes.

• Create a *Tip of the Week* Task in your team Folder, and share insights (like examples from your industry's leaders, useful resources, competitors' recent releases, etc) that you and your team have discovered. @mention the team each week when new tips are added.

• Create a *Masterpieces* Folder and collect your best-performing assets there. Add a file widget to your team Dashboard for reference and inspiration.

Have other ideas? Share them in the Community.

# Develop New Management Habits

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## Challenge

Creating a Dashboard or Report, or setting up Wrike in general are all great things to do. But they're steps — not endpoints.

## Solution

Create routines to help you actually use the systems you've built out and streamline your processes.

*Get. Things. Done.*

### Daily routines

- Start your day (and have your team begin theirs) by checking their Wrike Inbox for any new @mentions or assignments.
- Start work from your Team Lead dashboard.
- Have team members start work from their personal dashboard.
- *Traffic managers*: Check your incoming work dashboard and assign out work.

### Weekly routines

- During team meetings, review what everyone is working on and project statuses.
- Check to see what's running behind schedule and adjust plans as necessary.
- Have team members update their priorities and what they're working on by Monday.
- Have your team block off time to clean up task statuses and update anything that may have fallen through the cracks.

### Ad hoc actions

- Adjust processes as new releases make more possible.
- Hold impromptu trainings with Wrike users (or just your team) when processes change.

### Monthly routines

- Set aside time for you and your team to clean up your Workspaces: Archive completed projects, delete test folders and duplicated tasks, and remove outdated onboarding projects.
- Collect best practices from the team, and share them with others. Try using a Wrike Knowledge Base Folder.

### Quarterly routines

- Share a report with management showing what was accomplished during the quarter.
- Iterate and make Wrike work for you: Collect feedback and make changes as needed to request forms, templates, etc.
- Survey to see if the folder structure is clear, clean, and easy to use.
- Sync with other Wrike champions to hear new ideas, what's working, and what's not.

# Typical Day in Wrike for Team Members

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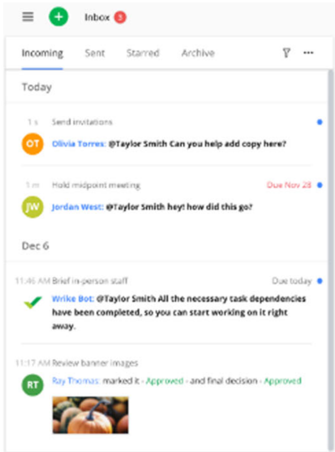
## Start the Day

• Check your Wrike Inbox for new @mentions or assignments. Respond to anything that's urgent or that won't take much time.
• Check your personal Dashboard in the morning and see what work is planned for the day. Reschedule any overdue Tasks or decide what to do with them.
• Traffic managers: Assign out any new work that's come in since yesterday morning.

## Throughout the Day

• Work out of your personal Dashboard (or whatever view you find most comfortable) and complete any items due today.
• Periodically check your Inbox to stay on top of items coming in.
• Make progress on items due this week.
• For designers or creatives: Work out of an approval Dashboard to manage the items pending approval, etc.

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## End of the Day

• Check if any items that you need follow-ups on have been replied to. Send an @mention to anyone who might need a reminder.
• Prioritize your work for the following day.

### Wrike tip

Use a custom status for Tasks that where you're waiting for someone else input.

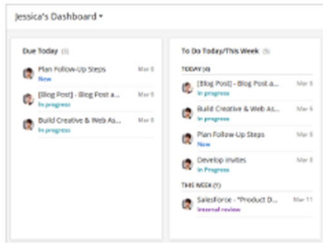
## Special Cases

**Designers and Creatives + Adobe**

• If you primarily work creating or editing assets, then you may not need to work out of the desktop/browser version of Wrike. Try Wrike's Extension for Adobe Creative Cloud.

**Away from your computer?**

• The iOS and Android apps help you see what's going on in Wrike when you're away from your computer, and make it easy to respond to and send messages.

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# 10 Signs You're Making the Most of Wrike

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### 1. Your Workdays Start With Wrike

Everyone in your team starts each work day by:

• Checking their Inbox for new assignments and questions.

• Reviewing their personal dashboard for today's priorities.

### 2. Email Discussions Are Minimized

Your team isn't using email to discuss internal work. Instead, you're discussing work in relevant tasks and projects, using @mentions and quoting.
Learn more.

### 3. Use a Knowledge Base Folder

You have a knowledge base folder in your account containing description of work processes, best practices, work habits, and the permalinks to all important items. See an example.

### 4. Actionable Meetings

You start your team meeting by reviewing a team dashboard and Gantt chart. At the end of the meeting, you have a list of action items to work on. Learn more.

### 5. Scheduled Reports

It takes you less than 3 minutes to get a report on the projects you've completed in the last quarter. Invest a couple of hours into building reports once, and then review them with the required cadence.

### 6. Project Visibility for Clients

It takes just a few minutes to share the updated version of a project roadmap or calendar with your client.
Learn how to build trust with your clients.

### 7. Streamlined Work Intake

When you ask for the input of a different team, the common response is, "Fill in the request form!" Request forms make it easier to scope, prioritize, and resource the request.

### 8. Templatized Onboarding

Onboarding new employees is templatized. You aren't recreating the wheel every time a new employee is hired, and adoption is smoother with the use of templates. Learn about templates.

### 9. Quick Access to Assets

You don't dig through email threads to find approved files. Create a file widget and add it to your personal dashboard to get quick access to the latest version of files. Learn more.

### 10. Wrike Is a Single Work Hub

You don't remember the last time you've heard questions like "Who's responsible for this?" or "What's the deadline?" All work-related info is stored in Wrike.

### Useful features:

- Dashboard
- Reports
- Inbox
- Permalink
- Request form
- Attachments
- Gantt Chart

### Resources:

Webinar: 10 Signals You're Making the Most of Wrike