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
- Integrating Wrike
- Team Onboarding
- Change Management

2. Plan

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

3. Execute and Monitor

- When to use Which Work View
- Setting Clear Expectations for Your Team
- Help Team Members Understand Their Priorities
- Organize Work-Related Communications
- Make Your Meetings More Actionable
- Gain Visibility into Your Team's Work

4. Develop Habits

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

Organize Your Work

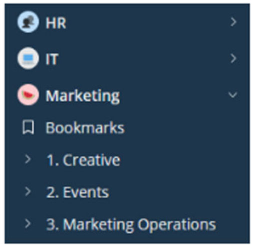
PDF

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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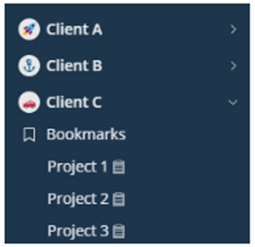

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Space level

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 Folder for each department, client, etc. under the shared section you use. 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

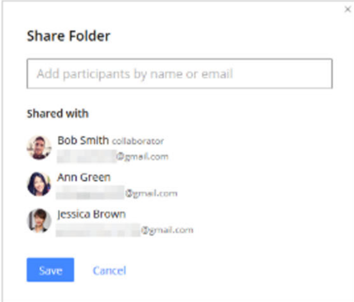
PDF

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. 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 Dashboards and Gantt Chart

1. Dashboards are private by default, but can be shared with users.
2. When you need to share a project plan with someone outside your Wrike account, create Gantt Chart snapshots.*

Limiting access

- License types like Collaborator and External User let you limit a person's ability to share information with others.*

*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
- 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.

Integrating Wrike

PDF

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

Document Editor

Great for: copywriters

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

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

PDF

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 template project in Wrike**. Create a template project 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

PDF

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.

Identify Repeatable vs. Unique Work

PDF

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 task statuses.

Example: When you need a simple design element (like creating an icon), create a Task 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

PDF

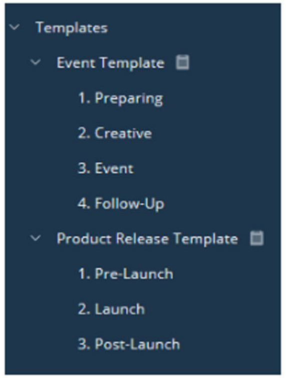
Challenge

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
- 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.
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

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

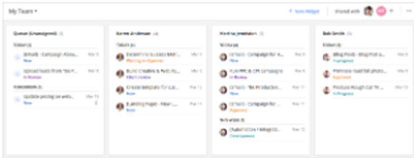
PDF

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

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.



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Feature how-to

• Dashboard widgets

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

• Launching Projects from templates (keep all your template Tasks assigned and in a deferred status).

Get a Clear View of Your Project in Gantt Charts

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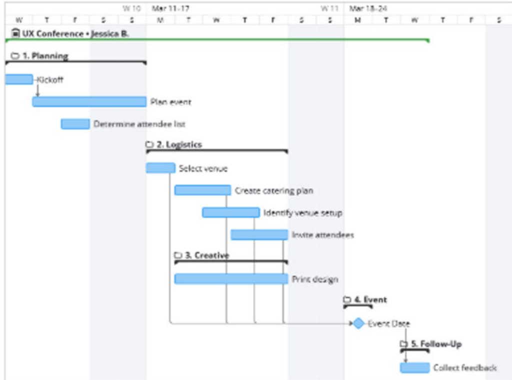

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Challenge

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

Stream

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

Stream

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.

Help Team Members Understand Their Priorities

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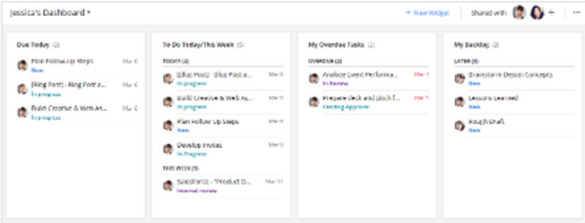

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Challenge

- 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 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

Share

Share the Dashboard with each

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.
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. Add each widget to the personal Dashboard.

Organize Work-Related Communication

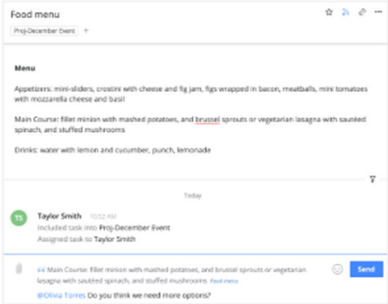
PDF

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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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 to show gratitude when someone does a great job.

• Leverage emojis in comments and reactions to reinforce your words.

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

Make Your Meetings More Actionable

PDF

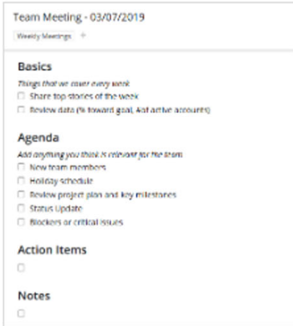
Challenge

• 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.

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.

Gain Visibility Into Your Team's Work

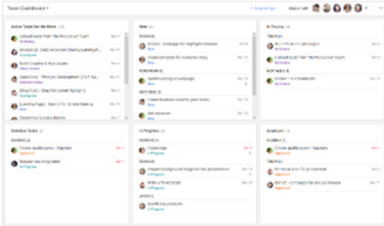
PDF

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.



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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.

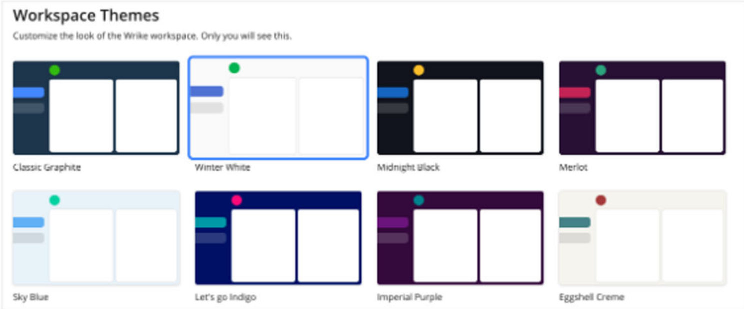
Build it

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. Filter for all Tasks with the default settings of a new Request (e.g., **Active** and **Assigned to you**).

Add a Human Touch to Online Collaboration

PDF



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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

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 and Dashboards. *(E.g., A "Grab Bag" widget for unassigned Tasks, "Oh, we're late" for overdue Tasks, and "Hall of Pride" for completed Tasks.)*

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

• 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 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

• 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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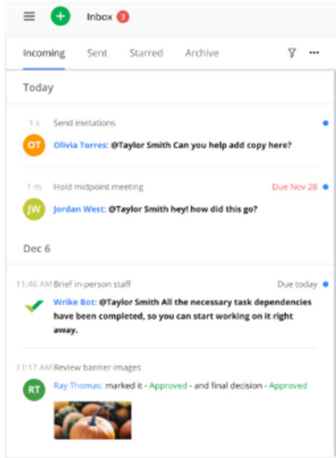
Start the Day

• 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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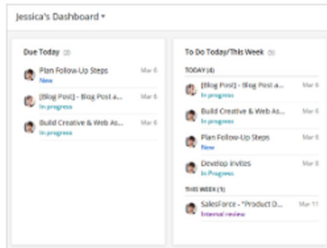
End of the Day

• 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.

Special Cases

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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7 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. 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.

6. 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.

7. 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.

Resources:

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

Useful features:

Dashboard
Inbox
Attachments