wrike
collaborate

# Conference Catalog

Wrike Collaborate North America
October 20-21, 2020

# Conference Agenda

## Tuesday, October 20

9:00 a.m. – 9:30 a.m. PDT

**Welcome Keynote with Andrew Filev, Founder & CEO, Wrike**

9:30 a.m. – 10:00 a.m. PDT

**Nonprofit Customer Panel: How To Operate Collaboratively in Today's Ever-Changing Environment & Economy as a Nonprofit Agency**

Followed by live Q&A

- Stephanie Wilson, Project Manager, Collections and Interpretation, Georgia O'Keeffe Museum
- Ryan Nelson, Controller, Entrust Disability Services
- Marcus Manderson, Supervisor of Audiovisual Operations, National Geographic Society
- Panel Leader: Renee Thomas, Regional Head of Customer Success, Wrike

This panel will focus on some of the key themes within the industry, including best practices for operating with limited resources, key metrics for measuring efficiency in a nonprofit environment, and reacting to changes within each organization's sphere of influence as they face the challenges related to COVID-19. Join us for a live Q&A right after this session!

10:00 a.m. – 10:15 a.m. PDT

**Live Q&A for Nonprofit Customer Panel**

- Stephanie Wilson, Project Manager, Collections & Interpretation, Georgia O'Keeffe Museum
- Ryan Nelson, Controller, Entrust Disability Services
- Marcus Manderson, Supervisor of Audiovisual Operations, National Geographic Society
- Panel Leader: Renee Thomas, Regional Head of Customer Success, Wrike

10:30 a.m. – 10:50 a.m. PDT

**Celebrity Keynote: Jackie Joyner-Kersee**

- Jackie Joyner-Kersee, Six-time Olympic Gold Medalist, Motivational Speaker and Founder, Jackie Joyner-Kersee Foundation

11:00 a.m. – 11:45 a.m. PDT

## Higher Education Customer Panel: How To Scale & Collaborate With Limited Resources

Followed by live Q&A

- Frank Tramble, Senior Director, Strategic Communications & Operations, Georgetown University
- George Evano, Senior Director, Content Strategy, University of Oregon
- Mitchell Bausch, Marketing Coordinator for Enrollment & Academic Services, Texas A&M University
- Panel Leader: Amir Younes, VP of Client Success, Head of CSO, North America, Wrike

This panel will focus on topics that are top of mind for our many education clients, including best practices for working with limited resources, collaborating cross-departmentally, and adjusting plans and processes in the wake of COVID-19. Join us for a live Q&A right after this session!

11:45 a.m. – 12:00 p.m. PDT

## Live Q&A for Higher Education Customer Panel

- Frank Tramble, Senior Director, Strategic Communications & Operations, Georgetown University
- George Evano, Senior Director, Content Strategy, University of Oregon
- Mitchell Bausch, Marketing Coordinator for Enrollment & Academic Services, Texas A&M University
- Panel Leader: Amir Younes, VP of Client Success, Head of CSO, North America, Wrike

12:00 p.m. – 1:00 p.m. PDT

## Live raffles in the Expo Hall

1:00 p.m. – 2:00 p.m. PDT

## Live “Ask the Experts” Q&A Session

- Moderator: Adler Chan, Director of Client Success Enablement, Wrike
- Expert: Patrick Rohlfsen, Engagement Manager, Wrike
- Expert: Maxim Maslak, Customer Success Manager, Wrike

1:00 p.m. – 2:00 p.m. PDT

## Birds of a Feather Roundtable Discussions

**Marketing and Creatives**

- Moderators: Simrin Purhar, MediaValet and Paul Hearing, Enterprise Customer Success Manager, Wrike

**Education**

- Moderator: Irina Kosenkova, Customer Success Manager, Wrike

**Managing Remote Teams**

- Moderator: Diane Jubelt, Customer Success Manager, Wrike

**Professional Services**

- Moderators: Lesley Hausmann, Services Principal, Wrike and Meghana Prashanth, Professional Services Consultant Wrike

# Wednesday, October 21

9:00 a.m. – 9:45 a.m. PDT

### Product Keynote with Alexey Korotich, VP of Product, Wrike

10:00 a.m. – 11:00 a.m. PDT

### Live "Ask the Experts" Q&A Session

- Moderator: Lesley Hausmann, Services Principal, Wrike
- Expert: Connor McCloskey, Customer Success Manager, Wrike
- Expert: Andrey Nikitin, Customer Success Manager, Wrike

10:00 a.m. – 11:00 a.m. PDT

### Birds of a Feather Roundtable Discussions

**Agile**

- Moderator: McKayl Bergman, Enterprise Customer Success Manager, Wrike

**Nonprofit**

- Moderator: Michael Sanders, Customer Success Manager, Wrike

**Change Management**

- Moderator: Sara Eisenberg, Webinar Manager, Wrike

11:00 a.m. – 11:35 a.m. PDT

### Agile Customer Panel: Get Radical Output Fusing Wrike + Agile

Followed by live Q&A

- Jeff Hartlieb, Director, Project Management, Attractions & Exhibits, Nickelodeon
- Justin Zimmerman, Marketing Operations Director, Salesmsg.com
- Shaun Carlson, Director of R&D & Continuous Innovation, Arvig
- Panel Leader: Abhay Rajaram, CCO, Wrike

This panel will discuss the reasons why each of these organizations adopted an Agile methodology, the benefits that working in Agile has brought to each team, and some of the ways they've configured Wrike to better enable their team to adopt Agile. Join us for a live Q&A right after this session!

11:35 a.m. – 11:50 a.m. PDT

## Live Q&A for Agile Customer Panel

- Jeff Hartlieb, Director, Project Management, Attractions & Exhibits, Nickelodeon
- Justin Zimmerman, Marketing Operations Director, Salesmsg.com
- Shaun Carlson, Director of R&D & Continuous Innovation, Arvig
- Panel Leader: Abhay Rajaram, CCO, Wrike

12:00 p.m. – 1:00 p.m. PDT

## Live raffles in the Expo Hall

1:00 p.m. – 1:55 p.m. PDT

## Marketing Creatives Customer Panel: Tighten Corners, Don't Cut Them: How Automation Results in a Productivity Transformation

Followed by live Q&A

- Karen Hodges, Head of Studio Operations, Beats by Dre / Apple
- Kate Collins, Digital Project Manager, Postali
- Mary Ellen Grom, Executive Director, Marketing Communications, AFL
- Panel Leader: Fraser Charles, Director of Global Strategic Partnerships, MediaValet

This panel will discuss best practices in the creative/marketing industry for operating productive and efficient teams. We'll also discuss some of the similarities and differences between internal and external "agencies" as they relate to dealing with stakeholders, proofing and review cycles, and measuring key metrics. Join us for a live Q&A right after this session!

1:55 p.m. – 2:15 p.m. PDT

## Live Q&A for Marketing Creatives Customer Panel

- Karen Hodges, Head of Studio Operations, Beats by Dre / Apple
- Kate Collins, Digital Project Manager, Postali
- Mary Ellen Grom, Executive Director, Marketing Communications, AFL
- Panel Leader: Fraser Charles, Director of Global Strategic Partnerships, MediaValet

# On-Demand Celebrity Keynote Session

**Celebrity Keynote: Eniola Aluko**

Eniola Aluko, British-Nigerian football executive, commentator, and former professional player, Director of Women's Football at Aston Villa

# On-Demand Customer & Partner Breakout Sessions

**Sponsor Session: Emerging Stronger From the Pandemic: A Tale of a Rock-Solid MarTech Stack**

Fraser Charles, Director of Global Strategic Partnerships, MediaValet
Amy Lofgreen, Marketing Director, BaseCamp Franchising

Underpinning a team's ability to charge forward no matter the circumstances, this year proved undeniably why DAM (digital asset management) is a critical technology for effective collaboration and business continuity. In a time when entire campaigns were nullified and team resources and budgets were at risk, the combination of a cloud-based DAM and project management solution helped leading organizations thrive in the face of uncertainty. Join our session with Amy Lofgreen, Marketing Director at BaseCamp Franchising, where she shares how the combination of MediaValet and Wrike enabled this retailer to navigate the pandemic with reduced resources and emerge stronger than ever.

**Session Goal:** To empower and equip attendees with a thought-provoking discussion on how the right tools are absolutely foundational for a team's success – even in difficult and uncertain times when adaptation is a must. This session will teach attendees how people, processes, and technology all play a huge role in a team's ability to emerge stronger than ever.

**Target Audience:** Marketers and creatives who want to see firsthand why a cloud-based DAM and project management solution are critical technology components for boosting collaboration, business continuity, and productivity. This session is also perfect for anyone currently using Wrike, including users of Wrike for Marketers who want to learn how they can better capitalize on the digital content they're creating.

## Sponsor Session: Content Orchestration With WoodWing

Perry Solomon, General Manager, Brands, WoodWing USA
Owen Greenwell, Content Operations Director, Medium Rare Content Agency

Join Perry Solomon, GM of Brands, WoodWing USA, and Owen Greenwell, Content Operations Director, Medium Rare Content Agency, for this informative "fireside chat." They'll discuss how the WoodWing/Wrike integration helps, Medium Rare Content Agency a leading Australian content agency serving many of Australia's and New Zealand's most iconic brands, bring the following benefits to their clients:

- Easier project administration (including faster project setup time, content use tracking, and client billing)
- Elimination of repetitive tasks and faster response times
- Greater transparency
- More consistent working experience for staff
- Better support for remote workers and external partners

**Session Goal:** To showcase delivering an optimized content creation workflow with the integration between WoodWing's Content Orchestration platform (digital asset management and multichannel content production) and Wrike.

**Target Audience:** All creative teams that aim to optimize their creative workflow and better manage content across multiple channels.

## Customer Session: Ch-Ch-Changes: How To Minimize Resistance & Maximize Success!

Briana Sever, Project Manager, B2B Marketing, Brookfield Properties

Change. While it's rarely welcomed in the workplace, it's the key ingredient often missing at companies, preventing positive progress and improvement. Knowing this, why are people still afraid of change? Whether you're in the early planning stages of your Wrike rollout or have already implemented it in your company, chances are you've been met with your share of resistance along the way. In this session, attendees will learn how to assess their target audience, leverage the support of executive leadership through effective communication, and prepare a change management plan to encourage adoption, all while doing it the "Wrike" way.

**Session Goal:** To equip attendees with the ideas they need to develop a solid change management plan and set their companies up for success. This session will teach attendees how to effectively engage audiences in a way that not only promotes Wrike adoption but engrains it within daily routines.

**Target Audience:** Individuals who are responsible for the implementation and maintenance of Wrike, including admins, deployment teams, and potential clients considering Wrike as a PM software solution.

## Customer Session: Becoming World Class: How Operational Excellence Can Help You Level Up

Amory Borromeo, Head of Technology Operations, Carvana

How do you feel when you show up to work every day? How do you feel when you leave? What if there was a way to take those precious hours spent working and turn them into pure magic? Operating at world-class levels is no longer something only major manufacturing companies can achieve. It's available to all of us, regardless of our role, leadership level, or industry. Join us as we explore the core principles of operational excellence and walk away with the tools and approaches to immediately implement these best practices in your own day to day so you end your day feeling accomplished!

**Session Goal:** Participants should walk away from this session armed with tangible actions they can implement within their own teams/organizations.

**Target Audience:** This session applies to any discipline and all experience levels. It usually starts with a show of hands to gauge the audience so the messaging/examples can be tailored to the group's needs.

## Customer Session: Understanding What It Means To Win Small: How Wrike Empowers Collaboration & Enables a Kaizen Culture

Jessica Wooding, Kaizen Manager, Chosen Foods

We all want to improve and create improvements in our work and for our company, but the question is: How? Is it the great, big ideas that take years to achieve, or is it actually a collective effort and mentality around making small improvements that yield the greatest results? Learn how Chosen Foods uses Wrike to create these small improvements across their creative and product development teams to create a culture of Kaizen.

**Session Goal:** To provide attendees a firm understanding of how focusing improvement efforts on small wins rather than radical changes can produce the greatest impact. This session will also provide an overview of the Kaizen philosophy and framework for how they can apply this approach and use Wrike to win small every day by everyone, everywhere.

**Target Audience:** Individuals who are looking to affect change and produce improvement in their and/or their team's work through the use of Wrike, including admins, regular users, and potential clients. This session is for anyone who wants to learn how to affect the greatest improvement and see examples of how Wrike can be an instigator, enabler, and promoter of change within their organization and work.

## Customer Session: Navigating Projects in the Digital Age

Taylor Cotter, Strategic Initiatives Manager for the Customer Experience (CX) Department, Datto

The emergence of the global pandemic COVID-19 has played a significant role in today's working environment. Although the long-term effects are unknown, it serves as a test to see how project managers can effectively coordinate initiatives in a virtual setting. As we move into the digital age, we need to make a concerted effort to be inclusive of global teams where stakeholders are not in the same location. In order to maintain timelines, continuously engage stakeholders, and make significant changes, project managers need to adjust their approach and tactics accordingly. This session will cover best practices, tips, and tricks for successful virtual project management.

**Session Goal:** To provide project managers or project owners a "toolkit" with which they can approach virtual project management. Based on their project and working environment, they can utilize a mixture of the best practices outlined in this session, including Wrike as a project management tool, to effectively manage an initiative regardless of where the stakeholders are located.

**Target Audience:** Project managers or members who own or initiate strategic projects within their organization. Open to all industries and Wrike users to adapt the concepts that make sense to their business.

## Customer Session: Beyond One Team – Expanding Wrike Usage To an International Organization

Selah Stivers, North American Marketing Director, TerraCycle, Inc.

Getting your team started with Wrike is challenging. Being the instigator of a company-wide adoption is even more challenging! Join the marketing leads of TerraCycle, Inc., an international company committed to Eliminating the Idea of Waste® as we discuss how to maintain momentum with Wrike, establish healthy growth plans within the system, and become change leaders in your company!

**Session Goal:** To give other Wrike admins and ambassadors tips, tricks, and real-life examples for how to expand Wrike usage beyond a single team while not losing their sanity in the process!

**Target Audience:** Wrike admins and ambassadors

## Customer Session: OKRs & Analyze

Michael Michalak, Senior Business Process Analyst, Thomson Reuters

How do you turn the Titanic? With data and visualization. Come see how FindLaw, a business division of Thomson Reuters, used organizational goal setting and Wrike Analyze to revolutionize their business in 12 months.

**Session Goal:** To inspire businesses like Thomson Reuters to push boundaries and achieve more than they thought possible.

**Target Audience:** Users, managers, and Wrike admins

# On-Demand Wrike Breakout Sessions

### Elevating Your Organization's Performance With the Work Management Proficiency Index

Matt Williams, Regional Head of Customer Success, Wrike

The Work Management Proficiency Index (WMPI) is a vital tool used by hundreds of companies to elevate their work management processes. By categorically benchmarking performance and creating tailored recommendations for process optimization, we've seen companies of all sizes benefit from their implementation of the WMPI. Maturity models have been used for decades in software to improve process efficiency, and the WMPI focuses on the seven key factors that determine how effectively your organization is currently operating. This presentation will give you a taste of the secret sauce that allows Wrike to deliver phenomenal outcomes for customers.

**Session Goal:** Audience members will learn what maturity models do and why they can be powerful tools for gaining insights into their business. They'll also gain awareness of the WMPI and how to use the insights gained to transform their organization.

**Target Audience:** All current Wrike customers

### The World Is Your Oyster: Unlocking Your Data Using Wrike Integrate and Wrike Analyze

Mark Tapia, Professional Services Consultant, Wrike

As your Wrike account grows and matures, it becomes a source of critical business data teams need to make key decisions. In this session, you'll learn how to take advantage of the synergies between Wrike Integrate and Wrike Analyze to unlock more of your Wrike data. See all your key metrics in a single, reliable place by using Wrike Integrate to sanitize, automate, and import your external data. Then, visualize your data trends and get actionable insights, all within Wrike using Wrike Analyze.

**Session Goal:** To Identify synergies between Wrike Analyze and Wrike Integrate by demonstrating the visualization of custom data points within Wrike Analyze, capturing custom data flows with Wrike Integrate, and keeping data accurate and up to date using Wrike Integrate.

**Target Audience:** Executives and department heads who need quick insights into business metrics, and project managers who need visibility into project progress and to guarantee their data is accurate.

## Digital Transformation – Changing the Way You Work, Not Just Where You Work

Cory Cunningham, PS Consultant, Wrike

Digital transformation has always been a popular concept. This session will explore leveraging digital transformation of work using Wrike to enable teams to gain real value at the end-user level – not just move manual processes to digital platforms.

**Session Goal:** Attendees will gain an understanding of digital transformation concepts and ways to leverage digital transformation using Wrike. Attendees will also gain access to helpful tools for mapping process changes within their organizations.

**Target Audience:** Owners, system admins, and team leads

## Fostering Hierarchical Visibility Within Wrike

Shane Tallon, Solutions Architect, Wrike

Don't believe that you can get accurate reporting in Wrike at all levels of your organization? Nonsense! Let Shane show you how to visualize the most important data within your organization at a number of different levels. Shane will cover a real-life example of a professional services organization that ran a multi-year project with a rolling project staff of 60 people. This kind of reporting applies to any enterprise organization that runs large, multi-year projects.

**Session Goal:** The audience should come out of the presentation with some good ideas about how to report on their data in Wrike the right way to key personnel levels within their organization.

**Target Audience:** Executives, managers, individual contributors, and for all people churning through tasks, projects, and everything in between.

## From Mess To Magic: How UNSW Sydney Tripled Reporting Accuracy & Improved Engagement by 2.5x

Miron Mizrahi, Solutions Architect, Wrike

A year after deploying Wrike, University of New South Wales (UNSW) Division of External Relations found itself in a tough spot: hundreds of mostly empty folders, a long and complex request form, adoption issues, and 70% of work non-reportable. The team knew something had to be done. During the first half of 2019, they embarked on a mission to turn things around with super impressive results: Time spent in Wrike soared, engagement exploded, and the team can now report on 90% of the work they do. In this session, we'll describe the journey UNSW took to transform their Wrike deployment and outline how they tackled their challenges and achieved these amazing results.

**Session Goal:** To show how integration/automation can supercharge your ROI, the importance of governance for value delivery, and that Wrike is more than a tool.

**Target Audience:** All Wrike customers

## Strategic Execution in the New Normal

Archie Sharma, VP of Strategic Programs, Wrike

The pandemic has created a large amount of uncertainty, especially on the economic front, resulting in increased financial pressure, concerns for employee health safety, and disruption in both supply and demand for various industries. Business leaders need to get ahead of the curve and plan for all the scenarios that may play out in the next one to two years. In this session, we'll walk through a flexible framework for business continuity in the "New Normal" and cover the entire workflow, which includes: strategy frameworks > strategic levers > scenario planning > operating plan > > operating plan review.

**Session Goal:** Attendees will learn a strategic and operational framework for CXOs to adapt and plan in the "New Normal."

**Target Audience:** CXO (CEO/CFO/CSO/COO), strategy office, PMO office, business operations

## Be a Master at Cross-Functional Go-to-Market

Renat Gersch, Director of Product Marketing, Wrike
Archie Sharma, VP of Strategic Programs, Wrike

Launches are the ultimate game of hot potato. So many people are responsible for launch success – from product to marketing to operations. Whether you're launching new products, projects, or programs or responsible for go-to-market for new or expanded offerings, motivating and coordinating cross-functional contributors is complicated. When it comes to communicating objectives, timelines, and risks, as well as building trust top to bottom and sideways, the potatoes are flying all over the place. But there's a formula for success! Join Wrike's Vice President of Strategy & Operations and our Director of Product Marketing Management to learn what it takes to master cross-functional go-to-market and tame launch chaos.

**Session Goal:** Tame launch chaos with go-to-market processes to launch initiatives such as new product and program launches and expand offering or cross-functional strategic initiatives. Implement cross-functional go-to-market in your organization and use Wrike to motivate and coordinate activities across teams, keep work moving forward to meet deliverables, and launch successfully. Manage objectives, timelines, cross-functional alignment, and risks, as well as build trust top to bottom and sideways with Wrike.

**Target Audience:** Product managers, product marketing, marketing managers, program managers, PMOs, operations managers who plan go-to-market strategy, cross-functional initiatives, and product launches.

# On-Demand Sessions From Collaborate Europe

### Automation Customer Panel: How To Harness the Power of Automation in Your Workflows

Jacques du Toit, Business Systems Manager, ITG
Javier Hernandez, Operations Excellence Manager, Siemens Smart Infrastructure
Panel Leader: Veronica Ivanova, Sales Director, EMEA Account Management, Wrike

This panel will focus on scaling production and efficiencies in the digital economy. The ability to reliably offload manual work to a machine is critical to streamline processes and efficiently scale your business.

### Change Management Customer Panel: Implementing Change Management Across Distributed Teams

Samantha Hanreck, Global Head of Information Technology, ITG
Shiella Christy, Business Director, Performics
Adam Griffin, COO, ELDO Energy
Panel Leader: Donnacha Friel, AVP Sales EMEA, Wrike

This panel will focus on topics that are top of mind for our many organizations when it comes to change management. Change is scary, so our panel will share tips to successfully reduce the fear and pave the way to implementing new technologies.

## Guide To Implementing Wrike in a Fast-Paced Work Environment

Andriy Vertseshuk, Chief Operational Excellence Officer, Modern-Expo Group

This presentation will cover the theory and practice of implementing Wrike in a fast-paced work environment. You'll learn how to drive adoption, accelerate time to value, and create a single source of truth for more than 1,000 active employees. What is the nature of change? How do we plan our goals for implementation? Which analytic tools will be helpful to track your progress? How do we drive changes in an ever-shifting work environment? All these and many other questions will be answered along our journey with Wrike: from the launch of a new platform to scalability challenges in one of the leading vendors of trade equipment in Europe and Asia.

**Session Goal:** To showcase a successful change management journey of an operational excellence driven organization at scale.

**Target Audience:** Wrike account owners and champions looking for strategies for Wrike adoption and change management within fast-paced organizations.

## How Wrike Became a Driver of Digital Transformation & Cross-Collaboration at Siemens Smart Infrastructure

Christina Fischer, Product Manager, Project Execution Tooling, Siemens Smart Infrastructure, Global Headquarters

This session will:

- Provide an introduction to Siemens Smart Infrastructure and the use cases for Wrike.
- Offer insight into process standardization, templates, and automation, as well as support models and the importance of the human factor.
- Share key success factors and challenges for an enterprise approach, with best practice tips discovered by the Siemens team.

**Session Goal:** To share useful information on how to start, deploy, and implement Wrike successfully for large, enterprise organizations or new customers without a clear process in place.

**Target Audience:** New enterprise customers or prospects, champions of organizations with complex organizational structure, participants interested in best practices, and attendees who need help with defining key success factors or KPIs for their own deployment.

# On-Demand Sessions From Collaborate Asia

### Collaboration Customer Panel: Managing Collaboration – People, Power & Money

Meryl Johnston, Founder & CEO, Bean Ninjas
Loretta Porche, Integrated Planning & Performance Manager, The University of Queensland
Liam McGuigan, Integrated Marketing Services Planner, The University of Queensland
John Kelso, CEO, POWERPLANT Project Services
Panel Leader: Luke Mannering, Senior Account Manager, Wrike

We explore how streamlined collaboration increases productivity and creates successful operations and efficient resource management. We speak to both SME and enterprise organizations on what their take is on managing this all under one (digital) roof.

### Digital Business Customer Panel: Running & Scaling a Digital Business With Wrike

Heather Laybutt, Head of Professional Services, Lab3
Owen Greenwell, Content Operations Director, Medium Rare Content Agency
Josh Doolan, Managing Director, Mudbath Digital
Panel Leader: Miron Mizrahi, Solutions Architect, Wrike

Every business is digital nowadays. Success in the digital world requires efficient resourcing, digital collaboration, and streamlined processes. In this session, three business leaders will share their experiences with Wrike and how they're using it to run and scale their companies.

## Success in 10 Minutes With 3 Customers

Patrick Gilbert, Director of Customer Success & Professional Services for APJ, Wrike
Meryl Johnston, Founder & CEO, Bean Ninjas
Josh Doolan, Founder & CEO, Mudbath Digital
Therese Sabarre, Chief Business Advisor, BIMS Technologies

Join Wrike APJ's Director of Customer Success & Professional Services, Patrick Gilbert, as he spends 10 minutes each with three customers across Asia Pacific, all using Wrike in very different ways. Learn more about their use cases and the associated benefits and value they've obtained through using Wrike.

**Session Goal:** To provide a few real-life scenarios of what our customers are using Wrike for and the good value they're getting from it.

**Target Audience:** Anyone looking to start or expand Wrike in their workplace.