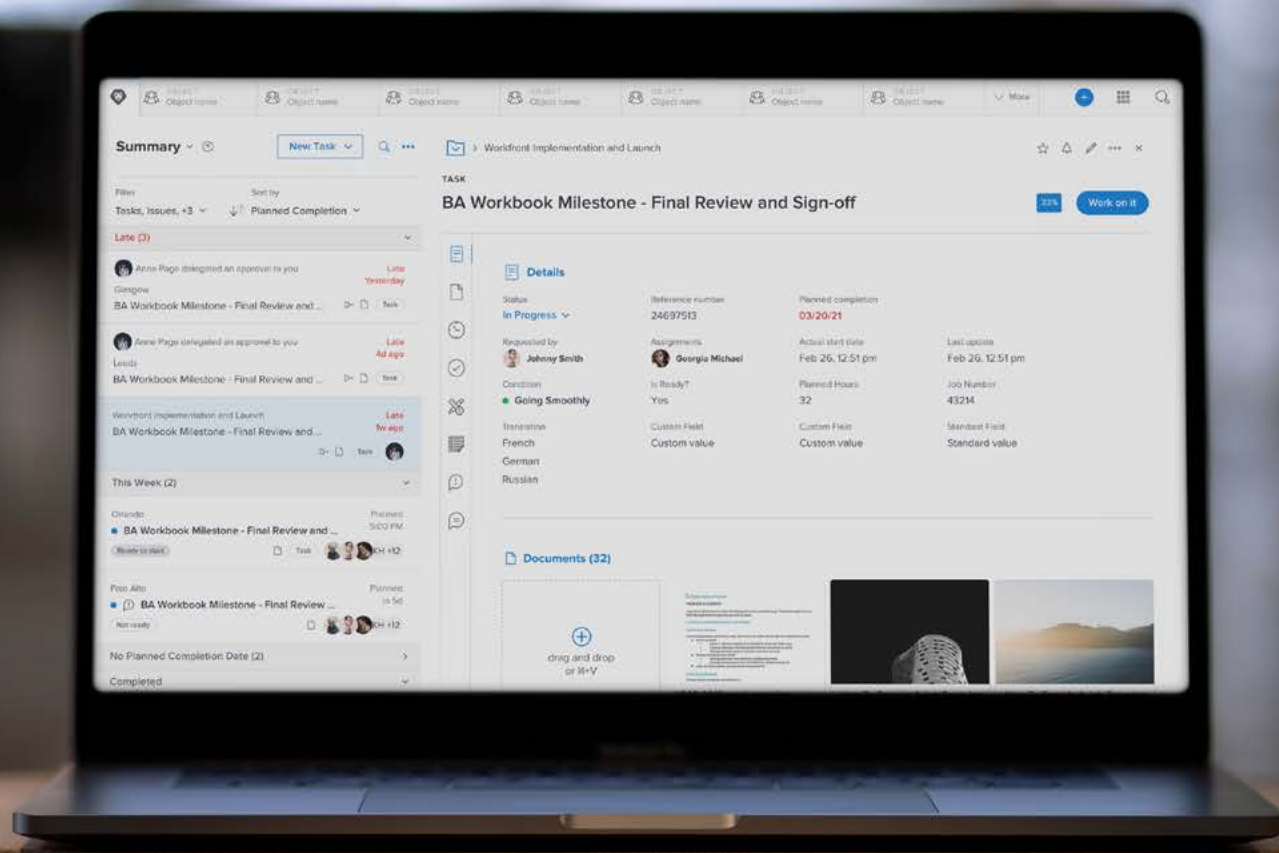




Land and Expand Playbook

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Section 1: Introduction

There's a shift underway in how enterprises operate.

Digitization is sweeping across every industry. By 2020, companies will spend over \$2 trillion digitizing their business. But what does it mean—for you, for our customers, and for our partners? What does Workfront have to do with digitization?

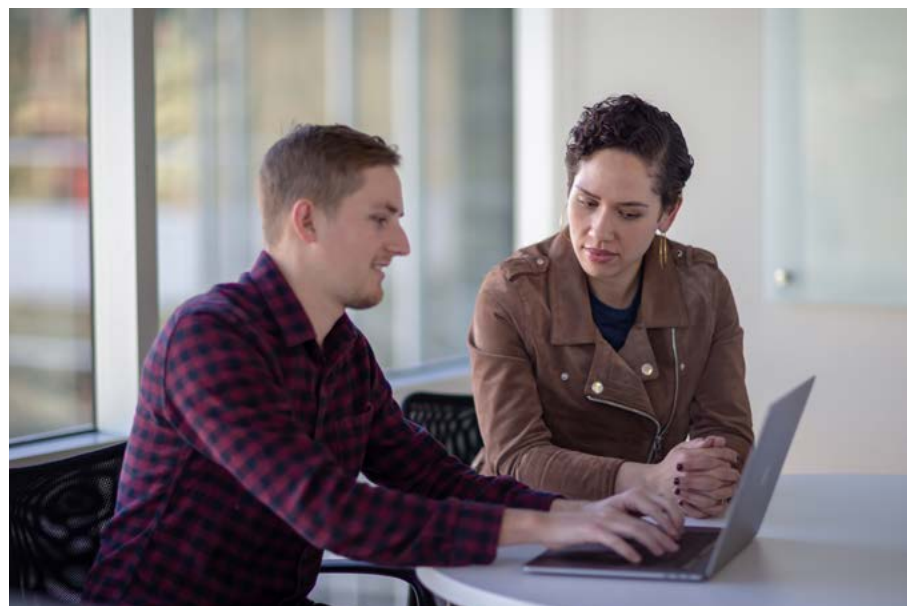
It's very simple: *Workfront digitizes work*. The Product Marketing team researched our customer base and learned that the primary use cases for Workfront involve centralizing work, digitizing work processes, reviewing & approving work, governing compliance workflows, and delivering client-facing services. In sum, we digitize all of that work.

Every business and organization must shift its operating model, or they will be left behind.

For the sake of both critical revenue and customer experience, businesses can expedite work like product development, omnichannel marketing campaigns, and portfolio management by taking it out of spreadsheets and email and “platforming” it to Workfront. They can see it all. And they can measure anything, ultimately allowing *people to do their best work*.

This playbook helps you lead this shift with prospects and customers. We've taken a simplified approach to help you market and sell Workfront solutions. Here's what's improved:

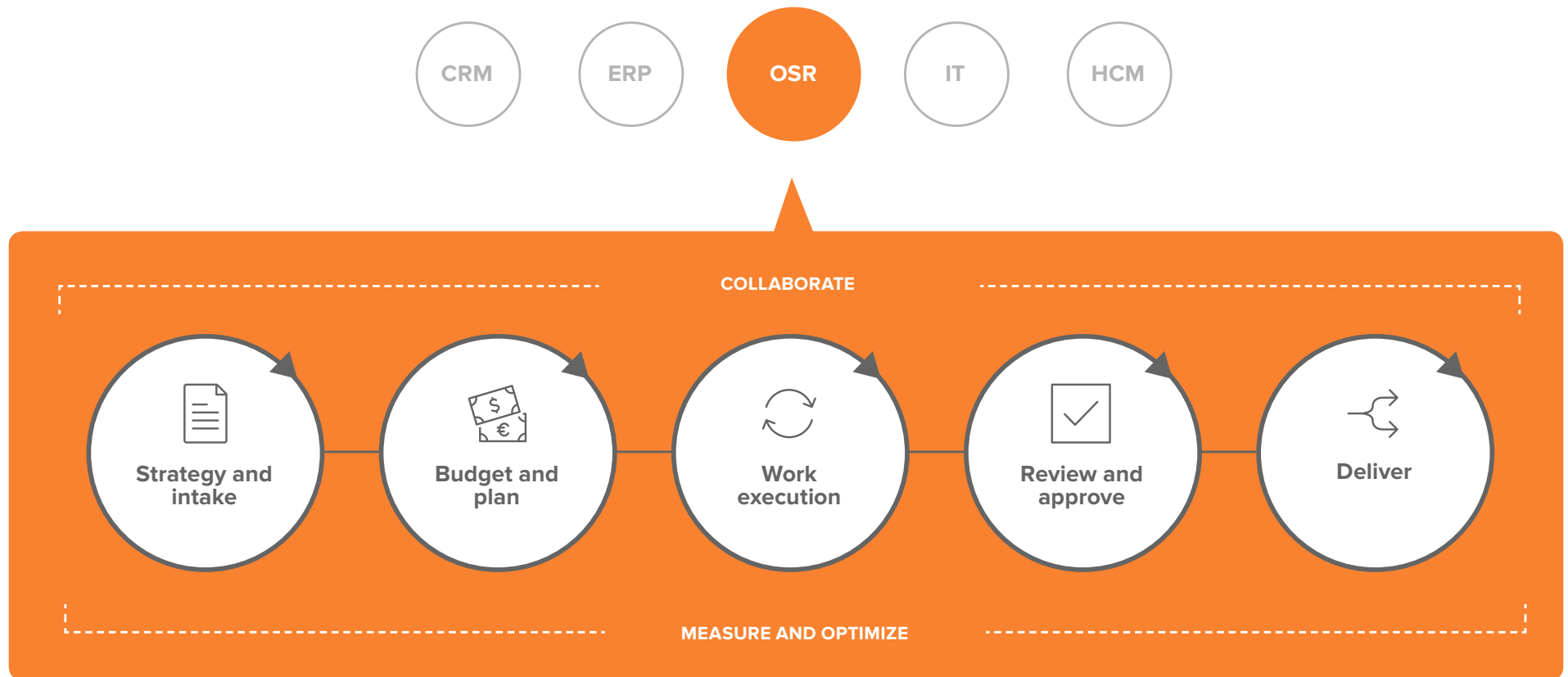
- **A focus on use cases:** We've added greater detail on the use cases you should pursue for net new and growth opportunities. In short, these are the workflows and processes customers can update with our modern work platform. Every business has them, and we're going to show you how to find them in every opportunity.
- **Better tools to position our value:** We've included better tools like a Value Positioning framework to help you leverage the playbook to create the positioning and set the buying criteria in a more competitive market.
- **More prescription of how to do Modern Work:** We've mapped each use case to the Anatomy of Modern Work and show who's involved in each phase of work, the likely integrations required, and the measures a customer should drive to modernize their work.
- **Mapping use cases to buying centers:** We show you the most common use cases where Workfront will excel in each buying center.



Use these tools to help more prospects and customers successfully modernize their work. Take the time up front to run the sales process, create value for the customer, and know how we solve their problems better than anyone else. Your investment of time will help you establish credibility earlier, be seen as a trusted advisor, and create successful customers who will grow as they transform.

Happy selling,
Scott Lee & the Product Marketing Team

Modern Work Management.



Value Creation Pitch Deck.

When introducing Workfront to a new prospect, we need to validate the pain they are experiencing and give them hope for a brighter future. Our goal is to show them they aren't alone in this journey, and that Workfront has helped other enterprises in their same situation.

After this deck, you would bring in an Solutions Advisor to do more process discovery and eventually follow with a configured demo.

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Modern Work Management for the Enterprise

1

CONFIDENTIAL

SLIDE 1

Hello Mr./Mrs. Customer, it's great to be with you to share some insights we have about work.

WORKING WITH THOUSANDS OF LEADERS

L'OCCITANE
UN PRODIGE

HEIFER
NUTRITION

LOCKHEED
CORPORATION

FARMERS
INSURANCE

FDA

BOEING

PEPPERDINE
UNIVERSITY

Ameritas

Prudential

FedEx
Corporation

Comcast

ThermoFisher
SCIENTIFIC

STARBUCKS

STANLEY

WebMD

charles SCHWAB

BARNABAS
HEALTH

WarburtonS

Cleveland Clinic

APPTIO

LOYOLA
UNIVERSITY CHICAGO

Informatica

Santander

ESPN

Schneider
Electric

Adobe

2

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SLIDE 2

Working with thousands of leaders across virtually every major industry...

THE DIGITAL WORK CRISIS

We know most companies are looking at work **ALL WRONG.**

3 CONFIDENTIAL

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SLIDE 3

We know that most companies are looking at work ALL WRONG...

THE DIGITAL WORK CRISIS

It's not *just* about collaboration, project management, going agile or saying goodbye to silos.

This misses the point.

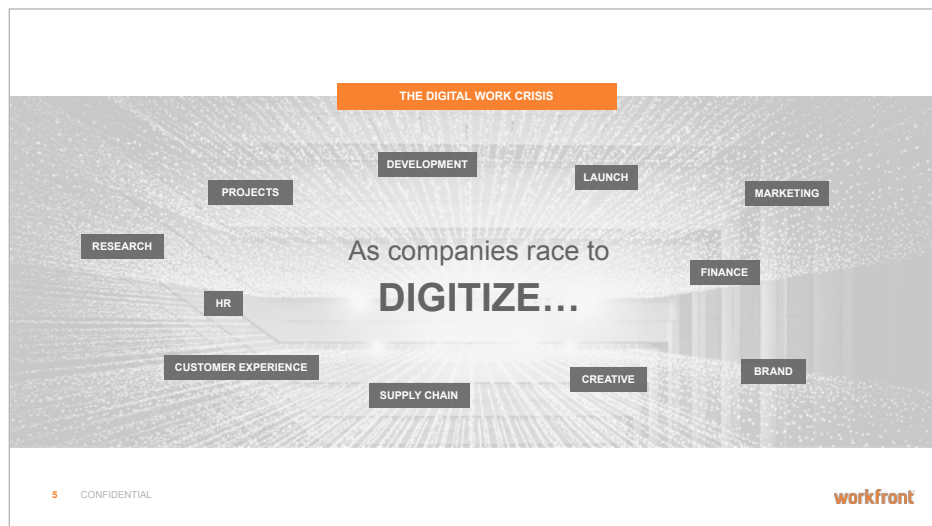
4 CONFIDENTIAL

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SLIDE 4

You see, it's not just about collaboration, project management, going "Agile", or saying goodbye to silos.

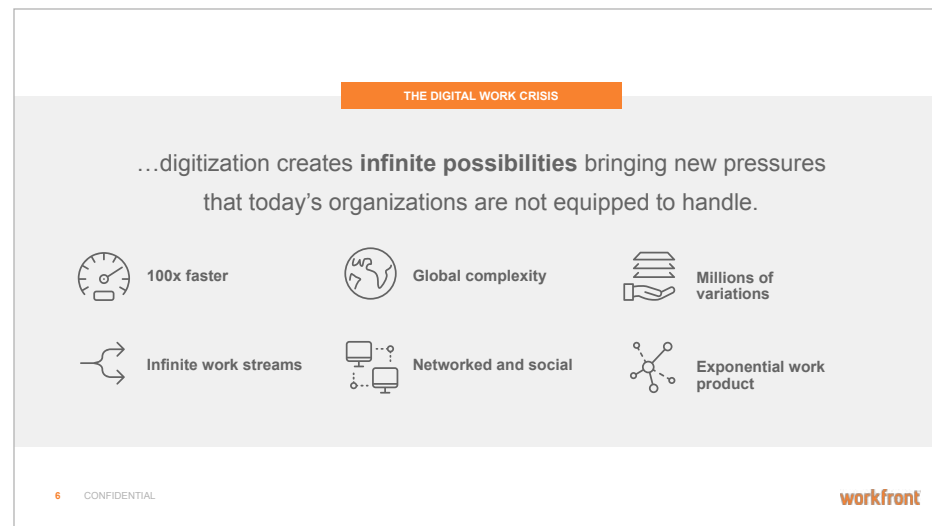
THIS MISSES THE POINT.



SLIDE 5

As companies race to Digitize everything...

[click]... from Development to Marketing to Supply Chain and Customer Experience... they HAVE TO ACCELERATE THE SPEED at which they conduct business...



SLIDE 6

...but **DIGITIZATION** creates **INFINITE POSSIBILITIES**—bringing new pressures that today's organizations are just not equipped to handle.

- You have to go 100 times faster... because speed is the new currency.
- You operate in a globally complex ecosystem where geographic boundaries have shrunk.
- You struggle meeting the needs of customer expectations, with millions of product variations now the norm.
- And there are Infinite work streams that are high volume, short-sprints, and all running in parallel.
- Your employees expect work systems to be effortlessly networked and social.
- Lastly, you're creating exponential work product, with literally exabytes of data and digital artifacts being produced continuously.

THE DIGITAL WORK CRISIS



Functions and teams are disconnected and not executing together.

Work processes are analog and operate at different paces.

Exabytes of artifacts and data are trapped in silos.

Companies that fail to modernize work are being left behind.

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SLIDE 7

Yes, the race to digitize across every business function is ON—but this also brings its own set of challenges:

- If done haphazardly, teams can become disconnected and find it nearly impossible to execute goals together.
- Work processes that remain manual and analog will operate at different paces.
- The aforementioned exabytes of data and artifacts stay trapped in silos.

COMPANIES THAT FAIL TO MODERNIZE WORK ARE BEING LEFT BEHIND.

THE DIGITAL WORK CRISIS



... and executives are **FLYING BLIND** with no way to plan, execute, and measure work at a strategic level.

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SLIDE 8

Executives are FLYING BLIND with no way to plan, execute, and measure.

THIS IS A DIGITAL WORK CRISIS, LEAVING MANY COMPANIES BEHIND, UNABLE TO COMPETE TODAY—LET ALONE INNOVATE FOR TOMORROW.

THE DIGITAL WORK CRISIS

...and the problems are getting **WORSE** every day.

93% of high value work will be digital by 2020.
Source: IBM Cognitive Colloquium Event, 2015

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SLIDE 9

AND THE PROBLEMS ARE GETTING WORSE EVERY SINGLE DAY.
IBM says that 93% of high value work will be digital by 2020.

THE DIGITAL WORK CRISIS

 **The status quo**
Legacy productivity tools

 **Stretch existing applications/platforms**
Accept constraints, force fit for business

 **Point tools**
Incremental, band-aid, good enough is ok

Business survival requires bold new steps.
Existing approaches were built for another era.

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SLIDE 10

Many organizations have attempted to solve this by rolling out various collaboration and project management initiatives,
[click] Using legacy productivity tools,
[click] adopting incremental point solutions,
[click] or force-fitting existing platforms.
But these initiatives fail because these tools were not built for the demands of how people work today.
BUSINESS SURVIVAL REQUIRES BOLD NEW STEPS.

THE DIGITAL WORK CRISIS

There is a better way.

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SLIDE 11

THERE IS A BETTER WAY...

THE NEW MODEL FOR WORK

Tomorrow's leaders operate
with a different set of rules
championing a shift to a
NEW MODEL OF WORK.



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SLIDE 12

The business leaders of tomorrow are operating with a different set of rules.
They champion a shift to a NEW model of work.

THE NEW MODEL FOR WORK

NOW	NEXT
Analog	Digital
Uncoordinated, disconnected	Working in harmony
Ad-hoc, siloes everywhere	Cross-functional and connected
Inconsistent, unpredictable	Observable and accountable
Invisible, unmeasured	Act with certainty and precision

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SLIDE 13

A new model of work that:

- Digitizes their work processes, as they seek to eliminate manual, analog processes.
- One that turns uncoordinated, disconnected work into truly orchestrated work that keeps teams in harmony with over-arching goals and strategies.
- Breaks down the silos and drives cross-functional collaboration.
- Makes work observable, creating visibility and accountability.
- And ends the guesswork by giving them the power to act with certainty and precision....

THE NEW MODEL FOR WORK

This new model of work **accelerates** and **orchestrates** work with the precision and certainty you run the rest of your business.

Finance System of Record	Customer System of Record	HR System of Record	IT System of Record	Operational System of Record
				

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SLIDE 14

In fact, this new model of work ACCELERATES and ORCHESTRATES work with the precision and certainty with which you run the rest of your business, because you KNOW WHAT'S HAPPENING ACROSS THE ORGANIZATION.

[click]

At Workfront, we call this MODERN WORK MANAGEMENT: one OPERATIONAL SYSTEM OF RECORD in which all of your business is PLANNED, ALIGNED, CHOREOGRAPHED, and MEASURED.

THE NEW MODEL FOR WORK

These leaders have figured it out...



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SLIDE 15

These leaders have figured it out...

CITRIX®

"Workfront delivers fact-based, data-driven information in real time. It's our single source of truth."

Perry Hovanic
Director of New Product Innovation

Improved collaboration with 40 task owners across multiple organizations and teams.



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SLIDE 16

Perry from Citrix is responsible for new product innovation, and now Citrix has a "single source of truth" that delivers the facts and data about their work in real-time.

FOSSIL
GROUP

"Workfront has given Fossil a platform to deliver critical information to the creative departments and helps give marketing visibility to the time needed to complete projects."

Philip Bower
Director of Creative Services



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SLIDE 17

Philip runs Creative Services at Fossil. They now have a platform that helps them deliver creative work on time and that keeps Marketing updated on timelines.

Fender

"Workfront is really about working smarter, allowing us to work faster and more efficiently. It's so adaptable that any business group can easily customize and use it."

Jenna Shiba
Marketing Operations Manager

30-40% less time spent in meetings for creative team members.



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SLIDE 18

Jenna at Fender has helped the company work smarter, faster, and more efficiently while reducing meeting time.



"Workfront provides the collaboration and visibility our project managers, engineers, and leadership needed to deliver on our promises to our Xfinity customers."

Brady Robinder
Manager Deployment Automation



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SLIDE 19

Brady at Comcast is able to orchestrate project managers, engineers, and leadership to collaborate and stay aligned in serving millions of Xfinity customers.



"Workfront allows our team to be innovative and flexible when implementing solutions for vendor and request management."

Adina Pierce
Workfront Admin and Service Lead

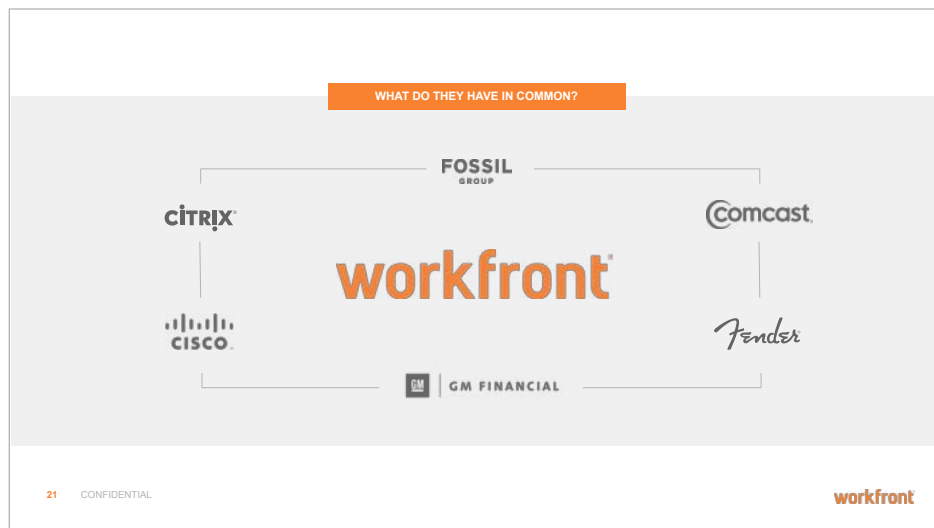
Boosted the CRC team's on-time delivery rate to 99% in just three months and saved Cisco 85% in work management investment.



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SLIDE 20

And Adina at Cisco has boosted their solution implementation team's on-time delivery rates to near-perfect while saving money in the process.

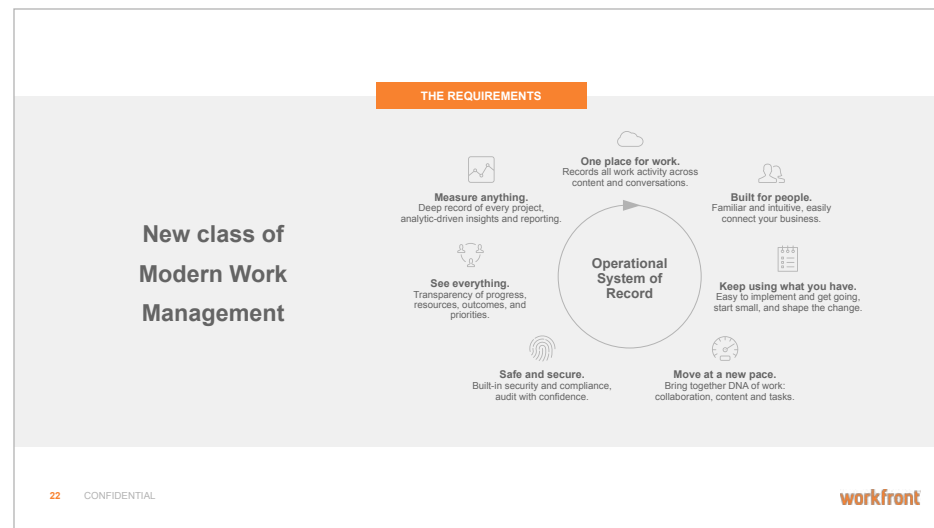


SLIDE 21

What do these companies all have in common?

[click]

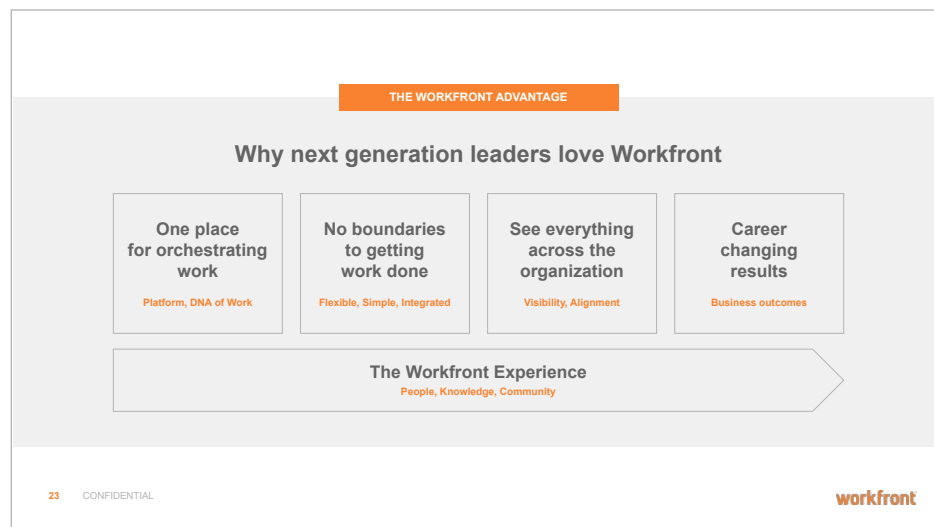
They're using **Workfront** to MODERNIZE HOW THEY WORK, and they're seeing incredible results in their businesses.



SLIDE 22

This new class of work requires a modern work management platform for the enterprise. Why? Because across every enterprise, there are teams of people who want to change the world. Unleashing that kind of creativity and passion requires a modern work management platform: **[click & build]**

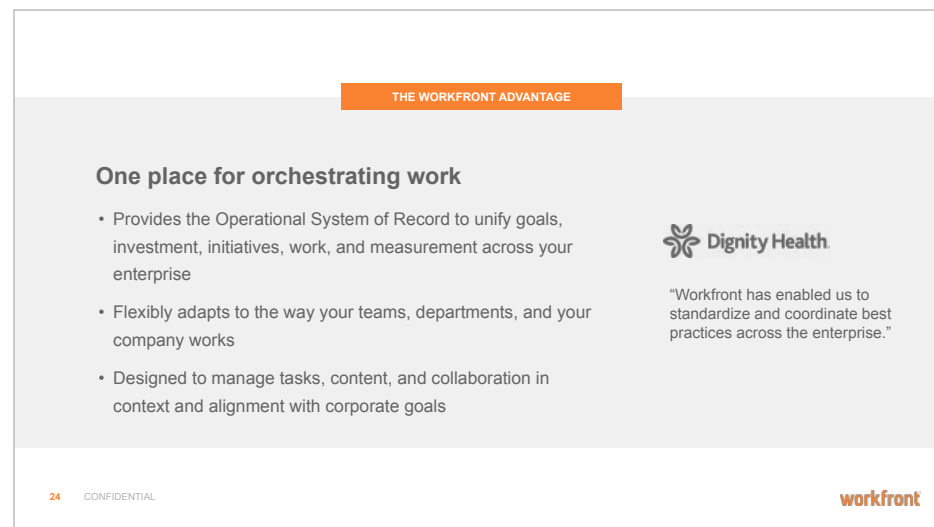
- **One place for work** – a deep record of all work activity.
- **Built for people** – it's familiar, intuitive, and easily connected to your business.
- **Keep using** – let's you keep using what you have, easy to get going, start small, and adapt to your business needs
- **Move at a new pace** – helping you bring together collaboration, content, and tasks so your people can focus and eliminate clutter
- **Stay safe and secure** – with built-in security and compliance, giving your business confidence.
- **See everything** – the ability to have transparency of progress, resources, outcomes, and priorities.
- **Measure anything** – the ability to have a deep record of every project, analytics-driven insights, and reporting.
- WE CALL THIS AN "OPERATIONAL SYSTEM OF RECORD".



SLIDE 23

These next-generation leaders love Workfront because it:

- Gives them one place for orchestrating work—Workfront creates **one place for all work** across every department, serving as the Operational System of Record that unifies your entire organization.
- Eliminates the **boundaries to getting things done**—Workfront incorporates your existing tools, making it easy for teams to get started working together and to adapt as the organization evolves.
- Helps them **see everything across the organization**—Workfront customers make smarter, faster decisions because work is observable and aligned across every aspect of their business.
- Produces **career-changing results**—The people who choose and use Workfront to transform their organizations for the digital era unleash potential and deliver high-value impact.
- The **Workfront Experience** means Workfront fast-tracks customers' success through active knowledge sharing, peer idea exchanges, and executive feedback sessions, both during initial implementation and over time.



SLIDE 24

Workfront gives you one place for orchestrating work,

- **Providing an Operational System of Record that lets you** unify goals, investment, initiatives, work, and measurement across your enterprise.
- Flexibly adapting Workfront to the way that your teams, departments, and company work.
- Designed to manage tasks, content, and collaboration in context and alignment with your goals.

THE WORKFRONT ADVANTAGE

No boundaries to getting work done

- Easy to use, role-based user experience
- Easily connect to the tools and systems you use throughout the enterprise
- Configurable workflows to automate and accelerate work, maximizing investment in people



"We have quality, supply chain, engineering, manufacturing, and program management working in offices in Europe, Asia, and the U.S., working the same projects. If you want to be able to work on something here, go to bed knowing that another group's working on it productively, and come in the next day and have a solid extra eight hours worked on that project every single day, it's [Workfront] very powerful."

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SLIDE 25**Workfront helps eliminate the boundaries to getting things done with:**

- Easy-to-use, role-based experience allowing you to manage work among designated roles and groups.
- Easily connect Workfront to the tools and systems you use throughout the enterprise, from productivity apps to storage and other systems of record like Salesforce, NetSuite, Workday, SAP, and more.
- Digitize and configure workflows to automate and accelerate work so your people's creativity can be unleashed toward innovation.

THE WORKFRONT ADVANTAGE

See everything across the organization

- Enterprise view of priorities, resources, actions, and outcomes
- Provides analytic-driven insights and reports for faster, smarter decisions
- Provides work visibility across all primary business applications (email, collaboration, etc.)



"Workfront allows us to focus on strategy, creativity and innovation vs. day-to-day tasks that used to consume so much time. Employees appreciate our team because, through Workfront, we make it easier for them to be super productive."

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SLIDE 26**Workfront gives you visibility into everything across the organization:**

- Gives an enterprise-level view of priorities, resources, actions, and outcomes.
- Provides insights and reports for faster, smarter decisions.
- Helps your people stay connected to work even in other primary business applications like email, chat, and productivity suites.

THE WORKFRONT ADVANTAGE

Career changing results

- Become the hero: unleash the potential of your teams
- Give your best people the highest-impact work
- Develop people and teams through effective work management
- Become a change-agent for modernizing work
- Deliver clear outcomes: faster, more efficient, better results

Dräger

"I love it when my colleagues look at our group and say, 'You do what? How do you do that?' And I say, 'I have Workfront'."

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SLIDE 27

Workfront helps you produce career-changing results—The people who choose and use Workfront to transform their organizations deliver high-value impact.

- Become the hero as you unleash the potential of your teams.
- Give your best people the highest-impact work.
- Develop people and teams through effective work management.
- Become a change-agent for modernizing work.
- Delivery faster, more efficient, better results.

THE WORKFRONT ADVANTAGE

The Workfront experience

- Join a global community of leaders: online idea exchanges, in-person user groups, and conferences
- Direct line of communication with Workfront executives, multiple times a year
- Get up and running quickly by leveraging Workfront best practices and rich customer knowledge

illumina

"Workfront has been an amazing partner throughout our journey. I've benefited from learning how different groups adopt best practices, forming relationships across teams, and helping construct a better way for our whole organization to work together."

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SLIDE 28

The Workfront Experience means:

- Join a global community of leaders through online idea exchanges, in-person user groups, and conferences.
- Have a direct line of communication with Workfront executives multiple times a year.
- Get up and running quickly by leveraging Workfront best practices and rich customer knowledge.

CALL TO ACTION

 **Understand work processes.**

 **Identify areas to make a clear impact.**

 **See how it works in a custom demonstration.**

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SLIDE 29

You know Mr./Mrs. Customer, Workfront can help your business thrive in this digital era. So I'd like to ask for three commitments from you:

- First, let us run a Work Assessment to better understand how your teams work.
- Second, we will learn from that assessment and propose 1-2 immediate areas where we can make a clear impact on your business.
- Third, I invite you to see how Workfront works in a custom demonstration for your business.

Could we get together Thursday to schedule the Work Assessment?

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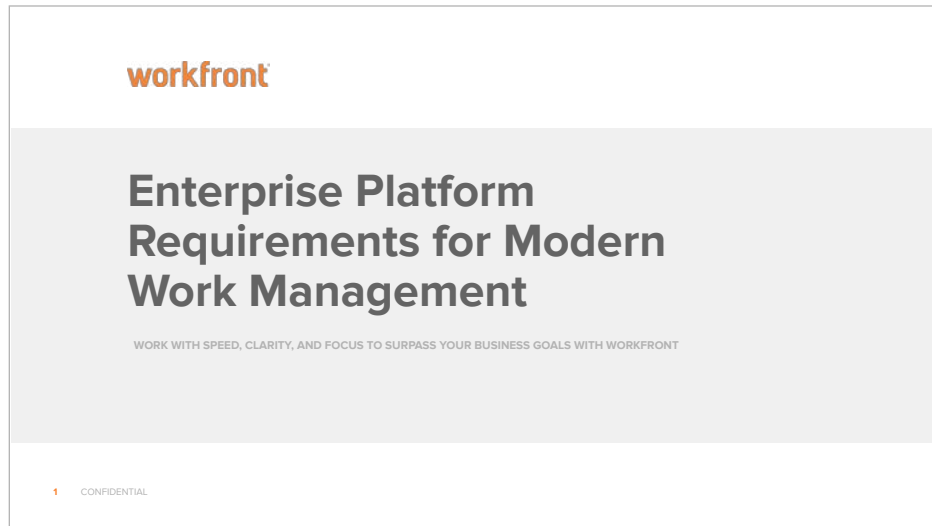
SLIDE 30

Thank you.

Validate Pitch Deck.

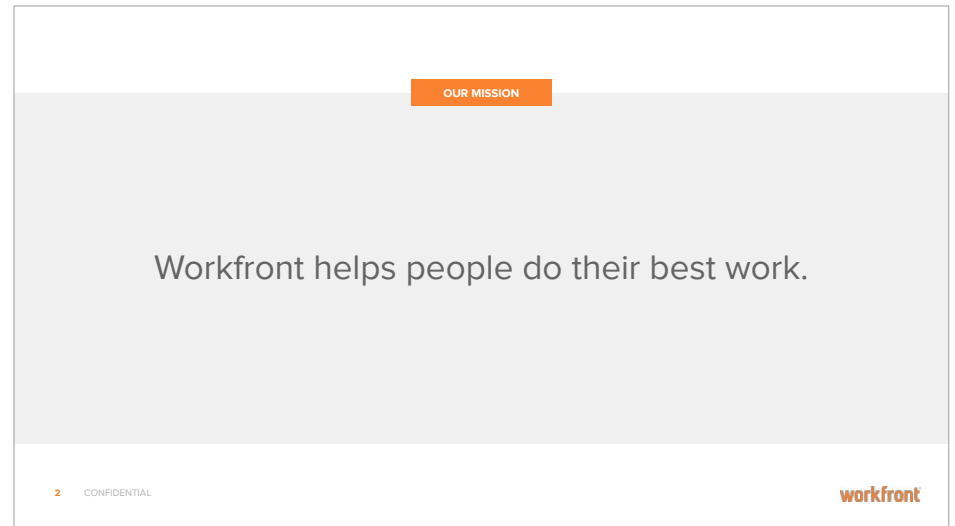
After your prospect is aware of Workfront as a company, they would like to know more about our platform and how we are going to help them. This deck will help you reiterate your prospect's pain and explain the requirements for a platform to help them successfully navigate a new way of working.

After reviewing this deck, you should identify which [job](#) aligns with their pain and solve for one or two use cases with Workfront.

**SLIDE 1**

Customer, thanks for taking the time to meet with us today.

At our last meeting, you had some questions about the Workfront platform.

**SLIDE 2**

To begin, it's important to understand why we've built this platform.

We believe work is noble, and we help people do their best work.

WE'VE HELPED 4,000 CUSTOMERS

L'Occitane
en Provence

Heifer
International

Old Navy

Wake Forest
University

Ameritas

Starbucks

Stanley

Adobe

Schneider
Electric

Cleveland Clinic

Warburton's

Barnabas Health

Charles Schwab

WebMD

Loyola University Chicago

Informatica

Santander

ESPN

ThermoFisher
Scientific

Comcast

FDA

Farmers
Insurance

FedEx
Corporation

Prudential

Boeing

Pepperdine
University

3

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SLIDE 3

In fact, we've helped over 4,000 organizations increase their business agility, efficiency, and visibility of work.

THE NEW MODEL FOR WORK

Tomorrow's leaders operate with a different set of rules championing a shift to a **NEW MODEL OF WORK.**



4

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SLIDE 4

Many of tomorrow's leaders at these organizations have actually embraced a new model for work.
They are operating with a different set of rules.
They champion a shift to a NEW model of work.

THE NEW MODEL FOR WORK

This new model of work **accelerates** and **orchestrates** work with the precision and certainty you run the rest of your business.

Finance System of Record	Customer System of Record	HR System of Record	IT System of Record	Operational System of Record
				

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SLIDE 5

This new model of work **accelerates and orchestrates work** with the precision and certainty with which you run the rest of your business.

- You have a financial system of record to absolutely know the truth about your financials.
- A customer system of record to know the truth about your customer relationships.
- An HR system of record to be able to manage all aspects of your employees.
- An IT system of record to keep tabs on service requests and delivery.
- But when it comes to knowing the truth about your work, how do you know?

You need an OPERATIONAL SYSTEM OF RECORD to have those answers.

THE REQUIREMENTS

New class of Modern Work Management

Operational System of Record

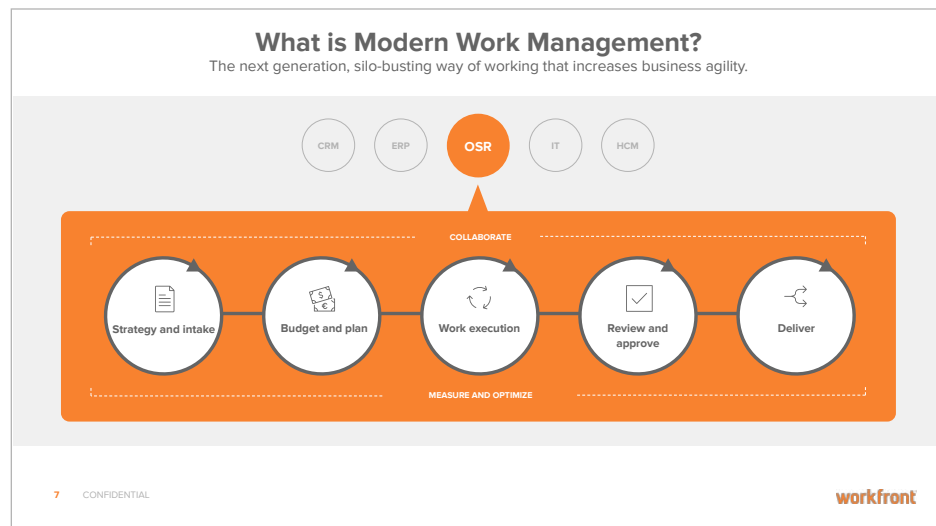
- Measure anything.** Deep record of every project, analytic-driven insights and reporting.
- See everything.** Transparency of progress, resources, outcomes, and priorities.
- Safe and secure.** Built-in security and compliance, audit with confidence.
- Move at a new pace.** Bring together DNA of work: collaboration, content and tasks.
- One place for work.** Records all work activity across content and conversations.
- Built for people.** Familiar and intuitive, easily connect your business.
- Keep using what you have.** Easy to implement and get going, start small, and shape the change.

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SLIDE 6

This new class of work requires a Modern Work Management Platform for the Enterprise. Why? Because across every enterprise, there are teams of people who want to change the world. Unleashing that kind of creativity and passion requires a modern work management platform: **[click & build]**

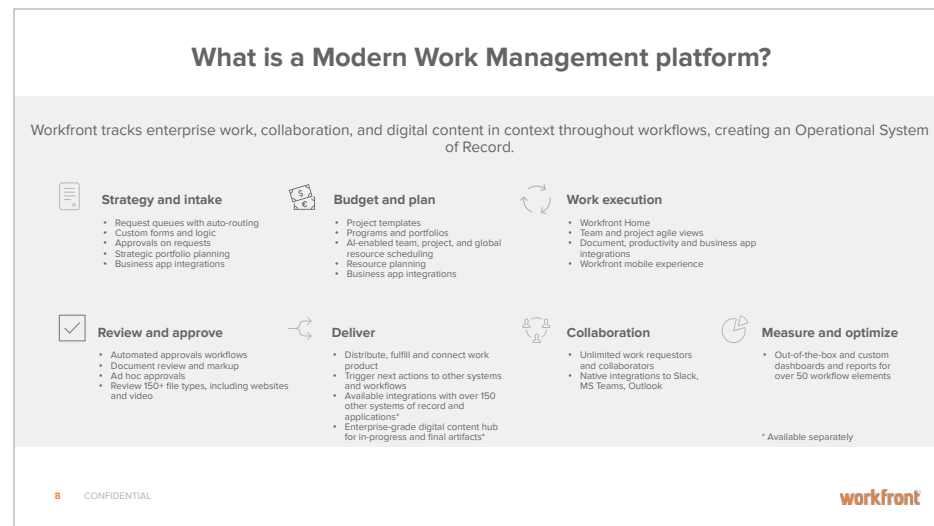
- **One place for work** – a deep record of all work activity.
- **Built for people** – it's familiar, intuitive, and easily connected to your business.
- **Keep using** – let's you keep using what you have, easy to get going, start small, and adapt to your business needs
- **Move at a new pace** – helping you bring together collaboration, content, and tasks so your people can focus and eliminate clutter
- **Stay safe and secure** – with built-in security and compliance, giving your business confidence.
- **See everything** – the ability to have transparency of progress, resources, outcomes, and priorities.
- **Measure anything** – the ability to have a deep record of every project, analytics-driven insights, and reporting.



SLIDE 7

Modern Work Management increases business agility by **STANDARDIZING WORK ORCHESTRATION** around best practices in a common workflow:

- It begins with your Strategy, or a Request...
- Then you assign resources and form or select a plan to execute on that Strategy or Request...
- You ask teams to execute on the work....
- And to get the right approvals on the work to ensure quality and compliance...
- And then the work product is delivered – either to customers, to other workstreams, or other initiatives
- Throughout this Modern Work process, your teams can collaborate and leaders can measure and optimize toward the initial requirements of the Strategy or Request.



SLIDE 8

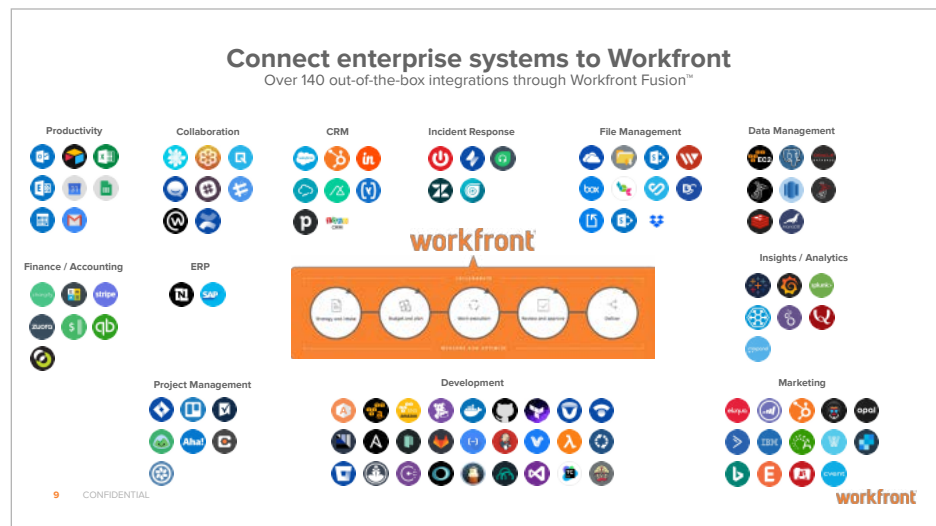
A Modern Work Management Platform gives your organization the power and capacity to do your best work.

And doing Modern work creates an Operational System of Record.

To achieve this, you need specific capabilities in the platform:

- (review the requirements as fit to the customer's Value Pyramid)

WORKFRONT DELIVERS THESE CAPABILITIES.

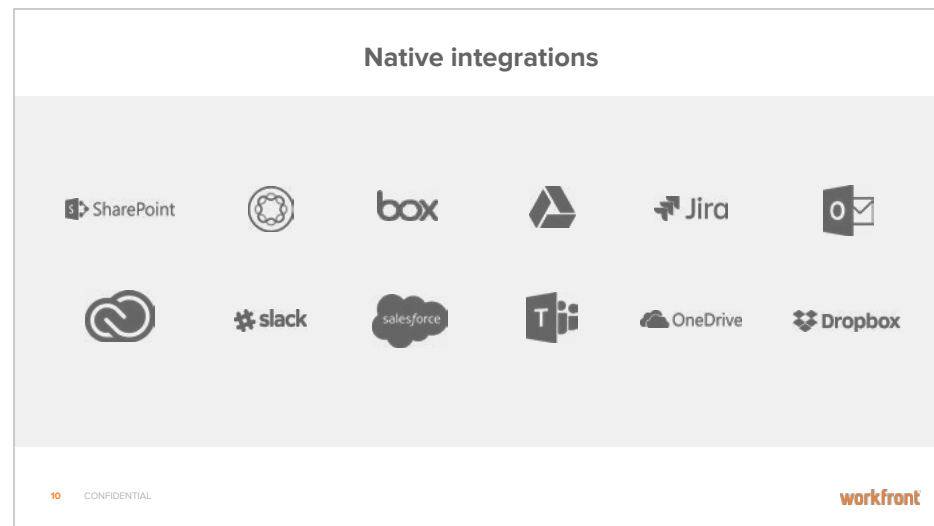


SLIDE 9

A Modern Work Management Platform must be boundary-less, integrating your systems and tools into this “backbone” of work.

That is why Workfront easily connects to over 140 different systems and apps with its integration platform, Workfront Fusion:

- Helps avoid data duplication between systems.
- Enables free flow of data into and out of your OSR.
- Ensures work keeps moving—at speed and at scale...



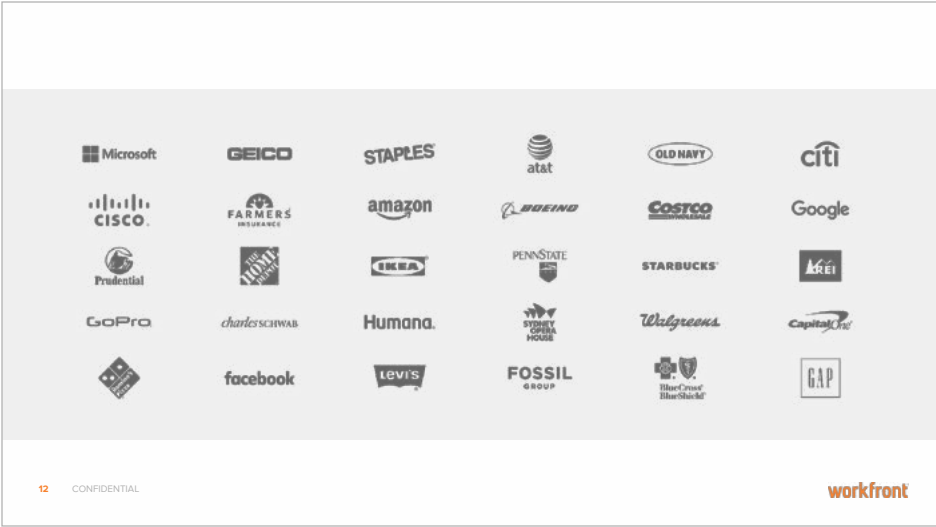
SLIDE 10

We also have native integrations like Workfront for Jira to make work between teams using different tools and methodologies work better together. For example:

- In Workfront, you can create Jira tickets by simply assigning a task to a Jira team.
- In Jira, that work can be assigned, worked on, and updated in Jira, and that information is synced back to Workfront.
- Now you have the data about work in two systems reportable in Workfront, your operational system of record.

We also offer the following integration options:

- Workfront for Outlook
- Workfront for Jira
- Workfront for Slack
- Workfront for Salesforce
- Workfront for Adobe Experience Manager
- Workfront for Adobe Creative Cloud
- Workfront for Android/iOS app
- Workfront for Box
- Workfront for Google Drive
- Workfront for Sharepoint



SLIDE 11

The result: WE HELP ORGANIZATIONS WORK BETTER, SMARTER, AND FASTER.

We help you:

- Increase project capacity—the ability to take on more work.
- Decrease the time it takes for them to go to market.
- Deliver goods and services on time.
- Reduce risk through better compliance.

SLIDE 12

And we’ve helped many companies achieve these results. We can do the same for you.

The Workfront logo, consisting of the word "workfront" in a bold, orange, sans-serif font.

13 CONFIDENTIAL

SLIDE 13

Thank you.

The Workfront Product Line.

Workfront is the first enterprise application platform for modern work management that connects enterprise work, collaboration, and digital artifacts into the Operational System of Record. Our platform breaks down silos and accelerates work providing the enterprise visibility, speed, efficiency, quality, and control.

Our platform consists of Workfront (packaged in four editions), plus additional products, native integrations, and the Workfront Fusion integration platform. Below is a brief overview of all the Workfront product offerings.

workfront®

Modern work management allowing organizations to work better, smarter, faster.

Key Value: Work automation and orchestration in a single platform including:

- Strategy and intake
- Portfolio management
- Resource management
- Work management
- Review and approval
- Reporting and dashboards
- Easy collaboration

Add-On Products:

workfront LIBRARY™

A digital content hub connecting work and content so teams can work faster than ever.

Key Value:

- Integration with Workfront
- Personalized content spaces
- Enterprise-grade search
- Flexible organization

Workfront is required to purchase Workfront Library.

workfront FUSION™

Codeless integration platform connecting Workfront to other business-critical applications.

Key Value:

- Codeless integrations
- Map complex business processes
- Automated updates for the API
- Eliminate manual work

Workfront is required to purchase Workfront Fusion.

Native Integrations.

Workfront for Microsoft



Workfront for Microsoft Outlook

Create, manage, assign, and update Workfront tasks directly from Microsoft Outlook 365.



Workfront for Microsoft Teams

Keep work moving forward by completing approvals, updating tasks, and receiving Workfront notifications directly from Microsoft Teams.



Workfront for Microsoft Sharepoint

Connect Sharepoint with Workfront to quickly manage and coordinate digital content across teams.



Workfront for Microsoft OneDrive

Link documents to Workfront projects and tasks directly from Microsoft OneDrive.

Connect with Microsoft Dynamics CRM, Microsoft SQL Server, and Microsoft VSTS with Workfront Fusion.

Workfront for Adobe



Workfront for Adobe Creative Cloud

Save time by updating your projects and tasks without leaving Adobe Creative Cloud.



Workfront for Adobe Experience Manager Assets (purchased separately)

Deliver amazing work faster by automatically sending completed work to Adobe Experience Manager Assets.

Workfront for Google



Workfront for Google Drive

Attach Google files directly to Workfront projects and tasks and easily route for approvals.



Workfront for G Suite Add-Ons

Approve work, review task details, and create new work from any G Suite application.

Connect with Google Analytics, Google Cloud, Google Admin, Google Tasks, Google Calendar, Google Contacts, Google Doc, Google Sheets, and Google Slides with Workfront Fusion.



Workfront for Jira

Maintain a single source of truth across the enterprise by connecting work completed in Jira with the work managed in Workfront.



Workfront for Salesforce

Submit Workfront requests and receive work updates on any Salesforce account or opportunity record.



Workfront for Slack

Seamlessly collaborate across teams by searching for Workfront projects/tasks/issues, updating tasks, requesting work, and approving documents from any Slack conversation.



Workfront for Box

Download and upload files directly from Box onto any Workfront project, task, or issue.



Workfront for DropBox

Download and upload files directly from DropBox onto any Workfront project, task, or issue.

Complimentary Add-Ons.

Workfront API

Connect to Workfront and virtually any other application through the Workfront API.

Workfront Mobile App (iOS, Android)

Update your tasks, assign new work, and keep track of your team's projects, in real-time, from anywhere with the Workfront mobile app.

Value Positioning.

Map their role to the pain we solve for that persona.

(Refer to persona content in the playbook.)

CHAMPION:

NAME: _____

ROLE:

PAIN:

ECONOMIC BUYER:

NAME: _____

ROLE:

PAIN:

Step 2: Create and confirm the elements of your Value Pyramid.

Why change?

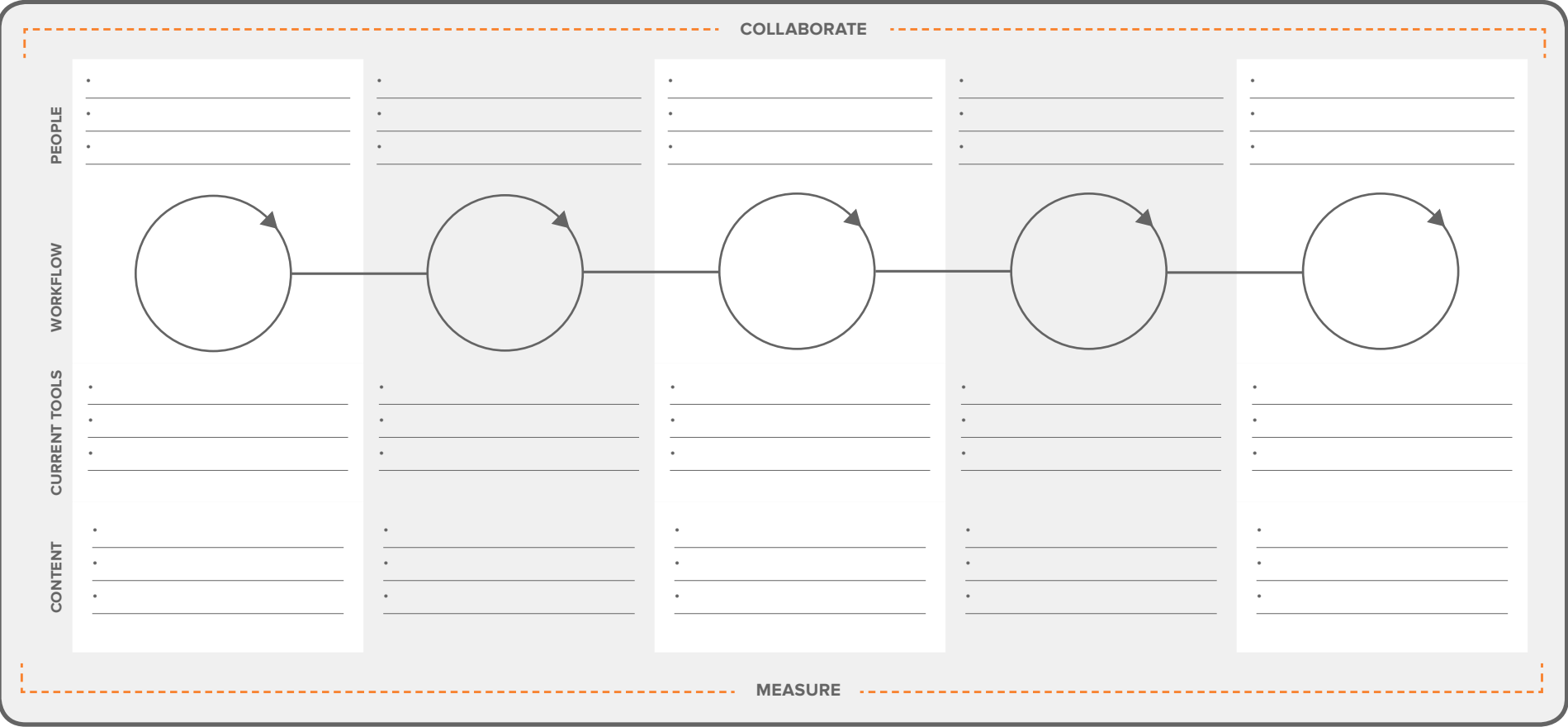
Step 3: Establish current state challenges, identify the trigger, and outline negative consequences.

[illegible]

Value Positioning.

Create the Value Proposition.

☐ **Step 4:** What is the Use Case? Which Job maps to this use case? What is the Value Driver?



Job: _____ **Value Driver:** _____

Value Positioning.

The Requirements

☐ **Step 5:** What capabilities are required to complete the job?
(Refer to the [Work Management Selection Criteria.](#))

Why now?

☐ **Step 6:** Discuss compelling events and costs of delay.

☐ **Step 7:** List the [competitors](#) and why we do it better.

Competitor 1:

Why we do it better:

Competitor 2:

Why we do it better:

☐ **Step 8:** Highlight Workfront Success Stories.

☐ **Step 9:** Continually gain sponsorship for next steps.

Section 2: How We Help

The Five Jobs We Do for Customers.

Workfront helps thousands of companies operate in the modern workplace. After interviewing and researching how our most successful customers use our platform, we identified five unique ways we can help other enterprises. You know these as the five Jobs We Do.

The following pages provide detail for each Job We Do.

				
Centralize Work in One Solution	Digitize Work Processes	Review and Approve Digital Work	Govern Compliance Workflows	Deliver Client-Facing Services
THE JOB DESCRIPTION				
Manage all work in one collaborative system for greater visibility into all work.	Bring products, experiences, creative work, and content to market faster and more efficiently.	Provide fast, collaborative review and approval of digital content for quality and consistency.	Automate the end-to-end work that ensures regulatory, brand, and corporate compliance.	Deliver services to stakeholders and clients while maximizing resource utilization.
THE WHY				
Visibility. Gain complete transparency into work.	Predictability and Speed. Get quality work to market faster.	Quality. Consistently deliver the best work.	Control. Establish governance and mitigate risk.	Efficiency. Increase profit margins and customer satisfaction.

The Five Jobs We Do for Customers.

Workfront helps thousands of companies operate in the modern workplace. After interviewing and researching how our most successful customers use our platform, we identified five unique ways we can help other enterprises. You know these as the five Jobs We Do. The following pages provide detail for each Job We Do.

	CENTRALIZE WORK IN ONE SOLUTION	DIGITIZE WORK PROCESSES	REVIEW AND APPROVE DIGITAL WORK	GOVERN COMPLIANCE WORKFLOWS	DELIVER CLIENT-FACING SERVICES
Marketing	• Program management • Marketing Operations • Project Management	• Creative production • New hire onboarding • Campaign management	• Proof digital content • Review HTML5 content • Proof video content	• Brand management • Regulatory compliance	• Creative services
IT	• Portfolio, Program, Project Management • Mergers and acquisitions	• Vendor onboarding • New hire onboarding	• Portfolio/project vision documents • Roadmaps	• Regulatory compliance • Privacy and security projects	• Software delivery • Website management
Product Development	• Portfolio management • Project Management	• New product launch • Market research • Supply chain • Stage gate automation	• Launch materials • Proof of concepts • Product vision	• Regulatory compliance • Quality assurance • Security and privacy	• Design services
Professional Services	• Account management • Portfolio/project management	• New client onboarding • New hire onboarding	• Proof • Client work reviews	• Regulatory compliance	• Services delivery • Implementation services
Agency	• Agency client management • Program/project management	• Creative production • New hire onboarding	• Review client work • Proof digital content	• Brand management • Regulatory compliance	• Agency services

COMPLETE LIST OF USE CASES BY JOB AND BUYING CENTER

Our customers do some amazing things with Workfront! We researched thousands of ways our customers use Workfront to get more visibility into work, and here's what we've learned: customers are using Workfront to modernize their business operations. How? By putting those business processes into Workfront so they collaborate better, have better visibility, and increase the speed and capacity of their teams to do work. Here are the most common uses of Workfront:

Job 1: Centralize Work in One Solution.

Marketing:

- Ad hoc requests
- Advertising project management
- Campaign brief creation
- Campaign planning
- Content calendars
- Content requests
- Creative project management
- Creative work intake
- Demand management
- Email list management
- Integrated marketing programs
- [Marketing operations](#)
- Marketing resource management
- [Portfolio/program management](#)
- [Project management](#)
- Resource management
- Social media requests
- Sports marketing
- Strategic communications

IT:

- Ad hoc requests
- Business case creation
- Data change management projects
- Data management
- Demand management
- Department operations
- Enterprise project management
- Executive reporting on projects
- Forecast available resources
- Incoming work requests
- IT operations
- [Portfolio management](#)
- [Post merger integration](#)
- Project dashboards and reporting
- [Project management](#)
- Quarterly OKR reports
- Transforming system infrastructure
- Work budget and cost management
- Work management reporting
- Workload analysis and forecasting

Product Development:

- Ad hoc requests
- Business case creation
- Engineering project management
- Innovation roadmap
- Issue management
- Manufacturing project management
- Procurement operations
- Product forecasting
- Product operations
- [Product/portfolio management](#)
- [Project management](#)
- Quarterly OKR reports
- Roadmap development

Professional Services:

- [Account management](#)
- [Client project management/automation](#)
- Client reporting
- Client requests
- Manage client projects

Agency:

- Ad hoc project/work management
- [Agency client/account management](#)
- Agency portfolio and project planning
- Capacity planning
- Creative brief intake
- Demand management
- Executive reporting
- [Project management](#)
- Project prioritization

COMPLETE LIST OF USE CASES BY JOB AND BUYING CENTER

Our customers do some amazing things with Workfront. We researched thousands of ways our customers use Workfront to get more visibility into work.

Job 2: Digitize Work Processes.

Marketing:

- Advertising campaigns
- Agile work management
- [Campaign management](#)
- Collaboration across teams
- Content management
- Corporate communication work management
- [Creative production](#)
- Creative work management
- Customer communication management
- Design process
- Digital and print campaigns
- Digital content production
- Digital marketing campaigns
- Editorial work
- Email marketing projects
- Event management
- Franchise onboarding
- Marketing audience research
- Marketing operations
- Media management
- Merchandising operations
- [New hire onboarding](#)
- Print production
- Public relations
- Retail design management
- Retail display creation
- Store openings
- Surveys
- Trade shows
- Video production
- Voice of customer research

IT:

- Agile work management
- Change management enablement
- Coordinate work in IT department
- IT support service management
- Kanban process
- [New hire onboarding](#)
- Platform migration
- Policy management
- Project cost management
- Quality assurance
- Remote collaboration
- Transition services
- [Vendor onboarding](#)
- Work routing

Product Development:

- Create SKUs for new products
- Cross-departmental collaboration
- Customer research
- Customer discovery
- Development training
- Global packaging work management
- Hardware deployment
- Inventory management
- Market research
- Minimum viable product creation
- New hire onboarding
- New product design
- New product introduction
- [New product launch](#)
- Product development

- Product distribution
- Product documentation
- Prototyping
- Quality assurance management
- [Stage gate automation](#)
- [Supply chain management](#)

Professional Services:

- [Client implementation services](#)
- Collaboration between clients and the consultancy
- Cross-team workflows
- Manage customer-facing materials
- [New client onboarding](#)
- [New hire onboarding](#)
- Software deployment management
- Work routing

Agency:

- Agile work management
- Collaboration between clients and the agency
- [Content/creative production](#)
- Cross-departmental workflows
- Digital asset management
- Digital workflow management
- [New hire onboarding](#)
- Work routing

COMPLETE LIST OF USE CASES BY JOB AND BUYING CENTER

Our customers do some amazing things with Workfront. We researched thousands of ways our customers use Workfront to get more visibility into work.

Job 3: Review and Approve Digital Work.

Marketing:

- [Approve digital content](#)
- Content approvals
- Content proofreading
- Creative work approvals
- Digital proofing
- Video proofing

IT:

- [Digital content approvals](#)
- Digital work approvals

Product Development:

- [Design approvals](#)
- Digital content approvals
- Roadmap approvals

Professional Services:

- Client charters
- Client review and approval

Agency:

- [Approve digital work](#)
- Client approvals
- Creative work approvals

Job 4: Govern Compliance Workflows.

Marketing:

- Brand management
- [Compliance approvals](#)
- Global design management

IT:

- Cyber security projects
- Global security projects
- Internal compliance workflows
- Privacy projects
- Risk assessments
- Risk operations

Product Development:

- Approve new generic drugs
- Compliance workflows
- Cyber security projects

Professional Services:

- Client audits

Agency:

- Audit trails
- Federal work approvals
- Regulation tracking

COMPLETE LIST OF USE CASES BY JOB AND BUYING CENTER

Our customers do some amazing things with Workfront. We researched thousands of ways our customers use Workfront to get more visibility into work.

Job 5: Deliver Client-Facing Services.

Marketing:

- [Creative services](#)
- External agency collaboration
- Graphic design
- Time tracking
- Web services delivery
- Website management

IT:

- Time tracking
- Web management

Product Development:

- Product design
- Product packaging creation
- PTO tracking
- Time tracking

Professional Services:

- Client dashboards
- [Client services work management](#)
- [Implementation services](#)
- Job forecasting
- Resource management
- Time management and reporting

Agency:

- [Agency services](#)
- Agency timesheets/time tracking
- Client reporting
- Cross-agency collaboration
- Project budget/cost tracking
- Utilization reporting

Job 1: Centralize Work in One Solution.

Manage all work and processes, whether simple or complex, in one collaborative system for greater visibility into all activities.

Value Driver: Visibility

Gain complete transparency
into all work



Pain

- **Executive:** Lack of enterprise visibility impairs real-time decision-making, resulting in project delays and increased costs.
- **Champion:** Reduced productivity from manually capturing project updates through meetings, report-building in spreadsheets, impromptu drive-by's, and email.

Positive business outcomes

- Bring disconnected work into one system for increased visibility and improved project delivery.
- Improve collaboration across the enterprise through a single platform of engagement.
- Improve resource utilization to drive more effective and efficient use of knowledge workers.
- Cut costs through system consolidation.

Unique differentiators

- AI-enabled resource scheduling.
- Easily know when your team can take on more work with Resource Planner.
- Customizable forms and business cases for better prioritization.
- Customizable workflows for increased efficiencies and better flexibility.

Job 1: Centralize Work in One Solution.

Manage all work and processes, whether simple or complex, in one collaborative system for greater visibility into all activities.

Benefits from our customers' perspective

- Role-based user experience
- Intuitive collaboration on work (Slack, Outlook, Mobile)
- Mixed methodology support
- Portfolio of products that support the evolution of the enterprise

How we do it

- **L'Occitane en Provence** estimates a \$250,000 per year savings from eliminating duplicate requests and late detected issues.
- The Performance Excellence Group at **Dignity Health** has complete visibility into the 250+ projects it oversees every year. As they expanded Workfront throughout their organization, they were able to standardize their processes to save more than 100 hours—*per day*.
- **Peregrine** saw a 300% increase in project capacity within six months of implementing Workfront.
- **Advance Auto Parts** increased their team productivity by more than 50%.
- **Cisco** noticed instant and accurate visibility into work, status, schedules, and resources which helped them improve efficiencies and increase their on-time delivery rate to 99% in just three months. Additionally, because they consolidated disparate tools, they saved 85% of their work management investment.
- **Citrix** saw a 35% reduction in their director's email and created a single source of truth for all work; 50% reduction in time spent during compliance meetings; improved collaboration with 40 task owners across multiple organizations and teams.

WHY WE DO IT BETTER

30%

Increase in
project capacity

50%

Less time in
project-related meetings



Real-time visibility



Cost reduction through
tool consolidation

Job 1: Centralize Work in One Solution.

Manage all work and processes, whether simple or complex, in one collaborative system for greater visibility into all activities.

CUSTOMER EXAMPLES

Visibility



Cisco: Cisco had trouble facilitating collaboration between departments because of the disparate tools they used. Each month, they spent a massive amount of man hours gathering data for their reports and planning sessions. After Workfront, they had instant and accurate visibility into the work status, schedules, and resources associated with each department. They were also able to increase their on-time delivery rate to 99% in just three months.



Members 1st Federal Credit Union: Tracking work manually consumed precious time and resources without delivering the visibility the company needed. As requests came in, team members had to retype the information into an Excel spreadsheet for better reporting purposes. After Workfront, they saw a 29% increase in completed projects because they eliminated redundant behaviors and could better prioritize projects against business objectives.

Increase productivity



Trek: Trek only hit their deadlines 50% of the time, which led to lost revenue and opportunity. After Workfront, they spent less time in meetings and reclaimed 30% of their time for innovation. Because they could properly identify bottlenecks and make prioritized resourcing decisions, they increased their on-time delivery rate to 80%.



Northstar New Jersey: Managing the sales and marketing for the NJ Lottery requires a high attention to detail and quick deadlines. Their inconsistent processes and low visibility across projects prevented accurate reporting so the team had little confidence in the monthly resourcing numbers they looked at. After Workfront, they had 360-degree visibility into all the work the teams needed to accomplish. They were able to improve their project turnaround time by 24 hours and have 90% faster and more accurate reporting.

Better collaboration



Dean Health: When people sent requests to the business intelligence team at Dean Health, many felt like their requests fell into a black hole because they didn't have any visibility into the status, assignments, or progress, which created a culture of mistrust. After Workfront, the team improved their collaboration and communication with their stakeholders. They were also able to practice better work assignment and allocation, which led to a better work-life balance and happier employees.

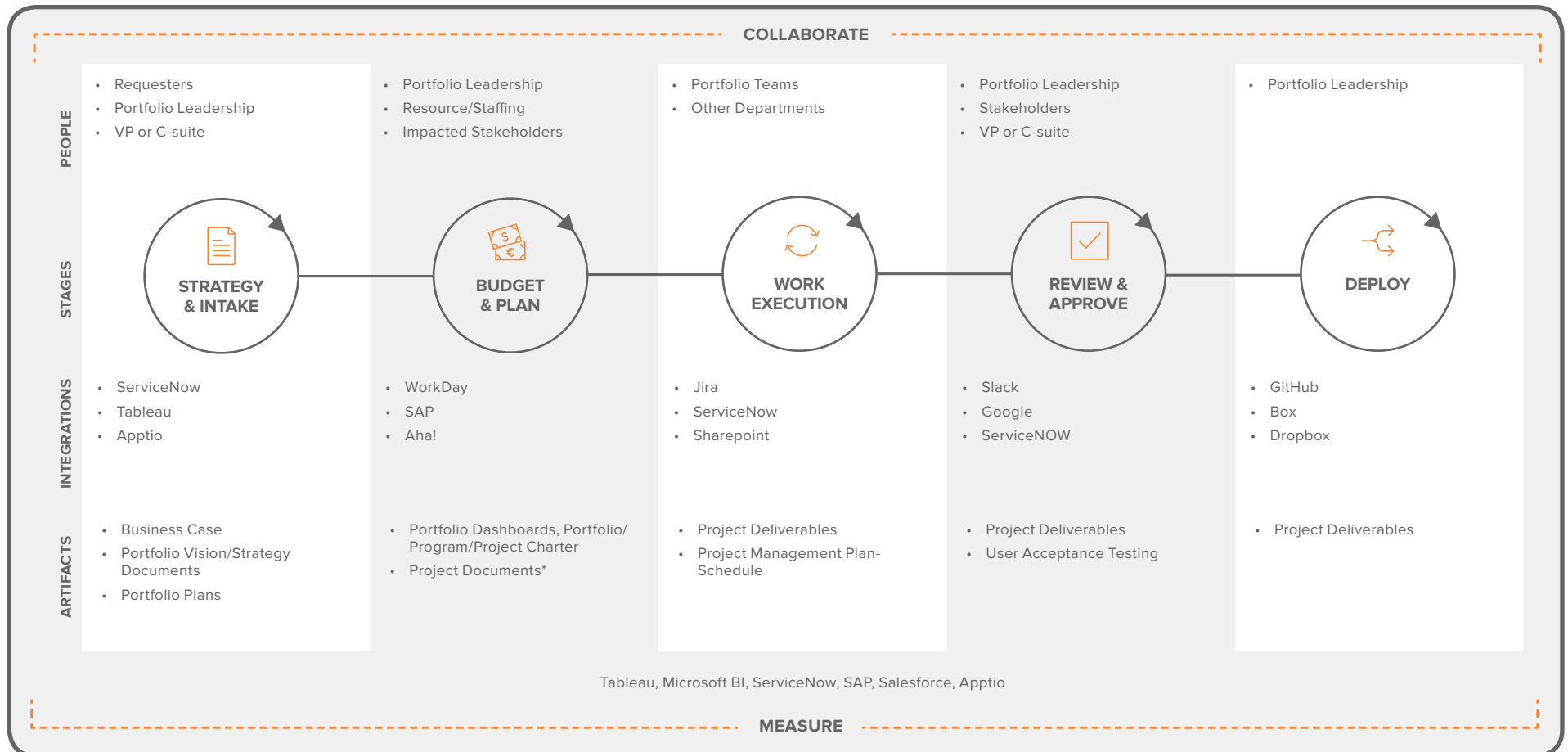


GL Education: GL Education had a variety of project management tools throughout their company due to acquisitions and siloed teams. This lack of project visibility created uncertainty for the senior management team about where resources were spent and what processes were effective. After implementing Workfront, they achieved an 80% increase in productivity and reduced the monthly reporting time by two days. They had greater trust between departments and their people were able to operate with more autonomy, which led to happier employees.

JOB 1 USE CASES

Global PMO (AKA Project, Program, or Portfolio Management, IT PMO, Department PMO).

PERSON RESPONSIBLE	RELEVANT DEPARTMENTS	MEASUREMENT OF SUCCESS
Portfolio (Program, Project) Manager, Chief of Staff, PMO Leader, IT Operations	IT, Product Development, Operations, Customer Experience, Finance, Legal, Marketing, HR	Portfolio/Program/Project Outcomes Business Objectives



* Project documents include: Resource Plans, Project Schedule, Stakeholder Logs, Budget Plans, Change Management Plans, RAID—Risk, Actions, Issues, Decision Logs, Communication Logs, Design and Testing Documents, Charters

JOB 1 USE CASES

Global PMO (AKA Project, Program, or Portfolio Management, IT PMO, Department PMO).

	STRATEGY	BUDGET & PLAN	WORK EXECUTION	REVIEW & APPROVE	LAUNCH	MEASURE	COLLABORATE
Description of Work:	New work is submitted through a request queue, Prioritized against current projects, Vetted to align with portfolio/program objectives, Approved by business/portfolio leadership	Work is prioritized based on portfolio alignment, Resources are planned, Detailed plans (requirements, sprint breakdowns, milestones) created, Tasks are assigned at the end of this phase	Work is done, Lots of collaboration	Digital work is reviewed, Feedback is implemented, Work is reviewed. (Work could be digital assets, physical products, new process.)	Approved work is deployed, published, launched, or completed	Monitor progress of work throughout the whole cycle, Deliver dashboards automatically so all stakeholders are in the loop	Discussions, meetings, and chats happening throughout the entire process
Key Workfront Features:	Custom forms Business case	Resource planner Portfolio optimizer	Agile/Waterfall projects Project milestones Update streams	Review and Approval My Library	Workflows with Workfront Fusion	Reports and Dashboard: Project status/delivery, Burn reports, Milestone reports, Utilization reports	Productivity Tool Integrations (Microsoft, Slack, Jira, Google)
Why Workfront Does It Better:	- Build smart request forms that capture all of the information you need to assess an incoming request. - Attach business cases to relevant requests to better understand the requirements and resources needed before vetting the idea.	- Forecast the resources you'll need for current and future work. - Automatically prioritize work based on customizable, portfolio-specific criteria.	- Allow each team to work the way they like (Agile, Waterfall, mixed) without sacrificing data or automation. - Track the progress of individual projects or groups of projects across major milestones.	- Automate the review and approval process of digital content for faster turnaround times. - Connect content and workflows together so your team can work faster than ever.	Automate workflows and data transfers across systems without requiring manual input.	Complete visibility across work including status, roadblocks, capacity, and forecasts.	Keep the teams connected across tools they use while keeping one place that tracks all activity and work.
Tool Consolidation:	Excel, PPM Tools (MS Project, Smartsheets)	Excel, PPM Tools (MS Project, Smartsheets)	Excel, PPM Tools (MS Project, Smartsheets)				Smartsheets, Trello, Asana

JOB 1 USE CASES

Global PMO (AKA Project, Program, or Portfolio Management, IT PMO, Department PMO).

VALUE STATEMENT: DATA TO SHOW THE VALUE OF YOUR WORK.

Pain

- Lack of visibility into work, progress, and resources impairs real-time decision-making and delays projects.
- Inconsistent and non-standard processes create unmanageable workloads and lost productivity.
- Disparate tools and systems make it impossible to tie work back to value for the company leaving the IT department as a cost center instead of a valued partner.

Perception change

FROM:	TO:
Ad hoc processes	Standardized, automated workflows
Incoming requests from all over	Centralized intake
Overburdened/overworked teams	Balanced workloads
Miscoped work, missed deadlines	Delivery on time and on budget
Long status meetings and emails	Real-time, automated dashboard delivery

How we help

- Templatize common workflows for faster delivery and accurate timelines.
- Real-time dashboards providing insight into work status, roadblocks, and forecasts.
- One place for work giving accurate insights into people's availability, their capacity for work, and their current workloads.
- Use artificial intelligence to assign new work to the right people based on job role, availability, and teams.
- Connect Workfront with the tools your teams use to do their work in (Jira, Adobe, Salesforce, email) to eliminate disruptions.

Customer use cases



Members 1st Credit Union: Increased project completion by 29% by eliminating redundant behaviors and better prioritized work.



L'Occitane en Provence: Saved \$250,000 per year by eliminating duplicate work and late detected issues.

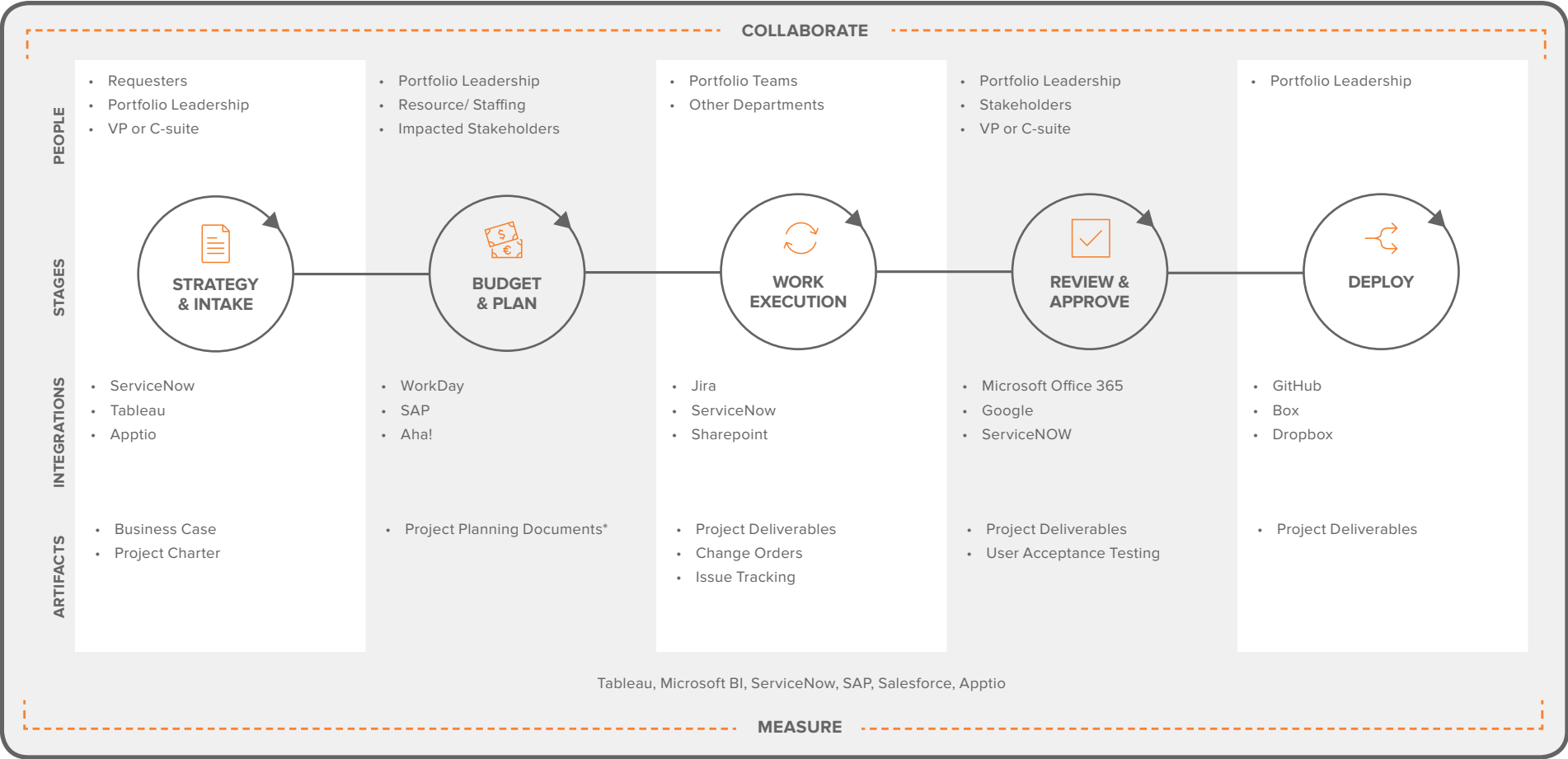


Advance Auto Parts: Increase team productivity by 50%.

JOB 1 USE CASES

Project Management.

PERSON RESPONSIBLE	RELEVANT DEPARTMENTS	MEASUREMENT OF SUCCESS
Project Manager PMO Leader	IT, Product Development, Operations, Customer Experience, Finance, Legal, Marketing, HR	On-time delivery Budget



* Project documents include: Resource Plans, Project Schedule, Stakeholder Logs, Budget Plans, Change Management Plans, RAID- Risk, Actions, Issues, Decision Logs, Communication logs, Design and Testing Documents

JOB 1 USE CASES

Project Management.

	STRATEGY & INTAKE	BUDGET & PLAN	WORK EXECUTION	REVIEW & APPROVE	DELIVER	MEASURE	COLLABORATE
Description of Work:	New work is submitted through a request queue, Prioritized against current projects, Approved by team leadership	Work is prioritized based on current priorities, Resource are planned, Detailed plans (requirements, sprint breakdowns, milestones) created, Tasks are assigned	Work is done, Lots of collaboration	Digital work is reviewed, Feedback is implemented, Work is reviewed. (Work could be digital assets, physical products, new process.)	Approved work is deployed, published, launched, or completed	Monitor progress of work throughout the whole cycle, Deliver dashboards automatically so all stakeholders are in the loop	Discussions, meetings, and chats happening throughout the entire process
Key Workfront Features:	Custom forms Auto routing	Resource planner AI resource scheduling	Agile/Waterfall projects Update streams	Review and Approval My Library	Workflows with Workfront Fusion	Reports and Dashboard: Project status/delivery, Milestone reports, Utilization reports	Productivity Tool Integrations (Microsoft, Slack, Jira, Google)
Why Workfront Does It Better:	- Build smart intake forms that capture all new ideas. - Start work faster by automatically routing new work to the right team.	- Forecast the resources you'll need for current and future work. - Use AI to assign work to the right people.	- Allow each team to work the way they like (Agile, Waterfall, mixed) without sacrificing data or automation. - Keep everyone in the loop with one place for updates, questions, and collaboration.	- Automate the review and approval process of digital content for faster turnaround times. - Connect content and workflows together so your team can work faster than ever.	Automate workflows and data transfers across systems without requiring manual input.	Complete visibility across work including status, roadblocks, capacity, and forecasts.	Keep the teams connected across tools they use while keeping one place that tracks all activity and work.
Tool Consolidation:	Excel, PPM Tools (MS Project, Smartsheets, Oracle)	Excel, PPM Tools (MS Project, Smartsheets, Oracle)	Excel, PPM Tools (MS Project, Smartsheets, Oracle)				Smartsheets, Trello, Asana

JOB 1 USE CASES

Project Management.

VALUE STATEMENT: DELIVER PROJECTS ON TIME.

Pain

- Lack of visibility into work, progress, and resources impairs real-time decision-making and delays projects.
- Inconsistent and non-standard processes create unmanageable workloads and lost productivity.
- Manual updates and reports limit the capacity of the team.

How we help

- Templatize common workflows for faster delivery and accurate planning.
- Real-time dashboards providing insight into work status, roadblocks, and forecasts.
- One place for work giving accurate insights into people’s availability, their capacity for work, and their current workloads.
- Artificial intelligence assigns new work to the right people based on job role, availability, and teams.
- Connect Workfront with the tools your teams use to do their work in (Jira, Adobe, Salesforce, email) to eliminate disruptions.

Perception change

FROM:	TO:
Ad hoc processes	Standardized, automated workflows
Incoming requests from all over	Centralized intake
Overburdened/overworked teams	Balanced workloads
Miscoped work, missed deadlines	Delivery on time and on budget
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Customer use cases



Members 1st Credit Union:
Increased project completion by 29% by eliminating redundant behaviors and better prioritized work.



L'Occitane en Provence:
Saved \$250,000 per year by eliminating duplicate work and late detected issues.



GL Education: 80% Increase in productivity.

JOB 1 USE CASES

Post-Merger Integration.

PERSON RESPONSIBLE	RELEVANT DEPARTMENTS	MEASUREMENT OF SUCCESS
Program Manager	Finance, Legal, Product Development, Information Technology, Corporate Strategy, Supply Chain, HR	Adherence to Budget, Effectiveness of Risk Management, Percentage of Net New Customers, Product Revenue Increase Through Cross-Sell



JOB 1 USE CASES

Post-Merger Integration.

	PMI STRATEGY AND PLANNING	"FIRST 100 DAYS" EXECUTION	INTEGRATION EXECUTION	MONITOR AND MEASURE DEAL EFFECTIVENESS	MEASURE	COLLABORATE
Description of Work:	Develop the First 100 Days plan, Identify the critical path for integration success, Identify milestones, workshops and synchronization mechanisms, Develop change management and communication plan, Set up and staff Integration Management Office (IMO)	Execute First 100 Days Plan to ensure business continuity, Define target operating model, Focus on core components of the business R&D and Product Dev, Operations and Supply Chain, Ensure IT, Finance, HR and Legal synergies, Establish monitoring tools and KPIs	For R&D/Product Dev: Define product dev strategy, rationalize merged product portfolio For IT: Define target IT system landscape and migration strategy For Sales Ops & Marketing: Define go-to market strategy for merged portfolio HR: Assess employment agreements, Execute transfers or terminations	Ensure monitoring tools (reports, dashboards, planned meetings, etc.) are fully operational, Track synergies and costs, Ensure KPIs are measured and tracked, Ensure IMO effectiveness is measured	Constant review of key metrics, Analyzing Gate Velocity, Resource Constraints	Collaboration across buy and sell side teams to reach consensus, Cross-functional execution of change management plan, ensure operational readiness and day-to-day execution of activities, Plan longer-term integration tasks, Manage realization against milestones
Key Workfront Features:	Project Templates Resource Planner	Project Milestones Update Streams	Issue Tracking Subscriptions	Reports and Dashboard	Reports and Dashboard, Workfront Fusion	Productivity Tool Integrations (Microsoft, Slack, Google)
Why Workfront Does It Better:	- Forecast the amount of resources you'll need for all parts of the integration. - Standardize processes and template each gate for accurate planning.	- Track all projects against the major milestones to prevent huge disruptions. - Keep everyone on the same page with one place for all updates and collaboration	- Centralize all updates, roadblocks, and issues associated with each project. - Allow leaders to opt in to real-time updates on all or part of the integration to save time on email blast updates.	Complete visibility across work including status, roadblocks, capacity, and forecasts	- Complete visibility across work including status, roadblocks, capacity, and forecasts. - Automate workflows and data transfers across systems without requiring manual input	Keep the teams connected across tools they use while keeping one place that tracks all activity and work
Tool Consolidation:	Excel, Smartsheets	Smartsheets, Asana, Trello	Excel, Smartsheets, Trello, Asana	Web DAM, Widen, DropBox, Box, Smartsheet		Smartsheet, Asana, Trello

JOB 1 USE CASES

Post-Merger Integration.

VALUE STATEMENT: STREAMLINE POST-MERGER INTEGRATION ACTIVITIES.

Pain

- Coordinating work with aggressive timelines and visible results is a complete headache and extremely time-intensive.
- It's hard to foresee major roadblocks like resourcing and prioritization before they become a huge project delay.
- Providing real-time status reports or updates is impossible with the current way we operate.

How we help

- Centralize work in one place for better visibility and transparency into all activities across multiple teams and departments.
- Automate workflows and standardizing processes for accurate planning and faster handoffs.
- Customizable reports and dashboards can be delivered to an inbox providing real-time transparency.
- Automate review and approvals workflows for faster velocity.
- Connect Workfront with the tools your teams use to do their work in (Jira, Adobe, Salesforce, email) to eliminate disruptions.

Perception change

FROM:	TO:
Manual stage tracking in Excel	A central place for all updates and activity
Regular, long status meetings/emails	Real-time dashboards with accurate reporting and updates
Irregular timelines and inaccurate projections	Predictable timelines and accurate projections
Inconsistent processes	Standardized approach to processes
Ad hoc review processes	Automated review workflows and centralization of the feedback
Reactive to the executive team	Proactively answering questions with data
Disconnected teams	Coordinated, streamlined work processes

Customer use cases



SunTrust: SunTrust is managing the merger of two banks with Workfront.



GM FINANCIAL

GM Financial: After acquiring another company, GM Financial used Workfront to combine the two organizations.

Job 2: Digitize Work Processes.

Bring product ideas, creative work, and content to market faster and more efficiently.

Value Driver:
Predictability and Speed

Get quality work to
market faster



Pain

- **Executive:** Inconsistent quality and missed deadlines which can erode confidence and impact revenue.
- **Champion:** Inconsistent and non-standard processes drive an unmanageable and overwhelming workload.

Positive business outcomes

- Decrease time to market.
- Increase on-time delivery of quality deliverables.
- Ensure consistent, high-quality work through standardization.
- Reclaim time for creativity and innovation.

Unique differentiators

- Automated, customizable workflows.
- Proof over 150 file types including HTML 5, live websites, video and more.
- Mobile proofing and approval decisions.
- Manage work on the go with mobile project management, request queues, and time tracking.
- AI-enabled resource management.

Job 2: Digitize Work Processes.

Bring product ideas, creative work, and content to market faster and more efficiently.

Benefits from our customers' perspective

- End-to-end workflow from idea to delivery.
- Online collaborative review and approval.
- Simple and intuitive resource management.
- Portfolio of products that support the evolution of the enterprise.

How we do it

- **Trendline** improved their team's efficiency by 20% and increased team productivity by 10%.
- **Trek** increased their on-time product delivery rate from 50% to 80% which generated millions in new revenue. They saw greater productivity and their team members regained 30% of their time for innovation.
- **Royal Society of Chemistry** improved their on-time task delivery rate by 48%.
- **Leapfrog** saw a 94% reduction in time to create new projects and a 50% reduction in project-related emails.
- **Intouch Solutions** estimated a 10-15% reduction in rework and saved approximately 30 hours in reporting.

WHY WE DO IT BETTER

70%

Decrease in
time to market

30%

Increase in on-time
delivery

30%

More time for innovation
and creativity

60%

Decrease in
production costs

Job 2: Digitize Work Processes.

Bring product ideas, creative work, and content to market faster and more efficiently.

CUSTOMER EXAMPLES

Predictable timelines



Xchanging: From claims administration to finance to information technology, Xchanging delivers a wide variety of business services to satisfied customers including London Gatwick Airport and Lockton. With employees spread across the UK and India, the Group Technology and Change Team (GTC) had great processes, but they were very manual and cumbersome, which led to high administrative overhead. After implementing Workfront, Xchanging reduced meeting time from 6 hours to 30 minutes each week. They cut project set-up time from 24 hours to seconds with templates. They also worked with other teams to establish a proactive, more mature PMO function.



Royal Society of Chemistry: The UK's professional body for chemical scientists, the Royal Society of Chemistry has been investing in education and maintaining standards for more than 170 years. Their marketing campaign process was highly manual and based solely in Word documents. This caused poor visibility into the work needed to accomplish their campaigns and supported poor prioritization practices. After implementing Workfront, the marketing and creative teams saved more than 80 hours per month with improved processes and eliminating busywork. They improved their on-time delivery rate by 48%, which allows team members to dedicate 10% of their time to work on their own projects.

Greater speed



Warburtons: From product development to IT, Warburtons invests in new and better ways to give British families great quality, great-tasting food. That includes increasing IT volume and speed in its interactions with more than 18,000 retailers every week. The IT department wanted to minimize their service disruptions, streamline approvals, and replace an aging application with Workfront. After implementing Workfront, the team delivered projects on time and faster with a new request classification. They saved 12 hours each week by eliminating meetings that used to capture status updates and data. Finally, they simplified the process for distributing deliverables to external consultants for their audits each year.



FOCUS Brands: Coordinating cross-geolocation campaigns required a tremendous amount of coordination. FOCUS Brands' current systems were not set up for the volume and speed needed to maintain their competitive edge. After implementing Workfront, they increased their team's efficiency by 20% because all the requests came through one system, which drastically decreases the amount of email and meetings. They also spend 30 fewer hours on creative audits and saved 5 hours a week in administrative tasks.

Increased accountability/confidence



Craftsy: Craftsy provides on-demand education and tools to help consumers bring their creativity to life. However, the company's rapid growth led to production team challenges, making it difficult for employees to track and manage the tasks required to complete projects on time and on budget. After implementing Workfront, the team doubled their number of videos created each week. They eliminated the number of product meetings and improved the team's accountability for the work and deadlines.

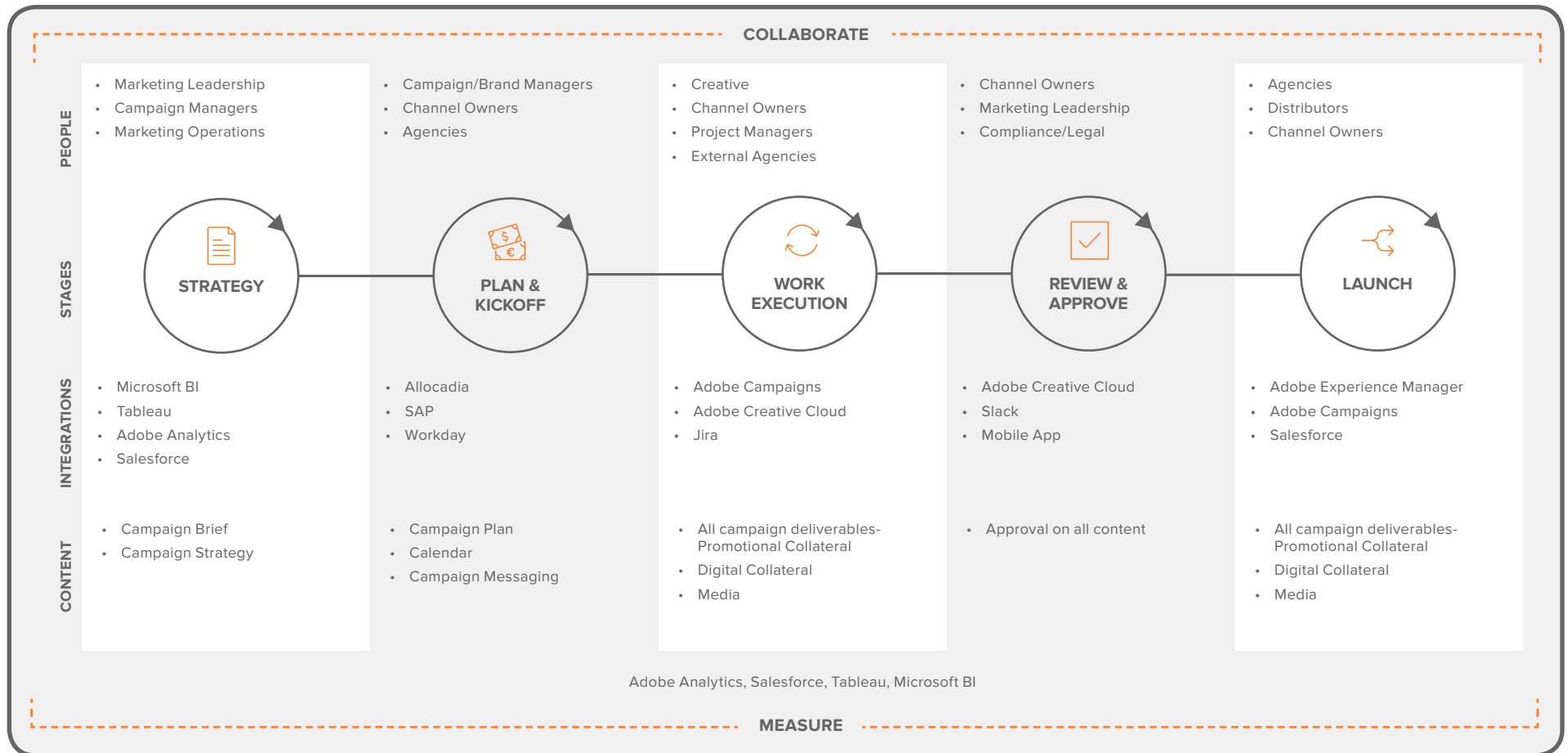


Northstar New Jersey: Managing the sales and marketing for the NJ Lottery requires high attention to detail and quick deadlines. Northstar NJ's inconsistent processes and low visibility across projects prevented accurate reporting so the team had little confidence in the numbers they looked at. After Workfront, they had 360-degree visibility into all the work the teams needed to accomplish. They were able to improve their project turnaround time by 24 hours and have 90% faster and more accurate reporting, 30% - 35% reduction in Marketing and Communications team email, and more efficient meetings.

JOB 2 USE CASES

Multi-Channel Campaigns (AKA: Omnichannel Campaigns, Marketing Campaigns, Integrated Campaigns).

PERSON RESPONSIBLE	RELEVANT DEPARTMENTS	MEASUREMENT OF SUCCESS
Campaign Manager, Brand Manager, Product Marketing Manager	Campaign/Brand, Product Marketing, Creative, All Marketing Teams, Sales Enablement, Partners	Lead Generation Product Sales/Units Sold



JOB 2 USE CASES

Multi-Channel Campaigns (AKA: Omnichannel Campaigns, Marketing Campaigns, Integrated Campaigns).

	STRATEGY	BUDGET & PLAN	WORK EXECUTION	REVIEW & APPROVE	LAUNCH	MEASURE	COLLABORATE
Description of Work:	Assess market performance, plan for future product releases, Identify new target audiences, Campaign brief creation and approval	Create campaign timeline and calendar, Assign resources, Put together campaign plans	Creation of all campaign materials, Lots of collaboration between teams	Channel owners approve, Campaign leads approve, Legal and Compliance review, Marketing leadership approves	Campaign is live in appropriate markets, Media is live, Advertisements have launched, Product sales are happening	Constant review of key metrics, Analyzing campaign performance based on product sales, Lead generation, Brand awareness	Discussions, meetings, and chats happening throughout the entire process
Key Workfront Features:	Custom forms Business case	Resource planner Project templates	Agile/Waterfall Projects Project Milestones	Review and Approval My Library	Workflows with Workfront Fusion	Reports and Dashboard, Workfront Fusion	Productivity Tool Integrations (Microsoft, Slack, Google, Jira, Salesforce)
Why Workfront Does It Better:	- Build smart request forms that capture all of the information you need to assess an incoming request. - Attach business cases to relevant requests to better understand the requirements and resources needed before vetting the campaign.	- Budget the amount of resources you'll need for current and future work. - Start work faster by templating your workflows and kicking off work quickly.	- Easy collaboration between teams that work in Agile, planners who prefer waterfall, or individuals who operate in both. - Track the progress of work across major milestones before diving into all the tactics.	- Automate the review and approval process for faster turnaround times. - Connect content and workflows together so your team can work faster than ever.	Automatically deploy content to the right distribution platform when the project is complete.	- Complete visibility across work including status, roadblocks, capacity, and forecasts. - Automate workflows and data transfers across systems without requiring manual input.	Keep the teams connected across tools they use while tracking progress in one system.
Tool Consolidation:	Excel, Smartsheets	Smartsheets, Wrike, Content Calendar tools	Smartsheets, Trello, Wrike, Asana	Web DAM, Widen, DropBox, Box, Smartsheet, Wrike	Web DAM, Widen, DropBox, Box		Smartsheet, Wrike, Asana, Trello

JOB 2 USE CASES

Multi-Channel Campaigns (AKA: Omnichannel Campaigns, Marketing Campaigns, Integrated Campaigns).

VALUE STATEMENT: LAUNCH MARKETING CAMPAIGNS TO MARKET FASTER.

Pain

- Disjointed processes and siloed teams make collaborating on campaigns impossible.
- Priorities change from one team to the next causing unnecessary delays.
- Work has to get done but people don't always know the most important work items.

Perception change

FROM:	TO:
Manual tracking in Excel	A central place for all updates and activity
Regular status meetings/emails	Real-time dashboards with accurate reporting and updates
Overworked and understaffed teams	Accurate planning based on people's capacity and workloads
Inconsistent processes	Standardized approach to campaign planning and execution
Ad hoc content review cycles and paper feedback	Automated review workflows and centralized the feedback

How we help

- Centralizing work in one place for better visibility and transparency into the campaign's activities.
- Automate workflows and standardize campaign processes for faster and more accurate planning.
- Reduce manual handoffs for more time to focus on strategy, insights, and creativity.
- Automate review and approvals and consolidate feedback into one place for faster turnaround times, accurate changes, and audit trails.
- Operational performance metrics and optimization.

Customer use cases



Focus Brands:
Increased team efficiency by 20% and saved 30 hours on creative audits.



Northstar New Jersey:
Improved project turnaround time by 24 hours and had 90% faster and more accurate reporting.

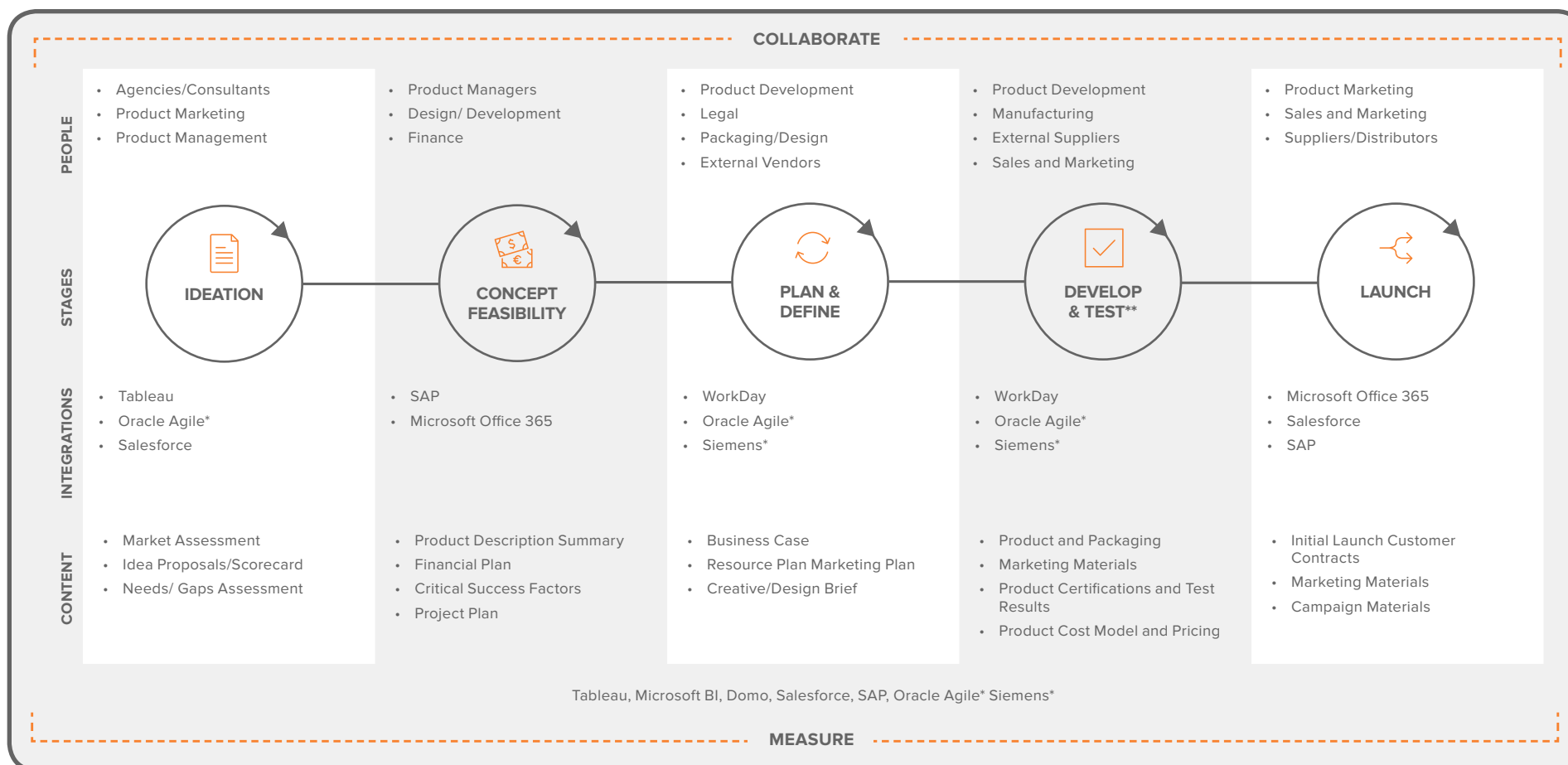


Cisco: Increased on-time delivery rate to 99% in just three months.

JOB 2 USE CASES

Stage Gate Automation (AKA: Product Development Process).

PERSON RESPONSIBLE	RELEVANT DEPARTMENTS	MEASUREMENT OF SUCCESS
Product Managers, Portfolio Managers, Project Managers	Product Development, Product Management, Product Marketing, Finance, Supplier Management, Supply Chain, Regulatory & Compliance	Timeliness of Gate Reviews, Adherence to Budget, Effectiveness of Risk Management



* Examples of Product Lifecycle Management Tools

** For CPG, most companies are not using Jira to develop their products.

JOB 2 USE CASES

Stage Gate Automation (AKA: Product Development Process).

	IDEATION	CONCEPT FEASIBILITY	PLAN AND DEFINE	DEVELOP AND TEST	LAUNCH	MEASURE	COLLABORATE
Description of Work:	Conduct market and competitive analysis, Identify emerging consumer needs/ trends, Develop idea proposals/ statements, Develop idea scorecards.	Product definition, Competitive product review, Pricing analysis, Develop business plan development, Define project plan	Product detailed requirements, Creative brief development, Project budget and timelines, Product forecast model, Patent review analysis, Product cost model, Marketing plan	Product design and packaging development, Product safety testing and certification, Market testing, Develop a media plan (print, publications, TV programming, Internet etc.)	Product demand planning, Product sales/distribution planning, Product launch and promotional marketing material, Product quality and compliance reviews, Final media planning	Constant review of key metrics, Analyzing Gate Velocity, Resource Constraints	Discussions, meetings, and chats happening throughout the entire process
Key Workfront Features:	Custom forms Business case	Resource Planner Project Templates	Project Milestones Update Streams	Review and Approval My Library	Workflows with Workfront Fusion Workfront Library Collections	Reports and Dashboard, Workfront Fusion	Productivity Tool Integrations (Microsoft, Slack, Google),
Why Workfront Does It Better:	- Build smart intake forms that capture all new ideas. - Attach high-level business cases ideas for faster vetting.	- Forecast the resources you'll need for current and future work. - Standardize processes and templatize each gate for more accurate planning.	- Track projects against the major milestones to keep work flowing. - Keep everyone in the loop with one place for updates, questions, and collaboration.	- Automate the review and approval workflows between product, legal, compliance, and quality teams. - Connect content and workflows together so your team always has access to the most up-to-date materials.	Centralize all launch materials for both internal and external use.	- Complete visibility across work including status, roadblocks, capacity, and forecasts. - Automate workflows and data transfers across systems without requiring manual input.	Keep the teams connected across tools they use while keeping one place that tracks all activity and work.
Tool Consolidation:	Excel, Smartsheets	Smartsheets, Asana, Trello	Excel, Smartsheets, Trello, Asana, MS Projects	Web DAM, Widen, DropBox, Box, Smartsheet	Web DAM, Widen, DropBox, Box		Smartsheet, Asana, Trello

JOB 2 USE CASES

Stage Gate Automation (AKA: Product Development Process).

VALUE STATEMENT: PREDICTABLE PRODUCT DELIVERY.

Pain

- Ideas get stuck in gates without progressing.
- Stage gates are very structured which doesn't foster a culture of innovation or speed.
- No visibility into all the work happening on each project within each gate.

Perception change

FROM:	TO:
Manual gate tracking in Excel	Real-time dashboards with accurate reporting and updates
Incoming ideas from a variety of sources	Centralized intake
Irregular timelines and inaccurate projections	Products predictably move through each gate
Inconsistent processes	Standardized approach to product planning and execution
Ad hoc review processes	Automated review workflows and centralization of the feedback

How we help

- Centralize work in one place for better visibility and transparency into status and resources.
- Automate workflows and standardizing processes for faster and more accurate planning.
- Connect Workfront with the tools your teams use to do their work in (email, Slack, Aha!) to eliminate disruptions.
- Customize the way each user interacts with Workfront so they only view relevant information.
- Automate review and approvals workflows for faster gate velocity.
- Customizable fields and reports to see information that is relevant to each gate or team.

Customer use cases



Trek: Reclaimed 30% of their time for innovation and increased their on-time delivery from 50 to 80%.



Citrix: Reduced emails by 35% and a 50% reduction in compliance-related meetings.

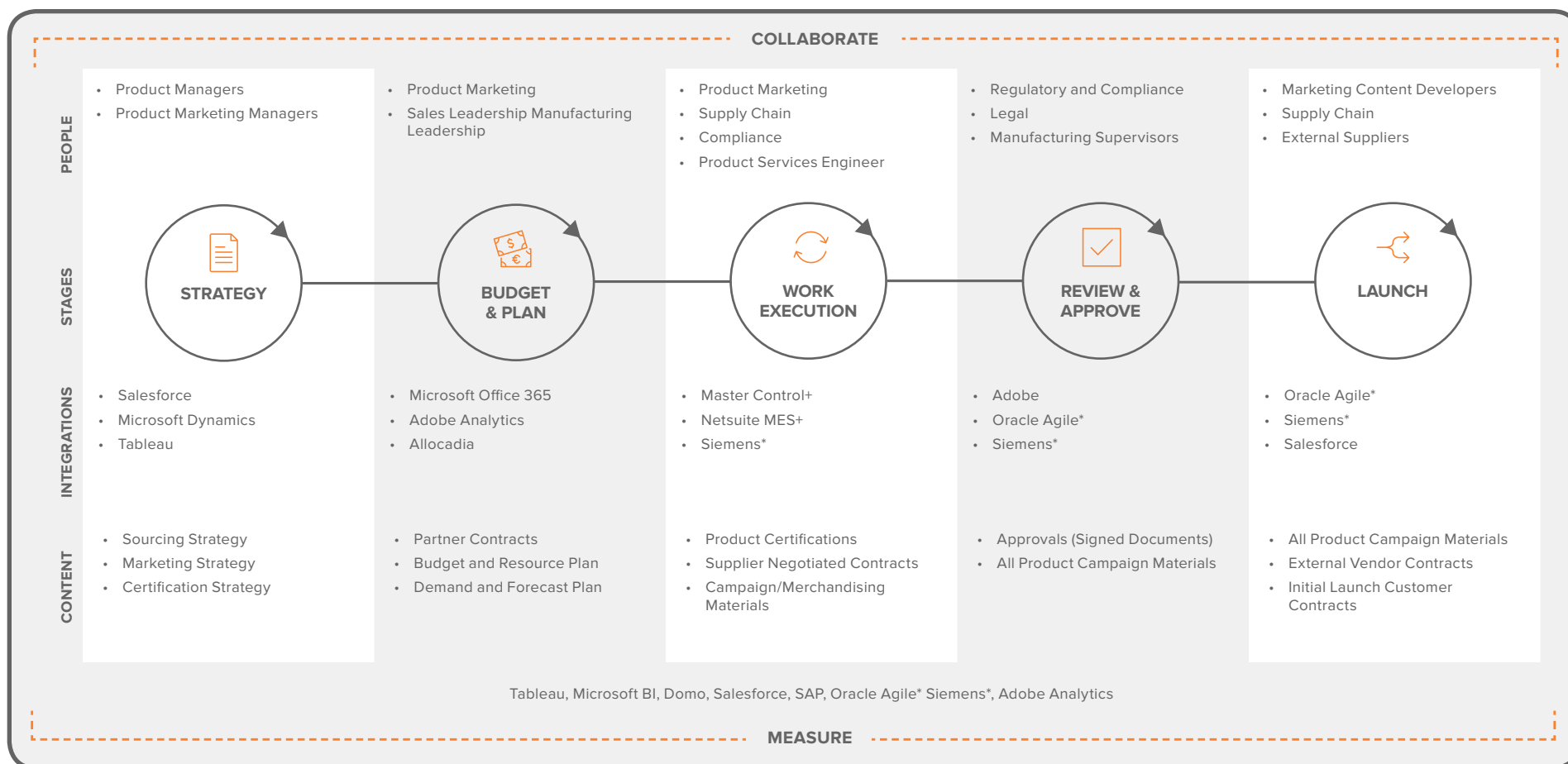


Kids II: 50% increase in efficiency by reducing meeting time.

JOB 2 USE CASES

New Product Launch (AKA: New Product Introduction).

PERSON RESPONSIBLE	RELEVANT DEPARTMENTS	MEASUREMENT OF SUCCESS
Product Managers, Product Marketing Managers	Finance, Sales, Product Management, Supply Chain, Regulatory & Compliance, Legal	Product Revenue Goal



* Examples of Product Lifecycle Management Tools

+ Examples of Manufacturing Execution System

JOB 2 USE CASES

New Product Launch (AKA: New Product Introduction).

	STRATEGY	BUDGET AND PLAN	WORK EXECUTION	REVIEW AND APPROVE	LAUNCH	MEASURE	COLLABORATE
Description of Work:	Finalize target markets, Create channel and distribution approach, Define product certification strategy, Finalize scale manufacturing and sourcing strategy	Define marketing/ promotion budget, Develop demand and supply plan, Complete product certification, Develop product support services, Develop channel partner communication plan	Task assignments to team members, Collaborate with certification agencies (e.g. UL, food testing labs, etc.), Develop merchandising materials, Create manufacturing and distribution plan, Close outstanding quality issues and deviations	Review and approve promotional and merchandising material, Approve external contracts (manufacturing, supply chain), Obtain certifications, Approve raw material sources for scale manufacture	Conduct product marketing campaign, Conduct promotion management, Initiate production ramp-up, Conduct channel partner training (if needed), Manage outbound logistics	Constant review of key launch activities, Resource constraints, on-time delivery	Discussions, meetings, and chats happening throughout the entire process
Key Workfront Features:	Custom forms Workfront Library	Resource Planner Project Templates	Project Milestones AI Resource Scheduling	Review and Approval Content Proofing	Workfront Library Collections	Reports and Dashboard, Workfront Fusion	Productivity Tool Integrations (Microsoft, Slack, Google)
Why Workfront Does It Better:	• Attach business cases for each new product launch before starting work. • Centralize all product-related materials in one place for quick access by all launch stakeholders.	• Budget the amount of resources you'll need from each team. • Templatize processes for each group for faster and more accurate planning.	• Track the launch against all major milestones to keep work flowing. • Use AI to assign work to the right people.	• Automate the review and approval workflows of all promotional content. • Centralize all feedback on any promotional content for fewer revisions.	• Centralize all launch materials for both internal and external use	• Complete visibility across work including status, roadblocks, capacity, and forecasts. • Automate workflows and data transfers across systems without requiring manual input	• Keep the teams connected across tools they use while keeping one place that tracks all activity and work
Tool Consolidation:	Excel, Smartsheets	Smartsheets, Asana, Trello	Excel, Smartsheets, Trello, Asana	Web DAM, Widen, DropBox, Box, Smartsheet	Web DAM, Widen, DropBox, Box		Smartsheet, Asana, Trello

JOB 2 USE CASES

New Product Launch (AKA: New Product Introduction).

VALUE STATEMENT: DATA TO STREAMLINE (AND SPEED UP) PRODUCT LAUNCHES.

Pain

- Product launches require work from many cross-functional teams which requires extra planning and collaboration to do right.
- Current processes require a lot of manual touches allowing some people to skirt accountability and firestorms.
- Keeping internal work and external agencies aligned is a nightmare.

Perception change

FROM:	TO:
Manual task tracking in Excel	Real-time, automated dashboard delivery
Irregular timelines and inaccurate estimates	Launch work is accurately scoped and delivered on time
Inconsistent processes	Standardized, automated workflows
Ad hoc review processes	Automated review workflows and centralized feedback
Miscoped work, missed deadlines	Delivery on time and on budget

How we help

- Centralize work in one place for better visibility and transparency into activities across the launch teams.
- Automate workflows and standardize launch processes for accurate planning and faster delivery.
- Connect Workfront with the tools your teams use to do their work in (Jira, Adobe, Salesforce, email) to eliminate disruptions.
- Use artificial intelligence to assign work to the right people across teams and departments.
- Consolidate feedback on all content into one place for faster turnaround times, accurate updates, and audit trails.

Customer use cases



Trek: Reclaimed 30% of their time for innovation and increased their on time delivery from 50 to 80%.



Citrix: Reduced emails by 35% and a 50% reduction in compliance-related meetings.

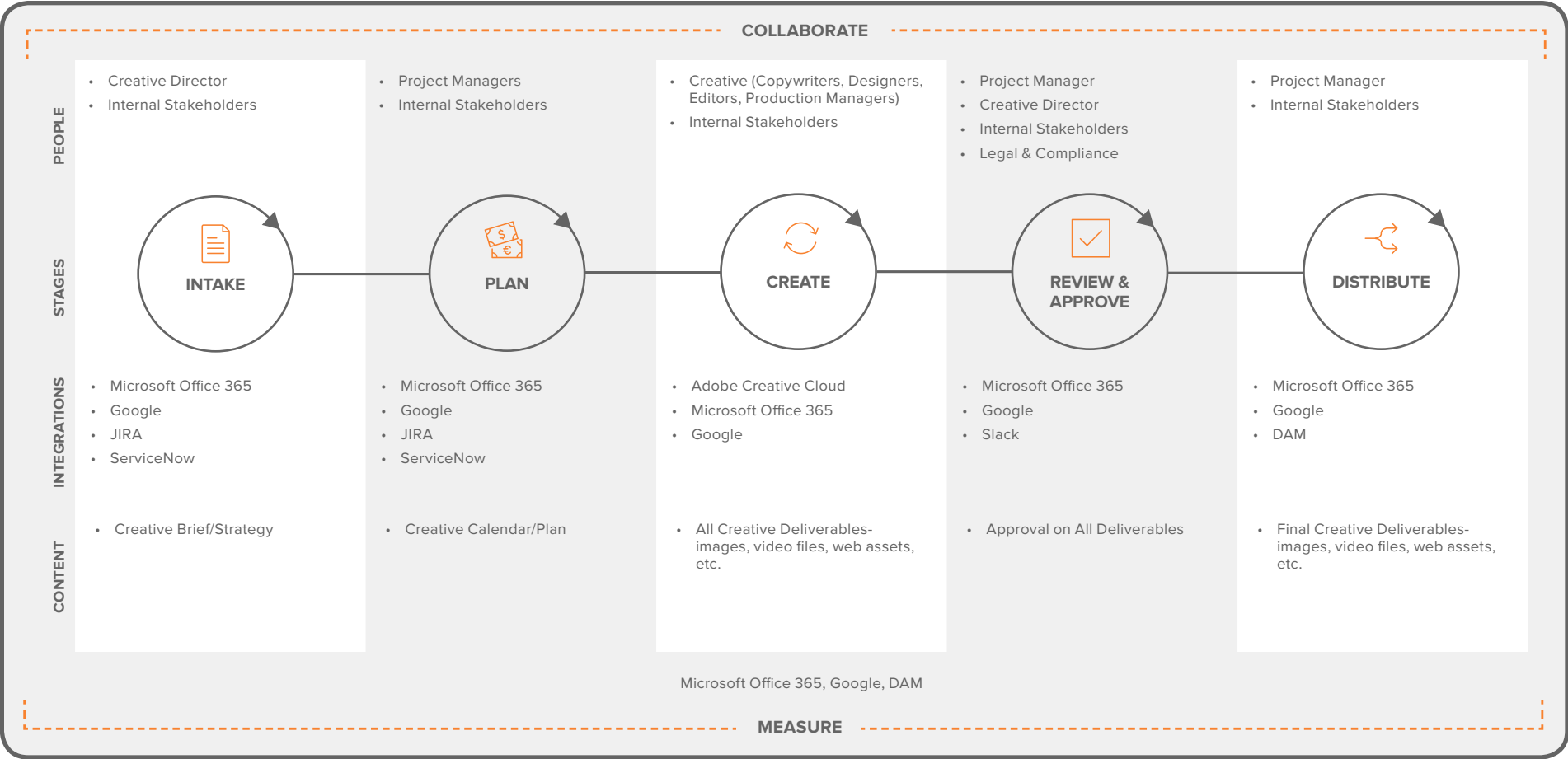


Kids II: 50% increase in efficiency by reducing meeting time.

JOB 2 USE CASES

Creative Production (AKA: Creative Services, Content Production).

PERSON RESPONSIBLE	RELEVANT DEPARTMENTS	MEASUREMENT OF SUCCESS
Creative Director, Project Manager	Creative, Content Marketing, Campaign/Brand, Digital Marketing, Product Marketing, Sales, PR	On-time Deliverables, Number of Completed Projects, Stakeholder Satisfaction



* Examples of Product Lifecycle Management Tools

+ Examples of Manufacturing Execution System

JOB 2 USE CASES

Creative Production (AKA: Creative Services, Content Production).

	INTAKE	BUDGET AND PLAN	CREATE	REVIEW AND APPROVE	DISTRIBUTE	MEASURE	COLLABORATE
Description of Work:	Internal Stakeholders request creative assets based on their department's needs. Development of creative brief outlining request.	Create creative timeline, Assign resources, and Develop creative plan.	Creation of requested creative assets. Lots of collaboration across relevant teams.	Assets approved by Creative team, Internal Stakeholders, and Legal & Compliance.	Final version of asset is provided to Internal Stakeholders, stored in DAM.	Continuous review of efficiencies around project intake and turnaround.	Discussions, meetings, and chats happening throughout the entire process.
Key Workfront Features:	Custom Forms Auto Routing	Resource Planner Project Templates	Agile/Waterfall Projects Adobe Creative Cloud Integration	Review and Approve Proofing	Reports and Dashboards: Team capacity, Project velocity, Project Status My Library	Reports and Dashboards	Productivity Tool Integrations (Microsoft, Slack, Google)
Why Workfront Does It Better:	- Build smart request forms that capture all of the information you need to assess an incoming request. - Automatically route new requests to the right team.	- Budget the amount of resources you'll need for current and future work so you can operate at full capacity. - Start work faster by templating your workflows.	- Allow each team to work the way they like (Agile, Waterfall, mixed) without sacrificing data or automation. - View tasks, documents, and updates without ever leaving Creative Cloud.	- Automate the review and approval process for faster turnaround times. - Centralize feedback in one place for faster implementation.	- Send approved content to one place until it's ready for distribution. - Complete visibility across work including status, roadblocks, capacity, and forecasts.	Complete visibility across work including status, roadblocks, capacity, and forecasts.	Keep the teams connected across tools they use while keeping one place that tracks all activity and work.
Tool Consolidation:	Excel, Smartsheets	Smartsheets, Wrike	Smartsheets, Trello, Wrike, Asana	Web DAM, Widen, DropBox, Box, Smartsheet, Wrike	Web DAM, Widen, DropBox, Box	Web DAM, Widen, DropBox, Box	Smartsheet, Wrike, Asana, Trello

JOB 2 USE CASES

Creative Production (AKA: Creative Services, Content Production).

VALUE STATEMENT: CREATE AMAZING WORK FASTER THAN EVER.

Pain

- Inability to collaborate effectively resulting in copious amounts of rework.
- Absence of a standardized process for creative intakes.
- Constantly changing priorities.

How we help

- Established intake and execution processes eliminating manual work.
- Real-time collaboration across departments and teams.
- Accurate project and resource planning.
- Streamlined review and approval processes to ensure the highest quality of work is being produced.
- Data-driven demand forecasting and capacity planning.

Perception change

FROM:	TO:
Ad hoc content review cycles and paper feedback	Automated review workflows and centralization of the feedback
Regular status meetings/emails	Real-time dashboards with accurate reporting and updates
Ad hoc requests	Prioritized backlog
Inconsistent processes	Standardized approach to creative intake and execution
Manual tracking in Excel	A central place for all updates and activity

Customer use cases



Cars.com: Saved on average 10 hours per week by improving chains of communication and eliminated 25% of the back-and-forth of copy editing.



Energy Company: Recovery of 1,000+ creative hours annually.

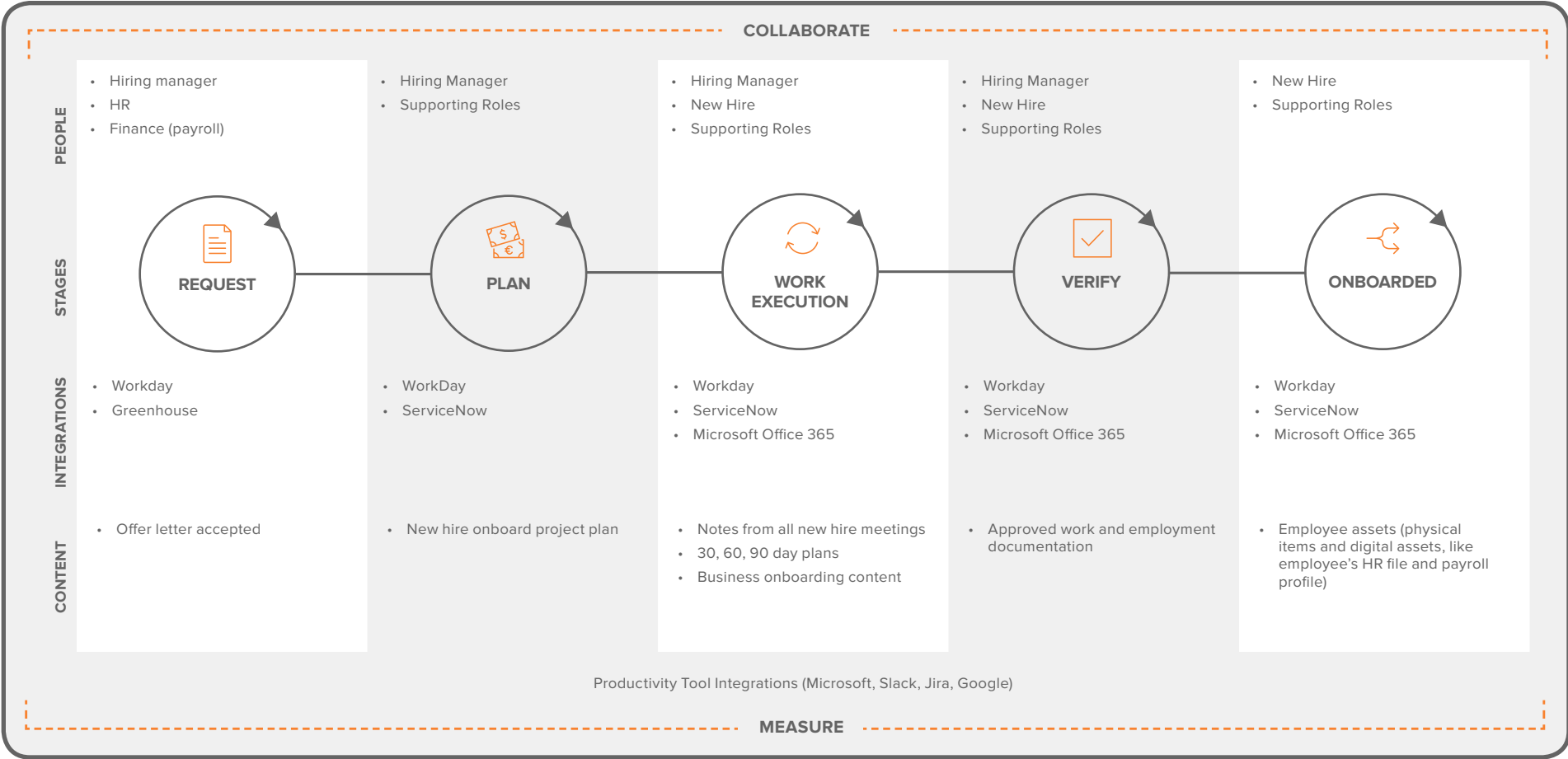


Workfront: Increased average number of completed tasks per week by 55%.

JOB 2 USE CASES

New Hire Onboarding.

PERSON RESPONSIBLE	RELEVANT DEPARTMENTS	MEASUREMENT OF SUCCESS
HR , Hiring manager	Shared services: HR, Finance, Security, Facilities Department for Employee	Employee Satisfaction, Onboarding Duration and Velocity



* Compliance: If certifications or licenses are required for the role.

JOB 2 USE CASES

New Hire Onboarding.

	REQUEST	PLAN	WORK EXECUTION	VERIFY	ONBOARDED	MEASURE	COLLABORATE
Description of Work:	Offer letter accepted, hire date created, new hire on-boarding project kicked off in Workfront.	Relevant departments are notified of the new hire's start date in their respective systems. Task assignments are made in Workfront's onboarding project.	New hire starts and begins completing their business onboarding tasks: training, HR work, meetings, etc.	Verification that training has occurred, hardware is installed, and the new hire is ready.	The new hire has all the resources they need to be successful in their role. They provide value.	Continued review of the new employee onboarding process based on company policy changes and employee feedback.	Discussions, meetings, and chats happening throughout the entire process.
Key Workfront Features:	Workfront Fusion Custom Forms	Project Template Resource Planner	Project Milestones Productivity Tool Integrations	Review and Approve WF Library	Project Completion	Reports and Dashboards	Productivity Tool Integrations (Microsoft, Slack, Google)
Why Workfront Does It Better:	- Build smart request forms that capture all of the information you need for new hires. - Use Workfront Fusion to automate workflows across systems.	- Forecast the hardware and tools you'll need for the new hire. - Streamline onboarding with department or role-specific project templates.	- Track the progress the onboarding plan across major milestones. - Connect with productivity systems already in place (Slack, calendars, email) for easier collaboration.	- Automate the approvals of certifications or key onboarding gates. - Connect onboarding documents with the project for seamless transitions.	Market the project complete with all onboarding tasks officially completed.	Complete visibility throughout the entire onboarding process including status updates, task completion, and velocity.	Connect people through the tools they use everyday.
Tool Consolidation:		Excel, Smartsheets	Excel, Smartsheets	Web DAM, Widen, DropBox, Box, Smartsheet, Wrike	Web DAM, Widen, DropBox, Box		

JOB 2 USE CASES

New Hire Onboarding.

VALUE STATEMENT: HELP NEW EMPLOYEES PROVIDE VALUE FASTER THAN EVER.

Pain

- New hire onboarding needs to be customized and tailored to each job role.
- Inconsistent employee onboarding experiences creates confusion and frustration from the beginning of an employee’s tenure.
- New hires can be overwhelmed in a new role without direction on who to work with and when.

Perception change

FROM:	TO:
Inconsistent experiences	Standardized, department-specific onboarding templates
No visibility into progress	Real-time dashboards with accurate statuses and updates
Disconnected systems and manual work	Seamless data passage between platforms
Poor communication	Centralized place for all communication and work

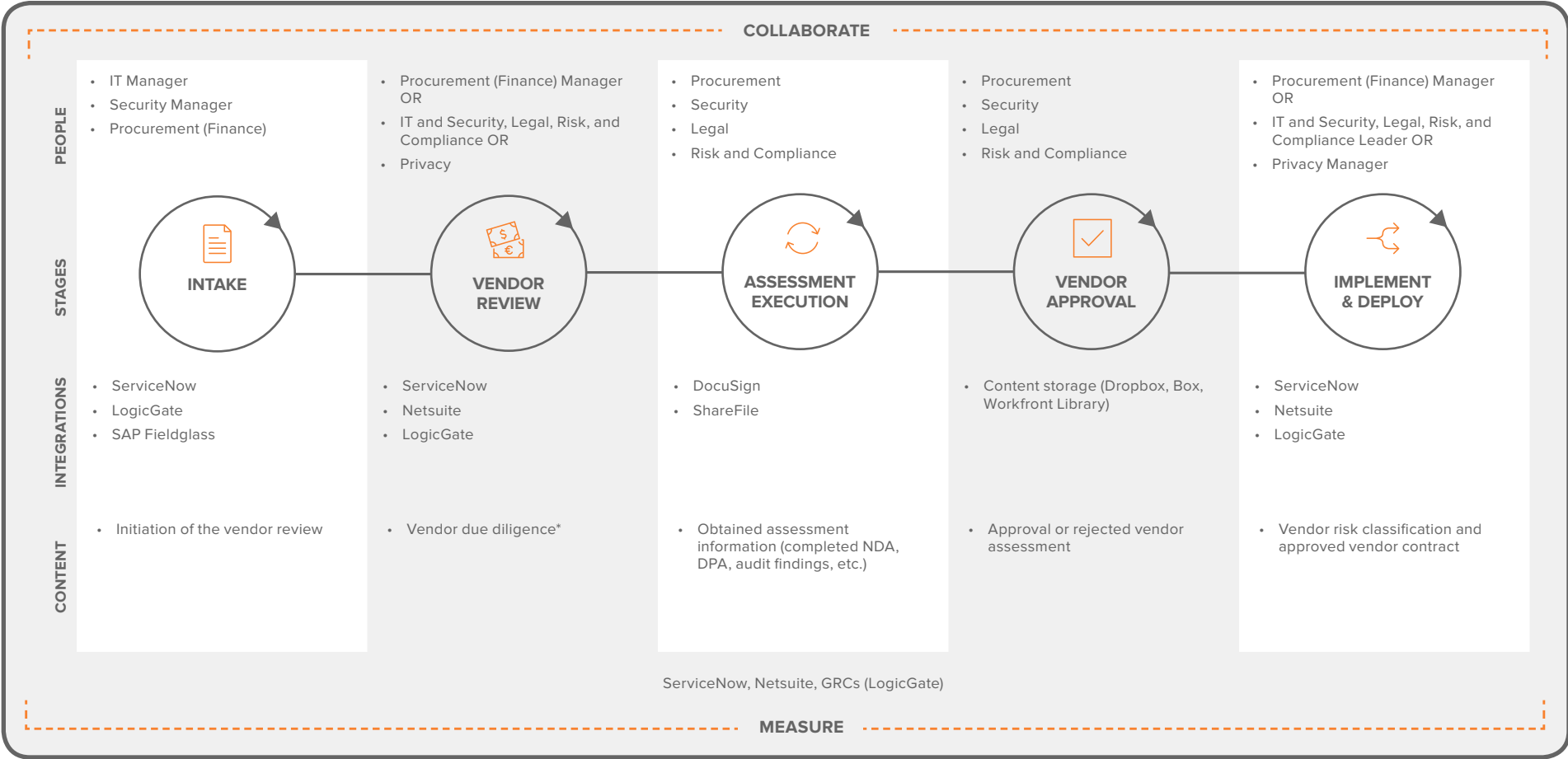
How we help

- Streamlined onboarding experiences tailored to each job role.
- Automated workflows between HCM and ITSM tools for smoother onboarding experiences.
- Complete transparency during the onboarding process for a better employee experience.
- Use AI to assign new tasks to the right support roles during the onboarding process.
- Centralize all communication with new hires to build a stronger community.

JOB 2 USE CASES

Vendor Onboarding (Software Vendors).

PERSON RESPONSIBLE	RELEVANT DEPARTMENTS	MEASUREMENT OF SUCCESS
Procurement (Finance) Manager, Security, Risk, or Compliance Manager	Procurement (Finance), IT and Security, Legal, Risk, and Compliance, Privacy	Percentage of Vendors Onboarded, Tracking Pace of Conditional Acceptance Process, Turnaround Time of Vendor Reviews, ROI of Vendor Onboarding



* Vendor due diligence which could include: contract review, cost, risk assessment, security privacy, and compliance control validation.

JOB 2 USE CASES

Vendor Onboarding (Software Vendors).

	REQUEST	PLAN	WORK EXECUTION	VERIFY	ONBOARDED	MEASURE	COLLABORATE
Description of Work:	Department submits a request to onboard a new vendor, Triggering a ticket within a vendor management system and a new request in Workfront.	Department which owns vendor management is notified of the new vendor review. The cross-functional teams review the vendor details (such as previous risk assessments, audit records, etc.)	Send assessment documents*, policies and/or procedures request to the vendor.	Review returned documents* from the vendor and reviewed for compliance, Approval or rejection decision is made. Requestor is notified of the decision.	Implementation begins for the new vendor.	Scheduled: 1. Annual vendor assessment 2. Change of service reviews, renewal and offboarding. 3. Track vendor payment 4. Vendor ROI assessment	Discussions, meetings, and chats happening throughout the entire process
Key Workfront Features:	Custom Forms	Auto Routing Project Templates	Update Streams Project Milestones	Review and Approval Workfront Library	Project Templates AI Resource Scheduling	Reports and Dashboards Workfront Fusion	Productivity Tool Integrations (Jira, Salesforce)
Why Workfront Does It Better:	Build smart request forms that capture all of the information you need to assess a new vendor request.	- Automatically route the new request to the right team. - Start work faster by templating your workflows.	- Centralize all communication with the vendor in one place so all stakeholders are kept up-to-date. - Track the progress of work across major milestones to keep the assessment moving.	- Automate the review and approval process for faster turnaround times. - Connect content and workflows together so your team can work faster than ever.	- Automatically create the deployment project once the vendor is approved. - Use AI to assemble the right implementation team.	- Complete visibility across work including status, roadblocks, capacity, and forecasts. - Automate workflows and data transfers across systems without requiring manual input.	Keep the teams connected across tools they use while keeping one place that tracks all activity and work.
Tool Consolidation:		ServiceNow, Jira, Smartsheet	ServiceNow, Jira, Smartsheet	Web DAM, Widen	Web DAM, Widen	Web DAM, Widen	

*Assessment documents can include: 3rd party questionnaire, audit reports, DPA (data protection agreement), contract, NDA (non-disclosure agreement), control evidence, policies and/or procedures

JOB 2 USE CASES

Vendor Onboarding (Software Vendors).

VALUE STATEMENT: STREAMLINE VENDOR ONBOARDING.

Pain

- Manual processes and siloed cross-functional team collaboration slows down vendor onboarding.
- It's difficult to meet the changing needs of the business while staying on top of vendor management.
- Obtaining vendor documentation is slow and disorganized without a central location to store all vendor documents.

Perception change

FROM:	TO:
Manual tracking in Excel	Real-time dashboards with accurate reporting and updates
Regular status meetings/emails	Visibility into work status available on demand
Ad hoc requests and limited resources	Planned campaigns with resource constraints worked out before work starts
Inconsistent processes	Standardized approach to vendor assessments
Disorganized vendor documentation	Automated review workflows and centralization of vendor documentation

How we help

- Automate workflows and standardize processes for faster onboarding assessments.
- Centralize work in one place for better visibility and transparency into the team's activities.
- Customize the way each user interacts with Workfront so they only view information that is relevant to them.
- Automate and document the review and approvals workflows for faster vendor assessments.
- Streamlined onboarding services experience resulting in happier peers.

Customer use cases



GL Education: 80% increase in productivity and greater trust between departments.



C_Space: Only needed 30 minutes to figure out project launch timelines.

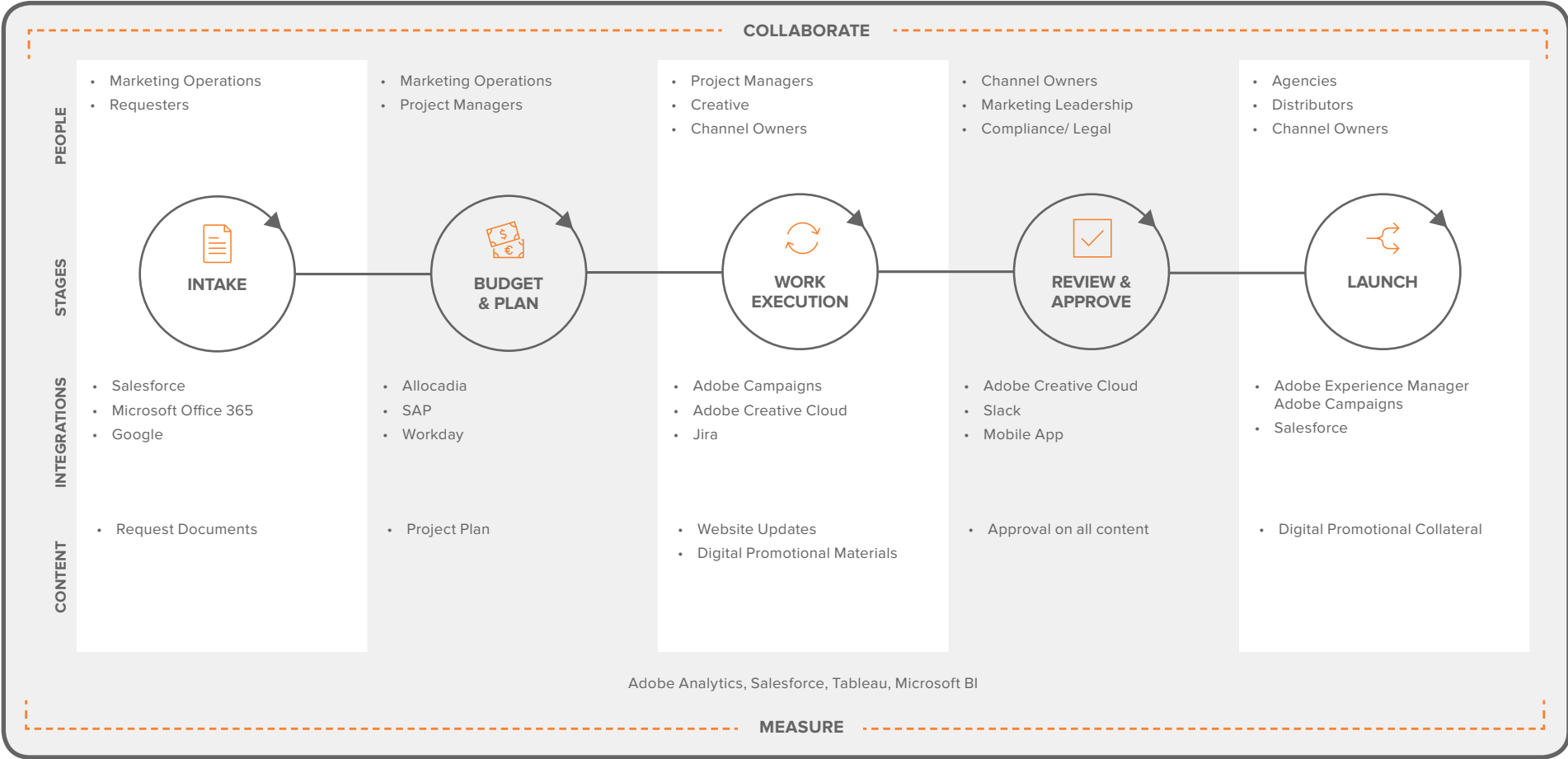


Dräger: Increased on-time delivery by 125%.

JOB 2 USE CASES

Marketing Operations.

PERSON RESPONSIBLE	RELEVANT DEPARTMENTS	MEASUREMENT OF SUCCESS
Project Manager, Marketing Operations Manager	Marketing Operations, Product Marketing, Creative, All Marketing Teams, Sales Enablement, Partners	Project Delivery, Budget Management, Website Uptime



JOB 2 USE CASES

Marketing Operations.

	INTAKE	BUDGET & PLAN	WORK EXECUTION	REVIEW & APPROVE	DELIVER	MEASURE	COLLABORATE
Description of Work:	Requests come through, Work is routed to the right team for action	New work is assessed against current work, Timeline created, Resources assigned	Request is completed	Work is approved by requestors, Legal and Compliance review, Marketing leadership approves	Request is completed, Launched, and Closed Out	Constant review of team productivity, output, efficiency, and quality	Discussions, meetings, and chats happening throughout the entire process
Key Workfront Features:	Request Queues Auto Routing	Project Templates AI Resource Scheduling	Agile Teams Project Agile	Review and Approval My Library	Workflows with Workfront Fusion	Reports and Dashboard: Status, Burn Down, Sprints	Productivity Tool Integrations (Microsoft, Slack, Google, Jira, Salesforce)
Why Workfront Does It Better:	- Build smart request forms that capture all of the information you need to assess an incoming request. - Automatically route new work to the right team based on the intake form	- Start work faster by templating workflows and projects. - Use AI to assign new work to the right people in seconds.	- Sprints are created and backlog work is planned. - Projects can be executed in traditional waterfall, Agile, or both.	- Automate the review and approval process for faster turnaround times. - Connect content and workflows together so your team can work faster than ever.	Automatically deploy content to the right distribution platform when the project is complete.	- Complete visibility across work including status, roadblocks, capacity, and forecasts. - Automate workflows and data transfers across systems without requiring manual input.	Keep the teams connected across tools they use while keeping one place that tracks all activity and work.
Tool Consolidation:	Excel, Smartsheets	Smartsheets, Wrike, Content Calendar tools	Smartsheets, Trello, Wrike, Asana	Web DAM, Widen, DropBox, Box, Smartsheet, Wrike	Web DAM, Widen, DropBox, Box		Smartsheet, Wrike, Asana, Trello

JOB 2 USE CASES

Marketing Operations.

VALUE STATEMENT: REDUCE THE COST OF MARKETING OPERATIONS.

Pain

- Disjointed processes and siloed teams make collaborating on projects impossible.
- Work comes in from a variety of channels, making it difficult to accurately scope projects.
- Work gets done, but people don’t always know the most important items.

Perception change

FROM:	TO:
Manual project tracking in Excel	Real-time dashboards with automated delivery
Overworked and understaffed teams	Accurate planning based on people’s capacity and workloads
Ad hoc processes	Standardized, automated workflows
Miscoped work, missed deadlines	Delivery on time and on budget
Ad hoc content review cycles and paper feedback	Automated review workflows and centralized feedback

How we help

- Centralize work in one place for better visibility and transparency into the team’s activities.
- Automate workflows and standardize processes for faster and more accurate planning.
- One place for work giving accurate insights into people’s availability, their capacity for work, and their current workloads.
- Automate review and approvals and consolidate feedback into one place for faster turnaround times and better brand management.
- Operational performance metrics across teams and optimization.

Customer use cases



Focus Brands:
Increased team efficiency by 20% and saved 30 hours on creative audits.



Northstar New Jersey:
Improved project turnaround time by 24 hours and had 90% faster and more accurate reporting.

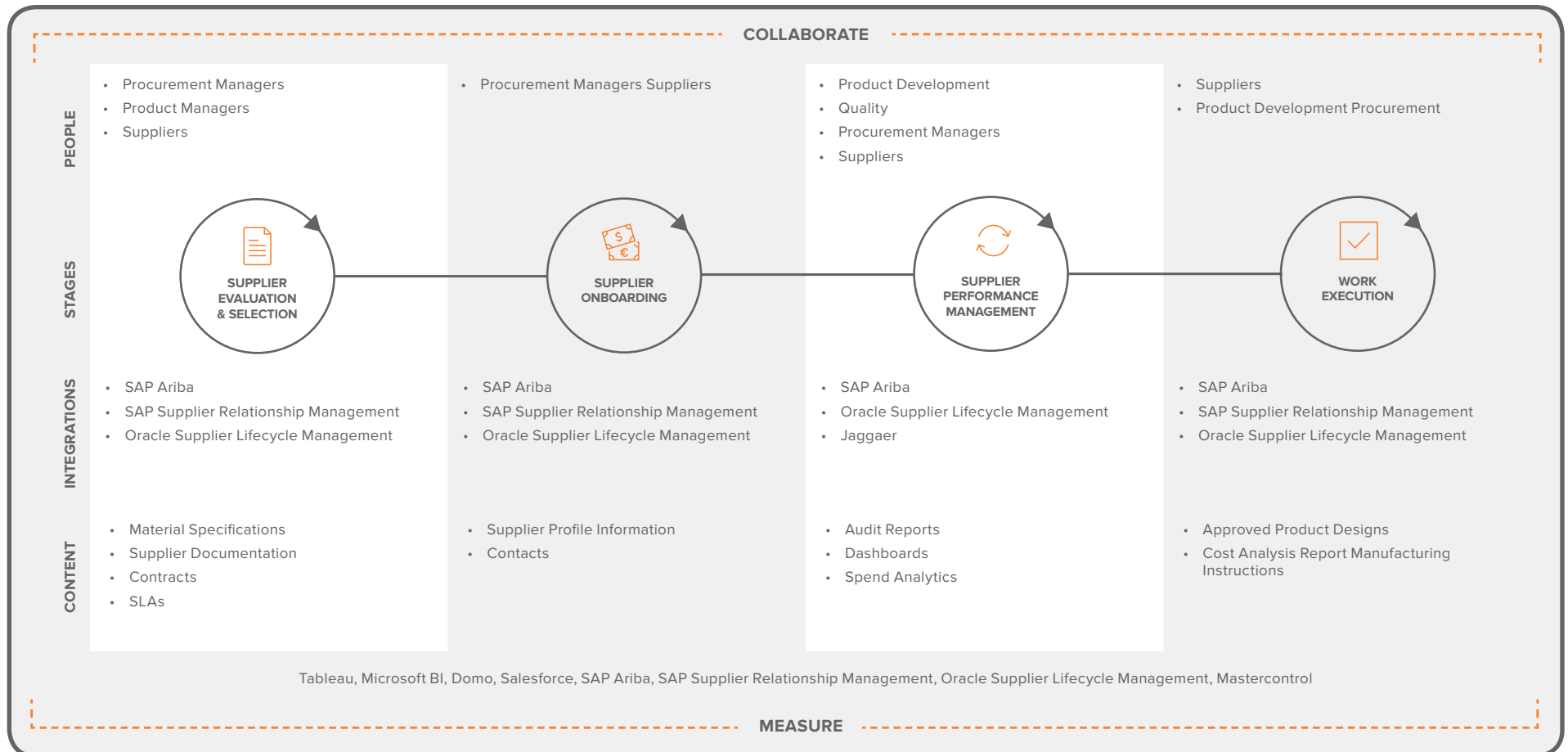


Cisco: Increased on-time delivery rate to 99% in just three months.

JOB 2 USE CASES

Supply Chain Inbound.

PERSON RESPONSIBLE	RELEVANT DEPARTMENTS	MEASUREMENT OF SUCCESS
Procurement Managers, Product Manager	Procurement, Regulatory & Compliance, Product Development	Supplier Performance Scorecards (on-time delivery, back-orders etc), Quality Metrics (number of corrective actions, number of defects/issues, failed audits, inspection failure rate)



JOB 2 USE CASES

Supply Chain Inbound.

	SUPPLIER EVALUATION AND SELECTION	SUPPLIER ONBOARDING	SUPPLIER PERFORMANCE MANAGEMENT	WORK EXECUTION	MEASURE	COLLABORATE
Description of Work:	Define specifications, Invite suppliers for quote, Gather supplier information (profile, credit check etc.), Shortlist supplier, Finalize contracts and SLAs	Create supplier profile, Invite supplier to use self-service portal for registration, Create contacts, Enable supplier in ERP for transactions	Perform periodic audits, Track and manage quality issues, Measure supplier performance through KPIs (on-time delivery etc.), Contract re-negotiation	Collaborate on product design, Create prototypes, Review and approve product designs, Scale up production on approved designs, Perform periodic cost analysis	Spend Analytics, Quality Metrics, Audit reports, Performance metrics	Collaboration across supplier teams, Day-to-day execution of activities
Key Workfront Features:	Project Templates Custom Forms	Update Stream Workfront Fusion	Project Milestones Reports and Dashboard	Workfront Library Collections Review and Approval	Reports and Dashboard, Workfront Fusion	Productivity Tool Integrations (Microsoft, Slack, Google)
Why Workfront Does It Better:	- Standardize and templatize processes for more accurate planning. - Build custom forms to track supplier information	- Automate workflows and data transfers across systems without requiring manual input. - Maintain one place for all updates and collaboration	- Track projects against major milestones to keep work flowing. - Centralize all updates, roadblocks, and issues associated with each project.	- Centralized documents shared between suppliers and product. - Automated approvals and document sharing between suppliers and the company.	- Complete visibility across work including status, roadblocks, capacity, and forecasts. - Automate workflows and data transfers across systems without requiring manual input.	Keep the teams connected across tools they use while keeping one place that tracks all activity and work.
Tool Consolidation:	Excel, Smartsheets	Smartsheets, Asana, Trello	Excel, Smartsheets, Trello, Asana	Web DAM, Widen, DropBox, Box, Smartsheet		Smartsheet, Asana, Trello

JOB 2 USE CASES

Supply Chain Inbound.

VALUE STATEMENT: PREDICTABILITY AND SPEED WITH SUPPLY CHAIN MANAGEMENT.

Pain

- Processes are ad hoc and not standardized.
- Coordinating work with suppliers is soiled and happens over email.
- Planning for new products isn't consistent so the supply chain team doesn't have the information they need early enough.

How we help

- Centralizing work in one place for better visibility and transparency into activities.
- Automating workflows and standardizing processes for faster and more accurate planning.
- Connect with productivity tools such as Microsoft, Google, and Slack to help team members get their work done while keeping Workfront as the source of truth for projects.
- Customize the way each user interacts with Workfront so they only view information that is relevant to them.
- Automate review and approvals workflows for faster gate velocity.

Perception change

FROM:	TO:
Manual stage tracking in Excel	Centralized place for all updates and activity
Regular, long status meetings/emails	Real-time dashboards with automated delivery
Irregular timelines and inaccurate projections	Predictable delivery
Inconsistent processes	Standardized product planning and execution
Ad hoc review processes	Automated review workflows and centralization of the feedback

Customer use cases



Trek: Reclaimed 30% of their time for innovation and increased their on-time delivery from 50 to 80%.



Citrix: Reduced emails by 35% and a 50% reduction in compliance-related meetings.



Kids II: 50% increase in efficiency by reducing meeting time.

Job 3: Review and Approve Digital Work.

Provide fast, collaborative review and approval of digital work for quality and consistency.

Value Driver:
Quality

Consistently deliver
your best work



Pain

- **Executive:** Brand compliance risk from low quality or incomplete work.
- **Champion:** Inconsistency and inefficiency of managing approval loops using email, job jackets, chasing sign-offs, and dealing with hundreds of email threads.

Positive business outcomes

- Save time by reviewing assets in one easy-to-use system.
- Ensure global brand consistency across the enterprise.
- Increase throughput by streamlining the asset approval process.
- Increase the volume of assets produced without adding resources.
- Eliminate the cost of mistakes.

Unique differentiators

- Digital proofing for over 150 file types, including: HTML5, video, audio, websites, and PSDs.
- Mobile review and approval.
- Historic audit tracking: A documented history of all approvals and actions across all versions to ensure compliance.
- Compare different versions of the same asset side-by-side.
- Set actions and resolve comments.
- Integrated work management and digital proofing.

Job 3: Review and Approve Digital Work.

Provide fast, collaborative review and approval of digital work for quality and consistency.

Benefits from our customers' perspective

- Side-by-side comparison is a game changer
- Intuitive UI, easy to use
- Simplified approach to a complex approval process
- Easy to delegate the review and approval process
- Portfolio of products that support the evolution of the enterprise

How we do it

- **Bare Escentuals** has reduced the time required to review a project by nearly 50%.
- **DBA Worldwide** has significantly sped up the review process and experienced an almost immediate reduction in errors.
- **Cars.com** saved an average of 10 hours per week by improving chains of communication and eliminated 25% of the back-and-forth in copy editing.
- **Runnings** has not missed a single deadline since

implementing this tool, even on a 16-page document.

- **Lending Tree** found success from a compliance perspective. The tool allows them to provide the “whys” regarding regulations, allowing them to work closely with marketing to make a project more compliant.

WHY WE DO IT BETTER

29%

Fewer revisions

56%

Faster project delivery



More effective
version control



Increased
accountability for
reviews and approvers

Job 3: Review and Approve Digital Work.

Provide fast, collaborative review and approval of digital work for quality and consistency.

CUSTOMER EXAMPLES

Increased speed to market



DBA Worldwide: DBA was using a paper-heavy system that included manual, time-consuming physical job jackets and manila folders to manage project workflow. With Workfront, they have significantly accelerated the review and approval process while reducing revision cycles and project errors. They not only increased accuracy, but also increased brand consistency.



LendingTree: LendingTree, the nation's leading online loan marketplace with the industry's largest network of lenders, provides consumers with a way to connect with multiple lenders for a number of financial borrowing needs. After implementing Workfront Proof, LendingTree can quickly move projects through the review and approval process. They view Workfront Proof as a competitive differentiator that helps them prove to their lenders that LendingTree stands out from the pack.



Pekin Insurance: With more than 800 employees, 1,500 agencies, and 8,500 independent agents, Pekin Insurance faced a challenge of maintaining consistent marketing standards because of their manual review and approval process. With the purchase of Workfront Proof, manual routing, stalled projects, and broken communication became a thing of the past. Streamlined and automated workflows improved the tracking and approval processes. Greater focus on project delivery and a trackable audit trail resulted in creative content being completed on time without sacrificing quality.

Consistently deliver your best work



Get1free: Get1Free is a San Diego-based company that provides area readers with the most comprehensive list of coupons, deals, discounts, and savings from a variety of distinctive local businesses. After implementing Workfront Proof, the artwork turnaround time has decreased from hours to minutes. The streamlined, clean process allows their sales reps and designers to focus more on sales and better artwork instead of being caught up in the bottleneck of communication.



Rouge24: Rouge24 is an award-winning design agency specializing in private label branding and packaging. The backbone of the company is a team of individuals with broad backgrounds and diverse expertise who are distributed around the country. After implementing Workfront Proof, Rouge24 streamlined the creative review and approval process to deliver projects on time, on budget, and that exceed client expectations. Projects continue to stay on track, and the distributed team members are experiencing improved collaboration and boosted efficiency.

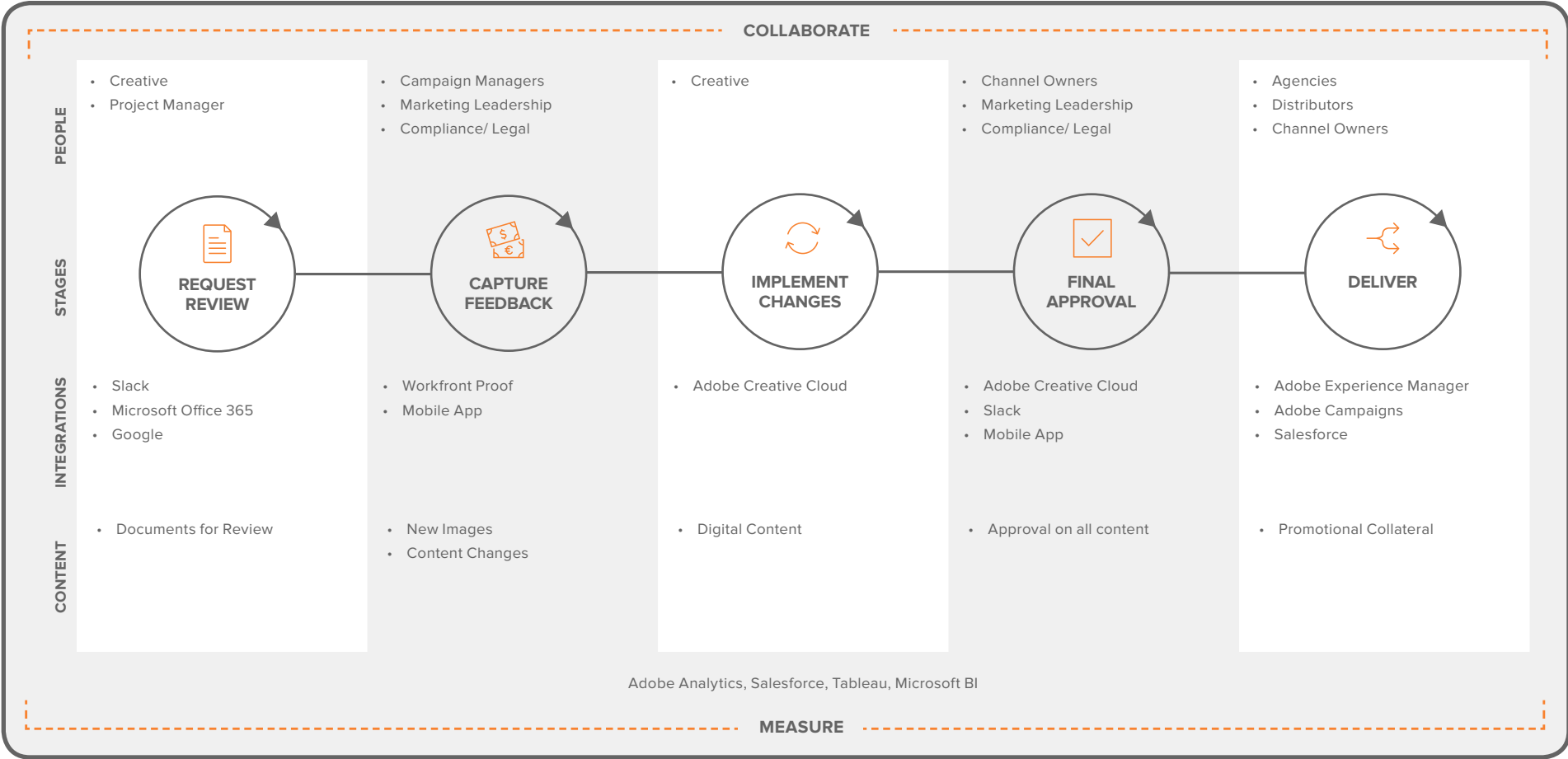


Guitar Center: Guitar Center is the world's largest retailer of musical instruments with 230 brick-and-mortar stores across the U.S. along with multiple online storefronts. For each product release, the marketing teams at Guitar Center would need to review and approve a multitude of marketing material. After implementing Workfront Proof, the marketing teams were able to decrease the amount of time an approval took from hours to minutes. They reduced confusion over which comments to implement and improved their time to market.

JOB 3 USE CASES

Review and Approval.

PERSON RESPONSIBLE	RELEVANT DEPARTMENTS	MEASUREMENT OF SUCCESS
Project Manager, Marketing Operations Manager	Marketing Operations, Product Marketing, Creative, All Marketing Teams, Sales Enablement, Partners	Project Delivery, Budget Management, Website Uptime



JOB 3 USE CASES

Review and Approval.

	REQUEST REVIEW	CAPTURE FEEDBACK	IMPLEMENT CHANGES	FINAL APPROVAL	DELIVER	MEASURE	COLLABORATE
Description of Work:	Document/ Content is created and routed for approval using Workfront.	New work is assessed against current work, Resources assigned.	Changes are implemented, New version is routed for approval	Work is approved by requestors, Legal and Compliance review, Marketing leadership approves.	Content is launched, and task is closed	Constant review of team productivity, output, efficiency, and quality.	Discussions, meetings, and chats happening throughout the entire process.
Key Workfront Features:	Automated Review Workflows Approval Templates	Proofing Viewer Attach Documents to Comments	Resolve Comments Version Control	Side-by-Side Comparison Auto Compare	Workflows with Workfront Fusion	Reports and Dashboard: Approval Stage	Productivity Tool Integrations (Microsoft, Slack, Google, Jira, Salesforce) Mobile App
Why Workfront Does It Better:	- Automate your approval workflows to prevent project delays. - Create standard approval templates so the right people get the approval at the right time.	- Provide targeted, actionable feedback on over 150 file types. - Attach documents to your comments for more context and direction.	- Check off comments as you implement feedback to track changes. - Store all versions within one document to make sure people review the current version.	- View two versions of the document side-by-side to see the changes. - Highlight the differences between two versions for quick checks.	Automatically deploy content to the right distribution platform when the document is approved.	- Know what stage each document is in at all times. - Reduce approval times by streamlining approval processes.	Let people make approval decisions from different productivity tools or their mobile app.
Tool Consolidation:	Excel, Smartsheets	Smartsheets, Wrike	Smartsheets, Wrike	Smartsheet, Wrike	Web DAM, Widen, DropBox, Box		Smartsheet, Wrike

JOB 3 USE CASES

Review and Approval.

VALUE STATEMENT: LAUNCH QUALITY WORK TO MARKET FASTER.

Pain

- Feedback isn’t always given on the most recent version of a document.
- Contradicting feedback from multiple sources—email, physical copies, meetings—causes confusion and project delays.
- Zero visibility into who has approved documents.

Perception change

FROM:	TO:
Ad hoc review cycles	Consistent approval processes and gates
Manual reminders to provide feedback	Automated notifications based on approval deadlines
Missed steps or approvers	Approval templates ensuring the right people make decisions
Decentralized feedback	One place to track comments
Limited accountability on providing approvals	Transparency into the approval process

How we help

- Automated approval workflows based on gates and decisions.
- Modern proofing viewer collecting feedback on over 150 file types.
- Ensure the right version is reviewed and approved with built-in version control.
- Automatically detect changes between two versions of content.
- Increase accountability with electronic signatures and clear audit trails.

Customer use cases

BARE ESSENTUALS®

Bare Escentuals: Reduced content turnaround time by 50%.



Pekin Insurance: Streamlined approvals and trackable audit trails.

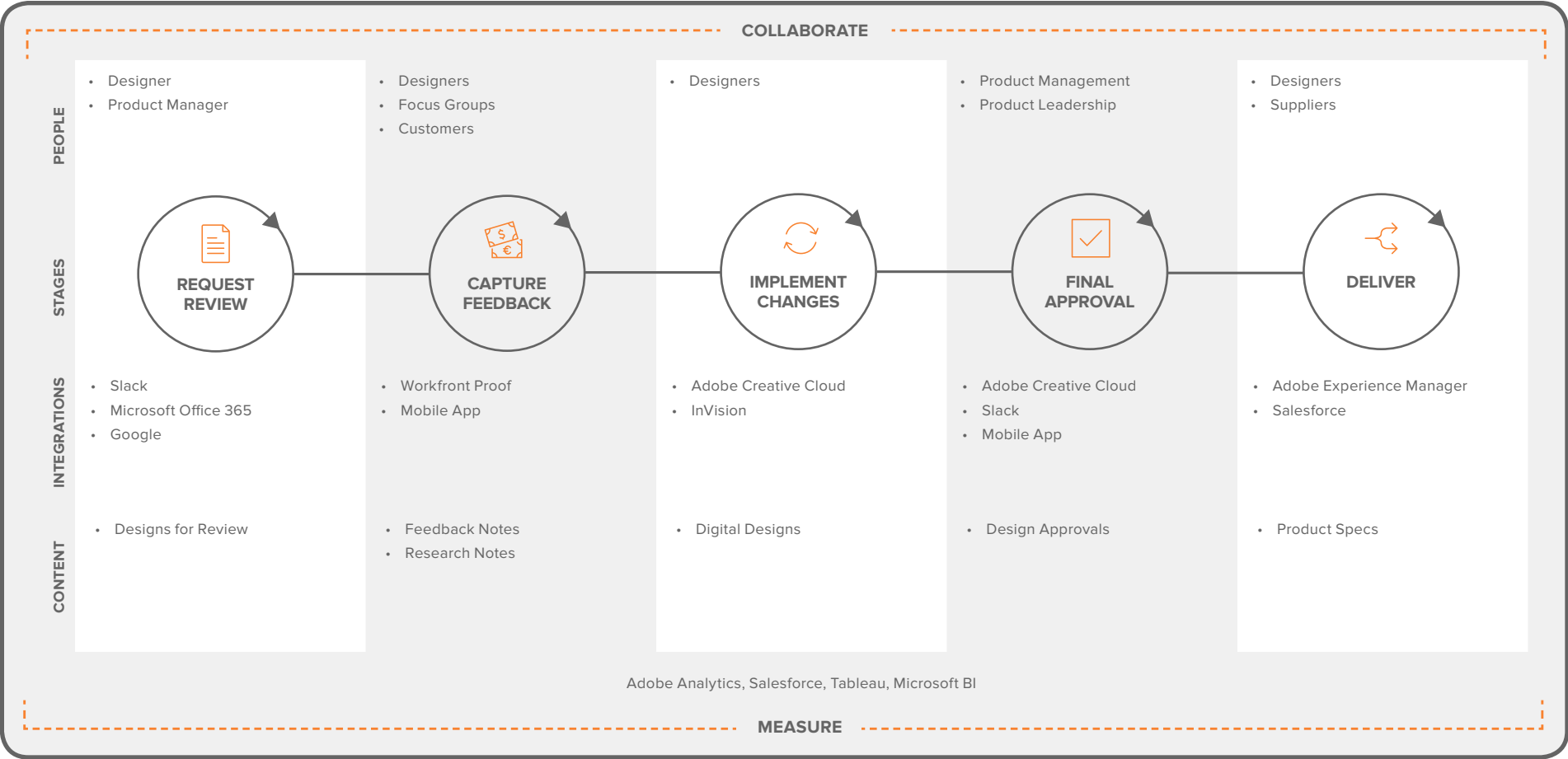


Guitar Center: Approvals happen in minutes.

JOB 3 USE CASES

Review and Approve Product Designs.

PERSON RESPONSIBLE	RELEVANT DEPARTMENTS	MEASUREMENT OF SUCCESS
Design Manager, Product Manager	Product, Supply Chain, Design	On-Time Delivery



JOB 3 USE CASES

Review and Approve Product Designs.

	REQUEST REVIEW	CAPTURE FEEDBACK	IMPLEMENT CHANGES	FINAL APPROVAL	DELIVER	MEASURE	COLLABORATE
Description of Work:	Designs are created and routed for approval using Workfront.	Designs are vetted with focus groups and potential customers. Feedback is consolidated.	Changes are implemented, New version is routed internally for approval.	Work is approved by product and product leadership.	Designs and product specs are sent to suppliers for production.	Constant review of team productivity, output, efficiency, and quality.	Discussions, meetings, and chats happening throughout the entire process.
Key Workfront Features:	Automated Review Workflows Approval Templates	Proofing Viewer Attach Documents to Comments	Resolve Comments Version Control	Side by Side Comparison Auto Compare	Workflows with Workfront Fusion	Reports and Dashboard: Approval Stage	Productivity Tool Integrations (Microsoft, Slack, Google, Jira, Salesforce) Mobile App
Why Workfront Does It Better:	- Automate your approval workflows to prevent project delays. - Create standard approval templates so the right people get the approval at the right time.	- Provide targeted, actionable feedback on over 150 file types. - Attach documents to your comments for more context and direction.	- Check off comments as you implement feedback to track changes. - Store all versions within one document to make sure people review the current version.	- Compare two versions of the document side-by-side to see the changes. - Highlight the differences between two versions for quick checks.	Automatically deploy content to the right distribution platform when the document is approved.	- Know what stage each document is in at all times. - Reduce approval times by streamlining approval processes.	Let people make approval decisions from different productivity tools or their mobile app.
Tool Consolidation:	Excel, Smartsheet	Smartsheet, Wrike	Smartsheet, Wrike	Smartsheet, Wrike	Web DAM, Widen, DropBox, Box		Smartsheet, Wrike

JOB 3 USE CASES

Review and Approve Product Designs.

VALUE STATEMENT: LAUNCH QUALITY WORK TO MARKET FASTER.

Pain

- Feedback from all the groups—internal and external—isn’t in one place for consideration.
- Contradicting feedback from multiple sources—email, physical copies, meetings—causes confusion and project delays.
- Zero visibility into who has approved the designs.

Perception change

FROM:	TO:
Ad hoc review cycles	Consistent approval processes and gates
Manual reminders to provide feedback	Automated notifications based on approval deadlines
Missed steps or approvers	Approval templates ensuring the right people make decisions
Decentralized feedback	One place to track comments
Limited accountability on providing approvals	Transparency into the approval process

How we help

- Automated approval workflows based on gates and decisions.
- Modern proofing viewer collecting feedback on over 150 file types.
- Ensure the right version is reviewed and approved with built-in version control.
- Automatically detect changes between two versions of content.
- Increase accountability with electronic signatures and clear audit trails.

Customer use cases

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Bare Escentuals: Reduced content turnaround time by 50%.



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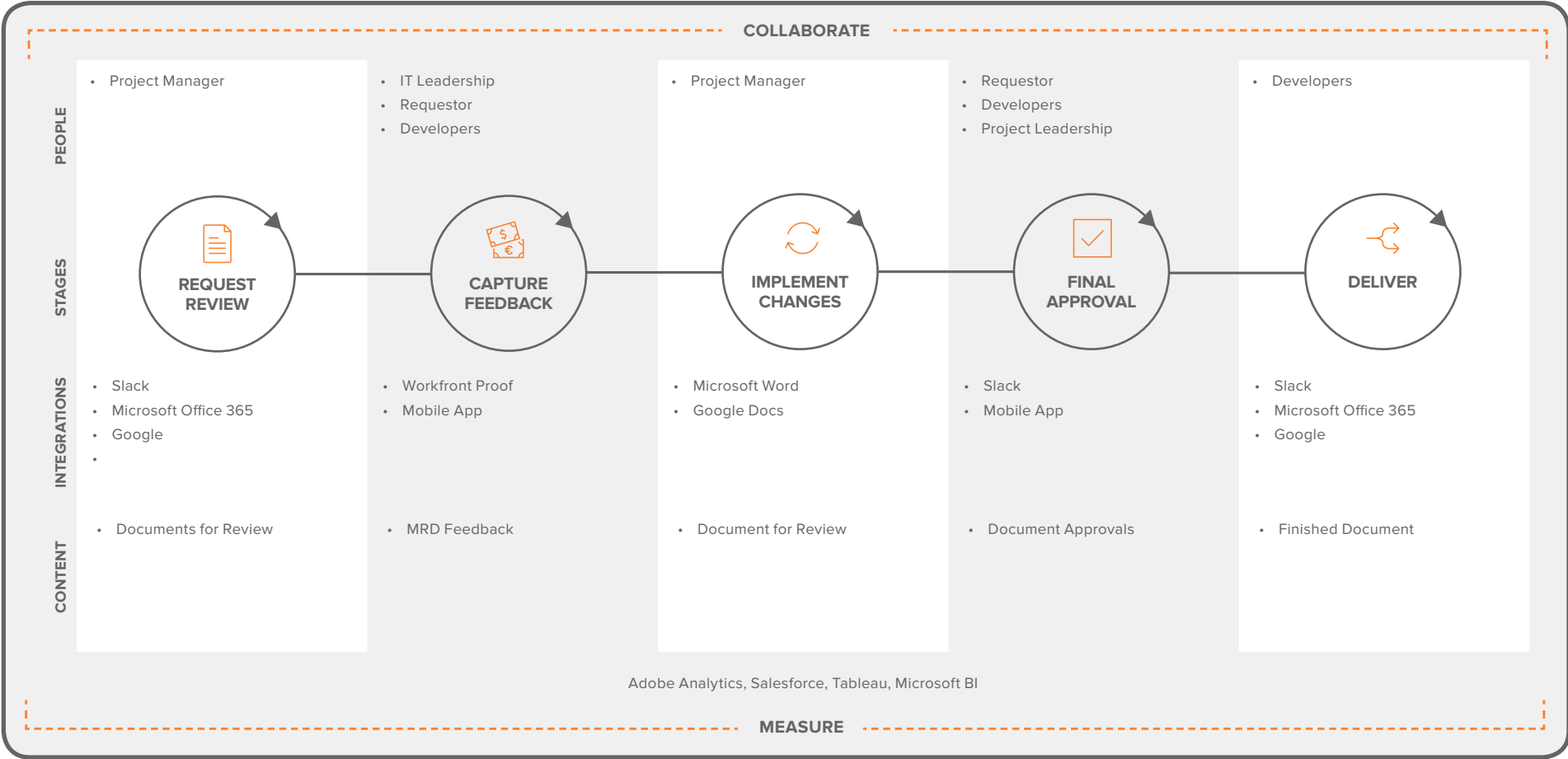


Guitar Center: Approvals happen in minutes.

JOB 3 USE CASES

Review and Approve IT Documents.

PERSON RESPONSIBLE	RELEVANT DEPARTMENTS	MEASUREMENT OF SUCCESS
IT Manager, Design Manager, Project Manager	IT	On-Time Delivery



JOB 3 USE CASES

Review and Approve IT Documents.

	REQUEST REVIEW	CAPTURE FEEDBACK	IMPLEMENT CHANGES	FINAL APPROVAL	DELIVER	MEASURE	COLLABORATE
Description of Work:	Strategies and requirement documents are created and routed for approval using Workfront.	Documents are reviewed. Feedback is consolidated into one system.	Changes are implemented, New version is routed internally for approval.	Work is approved.	Documents are sent to Workfront Library.	Constant review of team productivity, output, efficiency, and quality.	Discussions, meetings, and chats happening throughout the entire process.
Key Workfront Features:	Automated Review Workflows Approval Templates	Proofing Viewer Attach Documents to Comments	Resolve Comments Version Control	Side by Side Comparison Auto Compare	Workfront Library	Reports and Dashboard: Approval Stage	Productivity Tool Integrations (Microsoft, Slack, Google, Jira, Salesforce) Mobile App
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Tool Consolidation:	Excel, Smartsheets	Smartsheets, Wrike	Smartsheets, Wrike	Smartsheets, Wrike	Web DAM, Widen, DropBox, Box		Smartsheet, Wrike

JOB 3 USE CASES

Review and Approve IT Documents.

VALUE STATEMENT: APPROVE DOCUMENTS FASTER.

Pain

- Feedback from all the groups—internal and external—isn’t in one place for consideration.
- Contradicting feedback from multiple sources—email, physical copies, meetings—causes confusion and project delays.
- Zero visibility into who has approved the designs.

Perception change

FROM:	TO:
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Customer use cases

BARE ESSENTUALS®

Bare Escentuals: Reduced content turnaround time by 50%.



Pekin Insurance: Streamlined approvals and trackable audit trails.



Guitar Center: Approvals happen in minutes.

Job 4: Govern Compliance Workflows.

Automate the work processes that ensure regulatory, brand, legal, and corporate compliance within a single solution.

Value Driver:

Control

Establish governance and mitigate risk



Pain

- **Executive:** No confidence in having acceptable compliance processes in place to avoid fines and penalties.
- **Champion:** Tedious manual processes (email, meetings, etc.) to receive compliance approvals and maintain audit trails.

Positive business outcomes

- Mitigate risk of being non-compliant.
- Increase adherence to mandated processes & policies.
- Increase efficiency of repetitive tasks through automation.
- Ensure brand and regulatory compliance.
- Automate audit trails.

Unique differentiators

- Artificial Intelligence (AI) enabled resource management.
- Granular access controls.
- Easy to use.
- Support for complex approval processes.
- Automated routing for incoming requests.
- Digital proofing for HTML5, video, audio, websites and PSDs.
- Historic audit tracking.
- Custom forms.
- Flexible, real-time reporting and dashboarding.

Job 4: Govern Compliance Workflows.

Automate the work processes that ensure regulatory, brand, legal, and corporate compliance within a single solution.

How we do it

- **Zions Bank** has standardized its processes through the use of templates and checklists.
- **Charles Schwab** improved turnaround time, increased visibility into status and workload, and can quickly and easily provide the reports requested by the industry's regulators during an audit.
- **State of Ohio** now completes their audits in 40 hours to several months depending on the size of business and complexity.

WHY WE DO IT BETTER

5x

Increase in
adherence to corporate
processes/policies

50%

Increase in efficiency



Mitigate risk by enforcing
governance standards



World-class brand
management

Job 4: Govern Compliance Workflows.

Automate the work processes that ensure regulatory, brand, legal, and corporate compliance within a single solution.

CUSTOMER EXAMPLES

Increase in productivity

ATB Financial

ATB Financial: Every Friday, ATB Financial traffic managers distributed a spreadsheet requesting all team members to provide updates. Responses were then collected over the weekend and assembled into reports to be reviewed every Monday morning with the Vice President of marketing. Time-consuming and error-prone, this manual process provided no visibility into individual employee workloads and no way to measure on-time delivery. After they implemented Workfront, ATB Financial saw a 30% increase in productivity across the whole team. As a result, Admiral was able to reduce the cost to manage a job by 60%.

Consistently deliver your best work



Admiral: Admiral used a manual, paper-based signoff system to review and approve creative content with feedback provided using pen and ink. This process created a huge amount of work and required a vast amount of paper. They knew that their process was not only very costly, it wasn't environmentally friendly. After they implemented Workfront, Admiral had complete transparency into the compliance workflows. They also had an easy-to-access audit trail and better feedback control.

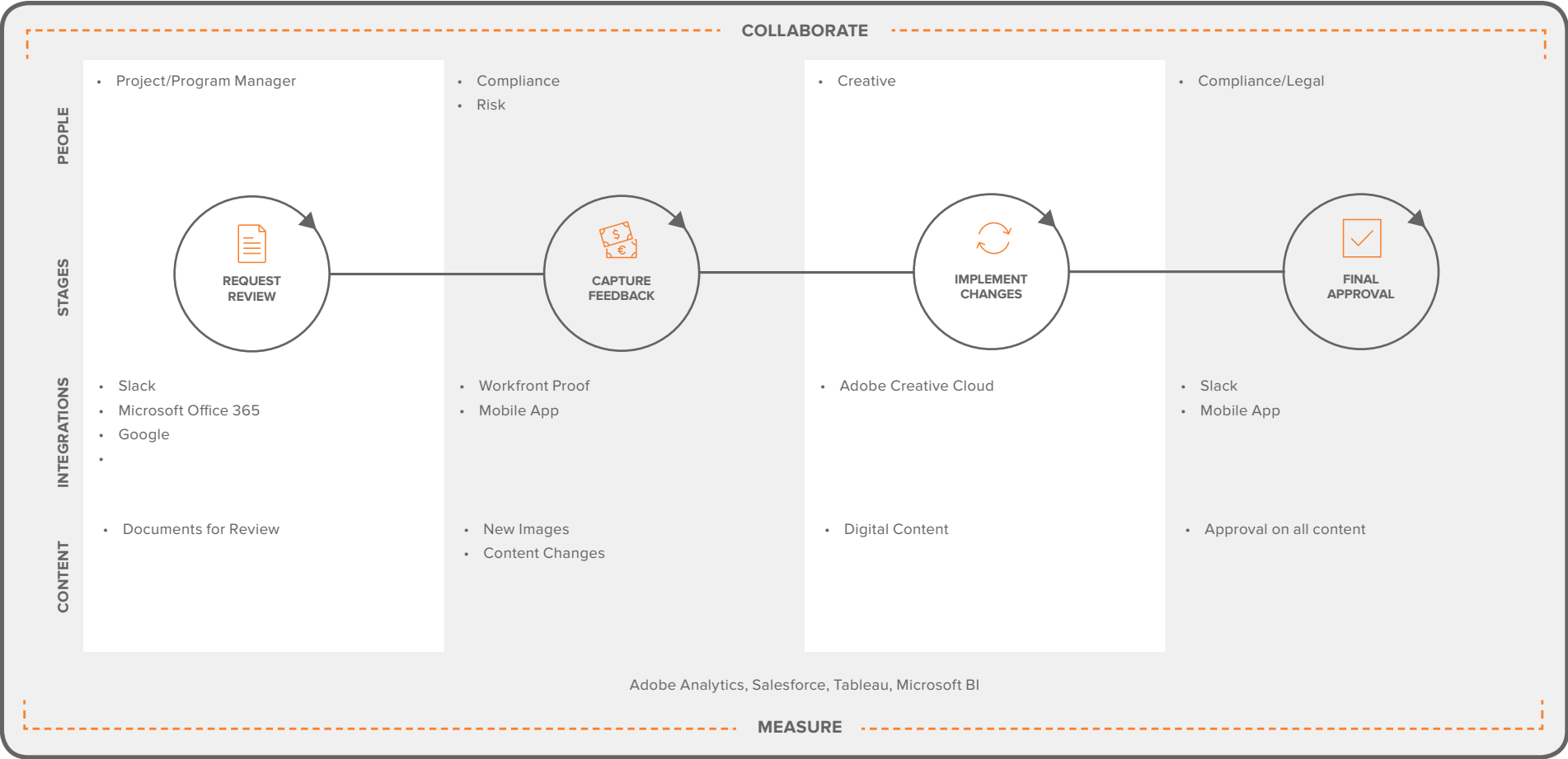


LendingTree: LendingTree needed a new method of collaboration that would satisfy their compliance needs while not limiting their creative staff. Because they worked in different locations, the marketing and compliance teams were using different ways to collaborate which did not provide a clear audit trail. After implementing Workfront, Lending Tree had complete visibility into all creative projects and a single, centralized place for feedback. They were able to route their projects faster and improve their marketing and brand compliance.

JOB 4 USE CASES

Review and Approval of Digital Content.

PERSON RESPONSIBLE	RELEVANT DEPARTMENTS	MEASUREMENT OF SUCCESS
Compliance, Risk, Legal, Security Manager	IT, Marketing, Product, HR, Operations	Brand Compliance, Government Regulations



JOB 4 USE CASES

Review and Approval of Digital Content.

	REQUEST REVIEW	CAPTURE FEEDBACK	IMPLEMENT CHANGES	FINAL APPROVAL	MEASURE	COLLABORATE
Description of Work:	Document/Content is created and routed for approval using Workfront	Compliance or Legal reviews the content	Feedback is completed	Content is reviewed one more time and given final approval	Constant review of team productivity, output, efficiency, and quality	Discussions, meetings, and chats happening throughout the entire process
Key Workfront Features:	Automated Review Workflows Approval Templates	Proofing Viewer Attach Documents to Comments	Resolve Comments Version Control	Side-by-Side Comparison Auto Compare	Reports and Dashboard: Approval Stage	Productivity Tool Integrations (Microsoft, Slack, Google), Jira, Salesforce Mobile App
Why Workfront Does It Better:	- Automate your approval workflows to prevent project delays. - Create standard approval templates so the right people get the approval at the right time.	- Provide targeted, actionable feedback on over 150 file types. - Attach documents to your comments for more context and direction.	- Check off comments as you implement feedback to track changes. - Store all versions within one document to make sure people review the current version.	- Compare two versions of the document side-by-side to see the changes. - Highlight the differences between two versions for quick checks.	- Know what stage each document is in at all times. - Reduce approval times by streamlining approval processes.	Let people make approval decisions from different productivity tools or their mobile app.
Tool Consolidation:	Excel, Smartsheets	Smartsheet, Wrike	Smartsheet, Wrike	Smartsheet, Wrike		Smartsheet, Wrike

JOB 4 USE CASES

Review and Approval of Digital Content.

VALUE STATEMENT: ACCELERATE COMPLIANCE APPROVALS.

Pain

- Contradicting feedback from multiple sources—email, physical copies, meetings—causes confusion and project delays.
- Approval and feedback audit trails are nonexistent or extremely hard to compile.
- Zero visibility into who has approved documents.

Perception change

FROM:	TO:
Ad hoc review cycles	Consistent approval processes and gates
Manual reminders to provide feedback	Automated notifications based on approval deadlines
Missed steps or approvers	Approval templates ensuring the right people make decisions
Decentralized feedback	One place to track comments
Limited accountability on providing approvals	Transparency into the approval process

How we help

- Automated approval workflows based on gates and decisions.
- Modern proofing viewer collecting feedback on over 150 file types.
- Ensure the right version is reviewed and approved with built-in version control.
- Automatically detect changes between two versions of content.
- Increase accountability with electronic signatures and clear audit trails.

BARE ESSENTUALS®

Bare Escentuals:
Reduced content
turnaround time by 50%.



Pekin Insurance:
Streamlined approvals
and trackable audit trails.



Guitar Center: Approvals
happen in minutes.

Job 5: Deliver Client-Facing Services.

Deliver services to stakeholders and clients while maximizing resource utilization.

Value Driver: Efficiency

Increase profit margins
and client satisfaction



Pain

- **Executive:** Operational inefficiencies mean tighter margins and poor client satisfaction.
- **Champion:** Lack of project visibility, inadequate scoping, and inconsistent communication reduces client satisfaction and diminishes workforce morale.

Positive business outcomes

- Increase profit margins.
- Improve resource utilization.
- Increase on-time delivery.
- Reduce meetings.
- Boost productivity.

Unique differentiators

- AI-enabled resource scheduling.
- Know when you can take on more work with Resource Planner.
- Customizable forms and business cases for better prioritization.
- Customizable workflows for increased efficiencies and better flexibility.

Job 5: Deliver Client-Facing Services.

Deliver services to stakeholders and clients while maximizing resource utilization.

Benefits from our customers' perspective

- Role-based user experience
- Flexible, real-time reporting
- Customizable and easy-to-use online forms
- Easy client collaboration

How we do it

- **Cisco** saved 85% in work management investment and 90% in implementation time.
- **C_Space** has seen greater productivity and helped team members regain 30% of their time for innovation.
- **Infuse Medical** transformed their business model from a fixed price to a more flexible

time-and-materials model because of the increased transparency.

WHY WE DO IT BETTER

\$2-7

Increase in profit margins

98%

On-time delivery rate

67%

Reduction in status meetings

30%

Increase productivity

Job 5: Deliver Client-Facing Services.

Deliver services to stakeholders and clients while maximizing resource utilization.

CUSTOMER EXAMPLES

Increased efficiency



Dignity Health: The Performance Excellence Group was tasked with facilitating all initiatives across Dignity Health's 40 facilities. Without a collaborative solution to manage all of its work, the Group was challenged to standardize best practices and coordinate efforts across the enterprise. After implementing Workfront, the team eliminated 38 spreadsheets required for monthly reporting. They gained an estimated 25% in project management time savings because of all the real-time visibility gained. The biggest gain was the 100 hours saved on a daily basis because of the efficiencies gained with standard templates, duplicate data entry, and automated approvals.



Warburtons: From product development to IT, Warburtons invests in new and better ways to give British families great quality, great tasting food. That includes increasing IT volume and speed in its interactions with more than 18,000 retailers every week. The IT department wanted to minimize their service disruptions, streamline approvals, and replace an aging application with Workfront. After implementing Workfront, the team delivered projects on time and faster with a new request classification. They saved 12 hours each week by eliminating meetings that used to capture status updates and data.

Increased profit margins



C_Space: The agency wanted more visibility into their work efforts to better scale their business. Because each team managed their work however they wanted, there wasn't an efficient way to provide visibility into the 300+ projects occurring simultaneously. After Workfront, their team only needed 30 minutes to figure out project launch timelines. They had instant visibility into projects, which eliminated the need for status meetings.



FOOTE, CONE & BELDING

FCB: As work turned more project-based, FCB was looking for a way to make sure everyone was aware of when work was due. After Workfront, they improved their ability to scope work and reduced the time spent in meetings or preparing status updates by 2 hours per team members. They also increased productivity and are saving an estimated 1000 hours of billable time.

Better employee morale



Kamo Power: The project management team at Kamo Power is responsible for keeping the power and telecommunications grid up and running. This involves challenging resource allocation and logistics coordination as the team moves from one problem area to the next helping customers. Just two months after implementing Workfront, Kamo Power saw vast improvements in the efficiency and communication of the project management and field teams. Morale increased because the teams were no longer burdened with updating and maintaining communication in many systems. The office teams were also able to instantly send updates and communications to the field team members through the Workfront mobile app.

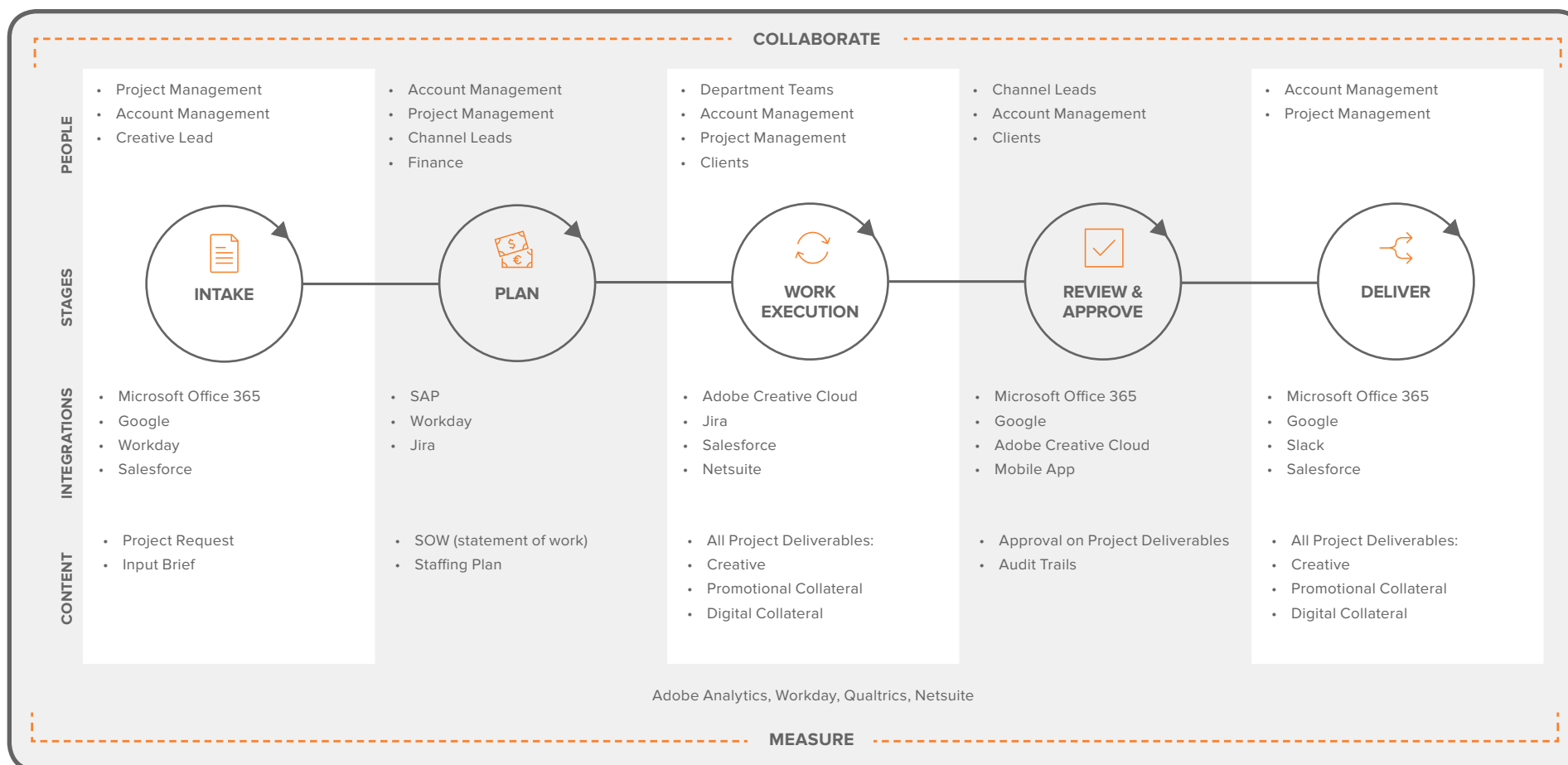


Ameritas: In 2012, Ameritas embarked on a comprehensive company rebranding initiative. The undertaking placed tremendous pressure on the creative services team charged with managing all of the design and content changes, ranging from logos and videos to web pages and print collateral. After implementing Workfront, Ameritas' Creative team cut their meeting time in half because of their real-time collaboration and visibility into project updates. Workfront also improved team morale by helping team members manage their increased workload and improving collaboration satisfaction by 50%.

JOB 5 USE CASES

Agency Client Management.

PERSON RESPONSIBLE	RELEVANT DEPARTMENTS	MEASUREMENT OF SUCCESS
Director, Agency Operations, Director of PMO, Director, Account Management	Agency Leadership, Creative, Program/Project Management, IT, Legal, Clients, Account Management	Client Satisfaction, Agency Revenue Resource Management (People and Hours)



JOB 5 USE CASES

Agency Client Management.

	INTAKE	PLAN	WORK EXECUTION	REVIEW AND APPROVE	DELIVER	MEASURE	COLLABORATE
Description of Work:	Agencies negotiate an annual contract with clients. A Scope of Work (SOW) is made for each client for the fiscal year.	Department leads meet to plan resources for the work outlined in the SOW. While the SOW is approved by the client, agency leads start resource and project planning.	Throughout the year, work is executed based on the required timing in the SOW. Department leads execute assigned work for the project. The account team and the client are informed of key milestones.	Department leads conduct internal and external client reviews based on the deliverable type. There are usually multiple rounds of each review.	Final content may be delivered directly to the client, or to a supporting production team, development team or channel. Final assets are stored and tagged in a DAM.	Actual vs. estimate hours to make sure the agency is charging the client correctly, Cadence of timeline and deliverables Client satisfaction surveys	Discussions, meetings, and chats happening throughout the entire process
Key Workfront Features:	Request Forms Auto Routing	Resource Planner Project Templates	Agile/Waterfall Projects Utilization Report Timesheets	Review & Approve Client Portals Mobile App	Workfront Library Audit Trails	Reports and Dashboard: Project status/ delivery, Burn reports, Milestone reports, Utilization reports	Productivity Tool Integrations (Microsoft, Slack, Jira, Google)
Why Workfront Does It Better:	- Build smart request forms that capture all of the information you need to scope out new work. - Automatically route work to the right team to get started.	- Forecast the resources you'll need for current and projected client work. - Quickly turn new work into projects with pre-built templates	- Sprints are created and backlog work is planned. - Projects can be executed in traditional Waterfall, Agile, or both.	- Automate the review and approval process of deliverables for faster delivery times. - Allow your clients to keep tabs on their projects without extra emails or meetings.	- Centralize all deliverables in one place for clients to access when they need them. - Keep track of all feedback and approvals with digital audit trails.	Complete visibility across work including status, roadblocks, capacity, and utilization.	Keep the teams connected across tools they use while keeping one place that tracks all activity and work.
Tool Consolidation:		Project Planning tools (Excel, MS Projects, Smartsheets)	Project Planning tools (Excel, MS Projects, Smartsheets)		Widen, Box, Dropbox, Bynder, WebDam		

JOB 5 USE CASES

Agency Client Management.

VALUE STATEMENT: INCREASE YOUR AGENCY’S CAPACITY AND CLIENT SATISFACTION.

Pain

- We need to serve clients to stay competitive, but we don’t have the manpower to support the workload.
- Inconsistent communication makes clients frustrated and slows down the team.
- Limited visibility into all the moving parts of a client’s project resulting in scope creep.

Perception change

FROM:	TO:
Manual tracking in Excel	Real-time, client-facing dashboards
Long status meetings/emails with clients	Visibility into work status available on demand
Inaccurate, manual resourcing forecasts	Accurate resourcing forecasts and capacity
Inconsistent processes	Standardized project planning and execution
Disorganized client updates	Automated updates and on-demand client reports

How we help

- Project templates for faster, more accurate scoping.
- Real-time dashboards for internal and external views.
- Automated review and approval of all deliverables for faster delivery.
- One place for all work for accurate capacity forecasting.
- Streamlined services experience resulting in happier, repeat clients.

Customer use cases



FCB: Increased productivity for estimated 1000 hours saving.



LeapFrog: 50% reduction in project-related emails.

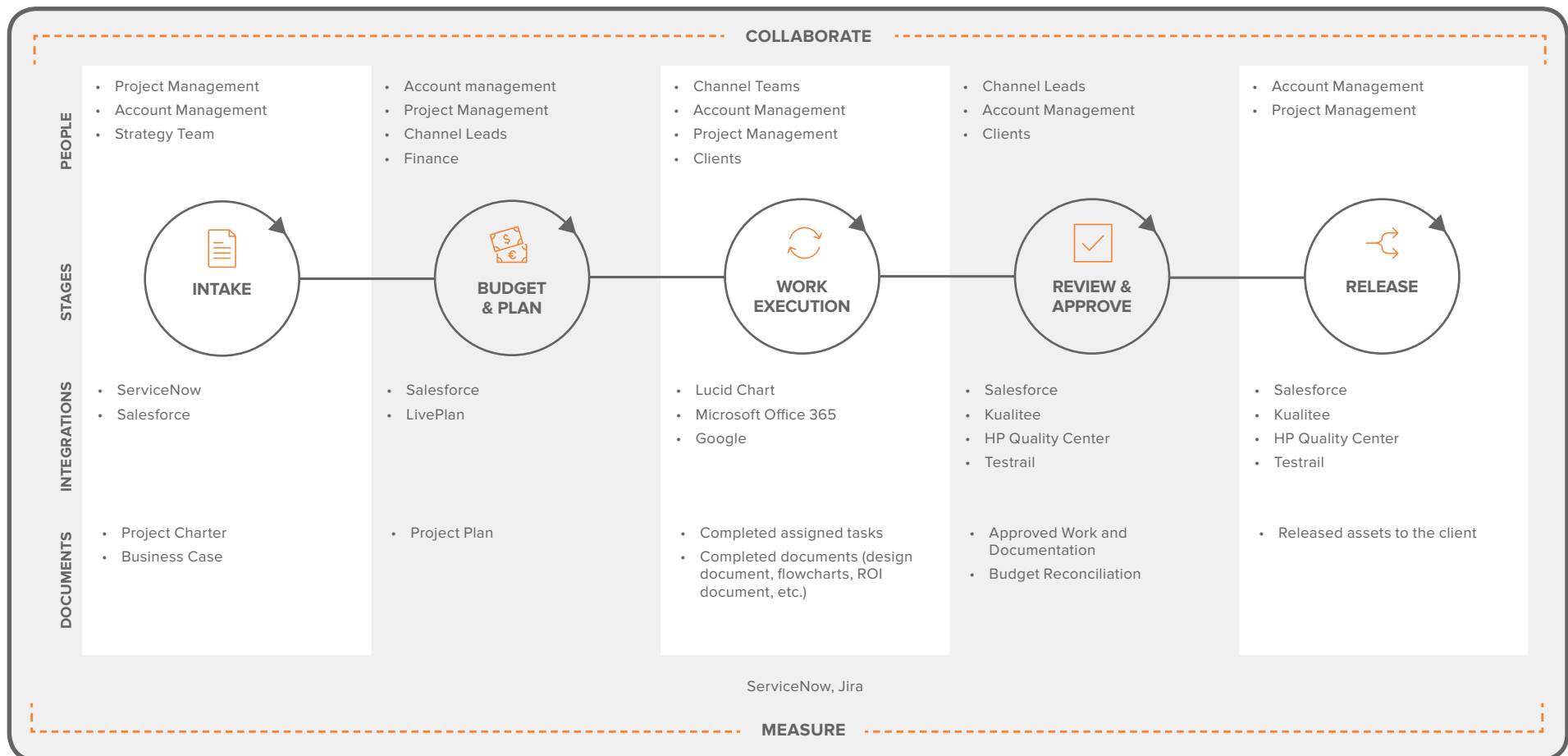


YA: 12% efficiency improvement.

JOB 5 USE CASES

Client Implementation Services.

PERSON RESPONSIBLE	RELEVANT DEPARTMENTS	MEASUREMENT OF SUCCESS
VP of Professional Services, Director of Professional/Client Services	Portfolio/Program/Project Manager, Analysts/Consultants, Engineers, Client/Implementation Trainers , Sales/Account Manager	Velocity of implementation, Cost of implementation, Client satisfaction & longevity of customer relations



JOB 5 USE CASES

Client Implementation Services.

	INTAKE	BUDGET & PLAN	WORK EXECUTION	REVIEW AND APPROVE	RELEASE	MEASURE	COLLABORATE
Description of Work:	A project brief is submitted by the business owner or the client for review and assessment	The charter or project plan is created, resources or stakeholders are assigned, and the budget is verified based on the client contract	Assigned tasks are executed in either, Agile, Waterfall, or Wagile—based on how the team operates. Standardized status reports with the client are scheduled.	*Review and approval happens throughout the project* Review the solution and validate that the solution meets the client's contract requirements	Demo, piloting, testing, and training to the client Client is then on-boarded and service is release	Business owner verifies and validates the requirements are met What they measure: time, budget, and scope based on the client contract and company requirements	
Key Workfront Features:	Requests Project Templates	Resource Planner AI Resource Scheduling	Agile/Waterfall Projects Project Milestones	Review & Approve Client Portals	WF Library	Reports and Dashboard: Project status/ delivery, Burn reports, Milestone reports, Utilization reports	Productivity Tool Integrations (Microsoft, Slack, Jira, Google)
Why Workfront Does It Better:	- Build smart request forms that capture all of the information you need to scope out new work. - Quickly turn new requests into projects with pre-built templates	- Forecast the amount of resources you'll need for current and projected client work. - Use AI to assign new tasks to the right people.	- Allow each team to work the way they like (Agile, Waterfall, mixed) without sacrificing data or automation. - Track the progress of work across major milestones to make sure it's progressing as planned.	- Automate the review and approval process of deliverables for faster delivery times. - Allow your clients to keep tabs on their projects without extra emails or meetings.	Centralize all deliverables in one place for clients to access when they need them.	Complete visibility across work including status, roadblocks, capacity, and forecasts.	Keep the teams connected across tools they use while keeping one place that tracks all activity and work.
Tool Consolidation:		Project Planning tools (Excel, MS Projects, Smartsheets)	Project Planning tools (Excel, MS Projects, Smartsheets)		Widen, Box, Dropbox, Bynder, WebDam		

JOB 5 USE CASES

Client Implementation Services.

VALUE STATEMENT: SERVE MORE CLIENTS WITH STREAMLINED PROCESSES.

Pain

- We need to serve clients to stay competitive, but we don't have the manpower to support the workload.
- Implementation is slow with manual workflows and processes.
- Clients feel out of the loop of the project, which makes them frustrated.

Perception change

FROM:	TO:
Manual tracking in Excel	Real-time, client-facing dashboards
Long status meetings/emails with clients	Visibility into work status available on demand
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How we help

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Customer use cases



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LeapFrog: 50% reduction in project-related emails.

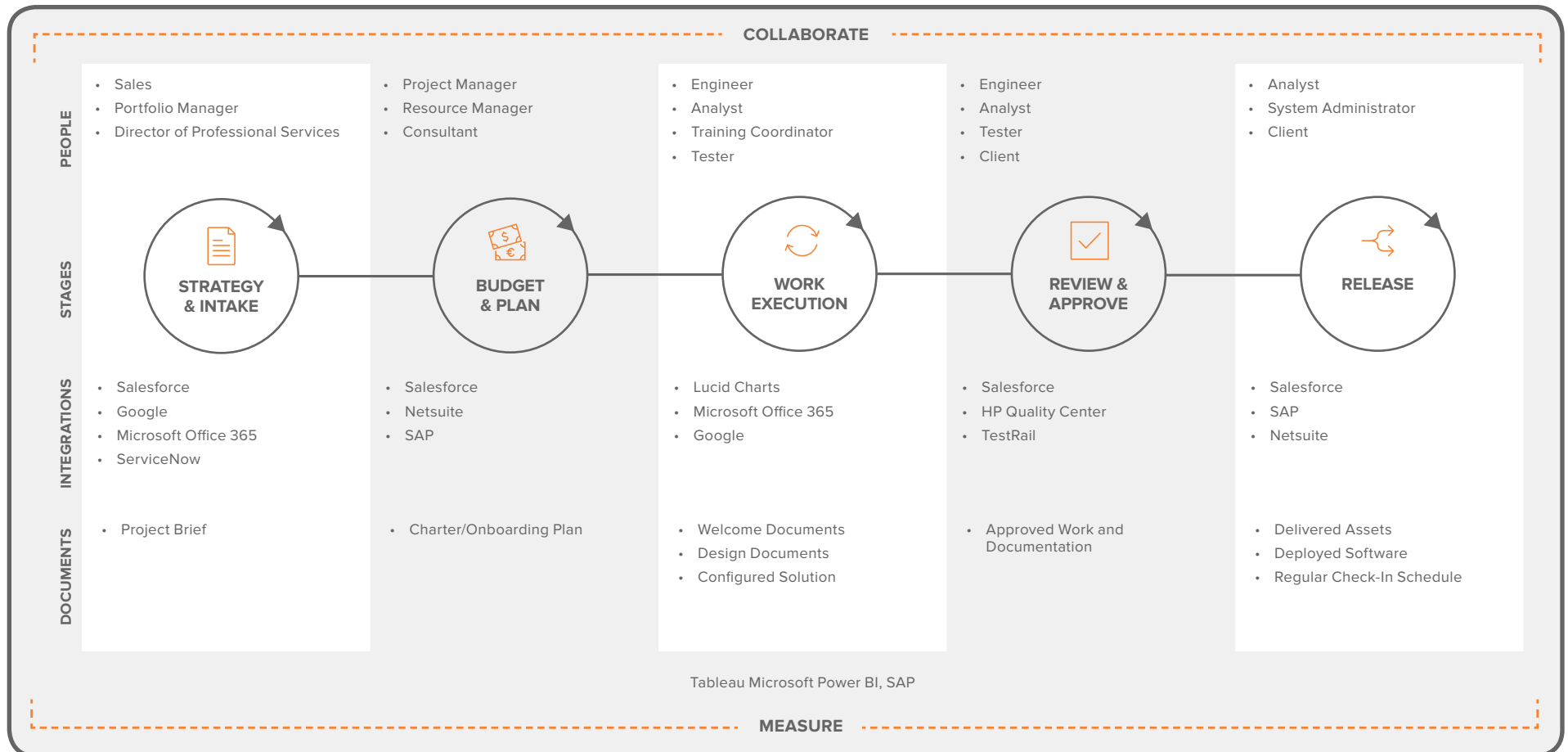


YA: 12% efficiency improvement.

JOB 5 USE CASES

New Client Onboarding.

PERSON RESPONSIBLE	RELEVANT DEPARTMENTS	MEASUREMENT OF SUCCESS
VP of Professional Services/Client Services, Director of Professional Services, Senior Manager of Professional Services	Portfolio/Program/Project Manager, Analyst/Consultant, Engineer, Training Coordinator, Sales/Account Manager, Client Services	Client Satisfaction, Adoption Metrics, On-Time Launch, Scope of Contract



* Account Manager and Project Manager present throughout the entire process.

JOB 5 USE CASES

New Client Onboarding.

	STRATEGY & INTAKE	BUDGET & PLAN	WORK EXECUTION	REVIEW AND APPROVE	RELEASE	MEASURE	COLLABORATE
Description of Work:	Once a new client has been approved and contracts are signed, sales submits a request to onboard the new client	Create a charter or project plan—identify and prioritize needs from client, set timeline, and assign resources	Execution of assigned tasks based on how the client operates (Agile, Waterfall, Hybrid). Status reports are scheduled based on client's preferred methodology	Review the solution, validating requirements of both ends are met	Deployment of solution to client	Continued review of deliverables and the onboarding process	Discussions, meetings, and chats happening throughout the entire process between internal teams and client
Key Workfront Features:	Custom Forms Salesforce Integration	Project Template Resource Planner	Waterfall/Agile/ Hybrid Client portals	Review and Approve Proofing	Workfront Library Workfront Fusion	Reports and Dashboards Workfront Fusion	Productivity Tool Integrations (Microsoft, Slack, Google)
Why Workfront Does It Better:	- Build smart request forms that capture all of the information you need to assess an incoming request. - Create automated workflows between Salesforce and Workfront to kick off work immediately.	- Forecast the amount of resources you'll need for current and future client work. - Start work faster by templating your workflows	- Collaboration can happen across teams that work in Agile, planners who prefer Waterfall, or individuals who switch between the two. - Give clients transparency into the progress of their work with real-time dashboards	- Automate the review and approval process for faster turnaround times. - Consolidate feedback on all digital artifacts in one place	- Automatically deploy content to the right distribution platform when the project is complete. - Centralize all documents in one place for quick internal or client access	- Complete visibility across work including status, roadblocks, capacity, and forecasts. - Automate workflows and data transfers across systems without requiring manual input	Keep the teams connected across tools they use while keeping one place that tracks all activity and work
Tool Consolidation:	Excel, Smartsheets	Smartsheets, Wrike	Smartsheets, Trello, Wrike, Asana	Web DAM, Widen, DropBox, Box, Smartsheet, Wrike	Web DAM, Widen, DropBox, Box	Web DAM, Widen, DropBox, Box	Smartsheet, Wrike, Asana, Trello

JOB 5 USE CASES

New Client Onboarding.

VALUE STATEMENT: EFFICIENTLY ONBOARD NEW CLIENTS ENSURING PROPER CLIENT ENABLEMENT.

Pain

- Inability to manage projects and resources, delaying release to clients.
- Poor communication between internal teams and external clients.
- Customers are unsure of where they are at in the onboarding process.

Perception change

FROM:	TO:
Inconsistent processes	Standardized approach to onboarding processes
Regular status meetings/emails	Real-time dashboards with accurate reporting and updates
Miscoped work, missed deadlines	Accurate and on time delivery
Poor internal/external communication	Automated review workflows and centralization of the feedback
Overburdened team members	Balanced workloads

How we help

- Standardize and automate the workflows improving the speed and quality of work.
- Clients gain insight into their onboarding plan with real-time dashboards.
- Real-time dashboards providing insight into work status, roadblocks, and forecasts.
- One place for work giving accurate insights into people’s availability, their capacity for work, and their current workloads.
- Centralize work, collaboration, and documents for faster services delivery.

Customer use cases



Cisco: Improved on-time delivery rate to 99% in just one quarter.



Warburtons: Saved 12 hours each week eliminating meetings that used to capture status updates and data.



Leapfrog: 50% reduction in project-related emails.

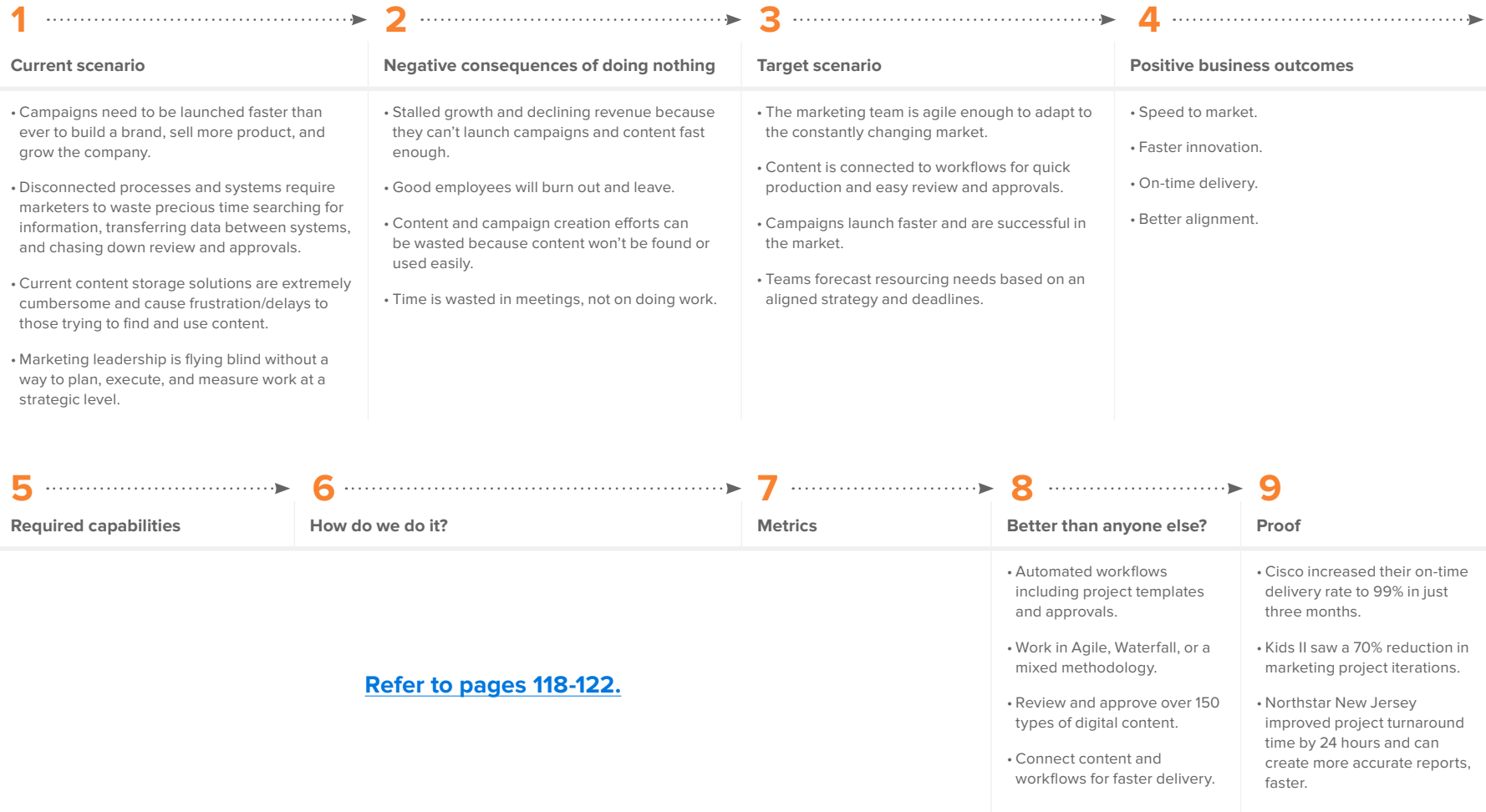
Section 3: Beat the Competition

Lock Out the Competition.

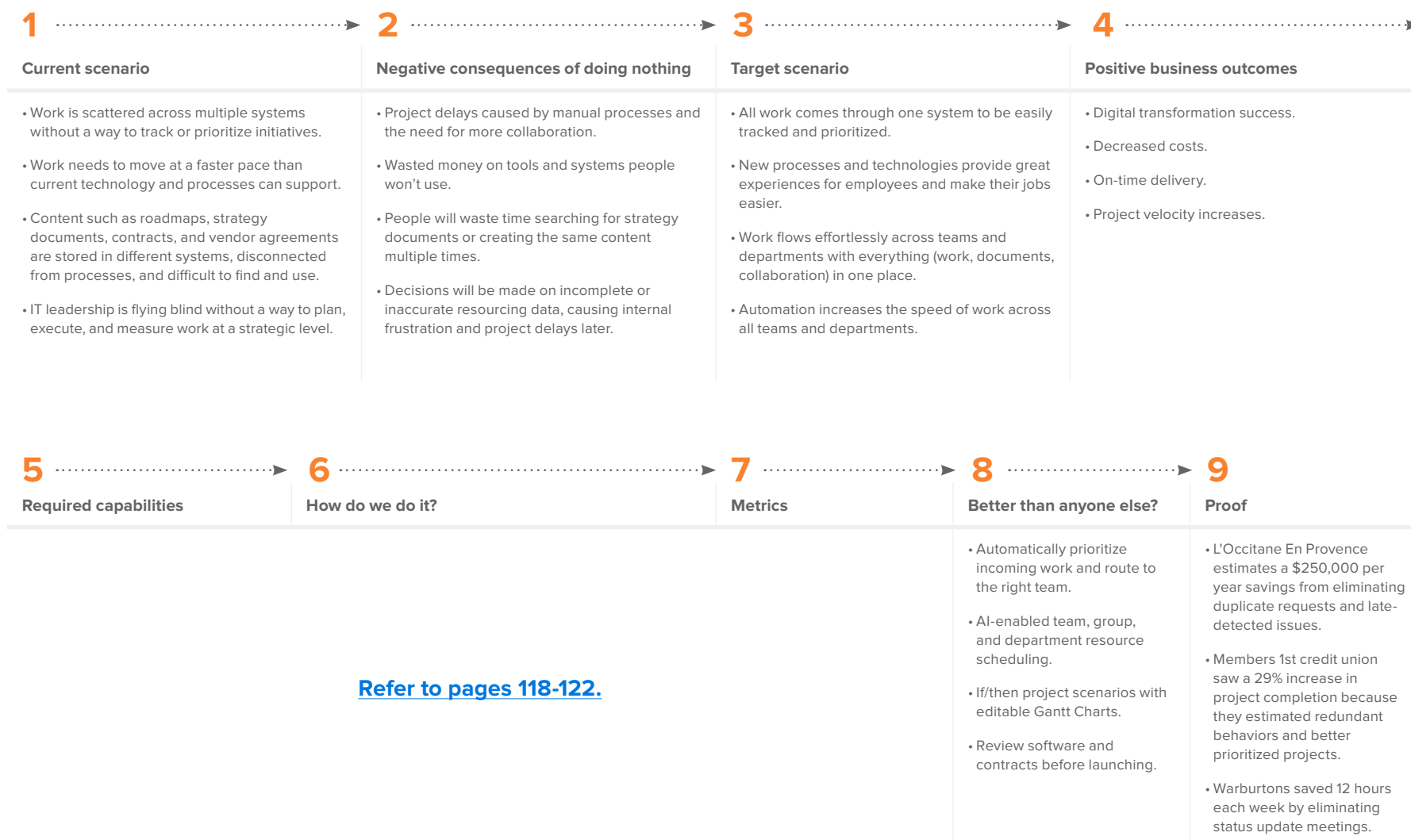
Workfront exists so people can do their best work and help companies thrive in a digital world. Digitization has created infinite possibilities bringing new pressures that today's organizations are not equipped to handle.

This guide will help you uncover the pain your customers are experiencing and tie that pain to negative business outcomes. Throughout the sales process you will encounter different softwares claiming to solve your customer's pain also. The Modern Work Management Selection Criteria will help you combat those claims and help you differentiate Workfront.

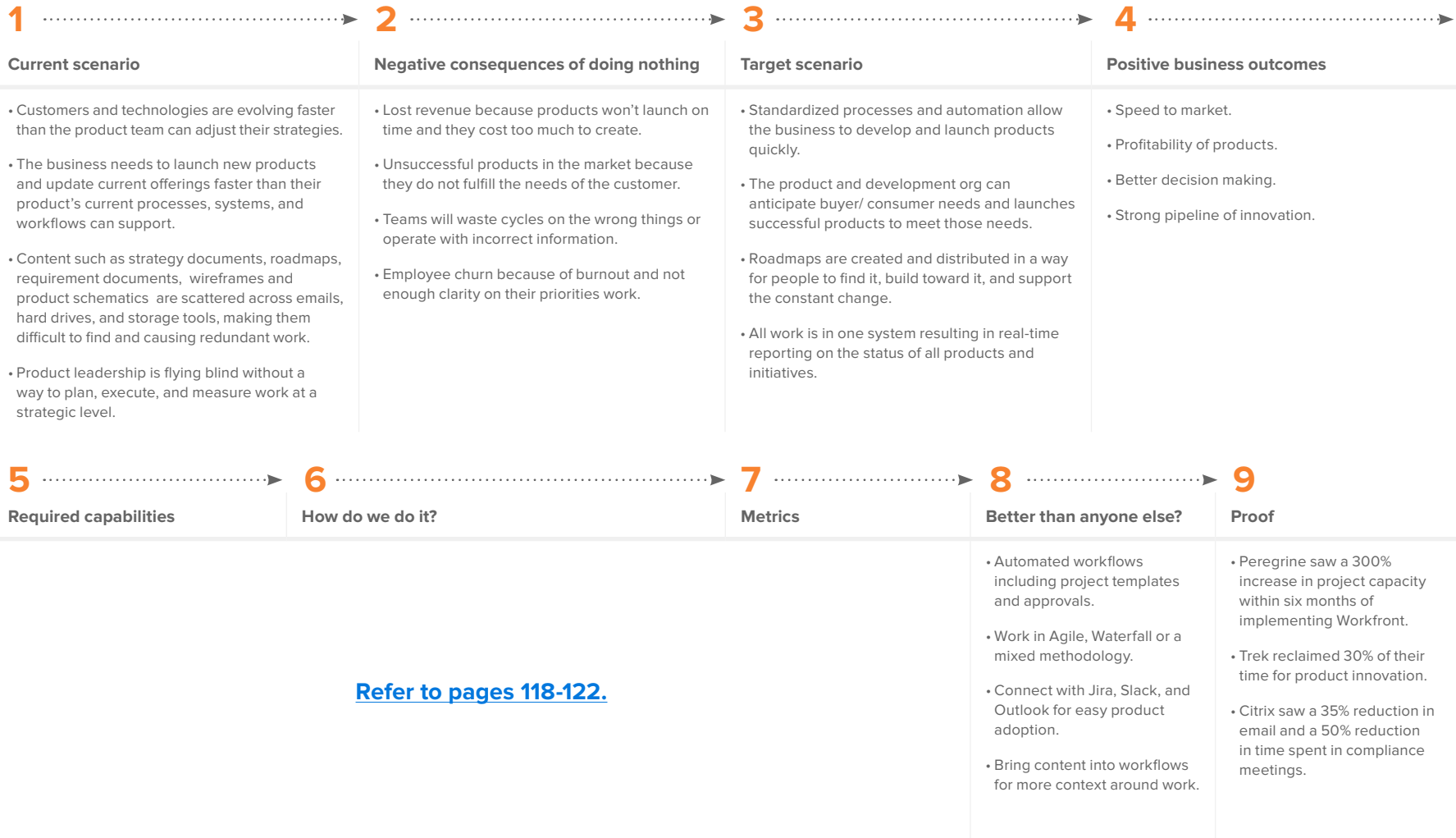
The Value Framework for Marketing.



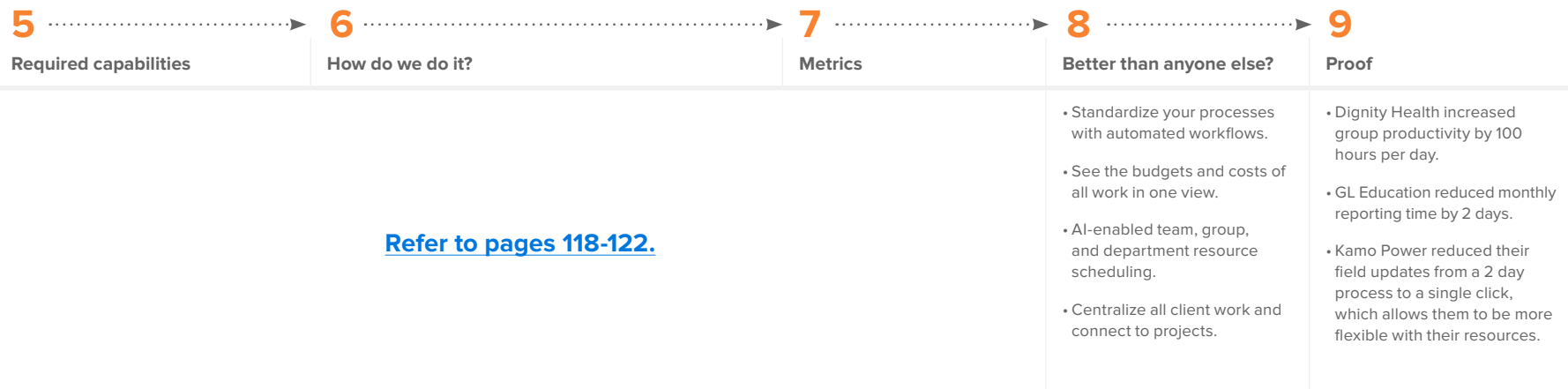
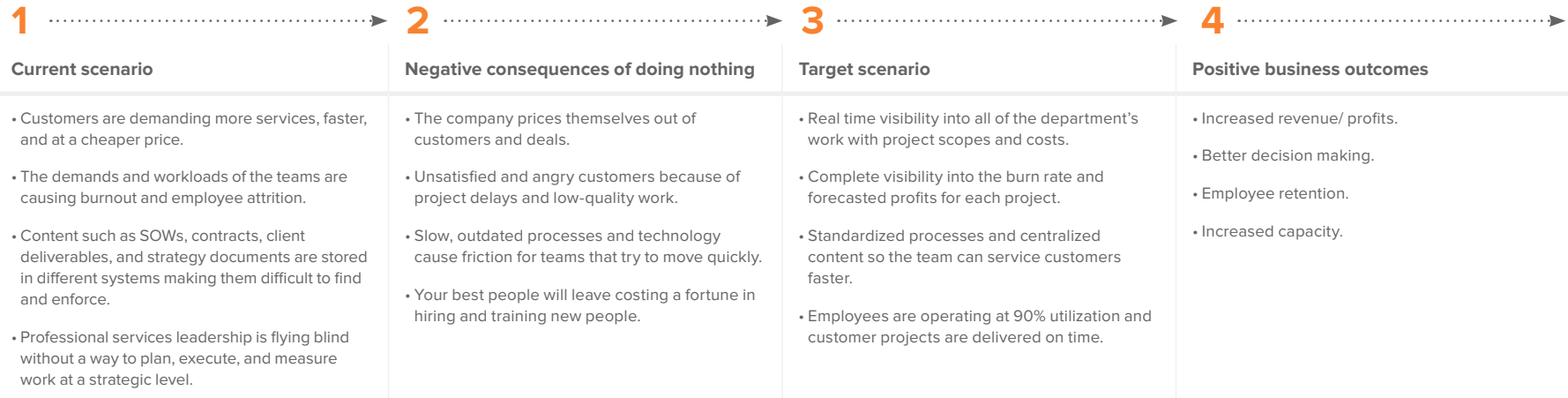
The Value Framework for IT.



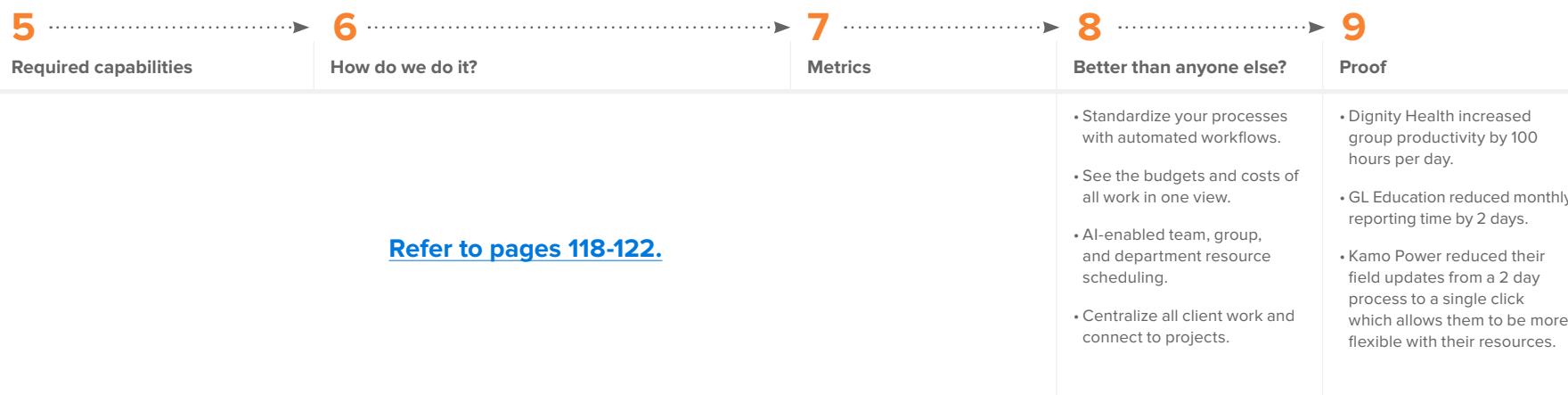
The Value Framework for New Product Development.



The Value Framework for Professional Services.



The Value Framework for Agency.



■ present ■ partial ■ not present

Modern work management selection criteria:

Strategy and intake

		Workfront	ServiceNow	Atlassian	Wrike	Microsoft	Smartsheet	Mavenlink	Asana	Aprimo	Clarizen	Planview	CA PPM	Workday	PeopleSoft
Internal request queues	All work requests centralized in one place.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
External request queues	External vendors and clients can request work from anywhere.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Mobile requests	Submit work requests from anywhere.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Customizable forms	Customize intake forms to allow departments to get all information they need from requestors.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Smart forms	Forms that build themselves based on logic and previous answers.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Request prioritization	Prioritize incoming requests based on your defined criteria.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Automated request routing	Set business rules to send requests to the right team.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Approvals on requests	Automatically route new requests for approval from the right people.	■	■	■	■	■	■	■	■	■	■	■	■	■	■

Service/case management

Service management	Centralized IT Service Management.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
App case management	App Dev Case Management.	■	■	■	■	■	■	■	■	■	■	■	■	■	■

Task management

Task assignment	Task assignment and notification.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Time-tracking	Task-specific time-tracking.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Task prioritization	Individual task prioritization.	■	■	■	■	■	■	■	■	■	■	■	■	■	■

Portfolio management

Business case	Tie new work and projects back to your business objectives with built-in business cases.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Alignment scorecards	See how new work aligns with your goals and business objectives.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Portfolio optimizer	Align projects based on outcomes, resource availability, and ROI.	■	■	■	■	■	■	■	■	■	■	■	■	■	■

■ present ■ partial ■ not present

Modern work management selection criteria:

Work management

		Workfront	Servicenow	Atlassian	Wrike	Microsoft	Smartsheet	Mavenlink	Asana	Aprimo	Clarizen	Planview	CA PPM	Workday	PeopleSoft
Project templates	Templatize common projects and workflows.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Automated workflows	Keep work flowing without manual handoffs or intervention.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Customizable workflow automation	Build your own workflows to support each team's processes.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Approval workflows	Approve work, digital content, projects, and plans.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Project management	Manage projects, timelines, and assignments.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Program management	Group related projects into programs for better tracking and reporting.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Portfolio management	Track and report on related projects and programs .	■	■	■	■	■	■	■	■	■	■	■	■	■	■
If/then project scenarios	See the impact of project changes before committing to them.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Work prioritization	Set business rules to prioritize work.	■	■	■	■	■	■	■	■	■	■	■	■	■	■

Resource/people management

AI-enabled team scheduling	Use AI to schedule team assignments based on roles, availability, and priority of work.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
AI-enabled department scheduling	Use AI to scheduled all work within the department based on roles, availability, and priority of work.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
AI-enabled global resource scheduling	Use AI to schedule work across teams and departments based on roles, availability, and priority of work.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Capacity planning	Plan future work on a weekly, monthly, quarterly, or annual basis based on the availability of your employees.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Resource forecasting	Plan the number of people—employees and contractor—you need to complete all work on time.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Utilization reporting	See how much projects cost in both time and money reporting.	■	■	■	■	■	■	■	■	■	■	■	■	■	■

Agile management

Sprint planning	Spirit planning with real-time prioritization.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Backlog management	Re-prioritize tasks and projects.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Mixed methodology support	Work in Agile, Waterfall or a hybrid approach.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Agile methodology support	Scrum and Kanban boards with complete Agile functionality.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Project agile views	Mange projects in the view that works for you—Agile, timeline, Gantt, Waterfall.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Team agile	Use Scrum or Kanban boards to manage the team's work and backlog.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Waterfall support	Manage projects based on task predecessors and a list of tasks	■	■	■	■	■	■	■	■	■	■	■	■	■	■

■ present ■ partial ■ not present

Modern work management selection criteria:

Easy collaboration

		Workfront	ServiceNow	Atlassian	Wrike	Microsoft	Smartsheet	Mavenlink	Asana	Aprimo	Clarizen	Planview	CA PPM	Workday	PeopleSoft
Unlimited requestors	Allow anyone (internal or external) to request work from any device.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Unlimited digital content reviewers	Allow internal and external parties to review digital content from any device.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Unlimited reporting viewers	Send reports and dashboards to anyone in your company.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
External collaborators	Invite external agencies, freelancers, or contractors to track their projects in Workfront.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Real-time contextual collaboration	Engage in real-time conversations in the context of projects, documents, and work.	■	■	■	■	■	■	■	■	■	■	■	■	■	■

Intuitive worker experience

		Workfront	ServiceNow	Atlassian	Wrike	Microsoft	Smartsheet	Mavenlink	Asana	Aprimo	Clarizen	Planview	CA PPM	Workday	PeopleSoft
Centralized work	All work, documents, deadlines, and context is in one place.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Mobile apps	Access, manage, and update your work from anywhere on any device.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Productivity apps integrations	Connect with the tools you use each day such as Slack, Teams, Jira, Salesforce, Outlook, Gmail, Adobe.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Single place to access work	One view to see all current and incoming tasks.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Bidirectional calendar sync	Block off time to complete tasks and work.	■	■	■	■	■	■	■	■	■	■	■	■	■	■

Review and approval

		Workfront	ServiceNow	Atlassian	Wrike	Microsoft	Smartsheet	Mavenlink	Asana	Aprimo	Clarizen	Planview	CA PPM	Workday	PeopleSoft
Static content review and approval	Review and approve static images such as JPGs, PDFs, Word documents, and more.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Interactive content review and approval	Review and approve content such as websites, prototypes, HTML5 content, and more.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Digital content review and approval	Review and approve over 150 digital file types including video and HTML5.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Auto compare documents	Compare two versions down to the pixel to identify changes.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Review and approve on mobile devices	Add comments and make approval decisions from your mobile device.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Unlimited approvals	Add as many approvers to digital content as you would like.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Ad hoc approvals	Send digital content for approval based on email address.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Automated approval workflows	Set up standard workflows to automatically route the content for approval.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Unlimited collaborators/approvers	Request feedback and approvals from internal and external parties.	■	■	■	■	■	■	■	■	■	■	■	■	■	■

■ present ■ partial ■ not present

Modern work management selection criteria:

Digital content hub

		Workfront	ServiceNow	Atlassian	Wrike	Microsoft	Smartsheet	Mavenlink	Asana	Aprimo	Clarizen	Planview	CA PPM	Workday	PeopleSoft
Customizable content organization	Organize content the way your enterprise operates.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Native integration with work platform	Connect content and workflows for faster delivery.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Work-in-progress content management	Easily share and review work in progress content.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Security controls for content/folder access	Keep private documents private.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Enterprise grade search	Find the assets you need quickly.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Automated metadata upload and sync	Organize content and tag instantly.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Link assets to work management platform	Keep content connected to workflows for easy access.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Personalized work spaces	Organize content the way you work.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Sharing with wm platform mgmt users	Easily share content with internal and external collaborators.	■	■	■	■	■	■	■	■	■	■	■	■	■	■

Reporting

Out-of-the-box reports	View status reports, delivery calendars, and more without any set-up: status, delivery calendars, resources.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Customizable reports	Build custom reports based on over 50+ data objects.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Dashboards	Consolidate multiple reports into one view for easy distribution.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Automated report delivery	Send reports to anyone on a scheduled basis.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Automated dashboard delivery	Send dashboards to anyone on a scheduled basis.	■	■	■	■	■	■	■	■	■	■	■	■	■	■

Integrations

Codeless integration to other platforms	Build integrations without incurring the costs of engineers or maintenance.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Open, RESTful API	Create custom integrations.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Native integrations to productivity suite	Allow your team to work in the tools they use all day.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Integrations with enterprise platforms	Ability to integrate with enterprise-level platforms, such as ServiceNow, Jira, Salesforce, and SAP.	■	■	■	■	■	■	■	■	■	■	■	■	■	■

Enterprise management

Department-based access levels/controls	Allow departments to work the way they need without sacrificing security.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Group-level administrators	Grant some administrative access to group leaders to share admin responsibilities.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Group license management	Set the number of licenses a specific department or team can use.	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Preview sandbox	Test integrations and updates before putting them into production.	■	■	■	■	■	■	■	■	■	■	■	■	■	■

present partial not present

Modern work management selection criteria:

Security and compliance

		Workfront	Servicenow	Atlassian	Wrike	Microsoft	Smartsheet	Mavenlink	Asana	Aprimo	Clarizen	Planview	CA PPM	Workday	PeopleSoft
Encryption at rest		present	present	not present	present	present	present	present	not present	present	present	present	present	present	present
Single sign-on	Enable easy access.	present	present	present	present	present	present	present	present	present	present	present	present	present	present
Audit rights	Audit who has access to your data, projects, and workflow.	present	partial	present	present	present	partial	not present	present	present	present	present	present	present	present
Whitelist IP	Select certain IP addresses to access your platform.	present	present	present	present	present	present	present	present	present	present	present	present	present	present
Privacy-specific team	Teams dedicated to keeping your data private and compliant with all geographical regulations.	present	present	present	present	present	present	present	present	present	present	present	present	present	present
ISO Certifications	Trust that your data is secure and private.	present	present	present	present	present	not present	not present	present	present	present	present	present	present	present

BATTLECARD



How to win against them

- **Lacks workflow management:** Lacks “true workflow” to manage in-take requests, document or request approvals (cannot approve work, digital content, projects, plans, or budgets); no ability to create workflow rules or actions to create automation.
- **Very limited true project management:** Lacks task predecessors and dependencies or robust task assignments.
- **No resource management:** No resource management or capacity planning capabilities.
- **Lacks proofing:** Has only basic document “yes/no” approvals; no ability to proof content or files.
- **Designed for small business:** Founders intended to create a simple offering specific to a small team or the SMB; lacks enterprise features such as portfolio management, DAM, and productivity reporting.

How to defend against them

- **“Basecamp is an all-in-one solution”:** Its integrated project management, collaboration and communication tool is simple to learn, deploy, and use, but makes it totally unfit for the enterprise.
- **“Basecamp is ‘good enough’ for the team or the department”:** While not actively sold to enterprise departments, some users may see it as a “good enough solution” for a specific team. This short-term strategy isolates the department and increases company-wide complexity by adding a separate and disconnected project management and collaboration tool.
- **“Basecamp is much lower cost”:** The \$99 per company with no per user charge aligns with its intended target of small business and is another strong indicator it is not an enterprise tool.

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Probing questions to ask

Workflow Capabilities

- If you look at Basecamp vs. Workfront, how easy is it to build or configure workflow in Basecamp? What about building approvals and applying them to projects, issues, requests, tasks, and digital content?
- What is Basecamp's ability to proof, review, and approve assets and content?
- Do you need to have a formal auditable approval process for external clients? Which vendor has the capabilities to support that need at scale?

Portfolio Management/Enterprise Work Management

- How can you report on your team's productivity levels OOTB in Basecamp?
- Can you align your projects or portfolios to business goals or strategy with Basecamp?
- With Basecamp, how can you focus on portfolio optimization with automated project hierarchy and cross-project or portfolio task dependencies?
- How important is it to your teams across the enterprise to work in an agile methodology?
- Do you need your collaborative work management platform in a language other than English or run in a European data center?

Resource Management

- Can you support automated resource leveling or contouring in Basecamp?
- How can you create "what-if" scenario models in Basecamp to visualize different resource & project scenarios?
- In 2017, Basecamp stated it didn't want to be an enterprise software company, and in 2018, it took the unusual step of declaring its intent to limit its number of employees to about 50, with the possible exception of growing support. Do you see your enterprise as being well-served by this strategy?

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How to win against them

- **Deep discovery to align Workfront to specific customer needs/use cases:** Wrike is well-known for its “high volume” sales strategy, lacking the ability to conduct custom demos. Customers frequently report Wrike’s product demos are “canned” without customization and are often perceived as “feature dumps”. Workfront can show value in aligning our platform to customers’ specific needs as well as creating a more custom demo to highlight that alignment.
- **Wrike is powered for the SMB or low-complexity enterprise:** Wrike’s platform is focused on meeting the needs of the SMB but not the enterprise, lacking depth & breadth in:
 - **Resource Management:** Very limited RM: no resource scheduling, automated resource contouring, no capacity planning, no resource forecasting, resource pools, or resource plans.
 - **Portfolio alignment:** No inter-project dependencies to align multiple projects; no concept of portfolio management or alignment of projects to a business goal or strategy.
 - **Workflow:** Limited to reviewing and approving files only (cannot approve requests, plans, or budgets); no workflow templates.
 - **Executive visibility & reporting:** Limited visibility into work by management & senior leadership; no reporting on productivity or utilization (cannot report on planned vs. actual resources or costs or view by hours, costs, or revenue).
 - **Limited tracking or audit capabilities:** Lack of compliance/audit tracking of assets through the entire lifecycle of an asset.
- **Limited digital content management:** Limited to approval of 13 file types with no support for interactive content or side-by-side comparisons; Limitations with proofing, such as being able to attach files to proofing comments as well as filtering, sorting, and finding proofing comments.
- **No support for Agile work methodology:** Does not support agile work methods.

How to defend against them

- **Wrike will talk about its higher rating in Forrester Wave:** The reality is that Workfront was rated the strongest current offering while Wrike was rated higher for its strategy driven by more frequent product releases.
- **Wrike will highlight its product trial:** Wrike has a full functionality trial that it leverages. Use this against them by giving the prospective customers 5-6 use cases that Wrike cannot accomplish.
- **Wrike will emphasize its lower price:** Wrike is built for the SMB and is priced accordingly.

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Probing questions to ask

Related to OSR/Cross-Department Scale

- How can you use Wrike as an “operational system of record” across multiple teams throughout the enterprise? What case studies does Wrike offer for customer companies with >500 employees using Wrike across multiple teams to centralize and manage enterprise-wide work?
- How can you report on your team’s productivity & resource utilization levels OOTB in Wrike?
- With Wrike, how can you focus on portfolio optimization with automated project hierarchy and cross-project or portfolio task dependencies?
- How important is it to your teams across the enterprise to work in an agile methodology or have the future option to work in Agile (beyond Kanban and Scrum)?

Related to Digital Content Management

- Compared to Workfront, how easy is it to build or configure workflow? How easy is it with Wrike to build approvals and apply them to projects, issues, requests, tasks, and digital content?
- How many OOTB content approval templates does Wrike support today?
- How flexible is Wrike for content management to support:
 - Attaching custom forms
 - Organize content into folders
 - Collaborate directly in document outside of the review process (collaborative work process) [Wrike can only support doc collaboration within its review tool]

Resource Management

- How can you support automated resource leveling or contouring in Wrike? What about resource forecasting?
- How can you create “what-if” scenario models in Wrike to visualize budget allocation scenarios?

Review and Approvals

- With Wrike, how can you proof rich content or interactive assets? Can you approval all requests with Wrike? Can you create skip logic in Wrike?
- How many OOTB approval templates does Wrike support today?

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How to win against them

- **Not built for the modern knowledge worker:** NOW is mainly used by IT and lacks utilization (& case studies) for use by enterprise workers; NOW's UX is IT-centric and not optimized for the knowledge worker, including lacking project templates to get moving quickly and no personal task management capabilities.
- **No Access to Latest NOW Features:** The latest features are not immediately accessible to customers using older versions of NOW; NOW is single-tenant-hosted and requires upgrading to new versions, which requires significant cost and effort (dedicated NOW developer, consultant, etc.).
- **Limited Task Management:** Cannot create tasks without a project in NOW. Limited task/new assignment notifications.
- **No digital content management:** This is one of the biggest weaknesses of NOW PPM, lacking content management, content reviewing or visual approval tools, no proofing; no DAM.
- **Data silos due to limited integration:** Cannot use file-sharing links. Very limited integration options with other non-NOW enterprise apps without requiring significant customized effort with partners.
- **Project and portfolio management for knowledge workers:** Users can only apply a template at project creation, and are unable to see all activities for each project across a single portfolio; there are no cross-project interdependency features.

How to defend against them

- **ServiceNow will say they are a single platform for the “entire enterprise”:** NOW's UX is IT-centric (see above), and is not built to meet the needs of modern work. It has limited individual task management, limited content interactivity, and no digital asset management capability.
- **ServiceNow touts that it's a good fit for structured work:** Structured work only accounts for 10% of enterprise work, which indicates that NOW lags behind in 90% of the modern work needed, including campaigns, product launches, and project planning.
- **ServiceNow highlights their intake/incident response capabilities:** This is misleading because the capabilities are limited to structured work only. Where Workfront wins is its ability to connect to NOW for incidents and structured work with broad enterprise unstructured knowledge work.

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Probing questions to ask

Modern Work Management

- How does ServiceNow support “unstructured work” (which is the bulk of modern work today)?
- How many case studies does ServiceNow have for customers using NOW PPM outside of the IT or DEV organization? Are there customer references available to discuss their successes using NOW PPM as an enterprise-wide MWM platform?
- How important is it to show overall productivity of teams other than IT?
- How much has IT customized ServiceNow? Who will determine the prioritization & timing of an upgrade to gain access to new PPM features? How can other teams (like marketing) get access to new upgraded PPM features if IT is not willing to be responsible for the costs of upgrade?
- Have you looked into the degree of effort is required in each release, especially if your version of ServiceNow has been customized in any way?

Digital Content Management

- How important is it for you to have an integrated digital content management system? One that integrates with work management to manage digital content, assets, files, and rich media?
- Do you need a platform that supports scalable content proofing to insure content (for campaigns, product releases, sales collateral, or website messaging) is compliant with messaging & branding guidelines?
- Do you have a need to manage hundreds to thousands of digital files for various enterprise needs with easy recall of approved assets as well as ability to approve new assets?
- What about the need to manage content and file types of all types, such as video, interactive GIFs, etc.?

Workflow & Approvals

- How important is it to your enterprise to have highly configurable and “smart” workflow to automate the review and approval processes that include internal and external stakeholders?
- Does your company have a need to accommodate the complex and changing nature of the reviewer and approver when they are out of the office, when employees are added or leave, or when new agencies are brought on to assist with work?

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How to win against them

- **Clarizen does not support configurable workflow OOTB:** Clarizen's OOTB solution is not configurable with any sort of logic, and sometimes it doesn't even run. There is also a disconnect between project and task levels.
- **Clarizen lacks basic project financial management capabilities:** Clarizen has very basic financial management, project costing metrics, and analytics. For project costing they only provide cost and revenue metrics, and they do not offer insight into non-labor based financials (for example, a user cannot put in software cost per month).
- **Clarizen has no native digital asset management capabilities:** No integrated DAM functionality.
- **Limited dynamic resource management:** Clarizen lacks the level of dynamic resource management that Workfront supports, including ease of use and update requests and resource leveling.
- **Lack of native integration with business platforms and marketing tech platforms:** Clarizen has no OOTB integration with Dropbox, Box, or Google Docs. Also, some customers have had concerns with Clarizen's security around API. Some have reportedly shut down their integration with Salesforce due to these concerns.

How to defend against them

- **Workfront isn't as configurable as Clarizen:** Clarizen will highlight their ability to configure workstreams and projects. They will also tout their app marketplace with over 108 applications to fill a specific need. However, their OOTB solution is not configurable with any sort of logic, sometimes doesn't run, and has a disconnect between project and task levels.
- **Clarizen is much more easy to use than Workfront:** Clarizen will speak to getting their users to start using the product in just two days. However, Clarizen has fewer capabilities and features; for example, they have non-existent document sharing, no proofing or DAM, no project templates, and very weak resource management.
- **Workfront is behind the industry in keeping up with the latest industry standards for security:** Clarizen will push their ISO 27001 certification to appeal to their EMEA prospects. It is important to note that their customers have voiced concerns over security around API and some have reportedly shut down their integration with Salesforce due to these concerns.

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Probing questions to ask

Portfolio Management/Alignment to Business

- Can you align your projects or portfolios to business goals or strategy with Clarizen OOTB?
- How can you create “what-if” scenario models in Clarizen to visualize budget allocation scenarios?
- With Clarizen, how can you focus on portfolio optimization with automated project hierarchy and cross-project or portfolio task dependencies?

Digital Content Management

- With Clarizen, how can you proof rich content or interactive assets within the platform?
- How flexible is Clarizen for content management to support:
 - Attaching custom forms and Organize content into folders.
 - Collaborate directly in document outside of the review process (collaborative work process). Wrike can only support doc collaboration within its review tool.

Resource Management

- Why can you support automated resource leveling or contouring in Clarizen?
- In Clarizen, how can you forecast resource needs?
- How can Clarizen optimize assigned tasks or projects with the right resource?

Workflow and Approvals

- How many OOTB approval templates does Clarizen support today?
- Compared to Workfront, how easy is it to build or configure workflow? How easy is it with Clarizen to build approvals and apply them top projects, issues, requests, tasks, and digital content?

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How to win against them

- **Not an enterprise-wide MWM or OSR platform:** Average customer is 50 seats with no examples of using Asana across the enterprise, as an enterprise-wide MWM platform or OSR.
- **Limited project portfolio optimization:** Asana lacks decision support that Workfront offers and does not support 'what-if' analysis or investment decision support. It offers limited insights, has no automated portfolio scenario generation or project-scoring/portfolio scorecards, and offers limited dependency analysis.
- **No DAM capabilities:** Asana promotes its file-sharing capabilities with Sharepoint, Dropbox, Google Drive and Box, but it does not offer true DAM functionality or asset management of any kind.
- **Lacks advanced resource and document management capabilities:** Asana has very basic resource management capabilities and requires manual resource search without ability to prioritize requests, assign or manage resource levels, resource contouring, resource scheduling, or resource modeling.
- **No reporting capabilities:** Asana has no in-platform reporting other than dashboards; requires exporting to Google Sheets for modeling of data.
- **Lacks workflow configurability:** Asana lacks the ability to configure workflows, UI and other fields to make Asana usability for any type of workflow.

How to defend against them

- **Flexibility to support multiple tasks & projects:** Asana customers report they use Asana to manage basic tasks for a number of needs and use cases. However, Workfront is more than a task & project management tool. Highlight Workfront's value as a MWM tool and OSR platform.
- **Ease of use with broad-type UI and better to visualized work:** Customers noted that they like the configurability and easy-to-use UI with Asana; Asana reports that it's easy for a team to visualize when work is happening. It is important to note that Asana is limited by the configurability and reporting associated with its UI, whereas Workfront scored the highest in ease of use when tested by administrators and team member testers.
- **Easier to set up and adopt:** Asana touts that anyone can set up Asana and that it's "lighter-weight" than Workfront. However, when put to the test, Workfront was rated higher for ease of use by administrators and team-member users. Asana also lacks several key functionalities (i.e. DAM and third-party integration) that significantly limit its ability to be a full-scope enterprise tool.

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Probing questions to ask

Cross-Enterprise Modern Work Management

- How can Asana manage all the work of a large enterprise in a single platform?
- On average, how big is the average enterprise Asana account? Do they have large enterprise MWM case studies that manage work across multiple teams across the entire enterprise?
- How does Asana support work productivity analysis? What type of report is available within the tool to report on work productivity?
- How does Asana support work in an Agile work methodology?

Digital Content Management

- How does Asana manage digital content approval? What about proofing?
- Does Asana have a true Digital Asset Management capability?

Resource Management

- What type of automated resource management features does Asana natively support?
- How can you create “what-if” scenario models in Asana to visualize different resource & project scenarios?

Workflow and Approvals

- How does Asana support customized workflow, such as reviewing, proofing, approvals for projects, issues, requests, tasks, and digital content?

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Microsoft®
Project

How to win against them

- **Not an enterprise-wide MWM or OSR platform:** Project lacks the ability to be used as a centralized MWM platform for an OSR.
- **No true DAM:** MSFT Project does not support true DAM capabilities, whereas Workfront allows you to create real-time changes to templates and workflow without having to manually “pull through” any changes.
- **Lacks configurable workflow and proofing:** Microsoft Project doesn’t support strong review or proofing capabilities as well as lacking support for configurable or customized workflows, and it does not support configurable workflows with any sort of assigned/built-in logic.
- **No support for repeating task management:** Project does not currently allow for tasks or projects to be replicated, which is an imperative functionality for any agency, nor does it have anything in its roadmap for this feature.
- **Lacks full support for marketing-specific use cases and needs:** Customers report that while Project is good for technical and IT project management, it does not offer the functionality needed to support the specific needs of GTM and marketing teams. Workfront supports the marketer’s needs and use cases directly, with DAM, configurable workflow and asset proofing.

How to defend against them

- **Easier to use and manage:** Microsoft counts on the familiarity aspect of its products, noting that Project has the same “look and feel” as Outlook. However, this viewpoint is limited in that modern customers need the ability to be able to replicate tasks and projects for quicker and easier workflow. Project does not currently have this ability, nor is it on their roadmap. Microsoft is also dependent on the functionality of other applications (Office Planner, Sharepoint, Microsoft “To-Do”), which are separate and non-integrated applications.
- **Deep knowledge and history of project management capabilities:** Microsoft tells prospects that they were the first project management software on the market, launching 29 years ago. They also mention that they had identified gaps in software, pertaining to resource management and have since “filled in the gaps”. However, its mediocre integration capabilities with third party tools limits its scope to companies that solely use Microsoft Suite, lacking OOTB integration with several key marketing platforms.

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Microsoft®
Project

Probing questions to ask

OSR/Platform

- How easy is it to integrate Project with other non-Microsoft platforms?
- How does Project support assignment management and tracking?
- How many case studies & references does MSFT have for Project being used as an OSR?

Digital Content Management

- How does Project manage digital content approval? What about proofing?
- Does Project have a true Digital Asset Management capability? [Sharepoint is not a DAM]
- How does Project support collaborative document management (reviewing, comments, co-working, approvals) in Project (without leaving the app)?

Workflow

- How does Project support customized workflow, such as reviewing, proofing, approvals for projects, issues, requests, tasks, and digital content?
- How can you create repeating workflow to create scale?

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How to win against them

- **Lacks transparency and insights into cross-enterprise work:** Jira lacks ability to provide executive and management insights across all enterprise work, including productivity insights.
- **Offers limited support for digital work processes:** Jira has no DAM and no native support for workflow, reviews, proofing, or approvals. Their tactic is to use a partner application—ConceptShare—for non-native review and approval capabilities. Even with ConceptShare, the app lacks support for non-linear, complex workflows. Jira (with or without ConceptShare added on), also lacks support for specific types of workflows, including inability to support marketing brand compliance use cases reviews & approvals, specific company policies, or industry regulatory governance.
- **“Which Jira are we talking about?”:** Atlassian has over 5 different Jira platforms: Jira Software (for Dev and PM) available as Cloud and Server and Jira Core (for knowledge workers) available as Cloud and Server. Both server options are completely different architectures and codebases than their cloud-based counterparts.
- **Requires partner app functionality to compete with Workfront:** Atlassian leverages their Marketplace to position partner application functionality against Workfront with equivalent capabilities. However, these add-on partner apps (such as Conceptshare for reviews and approvals) are NOT native integrations and require the user to administer, navigate, and use partner apps in a different UI and user experience.

How to defend against them

- **“Agile reporting” functionality:** Jira promotes they support sprint-level reporting. However, Jira actually lacks the ability to provide executive insights across all enterprise work, including business-level productivity. Workfront provides complete visibility into all work across people, teams, and departments including status, roadblocks, capacity, resource availability, and productivity and allows users to customize reports and automate their delivery.
- **Customizable workflows:** Jira states that users can create customizable workflows that “map to any style of work”. However, Jira was built and meant as an Agile application development tool & not progressed to support business use cases. To do the level of workflow customization that Atlassian promotes, extensive custom coding in Jira’ proprietary programming language (JBL=Jira Business language), which requires developer-level support to create & manage.

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Probing questions to ask

Modern Work Management

- Does your enterprise desire (today or in the future) to have visibility into work productivity of individuals, teams, and BUs?
- What is the cost you will have to incur to have a dedicated technical resource for customizations in Atlassian's proprietary language (JBL) to create custom workflows?
- Can you have resource management limited to both projects and portfolios in an automated fashion?
- Does Jira support automated resource management, such as project contouring to insure there is no resource over- or under-utilization?
- How does Jira support analysis and reporting of work productivity across a specific BU as well as the entire enterprise?

Digital Content Management

- How important is it for you to have an integrated digital content management system? One that integrates with work management to manage digital content, assets, files, and rich media?
- Do you need a platform that supports scalable content proofing to insure content (for campaigns, product releases, sales collateral, or website messaging) is compliant with messaging & branding guidelines?
- Do you have a need to manage hundreds to thousands of digital files for various enterprise needs with easy recall of approved assets as well as ability to approve new assets?
- What about the need to manage content and file types of all types, such as video, interactive GIFs, etc.?

Workflow & Approvals

- How important is it to your enterprise to have highly configurable and "smart" workflow to automate the review and approval processes that include internal and external stakeholders?
- Does your company have a need to accommodate the complex and changing nature of the reviewer and approver: when they are out of the office, when employees are added or leave, or when new agencies are brought on to assist with work? How does Jira handle this?

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How to win against them

- **Limited modern work management capabilities:** Smartsheet's Excel-like platform does not support the complex needs of the modern work environment (complex, interdependent tasks, etc.). It lacks features for tracking projects and has limited abilities to prioritize tasks, projects, and resources.
- **Lack of cross-team alignment:** SmartSheet cannot support standardization across multiple teams and GEOs for work initiation, project resourcing, and milestone progression.
- **No portfolio management:** Smartsheet has limited scaleable portfolio management and it cannot model different scenarios or manage complex portfolios of projects.
- **No ability to manage requests at scale:** Lacks request management features, which means there is no formal incoming request feature to manage requests or new projects at scale or any resource management capabilities.
- **No workflow for review & approvals:** Smartsheet has a limited ability to support workflow for reviews, proofing, & approvals. Even with Smartsheet's creation of added custom "workflow" (if you can call it "workflow"), it is extremely limited & lacks support for non-linear, complex workflow processes: no support for advanced multi-person routing, workflow auditing, documenting approvals, or enforcing compliance processes.
- **No productivity reporting or analysis:** No work/work productivity Metrics and KPIs and no way to view work at a consolidated, executive level.

How to defend against them

- **Increased agility of work:** Smartsheet touts that its simple, intuitive interface empowers business users to quickly configure, adapt, and improve their work processes to speed execution. However, the tool only supports the very basics of project and task management and does not support Agile work methods.
- **Real-time reporting visibility and collaboration:** Smartsheet highlights its ability to surface information in real time with dashboards and reports, and the ability to provide context into work execution and status. The reality is SmartSheet cannot report OOTB on work management metrics.
- **Value of web forms:** Smartsheet promotes that clients can use web forms to collect and act on data, and with easy-to-configure rules, the tool can automate repetitive actions. The issue is that there is no support for managing that collected data in workflow. Smartsheet-collected web form data can populate a sheet, but not utilized more broadly without manual user intervention to re-populate that data into other locations or data assets.

BATTLECARD



Probing questions to ask

Modern Work Management

- Does your enterprise desire (today or in the future) to have visibility into work productivity of individuals, teams, and BUs?
- How does SmartSheet support analysis and reporting of work productivity across a specific BU as well as the entire enterprise?
- With Smartsheet, how can I focus on portfolio optimization with automated project hierarchy and cross-project or portfolio task dependencies

Resource management

- How does SmartSheet support automated resource management, for assigned of the right resource without over- or under-utilization of resources?
- Can you forecast resource needs with SmartSheet?

Digital Content Management

- How does SmartSheet support digital content management, such as proofing, content/file reviewing, and approvals?
- With SmartSheet, how can you build or configure workflow? How does SmartSheet handle workflow for approvals and apply them top projects, issues, requests, tasks, and digital content?

BATTLECARD



How to win against them

- **Workflow and approvals:** Planview has limited integrated workflow or approvals capabilities, and no proofing capabilities. Very limited configurable workflow (no logic, multi-step processes, etc.).
- **Lacking calendaring capabilities:** Planview has limited calendaring capabilities beyond assigning tasks or resources by day/time.
- **Digital Asset Management functionality:** Planview has no DAM capabilities.
- **Lacks focus on strong enterprise work management functionality:** Planview focuses on specific use cases, mainly IT PPM. There are a limited number of customer references or case studies to demonstrate enterprise work management use cases.
- **Limited native integrated collaboration:** Planview's collaboration occurs outside Planview Enterprise and requires the deployment, integration, and extra subscription of Planview ProjectPlace.

How to defend against them

- **Ease of use:** Planview claims that prospects and customers find the platform easy to use. Research into the tool shows that it lacks easy-to-use functionality, such as the ability to manage more than 200 projects (lack of enterprise scalability), easy data importing and feeds from 3rd party data sources, and easy-to-use ad hoc reports and dashboards.
- **Manage digital work processes:** Planview touts that users can work in coordination with their IT cohorts. Workfront allows users to manage the lifecycle of digital work from ideation to fulfillment, unlike Planview which has no DAM capabilities and no usable UX outside of IT.
- **Govern compliance workflow:** Planview encourages users to leverage the tool as their governing solution as they review and approve programs. However, Workfront offers deeper compliance functionality around digital work with automated processes via templated workflows, approval management, and real-time collaboration.

BATTLECARD



Probing questions to ask

Modern Work Management

- How does Planview help to achieve broader work management outside of the IT department?
- Can you use Planview to align to portfolios or higher-level company goals or company strategy?
- What are Planview's capabilities to report on work productivity outside of the IT department?
- Do you think it will be important to be able to have visibility into work, projects, and productivity across the entire enterprise someday soon?
- How can you optimize assigned tasks or projects with the right resource through alignment by skillset in Planview?
- How Does Planview support document, project, and task collaboration across the entire enterprise, not just IT?

Digital Content Management

- How can you use Planview to manage digital content, such as content and file proofing, approvals, and reviewing?
- Does Project have a true Digital Asset Management capability?

Workflows & Approvals

- How does Planview support workflow requirements? How easy is it to build or configure workflow? How easy is it with Planview to build approvals and apply them top projects, issues, requests, tasks, and digital content?
- How does Planview support customized workflow, such as reviewing, proofing, approvals for projects, issues, requests, tasks, and digital content?

BATTLECARD



How to win against them

- **Lacks reporting sophistication:** The tool uses a standard SQL interface for reports, which requires significant knowledge of SQL to create reports.
- **Lack of proofing capabilities:** While the workflow is configurable for general marketing approvals, it lacks workflow specific for proofing of content and assets. Customers report struggling with trying to support in-line editing, performing reviews with comments, and making final edits to digital assets.
- **Integration and Extensibility:** Limited modern application and platform integrations.
- **Limited support for modern Agile work management:** Aprimo does offer the ability to do Agile, but they don't have an Agile view and they don't have the automation Workfront offers in the sprint planning tool to automatically select stories based on the team's capacity.
- **Resource management:** Aprimo offers capacity planning, but they don't have advanced resource scheduling abilities like resource contouring or AI-led resource management.

How to defend against them

- **Digital Asset Management (DAM) functionality:** Aprimo highlights its ability to easily manage images, videos, documents, and other assets across different stages of content lifecycles.
- **Marketing productivity:** Aprimo reports that their Marketing Productivity tool supports the project management, workflow, resource, and calendar activities that enable customer experience groups to increase their speed to market. Unlike Workfront, their project planning workflow is difficult to set up and hard to alter. Also, Aprimo's resource calendaring functionality pales in comparison to Workfront; they do not offer drag-and-drop work requests or tasks to individual resources or drag-and-drop resources into a task to automatically make assignments.
- **Centralized marketing platform with integrated campaign management capabilities:** Aprimo states that its Campaign tool allows modern marketers to easily perform deep segmentation on data where it rests across multiple sources, including the Cloud. However, whereas Workfront makes digital campaign management, data, and approvals easy, Aprimo has serious drawbacks with ease-of-use issues. Aprimo also doesn't capture a complete view with iPad dashboard reporting, nor does it maintain visibility and control from anywhere, at any time, and from any device.

BATTLECARD



Probing questions to ask

- Is support an Agile work methodology important/going to be important to your organization?
Are you okay with working the way Aprimo wants you to work?
- How important is it or will it become for your entire enterprise to be unified from a work management standpoint, not just marketing?
- How easy is it to create reporting on marketing work productivity without SQL scripting?
- What are Aprimo's native proofing capabilities? What is Aprimo's capabilities to approve content and files, as well as rich and interactive content?
- How easy is it to integrate Aprimo with other enterprise platforms?
- How does Aprimo support "Smart" resource management to ensure that resources are not under- or over-utilized? How does Aprimo support resource scheduling abilities like resource contouring or AI-led resource management.

Section 4: Who We Sell To

Buying Centers Overview.

MARKETING



Pam
Chief Marketing Officer
VP of Marketing



Olivia
Director of Marketing Operations
Director of Creative Operations

NEW PRODUCT DEVELOPMENT



Michael
Chief Product Officer
SVP of Product



Phil
Director of Product Management

IT ORGANIZATIONAL



Jay
Chief Technology Officer
Chief Information Officer



Denise
Director of IT
Director of PMO

PROFESSIONAL SERVICES



John
SVP of Professional Services



Vanessa
Director of Professional Services

AGENCY



Max
COO
CFO or Partner



Christine
Director of Operations



Pam
Marketing Executive

Centralize Projects in One Solution
Manage Digital Work Processes
Review and Approve Digital Work



Deliver Client-Facing Services
Govern Compliance Workflows



50%
male

50%
female

20+ yrs
experience

43-60
age

Common titles

- Chief Marketing Officer
- SVP/VP Marketing
- SVP/VP Marketing Operations
- SVP/VP Marketing Technology
- SVP/VP Marketing Production

Emotional drivers

- **Threatened/Worried**—C-Suite/CEO/Board does not have a marketing background and struggles to understand the value of Marketing
- **Competitive**—I want my department to appear to have the most efficient and leading edge
- **Creative**—I am a change agent within my organization
- **Ignorant**—I have never used a project/work solution and don't understand how it can help me

Challenges

- Demonstrating the value of the Marketing team**
 - No insights into the true affect Marketing has on revenue
 - Peers don't understand the costs associated with campaigns, brand, etc
 - Outsourced work is difficult to track
- Getting everything done without enough people and resources**
 - Not enough resources to manage current and future workloads
 - Major events (customer events, product launches, user groups, trade shows) disrupt the team for 2+ months
 - Tighter controls on financials and more attention is being paid to her timelines
- Growing the company's revenue with shared ownership of the P&L**
 - Cross-departmental collaboration reveals gaps in strategies and processes
 - No visibility into all of the corresponding parts of projects and initiatives
- Leading the transformation to a digital, customer-centric organization**
 - Creating consistent, connected conversations with customers/prospects in an ever-changing digital world
 - A constantly changing market requires constantly evolving messaging, branding, business models, and value propositions



Pam
Marketing Executive

Centralize Projects in One Solution
Manage Digital Work Processes
Review and Approve Digital Work



Deliver Client-Facing Services
Govern Compliance Workflows



Goals/desired outcomes

- Marketing qualified leads that translate to marketing source bookings
- A reliable revenue attribution model
- Management of their campaign calendar on spec and on budget
- Marketing meets their budget revenue objective
- Regular reporting of marketing activities tied to revenue
- Successful management and defense of the corporate brand
- Uniformity of processes across their departments ensuring efficiency and speed
- Prove the worth of efficiencies across their department/company
- Agility and adaptability to the constantly changing market

What they worry about

- Not being able to prove the value of my team to the CEO and my peers
- Maintaining the brand across all touchpoints
- Staying in lock-step with the business
- Not having enough people to do the work necessary—team burnout
- Keeping all the balls in the air
- Hitting revenue targets

How they shop

- Online research—industry-specific blogs/publications
- Will delegate to one or two trusted champions
- Word of mouth—she has a circle of colleagues she trusts for insights
- Often will pull in a consultant to research a solution despite having done their own research
- Often looks at current technology stack for native integrations

How they choose a vendor

- How will it help the team work faster?
- How can it increase productivity?
- How easy and intuitive is reporting?
- How can we tie work back to revenue?



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Why we win

- Kids II**
- 50% efficiency increase
 - 90% reduction in IT email
 - 80% administrative time savings
 - 70% reduction in marketing project iterations
 - 50% reduction in meeting time
- Cisco**
- Boosted the CRC team’s on-time delivery rate to 99% in just 3 months
 - Saved Cisco 85% in work management investment and 90% in implementation
- BBVA Compass**
- Regained 20+ hours per week to accomplish work
 - Increased team productivity by 3 hours per week
 - Improved project throughput by 50% per day
 - Meeting 100% of publishing deadlines
- Trek Bicycles**
- Increased efficiency—on-time product delivery rate increased from 50% to 80%, generating millions in revenue
 - Greater productivity—team members regained 30% of their time for innovation

Use cases

	FUNCTIONAL BENEFIT	ECONOMIC BENEFIT	PERSONAL BENEFIT
Campaign Management	Launch marketing campaigns faster	Hit your revenue goals and stay a leader in your market	Show the value of your department and lead a high-functioning organization
Creative Production	Visibility into the team’s work and capacity	Increase the number of completed projects executed by your team	Demonstrate your team’s contribution to the success of the enterprise
Marketing Operations	Single source of truth for all marketing work	Reduce the cost of marketing operations	Lead a world-class marketing organization
Review and Approval	Quickly provide feedback on all digital assets	Launch assets that uphold your brand	Maintain a brand reputation of high-quality work
Project Management	Keep important projects moving forward	Let your team focus on their job instead of manual processes	More time for strategy and vision



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1. Not in market

Pre-QSO:

“I know I have a problem.”

Problems Pam faces

- I have no way to show the CEO how much we contribute to the revenue number.
- I am looking to make my team more efficient and productive.
- I need to know who is working on what and when is it due—little visibility into timelines, deliverables, and process.
- My team does not have the ability to manage, coordinate, or be strategic with the current workloads.
- Creating consistent, connected conversations with customers/prospects in an ever-changing digital world.
- There is so much technology that we can buy. I want to know which we should we investigate.

2. Consideration

Pre-QSO/early post-QSO:

“I have started to research ways to solve my problem.”

Potential research areas for Pam

- How can I educate myself on this problem?
- Who else is having this problem?
- Has anyone on the team solved this at other organizations?
- Who do I know and trust who can fix this?
- Is anyone else in the organization using a solution to solve this problem?
- What are the best practices related to this problem?

Problem estimation

- What are our alternatives?
- If I don't address this, am I negatively impacted? What is the fallout of inaction?
- Is this problem the highest on my list right now? Is this the right time to solve this problem?
- Will fixing this problem get in the way of our current performance, specifically performance to our goals?
- Will a solution affect the current year strategic number negatively/positively?
- Is the problem the highest on my list right now?

3. Evaluation

Mid-stage opportunity:

“I know that a project/work solution is the answer, but which one?”

Evaluation questions Pam may ask

- How do I evaluate the differences among all the solutions out there?
- Will the value added be greater than the pain of adopting a new solution?
- Can my team handle this? Are we ready for this?
- Which solution will affect our ability to perform to our current goals?
- Which solution best aligns with my strategic plan? With the strategic plan of my peers?
- What are the deliverables by solution provider?
- What are the internal resources we will need to allocate to this?
- What are the metrics we will use to measure success?
- Does this need to happen this year?
- Do we have the ability to hire someone to help us select and/or implement?
- Is there any way to solve the problem without paying for it?

4. Decision

Late-stage opportunity:

“I have narrowed down my selection to a couple of vendors.”

Pam is down to her short list of providers

- Do I trust Workfront?
- Will Workfront deliver the results we have in mind? Can they actually solve the problem?
- What resources will Workfront bring to effort with regards to implementation/training?
- What experience does Workfront have in this specific area? Do they have industry references?
- Do we have the manpower to execute this?
- Which provider will help me post-implementation should something go wrong?
- Do I need additional C-Suite approval for this? If so, how do I convince them of the need to do this?
- Can we afford the solution? How will we pay for it?
- Has Legal approved the contract?



Olivia
Marketing Champion

Centralize Projects in One Solution
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Deliver Client-Facing Services
Govern Compliance Workflows



40%
male

60%
female

15 yrs
experience

37-46
age

Common titles

- Director, Marketing Operations/Technology
- Director, Marketing Campaigns
- Director, Marketing Project Management
- Director, Creative Operations/Services

Emotional drivers

- **Worried**—Peers and leadership in other departments do not understand the value of marketing
- **Personal Risk**—I don't want anyone to think the problems we are having are my fault
- **Competitive**—I want my organization to win—be the best
- **Impatient**—It's obvious how we solve this problem—how can I convince others that this is what we need?

Challenges

- 1. Velocity of work**
 - Campaign planning is tough and the sponsors do not have a view of all the corresponding parts of a project
 - We are asked to do more work, faster to compete
- 2. Resource constraints**
 - Competing priorities within the department with limited resources
 - Some work is outsourced to agencies and is difficult to track
 - Tighter controls on financials and more attention is being paid to timelines
- 3. Tight deadlines**
 - No clarity around project stack ranking or importance
 - Changing processes is difficult within their current culture—"We've always done it this way."
- 4. Cross-departmental work**
 - Project counterparts outside of marketing do not understand the process
 - Internal customers are asking for more insight into the processes and timelines



Olivia
Marketing Champion

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Goals/desired outcomes

- Projects are completed on time and on budget
- Leadership is happy
- Uniformity of processes across the department for better efficiencies
- Established (and documented) SLAs by project with agreement by each marketing lead
- Real-time reporting on all initiatives to identify roadblocks

What they worry about

- Making sure that management understands the value of their organization—requires accurate reporting to fully understand the value of what they do on a regular basis
- They fixate on problems both within and outside of their organization—they are fixers and doers
- Keeping all the balls in the air

How they shop

- Online research—industry-specific blogs/publications
- Peer groups—counterparts at other companies or departments
- Word of mouth—I have a circle of colleagues I trust for insights
- Often will still pull in a consultant to research a solution despite having done their own research
- Will test hands-on only after they've received some form of recommendation (consultant/peer/etc.).
- Would prefer a demo only after they've played with the product themselves

How they choose a vendor

- How can they customize the solution to fit their needs?
- What ROI will we expect from implementing the solution?
- How have other marketers used the solution?



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Marketing Champion

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Why we win

- Cisco
- Boosted the CRC team’s on-time delivery rate to 99% in just 3 months.
 - Saved Cisco 85% in work management investment and 90% in implementation.

- ATB Financial
- 30% increase in productivity with 5× the information to track.
 - Reduced the cost to manage a job by 60%.

- Advanced Auto Parts
- Increased team productivity by 67%.
 - Improved project management processes by approximately 75%.

- Cars.com
- Revisions and approvals are now 25% more efficient.

- Ameritas
- Increased collaboration satisfaction by 50%.
 - Reduced review cycle time and cost 40%.

Use cases

	FUNCTIONAL BENEFIT	ECONOMIC BENEFIT	PERSONAL BENEFIT
Campaign Management	Deliver the right campaigns on time	Standardize your processes and increase the team’s productivity	Cross-team collaboration isn’t a headache anymore
Creative Production	Capture, route, and deliver creative assets on time	Standardize processes so your team can gain back time	Better collaboration across teams eliminating undesired rework
Marketing Operations	Streamline processes for smoother operations	Eliminate manual processes so your team can handle more work	Work on the “real work” instead of admin work
Review and Approval	Faster review cycles	Launch work that is brand consistent and compliant	Create a consistent brand experience
Project Management	Centralize work for easier project management	Consolidate other project management tools	Lead the digital transformation change for marketing



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1. Not in market

Pre-QSO:

“I know I have a problem.”

Problems Olivia faces

- I am looking to make my job easier
- I need to know who is working on what and when is it due—little visibility into project timelines, deliverables, and process.
- I don't have time to manage, coordinate, and be strategic in my current role.
- My team needs to be more productive with their time; fewer review cycles, less rework.
- Hard to keep up with the demands and requests that come in multiple forms (emails, phone calls, IMs).
- I am using emails and spreadsheets to manage work which only creates more silos; I've used Microsoft Project and it doesn't solve my problem.
- We're lacking the insights needed to make accurate time estimates, optimize my team's time, and prove the value of the work we do.
- Because we use different tools, it's hard to easily gather data for reporting purposes.
- It's hard to show how much (and what kind of) work we actually do because information and data lives in different systems.

2. Consideration

Pre-QSO/early post-QSO:

“I have started to research ways to solve my problem.”

Potential research areas for Olivia

- Who else is having this problem?
- What are my peers doing about it?
- What are the best practices related to this problem?
- What does this issue mean for me and my team?

Problem estimation

- If I address this quickly, do I benefit personally?
- If I don't address this, am I negatively impacted? What is the fallout of inaction?
- Is the problem the highest on my list right now?

Problem validation

- How do I show my boss that we need a solution?
- Is anyone else in the organization using a solution to solve this problem?

3. Evaluation

Mid-stage opportunity:

“I know that a work solution is the answer, but which one?”

Evaluation questions Olivia may ask

- Which features do we absolutely need?
- Is this the right time to solve this problem? Are we ready for this?
- Does this solution align with my strategic plan? With the strategic plan of my peers?
- What are the internal resources we will need to allocate to this?
- What results do we expect? What are the metrics we will use to measure success?
- When will this begin? Are the goals attainable?
- Is there any way to solve the problem without paying for it?

4. Decision

Late-stage opportunity:

“I have narrowed down my selection to a couple of vendors.”

Olivia is down to her short list of providers

- Do I trust Workfront?
- Can we afford the solution? How will we pay for it?
- Will Workfront deliver the results we have in mind? Will they actually solve the problem?
- Which vendor will make me look good?
- Are we ready for this? Is my team equipped to accomplish this successfully?
- What resources will Workfront bring to the effort regarding implementation/training?
- What experience does Workfront have in this specific area? Do they have industry references?
- What are the payment terms? Has my C-Suite sponsor reviewed them?
- Has Legal approved the contract?
- Do we have the manpower to execute this?

How We Help Marketing Departments.

The 5 Jobs are the ways customers use Workfront help them accomplish their own work. The best part about using the 5 Jobs to better understand your client's use case? When you've learned the workflow for one use case, you've learned them all because each workflow will operate in a similar way.

Below, we're giving you a granular view of how marketers use Workfront.



Job 1: Centralize Work in One Solution.

The key value for Centralizing Work is visibility into all work. The way you measure the impact of this job is by increasing the throughput of the department.

This job is all about bringing work that exists in spreadsheets, meeting notes, and emails into one platform so the marketing department has visibility into what's going on. This work looks and feels a lot like project management which means if you understand one workflow, you'll understand them all. Below are examples of this work within marketing.

- Ad hoc requests
- Advertising project management
- Campaign brief creation
- Campaign planning
- Content calendars
- Content requests
- Creative project management
- Creative work intake
- Demand management
- Email list management
- Integrated marketing programs
- [Marketing operations](#)
- Marketing resource management
- [Portfolio/program management](#)
- [Project management](#)
- Resource management
- Social media requests
- Sports marketing
- Strategic communications

Job 2: Digitize Work Processes.

The key value for Digitizing Work Processes is speed and predictability. The way you'd measure the impact of this job is a decrease in time to market.

Every marketing team has workflows that are repeatable. This job is about changing those repeatable processes from manual and ad hoc to automated and digitized within Workfront. This means you're taking a manual process and building project templates within Workfront so the handoffs between teams goes smoothly.

- Advertising campaigns
- Agile work management
- [Campaign management](#)
- Collaboration across teams
- Content management
- [Content production](#)
- Corporate communication work management
- Creative work management
- Customer communication management
- Design process
- Digital and print campaigns
- Digital content production
- Digital marketing campaigns
- Editorial work
- Email marketing projects
- Event management
- Franchise onboarding
- Marketing audience research
- Marketing operations
- Media management
- Merchandising operations
- [New hire onboarding](#)
- Print production
- Public relations
- Retail design management
- Retail display creation
- Store openings
- Surveys
- Trade shows
- Video production
- Voice of customer research

How We Help Marketing Departments.

The 5 Jobs are the ways customers use Workfront help them accomplish their own work. The best part about using the 5 Jobs to better understand your client's use case? When you've learned the workflow for one use case, you've learned them all because each workflow will operate in a similar way.

Below, we're giving you a granular view of how marketers use Workfront.



Job 3: Review and Approve Digital Work.

The key value for Review and Approve Digital Work is increasing the quality of market-facing work. The way you'd measure the impact of this job is cutting down the costs of mistakes.

All marketing work starts in a digital format. Before it's distributed, printed, or launched, each artifact goes through extensive review cycles. This job is all about automating that process within Workfront so the right people approve the content before it is launched. This job also helps centralize feedback so people don't have to chase down comments or approvals.

- [Approve digital content](#)
- Content approvals
- Content proofreading
- Creative work approvals
- Digital proofing
- Video proofing

Job 5: Deliver Client-Facing Services.

The key value for Deliver Client-Facing Services is efficiency. The way you'd measure the impact of this job is an improvement in profit margins.

When margins matter, or time is tracked for billing purposes, creative teams need a way to help maximize their resources (people and budgets). This job is all about standardizing processes and tracking project budgets within Workfront so creative work can be delivered on time and within scope.

- [Creative services](#)
- External agency collaboration
- Graphic design
- Time tracking
- Web services delivery
- Website management

Job 4: Govern Compliance Workflows.

The key value for Govern Compliance Workflows is control over market-facing materials. The way you'd measure the impact of this job is adherence to compliance processes.

For this job, we're taking all of the manual processes around brand regulations, corporate policies, security, and privacy compliance and automating them within Workfront. Doing so provides an audit trail and ensures all marketing collateral is compliant with every type of legal regulation.

- Brand management
- [Compliance approvals](#)
- Global design management



Jay
IT Executive

Centralize Projects in One Solution
Manage Digital Work Processes
Review and Approve Digital Work



Deliver Client-Facing Services
Govern Compliance Workflows



65%
male

35%
female

25 yrs
experience

43-60
age

Common titles

- Chief Information/Technology Officer
- SVP/VP Information Technology
- SVP/VP PMO
- SVP/VP Data and Analytics

Emotional drivers

- **Threatened**—Jay often has to say “no” on requests and may feel threatened by other members of the C-Suite
- **Competitive**—I want my organization to win—be the best
- **Skeptical**—Who is Workfront?
- **Suspicious**—Unsure how a new software could actually help their business and will not cause unnecessary disruptions

Challenges

- 1. Enabling the business to operate faster**
 - Ensuring that their organization is positioned to adapt/change at the pace that their business and technology is changing
 - The organization has done things in a very specific way
 - The company is required to do more with less and IT needs to lead the way in automating manual processes.
- 2. Changing the perception of his department**
 - Shifting the thinking of his team from technology solutions to customer outcomes
 - Being perceived as a roadblock to other departments
 - Being both a people leader and a technology leader
 - His internal customers are asking for more insight into the processes and timelines
- 3. Justifying the costs associated with his department**
 - C-suite counterparts do not understand our processes or the “why” behind them
 - Knowing the true costs of work
- 4. One view of all the work happening within his department**
 - Not having one system that allows us to track and prioritize projects
 - Tighter controls on financials and more attention is being paid to
 - Acquiring the skills necessary for successful digital transformations to his timelines
 - Resource conflict and fire-drills associated with their current process/system



Jay
IT Executive

Centralize Projects in One Solution
Manage Digital Work Processes
Review and Approve Digital Work



Deliver Client-Facing Services
Govern Compliance Workflows



Goals/desired outcomes

- Deliver projects on time, on spec, and on budget
- Teams are working faster and smarter
- Standardization of processes
- Visibility to projects and processes for the team and the C-Suite team
- Real-time project prioritization

What they worry about

- The rapid pace at which technology is changing
- Maintaining a state of the art organization and the costs associated with BAU
- They fixate on problems both within and outside of their organization—they are fixers and doers.
- Keeping all the balls in the air

How they shop

- Forrester and Gartner (Magic Quadrant) is very important to them and is generally the first place they look
- They will often poll key contacts within their organization for a short list of options
- Word of mouth—via peers or online forums—positive and negative feedback noted
- Online research—industry-specific blogs/publications
- Conferences—industry-specific—they send a trusted employee to conferences for the sole purpose of shopping vendors
- Will NOT pull in other members of the C-Suite for decisions

How they choose a vendor

- How will we be supported and how does the platform integrate with our current tools?
- How customizable is the solution?
- How will this impact our current work?



Jay
IT Executive

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Why we win

- GL Education**
- Increased project management productivity by 80%.
 - Reduced the time it took to create the monthly reports from 48 hours to two.
 - Faster project resource comparison.
- Members 1st Credit Union**
- 29% increase in completed projects
 - Greater awareness and accountability
 - Ability to prioritize and align projects against business objectives
- Dean Health**
- Improved communication and collaboration
 - Improved visibility for better resource management and work-life balance
 - Quality of work improved, fostered a higher level of trust between teams
- Dignity Health**
- Eliminated 38 spreadsheets required for monthly reporting
 - Gained an estimated 20-25% in project management time savings
 - Increased group productivity by 100 hours a day
 - Improved project visibility and data accuracy
 - Replaced five disconnected applications

Use cases

	FUNCTIONAL BENEFIT	ECONOMIC BENEFIT	PERSONAL BENEFIT
IT PMO	Centralized place for all work: projects, programs, and portfolios	Consolidate project management tools to save on costs	Lead the digital transformation within your company
Vendor Onboarding	Transparency into all work managed by the IT organization	Streamline onboarding processes for consistent experiences	Support your peers' objectives and be seen as a team player
Post-Merger Integration	Stay connected and aware of all the merger activities without sitting in meetings	Spend less time supporting two companies with duplicate systems	Be the strategic leader of large mergers
Project Management	Build the right process to deliver projects on time	Automate manual processes for more productivity	Drive company initiatives with ease



Jay
IT Executive

Centralize Projects in One Solution
Manage Digital Work Processes
Review and Approve Digital Work



Deliver Client-Facing Services
Govern Compliance Workflows



1. Not in market

Pre-QSO:

“I know I have a problem.”

Problems Jay faces

- I am frustrated with the chaos and fire-drills associated with our current project work
- I need to know who is working on what and when it is due—little visibility into project timelines, deliverables, and process
- We have too many different systems tracking different aspects of the business
- Our current system/process/tool is way too cumbersome for the team and it doesn't solve our problem
- It is too hard to justify my current timelines/processes to my C-Suite peers
- Our current process/system creates silos and we need to be more productive
- We're lacking the insights needed to make accurate time estimates
- Because we use different tools, it's hard to gather data for reporting purposes

2. Consideration

Pre-QSO/early post-QSO:

“I have started to research ways to solve my problem.”

Potential research areas for Jay

- Who else is having this problem? What are my peers doing about it?
- Has anyone in the organization solved this problem at previous organizations?
- What does Gartner/Forrester say is the best option?
- What are the best practices related to this problem?
- What forums or conferences can we attend to get educated on the solution?

Problem estimation

- What does this issue mean for me and my team?
- If I don't address this, am I negatively impacted? My team? My organization?
- Will fixing this problem get in the way of our current performance, specifically performance to our goals?
- Will a solution affect the current year strategic number; negatively/positively?
- Is the problem the highest on my list right now?

3. Evaluation

Mid-stage opportunity:

“I know that a work solution is the answer, but which one?”

Evaluation questions Jay may ask

- Are the program technical specifications and software that integrates with the solution clearly outlined?
- What are the essential functions we need from a solution? How do I value/rank these functions?
- Is there a vendor that specializes in IT/PMO?
- Is this the right time to solve this problem? Are we ready for this?
- Will a solution affect our ability to perform to our current goals?
- Does this solution align with my strategic plan?
- What internal resources will need to be allocated to this?
- What are the metrics we will use to measure success? Are the goals attainable?
- Do I need to add staff to solve the problem? If so, where do I find them? How do I know they're the right resource?
- Is there any way to solve the problem without paying for it?

4. Decision

Late-stage opportunity:

“I have narrowed down my selection to a couple of vendors.”

Jay is down to his short list of providers

- Which vendor meets all the essential functions?
- Can we afford the solution? How will we pay for it?
- Do I trust Workfront? Will Workfront deliver the results we have in mind and actually solve the problem?
- Which vendor will work best with the team?
- How was the quality of the demo?
- Do they have the specialization/experience in IT/PMO? Do they have industry references?
- Do they understand our business? Does anyone internally know them?
- Are we ready for this? Is this the right solution?
- What resources will Workfront bring to the effort regarding implementation/training?
- Is my team equipped to accomplish this successfully?
- Has Legal approved the contract?



Denise
IT Champion

Centralize Projects in One Solution
Manage Digital Work Processes
Review and Approve Digital Work



Deliver Client-Facing Services
Govern Compliance Workflows



60%
male

40%
female

10-15 yrs
experience

35-48
age

Common titles

- Director, Project/Program Management
- Director, Information Technology
- Director, IT Operations

Emotional drivers

- **Worried**—I realize we need to fix our processes but can't stop current work in the pipeline
- **Personal risk**—I don't want anyone to think the problems we are having are my fault
- **Competitive**—I want my organization to win—be the best
- **Ignorant**—Isn't aware of all the options on the market or that they will work with her business

Challenges

- 1. Visibility into all of the work**
 - Not having one system that allows us to track and prioritize projects
 - Tighter controls on financials and more attention is being paid to her timelines
 - Can't forecast work accurately because of limited data
- 2. Going faster without more people**
 - Having to do more within the organization with less
 - Adapting fast enough to keep up with the speed of change within the business
 - Potential regulatory compliance challenges within their industry
- 3. Perception of being a roadblock instead of a partner to other departments**
 - They do things a very specific way here
 - Project counterparts outside of IT/PMO do not understand the processes
 - Her internal customers are asking for more insight into the processes and timelines
- 4. Being a people and technology leader**
 - A full project/work software requires established infrastructure and trained personnel to implement
 - Changing the way people work is hard and many resist it



Denise
IT Champion

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Review and Approve Digital Work



Deliver Client-Facing Services
Govern Compliance Workflows



Goals/desired outcomes

- Projects are delivered on time, on spec, and on budget
- Internal customers are happy with the team
- Standardized processes for more efficiency
- Provide real-time reporting on the team's contribution
- Accountability for established SLAs

What they worry about

- Production issues—making sure that the process/project is always moving forward
- Not having complete control or a handle on all the projects they have in a given timeframe
- Keeping all the balls in the air
- Not having enough time for everything—not being as efficient as they should be

How they shop

- Forrester and Gartner (Magic Quadrant) is very important to them and is generally the first place they look
- Peers are a close second—they will often call peers at other organizations or internally to ask who they use
- Word of mouth—via peers or online forums—positive and negative feedback noted
- Online research—industry-specific blogs/publications
- Conferences—industry-specific—they may attend a conference for the sole purpose of shopping vendors
- Price is the last part of the discussion

How they choose a vendor

- How will the vendor manage multiple projects and portfolios?
- How customizable is the solution?
- Will the platform integrate with our current solutions?



Denise
IT Champion

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Why we win

Xchanging

- Cut project set-up time from 24 hours to seconds
- Increased visibility into projects and capacity
- The work management solution gives the business greater visibility and control over portfolios, programs, projects, and resources
- Established a proactive, mature PMO function

Members 1st Credit Union

- 29% increase in completed projects
- Greater awareness and accountability
- Ability to prioritize and align projects against business objectives

Dean Health

- Improved communication and collaboration
- Improved visibility for better resource management and work-life balance
- Quality of work improved, fostered a higher level of trust between teams

Dignity Health

- Eliminated 38 spreadsheets required for monthly reporting
- Gained an estimated 20-25% in project management time savings
- Increased group productivity by 100 hours a day
- Improved project visibility and data accuracy
- Replaced five disconnected applications

Use cases

	FUNCTIONAL BENEFIT	ECONOMIC BENEFIT	PERSONAL BENEFIT
IT PMO	Complete transparency into all the work—and its status—that your teams manage	Standardize processes so your team can manage more work	Be a leader who delivers projects on time and on budget
Vendor Onboarding	Centralize all vendor onboarding processes and collaboration	Streamline onboarding processes for consistent experiences	Support the company by onboarding their vendors quickly
Post-Merger Integration	Templatize merger work so nothing is forgotten	Save time on updates and status meetings by automating those reports	Lead cross-functional groups toward a single goal
Project Management	Build predictable timelines and processes for new projects	Kick off work in seconds instead of days	Manage a lot of work without sacrificing weekends



Denise
IT Champion

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Govern Compliance Workflows



1. Not in market

Pre-QSO:

“I know I have a problem.”

Problems Denise faces

- I am looking to make my job easier
- I need to know who is working on what and when is it due—little visibility into project timelines, deliverables, and process
- We have too many different systems tracking different aspects of the business
- I don't have time to manage, coordinate, and be strategic in my current role
- Hard to keep up with the demands and requests that come in multiple forms (emails, phone calls, IMs)
- I am using emails and spreadsheets to manage work, which only creates more silos and takes time to set up and manage
- We're lacking the insights needed to make accurate time estimates, optimize my team's time, and prove the value of the work we do
- Because we use different tools, it's hard to easily gather data for reporting purposes

2. Consideration

Pre-QSO/early post-QSO:

“I have started to research ways to solve my problem.”

Potential research areas for Denise

- Who else is having this problem?
- What are my peers doing about it?
- What does Gartner/Forrester say is the best option?
- What are the best practices related to this problem?
- What forums or conferences can I attend to get educated on the solution?

Problem estimation

- If I don't address this, am I negatively impacted? What is the fallout of inaction?
- Who do I know who can help me understand the scope of my problem?
- Is anyone else in the organization using a solution to solve this problem?
- What does this issue mean for me and my team?

Problem validation

- How do I show my boss that we need a solution?

3. Evaluation

Mid-stage opportunity:

“I know that a work solution is the answer, but which one?”

Evaluation questions Denise may ask

- Are the program technical specifications and software that integrates with the solution clearly outlined?
- What are the essential functions we need from a solution? How do I value/rank these functions?
- Is there a vendor that specializes in IT/PMO?
- Is this the right time to solve this problem? Are we ready for this?
- Will a solution affect our ability to perform to our current goals?
- Does this solution align with my strategic plan?
- What internal resources will need to be allocated to this?
- What are the metrics we will use to measure success? Are the goals attainable?
- Do I need to add staff to solve the problem? If so, where do I find them? How do I know they're the right resource?
- Do we have the manpower to execute this?
- Is there any way to solve the problem without paying for it?

4. Decision

Late-stage opportunity:

“I have narrowed down my selection to a couple of vendors.”

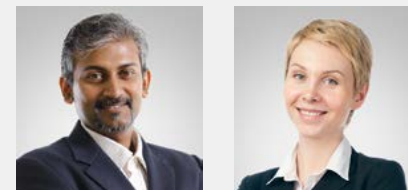
Denise is down to her short list of providers

- Which vendor meets all the essential functions?
- Can we afford the solution? How will we pay for it?
- Do I trust Workfront? Will Workfront deliver the results we have in mind? Will they actually solve the problem?
- Which vendor will work best with the team?
- Do they have the specialization/experience in IT/PMO?
- Do they have industry references?
- Do they understand our business? Does anyone internally know them?
- Are we ready for this? Is this the right solution?
- What resources will Workfront bring to the effort regarding implementation/training?
- Is my team equipped to accomplish this successfully?
- Has Legal approved the contract?
- Do I need additional C-Suite approval for this? If so, how do I convince them of the need to do this?
- Do we have the manpower to execute this?

How We Help IT Departments.

The 5 Jobs are the ways customers use Workfront help them accomplish their own work. The best part about using the 5 Jobs to better understand your client's use case? When you've learned the workflow for one use case, you've learned them all because each workflow will operate in a similar way.

Below, we're giving you a granular view of how IT departments use Workfront.



Job 1: Centralize Work in One Solution.

The key value for Centralizing Work is visibility into all work. The way you measure the impact of this job is by increasing the throughput of the department.

This job is all about bringing work that exists in spreadsheets, meeting notes, and emails into one platform so the IT department has visibility into what's going on. This work looks and feels a lot like project management, which means if you understand one workflow, you'll understand them all. Below are examples of this work within IT.

- Ad hoc requests
- Business case creation
- Data change management projects
- Data management
- Demand management
- Department operations
- Enterprise project management
- Executive reporting on projects
- Forecast available resources
- Incoming work requests
- IT operations
- [Portfolio management](#)
- [Post merger integration](#)
- Project dashboards and reporting
- [Project management](#)
- Quarterly OKR reports
- Transforming system infrastructure
- Work budget and cost management
- Work management reporting
- Workload analysis and forecasting

Job 2: Digitize Work Processes.

The key value for Digitizing Work Processes is speed and predictability. The way you'd measure the impact of this job is a decrease in time to market.

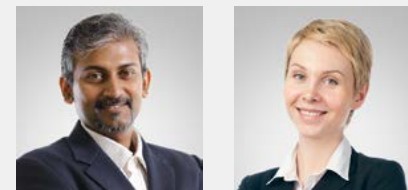
Every IT department has workflows that are repeatable. This job is about changing those repeatable processes from manual and ad hoc to automated and digitized within Workfront. This means you're taking a manual process and building project templates within Workfront so the handoffs between teams goes smoothly.

- Agile work management
- Change management enablement
- Coordinate work in IT department
- IT support service management
- Kanban process
- [New hire onboarding](#)
- Platform migration
- Policy management
- Project cost management
- Quality assurance
- Remote collaboration
- Transition services
- [Vendor onboarding](#)
- Work routing

How We Help IT Departments.

The 5 Jobs are the ways customers use Workfront help them accomplish their own work. The best part about using the 5 Jobs to better understand your client's use case? When you've learned the workflow for one use case, you've learned them all because each workflow will operate in a similar way.

Below, we're giving you a granular view of how IT departments use Workfront.



Job 3: Review and Approve Digital Work.

The key value for Review and Approve Digital Work is increasing the quality of market-facing work. The way you'd measure the impact of this job is cutting down the costs of mistakes.

IT departments generate digital content throughout all of their projects and processes that needs to be reviewed and approved by others. This job is all about automating that process within Workfront so the right people give their feedback before something is finalized.

- [Digital content approvals](#)
- Digital work approvals

Job 5: Deliver Client-Facing Services.

The key value for Deliver Client-Facing Services is efficiency. The way you'd measure the impact of this job is an improvement in profit margins.

When margins matter, or time is tracked for billing purposes, IT departments need a way to help maximize their resources (people and budgets). This job is all about standardizing processes and tracking project budgets within Workfront so their work can be delivered on time and within scope.

- Time tracking
- Web management

Job 4: Govern Compliance Workflows.

The key value for Govern Compliance Workflows is control over market-facing materials. The way you'd measure the impact of this job is adherence to compliance processes.

For this job, we're taking all of the manual processes around regulations, corporate policies, and security, and privacy compliance and automating them within Workfront. This provides an audit trail and ensures the company is always adhering to their policies.

- Cyber security projects
- Global security projects
- Internal compliance workflows
- Privacy projects
- Risk assessments
- Risk operations



Michael
New Product Development Executive

Centralize Projects in One Solution
Manage Digital Work Processes
Review and Approve Digital Work



Deliver Client-Facing Services
Govern Compliance Workflows



85%
male

15%
female

20+ yrs
experience

45-55
age

Common titles

- Chief Product/Technology/Innovation Officer
- SVP/VP Product Management
- SVP/VP Product Operations
- SVP/VP Product Development
- SVP/VP Research/Innovation

Emotional drivers

- **Worried**—Peers/CEO/Board does not understand why our process takes so long
- **Personal risk**—I don't want anyone to think the problems we are having are my fault
- **Competitive**—I want to provide the best products in the industry
- **Threatened**—I need to figure this out before a peer or the CEO does
- **Impatient**—It's obvious how we solve this problem—how can I convince others that this is what we need?

Challenges

- 1. Products take too long to build or launch**
 - Products and customers evolve faster than we can adjust our strategy
 - Complex processes prevent agility and speed
- 2. Focusing on the future while delivering products for the present**
 - The minutia of day-to-day activities doesn't allow for strategic or forward thinking
 - The workload is burning out people
- 3. No clarity on if the team is working on the most important items**
 - It's impossible to know everything that the product team is working on
 - No visibility into the pipeline and priority of projects
 - Competing priorities with limited resources
- 4. Roadmap alignment across the business**
 - Executive team alignment and support of the product(s) roadmap
 - Staying connected to a constantly evolving customer



Michael
New Product Development Executive

Centralize Projects in One Solution
Manage Digital Work Processes
Review and Approve Digital Work



Deliver Client-Facing Services
Govern Compliance Workflows



Goals/desired outcomes

- Launch products faster than ever
- Org and products are leading the industry
- Products hit revenue goals and operational budget
- Increased accountability for SLAs and deadlines
- Decreased employee turnover

What they worry about

- No stopping the roadmap—ensure that the team is focused and driving toward the plan
- Making sure we are building a product people want to buy—timeliness of the product
- Not having complete control or a handle on all the projects they have in a given timeframe

How they shop

- Note: Michael may not actually shop or research—he often is pulled into the buying process by his subordinates or peers
- Online research—directed by peers or subordinates
- Insights from counterparts in IT or at another company
- Word of mouth—I have a circle of colleagues he will use to verify findings
- Will be sensitive to their specific industry and role in their search—use cases or whitepapers specific to product development will have more impact with them

How they choose a vendor

- How will this integrate with our current systems?
- How much customization can we do to make it work for our needs?
- How will this impact all of our current work?
- How intuitive are the reports and dashboards?



Michael
New Product Development Executive

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Why we win

- Trek Bicycles**
- Reclaimed 30% of their time for innovation
 - Increased ability to hit deadlines from 50% to 80% of the time.
- Citrix**
- Reduced director’s email by 35% and the time spent in meetings by 50%.
- Kids II**
- Increased their workflow and project efficiencies by 50% and reduced meetings by 50%.

Use cases

	FUNCTIONAL BENEFIT	ECONOMIC BENEFIT	PERSONAL BENEFIT
Product Launch	Complete transparency into all work relating to product launches	Grow the company’s revenue with new products	Lead a product org with exceptional product introductions
Stage-Gate Automation	Faster decision-making at each product gate	Increase the team’s throughput	Build a strong pipeline of innovative products
Portfolio Management	Transparency into product investment areas	Ensure human capital and mind share investments are in the right product areas	Confidence in your product investment strategy
Supply Chain Management	Track and visualize all the work relating to sourcing and fulfilling new products	Eliminate costs incurred by late or rushed orders	Build a culture of accountability for SLAs, collaboration, and responsibility
Market Research	Increase the effectiveness of market research with standard processes	Build products that truly solve market needs	Confidence in the research your team conducts



Michael
New Product Development Executive

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1. Not in market

Pre-QSO:

“I know I have a problem.”

Problems Michael faces

- I am looking to make my team more efficient and productive
- I am frustrated that we can't get products to market faster
- I need to know who is working on what and when it is due—little visibility into project timelines, deliverables and process
- We have too many different systems tracking different aspects of the business
- I don't have time to manage, coordinate, and be strategic in my current role
- No one understands the complexity of our processes; current processes are too complex
- The team is using emails and spreadsheets to manage work, which only creates more silos
- We're lacking the insights needed to make accurate time estimates, optimize my team's time, and prove the value of the work we do
- Roadblocks on projects are not easily identified

2. Consideration

Pre-QSO/early post-QSO:

“I have started to research ways to solve my problem.”

Potential research areas for Michael

- Who else is having this problem?
- What are my peers doing about it?
- How can I educate myself on this problem?
- Is anyone else in the organization using a solution to solve this problem?
- What whitepapers can I consume to get educated on the solutions?

Problem estimation

- Is this a product development issue only or are other groups/orgs having this problem?
- What does this issue mean for me and my team?
- If I don't address this, am I negatively impacted? Is my team?
- Will fixing this problem get in the way of our current performance, specifically performance to our goals?
- Is the problem the highest on my list right now?

3. Evaluation

Mid-stage opportunity:

“I know that a work solution is the answer, but which one?”

Evaluation questions Michael may ask

- Who can I task to build a business case to justify a purchase, either in my org or another group?
- What are the essential functions we need from a solution?
- How do I value/rank these functions?
- Must we adapt to the software or vice versa?
- Is this the right time to solve this problem? Are we ready for this?
- Does this solution align with my strategic plan and that of my peers?
- What are the metrics we will use to measure success? Are the goals attainable?
- Is there any way to solve the problem without paying for it?
- Does this vendor specialize/ have experience in new product development?

4. Decision

Late-stage opportunity:

“I have narrowed down my selection to a couple of vendors.”

Michael is down to his short list of providers

- Which vendor meets all my needs the best?
- Can we afford the solution? How will we pay for it?
- Will Workfront deliver the results we have in mind? Will they actually solve the problem?
- Do they have industry references? Does anyone internally know them?
- Do they understand our business?
- What resources will Workfront bring to the effort regarding implementation/training?
- Which provider will help me post-implementation should something go wrong?
- Do I need additional C-Suite approval for this? If so, how do I convince them of the need to do this?
- Do we have the manpower to execute this?



Phil
New Product Development Champion

Centralize Projects in One Solution
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Deliver Client-Facing Services
Govern Compliance Workflows



80%
male

20%
female

15 yrs
experience

33-46
age

Common titles

- Director, Product Management
- Director, Product Innovation
- Director, Product Operations
- Director, Project Management

Emotional drivers

- **Worried**—Speed to market requirements change faster than I can produce the product
- **Personal risk**—I don't want anyone to think the problems we are having are my fault
- **Threatened**—Acknowledging that I need help with my current work may expose my team to additional scrutiny
- **Impatient**—It's obvious how we solve this problem—how can I convince others that this is what we need?

Challenges

- 1. Products take too long to build or launch**
 - Building products that consumers will buy
 - Worried current workload is burning his people out
 - It takes way too long to set up/launch a new project/product
- 2. Limited visibility into what teams are working on**
 - Competing priorities within the department
 - No clarity around project stack ranking
- 3. Staying connected to an evolving customer**
 - Products and customers are evolving at a very rapid pace faster than we are able to adapt
 - Staying up to speed on consumer/customer needs
 - Potential regulatory compliance challenges within their industry
- 4. Changing processes with products in development**
 - Changing processes is difficult within my current culture
 - We need the ability to run fully “Agile” and we can't right now



Phil

New Product Development Champion

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Deliver Client-Facing Services
Govern Compliance Workflows



Goals/desired outcomes

- Launch products faster than ever
- Products released are successful and hit revenue goals
- Standardize processes to be more efficient
- Move to automation—less manual touches on the process
- Real-time project prioritization

What they worry about

- Production issues—making sure that the process/projects are always moving forward
- Making sure we are building a product people want to buy—timeliness of the product
- Not having complete control or a handle on all the projects they have in a given timeframe
- I can't afford to lose any of my people—they are too valuable to our organization

How they shop

- Online research—PMO-specific blogs, sites
- Insights from counterparts in IT or at another company
- Word of mouth—I have a circle of colleagues I trust for insights
- They will often search PMO specific keywords—they don't believe a product development tool exists and look at PMO topics as complimentary
- Will be sensitive to their specific industry and role in their search—use cases or whitepapers specific to product dev will have more impact with them

How they choose a vendor

- How will this integrate with the other systems we're using?
- How customizable is the platform for our needs?
- How intuitive is reporting?
- Will this disrupt our current processes or slow down projects?



Phil
New Product Development Champion

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Why we win

- Trek Bicycles**
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- Citrix**
- Reduced email by 35% and the time spent in meetings by 50%.
- Kids II**
- Increased their workflow and project efficiencies by 50% and reduced meetings by 50%.

Use cases

	FUNCTIONAL BENEFIT	ECONOMIC BENEFIT	PERSONAL BENEFIT
Product Launch	Visibility into all the moving parts of a product launch	Launch successful products faster	Successfully lead product launches
Stage-Gate Automation	Standardize and track work throughout all product gates	Minimize time-to-market	Bring your product ideas to market faster
Portfolio Management	Organize and track all work related to each product portfolio	Prioritize the backlog based on your portfolio's goals	Keep your team organized and focused on the right work
Supply Chain Management	Streamline the process to identify and communicate with new suppliers	Eliminate costs incurred by rush orders	Confidence that suppliers will hit internal deadlines
Market Research	Standardize the market research processes	Eliminate time wasted on research that isn't useful	Uncover unmet market needs for your products



Phil

New Product Development Champion

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1. Not in market

Pre-QSO:

“I know I have a problem.”

Problems Phil faces

- I am frustrated that we can't get products to market quicker
- I need to know who is working on what and when it is due—little visibility into project timelines, deliverables, and process
- We have too many different systems tracking different aspects of the business
- I don't have time to manage, coordinate, and be strategic in my current role
- My team needs to be more productive with their time
- Inefficient status update meetings
- We're lacking the insights needed to make accurate time estimates
- Roadblocks on projects are not easily identified

2. Consideration

Pre-QSO/early post-QSO:

“I have started to research ways to solve my problem.”

Potential research areas for Phil

- What are my peers doing about it?
- How can I educate myself on this problem?
- Is this a product development issue or a project management issue?
- What are the best practices related to this problem?

Problem estimation

- If I address this quickly, do I benefit personally?
- If I don't address this, am I negatively impacted? What is the fallout of inaction?
- Who do I know who can help me understand the scope of my problem?

Problem validation

- How do I show my boss that we need a solution?

3. Evaluation

Mid-stage opportunity:

“I know that a work solution is the answer, but which one?”

Evaluation questions Phil may ask

- How do I build a business case to justify a purchase? Is it me/my org or another group?
- What are the essential functions we need from a solution? How do I value/rank these functions?
- Is there a vendor that specializes in new product development or project management for my industry?
- Is this the right time to solve this problem? Are we ready for this?
- Does this solution align with my team's strategic plan and with that of my peers?
- What are the internal resources we will need to allocate to this?
- Will I have to manage the implementation?
- What are the metrics we will use to measure success? Are the goals attainable?
- Do they have the specialization/experience in new product development?

4. Decision

Late-stage opportunity:

“I have narrowed down my selection to a couple of vendors.”

Phil is down to his short list of providers

- Which vendor meets all my needs the best?
- Can we afford the solution? Do we have budget for this?
- Do I trust Workfront? Will Workfront deliver the results we have in mind? Will they actually solve the problem?
- Do they have industry references? Does anyone internally know them?
- Do they understand our business?
- What resources will Workfront bring to the effort regarding implementation/training?
- Is my team (or am I) equipped to accomplish this successfully?
- Which provider will help me post-implementation should something go wrong?
- Does my boss have all the information they need to approve my recommendation?

How We Help Product Development Departments.

The 5 Jobs are the ways customers use Workfront help them accomplish their own work. The best part about using the 5 Jobs to better understand your client's use case? When you've learned the workflow for one use case, you've learned them all because each workflow will operate in a similar way.



Below, we're giving you a granular view of how Product departments use Workfront.

Job 1: Centralize Work in One Solution.

The key value for Centralizing Work is visibility into all work. The way you measure the impact of this job is by increasing the throughput of the department.

This job is all about bringing work that exists in spreadsheets, meeting notes, and emails into one platform so the product department has visibility into what's going on. This work looks and feels a lot like project management which means if you understand one workflow, you'll understand them all. Below are examples of this work within product.

- Ad hoc requests
- Business case creation
- Engineering project management
- Innovation roadmap
- Issue management
- Manufacturing project management
- Procurement operations
- Product forecasting
- Product operations
- [Product/portfolio management](#)
- [Project management](#)
- Quarterly OKR reports
- Roadmap development

Job 2: Digitize Work Processes.

The key value for Digitizing Work Processes is speed and predictability. The way you'd measure the impact of this job is a decrease in time to market.

Every Product department has workflows that are repeatable. This job is about changing those repeatable processes from manual and ad hoc to automated and digitized within Workfront. This means you're taking a manual process and building project templates within Workfront so the handoffs between teams goes smoothly.

- Create SKUs for new products
- Cross-departmental collaboration
- Customer research
- Customer discovery
- Development training
- Global packaging work management
- Hardware deployment
- Inventory management
- Market research
- Minimum viable product creation
- New hire onboarding
- New product design
- New product introduction
- [New product launch](#)
- Product development
- Product distribution
- Product documentation
- Prototyping
- Quality assurance management
- [Stage gate automation](#)
- [Supply chain management](#)

How We Help Product Development Departments.

The 5 Jobs are the ways customers use Workfront help them accomplish their own work. The best part about using the 5 Jobs to better understand your client's use case? When you've learned the workflow for one use case, you've learned them all because each workflow will operate in a similar way.

Below, we're giving you a granular view of how Product departments use Workfront.



Job 3: Review and Approve Digital Work.

The key value for Review and Approve Digital Work is increasing the quality of market-facing work. The way you'd measure the impact of this job is cutting down the costs of mistakes.

Product departments generate digital content throughout all of their projects and processes that needs to be reviewed and approved by others. This job is all about automating that process within Workfront so the right people give their feedback before something is finalized.

- [Design approvals](#)
- Roadmap approvals
- Digital content approvals

Job 5: Deliver Client-Facing Services.

The key value for Deliver Client-Facing Services is efficiency. The way you'd measure the impact of this job is an improvement in profit margins.

When margins matter, or time is tracked for billing purposes, product teams need a way to help maximize their resources (people and budgets). This job is all about standardizing processes and tracking project budgets within Workfront so their work can be delivered on time and within scope.

- Product design
- Product packaging creation
- PTO tracking
- Time tracking

Job 4: Govern Compliance Workflows.

The key value for Govern Compliance Workflows is control over market-facing materials. The way you'd measure the impact of this job is adherence to compliance processes.

For this job we're taking all of the manual processes around regulations, corporate policies, and security, and privacy compliance and automating them within Workfront. This provides an audit trail and ensures the company is always adhering to their policies.

- Approve new generic drugs
- Compliance workflows
- Cyber security projects



John
Professional Services Executive

Centralize Projects in One Solution
Manage Digital Work Processes
Review and Approve Digital Work



Deliver Client-Facing Services
Govern Compliance Workflows



80%
male

20%
female

15-20 yrs
experience

45-59
age

Common titles

- Partner/Principle/President
- COO
- SVP/VP Professional/Client Services

Emotional drivers

- **Worried**—I am worried about my employees and how I can make things easier for them
- **Personal risk**—Most John's have equity in the organization they work for—success goes directly to their bottom line
- **Competitive**—I want my organization to win—be the best
- **Ignorant**—I've never used a project/work solution and don't see how it can help me

Challenges

- 1. Demonstrating the value of the Professional Services team**
 - Showing how the Professional Services team contributes to revenue
 - Proving the process and workflow changes we're making are effective
- 2. Limited visibility into the projects happening on the team**
 - A project/work solution requires infrastructure and trained personnel to implement
 - Knowing when they can take on more projects and if they can support the sales pipeline.
- 3. Monitoring the profits of the department**
 - Resource management is difficult to track
 - Missing a single dashboard on projects and costs
 - Seeing the burn on the projects and preventing huge losses
 - More responsibility is placed on the team with a big focus on scaling profitably
- 4. Delivering more services faster**
 - Having to do more within the organization with less
 - Customers are demanding more from his team faster, and at a cheaper price
 - Customers are moving away from deeply ingrained relationships with clients and more project-based
 - Getting more projects completed with the same number of people without burning out the team



John
Professional Services Executive

Centralize Projects in One Solution
Manage Digital Work Processes
Review and Approve Digital Work



Deliver Client-Facing Services
Govern Compliance Workflows



Goals/desired outcomes

- Customer satisfaction
- Increased productivity to boost profits
- Knowledge of project status and contributions to revenue
- Ultimately move to more automation-less manual touches

What they worry about

- Clients having a poor experience and loss of renewal revenue
- Customers are doing more in-house
- Maintaining the brand
- Staying in lock-step with the business
- Resources—not having enough people to do the work necessary

How they shop

- Online research—industry-specific blogs/publications
- He is often already plugged into several forums for their specific industry—he will go there first to research
- Often will pull in one or two trusted champions on their team—champions have a lot of influence with this executive
- Often they may poll their clients for ideas
- They may assign someone to research, then research a solution on their own as well

How they choose a vendor

- How will we be supported during the implementation and beyond?
- How can this integrate with our existing platforms?
- What will the client experience be like?
- What ROI will we expect?



John
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Deliver Client-Facing Services
Govern Compliance Workflows



Why we win

- Covario**
- Simpler request management for 700 projects per year
 - Accurate time tracking
- FCB**
- Increased productivity and is now saving an estimated 1000 hours of billable time
 - Improved project estimate accuracy
- Leapfrog**
- 94% reduction in time to create new projects
 - 50% reduction in project-related emails
- YA**
- 12% efficiency improvement
 - Full visibility into utilization
- Trendline Interactive**
- Improved efficiency by 20%
 - Increased team productivity by 10%
 - Eliminated three distinct functional work tools

Use cases

	FUNCTIONAL BENEFIT	ECONOMIC BENEFIT	PERSONAL BENEFIT
Client Implementation Services	Complete transparency into the work of the team and the capacity of resources	Standardize processes so your team can help more clients	Client satisfaction and pride in their team
New Client Onboarding	Visibility into the status of all client projects and your team's capacity	Standardized processes allowing your team to maximize their time	Assure top-tier service to all clients



John

Professional Services Executive

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Deliver Client-Facing Services
Govern Compliance Workflows



1. Not in market

Pre-QSO:

“I know I have a problem.”

Problems John faces

- I am frustrated with the chaos and fire-drills associated with our current project work
- I need to know who is working on what and when it is due—little visibility into project timelines, deliverables, and process
- I don't know when our team can take on more work or if we have the capacity to fulfill against the pipeline
- Our current system/process and tools are way too cumbersome for the team
- We have too many different systems tracking different aspects of the business
- My team needs to be more productive with their time
- I don't know how much a project costs or which projects are profitable
- We're lacking the insights needed to make accurate time estimates, optimize my team's time, and prove the value of the work we do
- Because we use different tools, it's hard to gather data for reporting purposes
- I don't have the information I need to explain project delays to the team

2. Consideration

Pre-QSO/early post-QSO:

“I have started to research ways to solve my problem.”

Potential research areas for John

- Who else is having this problem?
- Has anyone in the organization solved this problem at previous organizations?
- How can I educate myself on this problem?
- What does Gartner/Forrester say is the best option?
- What whitepapers can I consume to get educated on the solutions?
- What forums or conferences can we attend to get educated on the solution?

Problem estimation

- What are our alternatives?
- What does this issue mean for me and my team?
- If I don't address this, is the firm negatively impacted? What is the fallout of inaction?
- Is the problem the highest on our list right now?
- Will fixing this problem get in the way of our current performance, specifically performance to our goals?
- Will a solution affect the current year strategic number negatively/positively?

3. Evaluation

Mid-stage opportunity:

“I know that a work solution is the answer, but which one?”

Evaluation questions John may ask

- How much will each vendor cost?
- What are the essential functions we need from a solution? How do I value/rank these functions?
- Who on the team is best suited to run the analysis/business case?
- Is there a vendor that specializes in professional services?
- Is this the right time to solve this problem? Are we ready for this?
- Will a solution affect our ability to perform to our current goals?
- Does this solution align with my strategic plan?
- What internal resources will need to be allocated to this?
- What are the metrics we will use to measure success? Are the goals attainable?
- Is there any way to solve the problem without paying for it?
- What do I get out of this solution? When do I get it?
- Do I need to add staff to solve the problem? If so, where do I find them? How do I know they're the right resource?

4. Decision

Late-stage opportunity:

“I have narrowed down my selection to a couple of vendors.”

John is down to his short list of providers

- Which vendor meets all the essential functions? Is this the right solution?
- Can we afford the solution? How will we pay for it?
- Do I trust Workfront?
- Will Workfront deliver the results we have in mind? Will they actually solve the problem?
- Which vendor will work best with the team?
- Do they have industry references? Does anyone internally know them?
- Do they have the specialization/experience in professional services?
- What is the experience of their team?
- What resources will Workfront bring to the effort regarding implementation/training?
- Is my team equipped to accomplish this successfully? Do we have the manpower to execute this?
- What is the payback period based on the business case?
- Has Legal approved the contract?
- Do we have the manpower to execute this?
- Do I need additional C-Suite approval for this? If so, how do I convince them of the need to do this?



Vanessa
Professional Services Champion

Centralize Projects in One Solution
Manage Digital Work Processes
Review and Approve Digital Work



Deliver Client-Facing Services
Govern Compliance Workflows



50%
male

50%
female

10-15 yrs
experience

35-48
age

Common titles

- Director, Professional Services
- Director, Customer/Client/Service Operations
- Director, Implementation

Emotional drivers

- **Worried**—I am worried about the employees and how I can make things easier for them
- **Personal risk**—I don't want anyone to think the problems we are having are my fault
- **Competitive**—I want my organization to win—be the best
- **Ignorant**—I have never used a project/work solution and don't see how it can help me

Challenges

- 1. Maintaining a handle of all the work happening on her team**
 - Adapting fast enough to keep up with the speed of change within the business
 - Not having a way to track and prioritize projects
 - Wasted hours consolidating updates for clients and leadership
- 2. Prioritizing the work on her team**
 - Everyone has different definitions of the “most important” work
 - More responsibility is placed on the team
 - Accurately forecasting work and necessary resources
- 3. Delivering services faster without adding headcount**
 - Resistance to change from the team
 - Changing processes while the team is helping clients
- 4. Monitoring profit margins**
 - A full project management software requires established infrastructure and trained personnel to implement
 - No insights into costs per project
 - Tighter controls on financials and more attention is being paid to her timelines



Vanessa
Professional Services Champion

Centralize Projects in One Solution
Manage Digital Work Processes
Review and Approve Digital Work



Deliver Client-Facing Services
Govern Compliance Workflows



Goals/desired outcomes

- Deliverables are met on time and on budget
- Clients are happy with their service
- Standardizing processes for better efficiency
- Knowledge of all client projects and contributions to revenue
- Identify project delays before they impact customers

What they worry about

- Project issues—making sure that the process/project is always moving forward
- Not having complete control or a handle on all the projects they have in a given timeframe
- Keeping all the balls in the air
- Not having enough time for everything—not being as efficient as they should be

How they shop

- Forrester and Gartner (Magic Quadrant) is very important to them
- Peers are a close second—they will often call peers at other organizations or internally to ask who they use
- Word of mouth—via peers or online forums—good and bad
- Online research—industry-specific blogs/publications
- Conferences—industry-specific events

How they choose a vendor

- How did the platform fare with Gartner/Forrester?
- How will we be supported after the implementation?
- How are current professional services companies using the platform?
- How customizable is the platform?



Vanessa
Professional Services Champion

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Review and Approve Digital Work



Deliver Client-Facing Services
Govern Compliance Workflows



Why we win

- Covario**
- Simplified request management for 700 projects per year
 - More efficient work delivery
- FCB**
- Increased productivity and is saving an estimated 1000 hours of billable time
 - Improved project estimate accuracy
 - Expanded project visibility to 100%
 - Reduced time spent in meetings and preparing status updates by approximately 2 hours per week
- Leapfrog**
- 94% reduction in time to create new projects
 - 50% reduction in project-related emails
- YA**
- 12% efficiency improvement
 - Full visibility into utilization
- Trendline Interactive**
- Improved efficiency by 20%
 - Increased team productivity by 10%
 - Reduced process steps by nearly half
 - Eliminated three distinct functional work tools

Use cases

	FUNCTIONAL BENEFIT	ECONOMIC BENEFIT	PERSONAL BENEFIT
Client Implementation Services	Centralize work and communication between teams and clients	Increase your team's capacity with automated workflows	Focus on client success instead of admin work
New Client Onboarding	Effectively manage and track multiple projects simultaneously	Increased productivity with real-time, cross-functional collaboration with internal teams and clients	Delivery quality work to each client, never missing a step or detail



Vanessa

Professional Services Champion

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Deliver Client-Facing Services
Govern Compliance Workflows



1. Not in market

Pre-QSO:

“I know I have a problem.”

Problems Vanessa faces

- I am frustrated with the chaos and fire-drills associated with our current project work
- I need to know who is working on what and when it is due—little visibility into project timelines, deliverables, and process
- I don't know when our team can take on more work or if we have the capacity to fulfill against the pipeline
- Our current system/process and tools are way too cumbersome for the team
- We have too many different systems tracking different aspects of the business
- My team needs to be more productive with their time
- I don't know how much a project costs or which projects are profitable
- We're lacking the insights needed to make accurate time estimates, optimize my team's time, and prove the value of the work we do
- Because we use different tools, it's hard to gather data for reporting purposes
- I don't have the information I need to explain project delays to the team

2. Consideration

Pre-QSO/early post-QSO:

“I have started to research ways to solve my problem.”

Potential research areas for Vanessa

- Who else is having this problem?
- Has anyone in the organization solved this problem at previous organizations?
- How can I educate myself on this problem?
- What does Gartner/Forrester say is the best option?
- What whitepapers can I consume to get educated on the solutions?
- What forums or conferences can we attend to get educated on the solution?

Problem estimation

- What are our alternatives?
- What does this issue mean for me and my team?
- If I don't address this, is the firm negatively impacted? What is the fallout of inaction?
- Is the problem the highest on our list right now?
- Will fixing this problem get in the way of our current performance, specifically performance to our goals?
- Will a solution affect the current year strategic number negatively/positively?

3. Evaluation

Mid-stage opportunity:

“I know that a work solution is the answer, but which one?”

Evaluation questions Vanessa may ask

- How much will each vendor cost?
- What are the essential functions we need from a solution? How do I value/rank these functions?
- Who on the team is best suited to run the analysis/business case?
- Is there a vendor that specializes in professional services?
- Is this the right time to solve this problem? Are we ready for this?
- Will a solution affect our ability to perform to our current goals?
- Does this solution align with my strategic plan?
- What internal resources will need to be allocated to this?
- What are the metrics we will use to measure success? Are the goals attainable?
- Is there any way to solve the problem without paying for it?
- What do I get out of this solution; when do I get it?
- Do I need to add staff to solve the problem? If so, where do I find them? How do I know they're the right resource?

4. Decision

Late-stage opportunity:

“I have narrowed down my selection to a couple of vendors.”

Vanessa is down to her short list of providers

- Which vendor meets all the essential functions? Is this the right solution?
- Can we afford the solution? How will we pay for it?
- Do I trust Workfront?
- Will Workfront deliver the results we have in mind? Will they actually solve the problem?
- Which vendor will work best with the team?
- Do they have industry references? Does anyone internally know them?
- Do they have the specialization/experience in professional services?
- What is the experience of their team?
- What resources will Workfront bring to the effort regarding implementation/training?
- Is my team equipped to accomplish this successfully? Do we have the manpower to execute this?
- What is the payback period based on the business case?
- Has Legal approved the contract?
- Do we have the manpower to execute this?

How We Help Professional Services Teams.

The 5 Jobs are the ways customers use Workfront help them accomplish their own work. The best part about using the 5 Jobs to better understand your client's use case? When you've learned the workflow for one use case, you've learned them all because each workflow will operate in a similar way.

Below, we're giving you a granular view of how Professional Services teams use Workfront.



Job 1: Centralize Work in One Solution.

The key value for Centralizing Work is visibility into all work. The way you measure the impact of this job is by increasing the throughput of the department.

This job is all about bringing work that exists in spreadsheets, meeting notes, and emails into one platform so the product department has visibility into what's going on. This work looks and feels a lot like project management, which means if you understand one workflow, you'll understand them all. Below are examples of this work within professional services.

- [Account management](#)
- Client project management/automation
- Client reporting
- Client requests
- Manage client projects

Job 2: Digitize Work Processes.

The key value for Digitizing Work Processes is speed and predictability. The way you'd measure the impact of this job is a decrease in time to market.

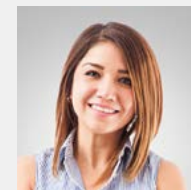
Every professional services team has workflows that are repeatable. This job is about changing those repeatable processes from manual and ad hoc to automated and digitized within Workfront. This means you're taking a manual process and building project templates within Workfront so the handoffs between teams and clients goes smoothly.

- [Client implementation services](#)
- Manage customer-facing materials
- [New client onboarding](#)
- [New hire onboarding](#)
- Software deployment management

How We Help Professional Services Teams.

The 5 Jobs are the ways customers use Workfront help them accomplish their own work. The best part about using the 5 Jobs to better understand your client's use case? When you've learned the workflow for one use case, you've learned them all because each workflow will operate in a similar way.

Below, we're giving you a granular view of how Professional Services teams use Workfront.



Job 3: Review and Approve Digital Work.

The key value for Review and Approve Digital Work is increasing the quality of market-facing work. The way you'd measure the impact of this job is cutting down the costs of mistakes.

Professional services teams generate digital content throughout all of their projects that needs to be reviewed and approved by internal groups and their clients. This job is all about automating that process within Workfront so the right people give their feedback before something is finalized.

- Client charters
- Client review and approval

Job 5: Deliver Client-Facing Services.

The key value for Deliver Client-Facing Services is efficiency. The way you'd measure the impact of this job is an improvement in profit margins.

This job is the bread and butter for professional services team. Because margins matter, professional services teams need a way to help their clients while maximizing their internal resources (people and budgets). This job is all about standardizing processes and tracking project budgets within Workfront so work can be delivered on time and within scope.

- Client dashboards
- [Client services work management](#)
- [Implementation services](#)
- Job forecasting
- Resource management
- Time management and reporting

Job 4: Govern Compliance Workflows.

The key value for Govern Compliance Workflows is control over market-facing materials. The way you'd measure the impact of this job is adherence to compliance processes.

For this job we're taking all of the manual processes around regulations, corporate policies, and security, and privacy compliance and automating them within Workfront. This provides an audit trail and ensures the company is always adhering to their policies.

- Client audits



Max
Agency Executive

Centralize Projects in One Solution
Manage Digital Work Processes
Review and Approve Digital Work



Deliver Client-Facing Services
Govern Compliance Workflows



60%
male

40%
female

25 yrs
experience

45-63
age

Common titles

- Chief Financial Officer
- Chief Operations Officer
- Senior Vice President, Operations
- Senior Vice President, Technology
- Senior Vice President, Finance
- Principle
- Partner

Emotional drivers

- **Threatened/Worried**—Business is in a hyper-competitive industry and we need to find a way to outpace our competitors
- **Competitive**—I want my company to be a leader in the creative space
- **Ignorant**—I have never used a project/work solution and don't understand how it can help me

Challenges

- 1. Maintaining profit margins**
 - Costly project delays
 - Constantly scrutinizing the bottom line with every project
- 2. Viewing costs of projects and accounts**
 - Limited insights into per project costs
 - Not enough insights into project pipeline
 - Work outsourced to contractors is difficult to track
 - Missing a single dashboard on projects and costs
- 3. Utilization of employees**
 - Limited information on ability to resource pipeline
 - Resource management is difficult to track
- 4. Clients are demanding services faster**
 - Providing great work in a hyper-competitive market
 - Customers are demanding more from the team faster, and at a cheaper price



Max
Agency Executive

Centralize Projects in One Solution
Manage Digital Work Processes
Review and Approve Digital Work



Deliver Client-Facing Services
Govern Compliance Workflows



Goals/desired outcomes

- Profitability of the agency
- Customer satisfaction, retention, and growth
- Cost per head/ROI on projects
- Servicing clients, faster, and with less overhead

What they worry about

- Clients having a poor experience and loss of renewal revenue
- Customers are doing more in-house
- Managing the P&L—revenue and expenses are a constant worry
- Staying in lock-step with the business
- Resources—not having enough people to do the work necessary

How they shop

- Online research—industry-specific blogs/publications
- Often will pull in one or two trusted champions on their team—champions have a lot of influence with this executive
- Word of mouth—he has a circle of colleagues he trusts for insights
- Often they may poll their clients for ideas
- They may assign someone to research a solution on their own as well

How they choose a vendor

- How customizable is it to our agency?
- How will the platform integrate with our other systems?
- What is the ROI of the solution?
- How intuitive is reporting?
- How will we be supported after implementation?



Max
Agency Executive

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Why we win

Covario

- Simpler request management for 700 projects per year
- Accurate time tracking

FCB

- Increased productivity and is now saving an estimated 1000 hours of billable time
- Improved project estimate accuracy

Leapfrog

- 94% reduction in time to create new projects
- 50% reduction in project-related emails

YA

- 12% efficiency improvement
- Full visibility into utilization

Trendline Interactive

- Improved efficiency by 20%
- Increased team productivity by 10%
- Reduced process steps by nearly half
- Eliminated three distinct functional work tools

Use cases

	FUNCTIONAL BENEFIT	ECONOMIC BENEFIT	PERSONAL BENEFIT
Agency Client Management	Visibility into the status of all client projects and agency's capacity	Serve more clients with less manual touches	Assure top-tier service to all clients
Creative Production	Visibility into the team's work and capacity	Increase the number of completed projects executed by your team	Demonstrate your team's contribution to the success of the enterprise



Max
Agency Executive

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Deliver Client-Facing Services
Govern Compliance Workflows



1. Not in market

Pre-QSO:

“I know I have a problem.”

Problems Max faces

- I am frustrated with the chaos and fire-drills associated with our current project work
- I need to know who is working on what and when it is due—little visibility into project timelines, deliverables, and process
- I don't know when our team can take on more work or if we have the capacity to fulfill against the pipeline
- Our current system/process and tools are way too cumbersome for the team
- We have too many different systems tracking different aspects of the business
- My team needs to be more productive with their time
- I don't know how much a project costs or which projects are profitable
- We're lacking the insights needed to make accurate time estimates, optimize my team's time, and prove the value of the work we do
- Because we use different tools, it's hard to gather data for reporting purposes
- I don't have the information I need to explain project delays to the team

2. Consideration

Pre-QSO/early post-QSO:

“I have started to research ways to solve my problem.”

Potential research areas for Max

- Who else is having this problem?
- Has anyone in the organization solved this problem at previous organizations?
- How can I educate myself on this problem?
- What does Gartner/Forrester say is the best option?
- What whitepapers can I consume to get educated on the solutions?
- What forums or conferences can we attend to get educated on the solution?

Problem estimation

- What are our alternatives?
- What does this issue mean for me and my team?
- If I don't address this, is the firm negatively impacted? What is the fallout of inaction?
- Is the problem the highest on our list right now?
- Will fixing this problem get in the way of our current performance, specifically performance to our goals?
- Will a solution affect the current year strategic number negatively/positively?

3. Evaluation

Mid-stage opportunity:

“I know that a work solution is the answer, but which one?”

Evaluation questions Max may ask

- How much will each vendor cost?
- What are the essential functions we need from a solution? How do I value/rank these functions?
- Will this be too disruptive and destroy creative thinking by turning us in robots?
- Is there a vendor that specializes in agency operations?
- Is this the right time to solve this problem? Are we ready for this?
- Will a solution affect our ability to perform to our current goals?
- Does this solution align with my strategic plan?
- What internal resources will need to be allocated to this?
- What are the metrics we will use to measure success? Are the goals attainable?
- Is there any way to solve the problem without paying for it?
- What do I get out of this solution; when do I get it?
- Do I need to add staff to solve the problem? If so, where do I find them? How do I know they're the right resource?

4. Decision

Late-stage opportunity:

“I have narrowed down my selection to a couple of vendors.”

Max is down to his short list of providers

- Which vendor meets all the essential functions? Is this the right solution?
- Can we afford the solution? How will we pay for it?
- Do I trust Workfront?
- Will Workfront deliver the results we have in mind? Will they actually solve the problem?
- Which vendor will work best with the team?
- Do they have industry references? Does anyone internally know them?
- Do they have the specialization/experience in agencies?
- What is the experience of their team?
- What resources will Workfront bring to the effort regarding implementation/training?
- Is my team equipped to accomplish this successfully? Do we have the manpower to execute this?
- What is the payback period based on the business case?
- Do we have the manpower to execute this?
- Has Legal approved the contract?



Christine
Agency Champion

Centralize Projects in One Solution
Manage Digital Work Processes
Review and Approve Digital Work



Deliver Client-Facing Services
Govern Compliance Workflows



35%
male

65%
female

10 yrs
experience

32-43
age

Common titles

- Director, Agency/Client/Creative Operations
- Director, Operations
- Director, Project Management
- Director, Agency Technology

Emotional drivers

- **Threatened/Worried**—Business is in a hyper-competitive industry and we need to find a way to outpace our competitors
- **Competitive**—I want my company to be a leader in the creative space
- **Ignorant**—I have never used a project/work solution and don't understand how it can help me

Challenges

- Limited view into all work**
 - No view of all the corresponding parts of a project
 - No visibility on current project status
 - No clarity around project stack ranking
- Delivering work faster**
 - Changing processes without disrupting client projects
 - Teams can be resistant to change
 - Lack of adoption of technology and new tools
 - The agency needs to serve more clients faster to stay relevant
- Increasing profit margins on projects**
 - Some work is outsourced to contractors and difficult to track
 - Tighter controls on financials
- Reducing employee turnover**
 - Manual processes add to the increasing number of tasks the team needs to accomplish
 - Proving the changes we're making are effective



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Goals/desired outcomes

- Projects are completed on time and on budget
- Clients and partners are happy
- Increase team productivity to support more work
- Uniformity/standardization of processes
- Knowledge of capacity and when the team can take on more work

What they worry about

- Making sure that management understands the value of a formal process
- Managing creative people and processes to a deadline can be difficult
- They fixate on problems both within their organization—they are fixers and doers.
- Keeping all the balls in the air

How they shop

- Online research—industry-specific blogs/publications
- Peer groups—counterparts at other companies or departments
- Word of mouth—I have a circle of colleagues I trust for insights
- Oftentimes they will still pull in a consultant to research a solution despite having conducted research themselves
- Will test hands on only after they've received some form of recommendation—consultant/peer/etc.
- Would prefer a demo only after they've played with the product themselves

How they choose a vendor

- How are other agencies using the platform?
- How customizable is the platform?
- What is the client experience?
- How easy is it to track time?
- How will this integrate with other systems?



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Why we win

Covario

- Simpler request management for 700 projects per year
- Accurate time tracking

FCB

- Increased productivity and is now saving an estimated 1000 hours of billable time
- Improved project estimate accuracy

Leapfrog

- 94% reduction in time to create new projects
- 50% reduction in project-related emails

YA

- 12% efficiency improvement
- Full visibility into utilization

Trendline Interactive

- Improved efficiency by 20%
- Increased team productivity by 10%
- Reduced process steps by nearly half
- Eliminated three distinct functional work tools

Use cases

	FUNCTIONAL BENEFIT	EMOTIONAL BENEFIT	PERSONAL BENEFIT
Agency Client Management	Effectively manage and track multiple client projects simultaneously	Automate processes to increase the agency's capacity	Delivery quality work to each client, never missing a step or detail
Creative Production	Capture, route, and deliver creative assets on time	Standardize processes so your team can gain back time	Better collaboration across teams eliminating undesired rework



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1. Not in market

Pre-QSO:

“I know I have a problem.”

Problems Christine faces

- I am frustrated with the chaos and fire-drills associated with our current project work
- I need to know who is working on what and when it is due—little visibility into project timelines, deliverables, and process
- I don't know when our team can take on more work or if we have the capacity to fulfill against the pipeline
- Our current system/process and tools are way too cumbersome for the team
- We have too many different systems tracking different aspects of the business
- My team needs to be more productive with their time
- I don't know how much projects cost or which projects are profitable
- We're lacking the insights needed to make accurate time estimates, optimize my team's time, and prove the value of the work we do
- Because we use different tools, it's hard to gather data for reporting purposes
- I don't have the information I need to explain project delays to the team

2. Consideration

Pre-QSO/early post-QSO:

“I have started to research ways to solve my problem.”

Potential research areas for Christine

- Who else is having this problem?
- Has anyone in the organization solved this problem at previous organizations?
- How can I educate myself on this problem?
- What does Gartner/Forrester say is the best option?
- What whitepapers can I consume to get educated on the solutions?
- What forums or conferences can we attend to get educated on the solution?

Problem estimation

- What are our alternatives?
- What does this issue mean for me; for my team?
- If I don't address this, is the firm negatively impacted? What is the fallout of inaction?
- Is the problem the highest on our list right now?
- Will fixing this problem get in the way of our current performance, specifically performance to our goals?
- Will a solution affect the current year strategic number negatively/positively?

3. Evaluation

Mid-stage opportunity:

“I know that a work solution is the answer, but which one?”

Evaluation questions Christine may ask

- How much will each vendor cost?
- What are the essential functions we need from a solution? How do I value/rank these functions?
- Will this be too disruptive and destroy creative thinking by turning us into robots?
- Is there a vendor that specializes in agency operations?
- Is this the right time to solve this problem? Are we ready for this?
- Will a solution affect our ability to perform to our current goals?
- Does this solution align with my strategic plan?
- What internal resources will need to be allocated to this?
- What are the metrics we will use to measure success? Are the goals attainable?
- Is there any way to solve the problem without paying for it?
- What do I get out of this solution? When do I get it?
- Do I need to add staff to solve the problem? If so, where do I find them? How do I know they're the right resource?

4. Decision

Late-stage opportunity:

“I have narrowed down my selection to a couple of vendors.”

Christine is down to her short list of providers

- Which vendor meets all the essential functions? Is this the right solution?
- Can we afford the solution? How will we pay for it?
- Do I trust Workfront?
- Will Workfront deliver the results we have in mind? Will they actually solve the problem?
- Which vendor will work best with the team?
- Do they have industry references? Does anyone internally know them?
- Do they have the specialization/experience in agencies?
- What is the experience of their team?
- What resources will Workfront bring to the effort regarding implementation/training?
- Is my team equipped to accomplish this successfully? Do we have the manpower to execute this?
- What is the payback period based on the business case?
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- Has Legal approved the contract?

How We Help Agencies.

The 5 Jobs are the ways customers use Workfront help them accomplish their own work. The best part about using the 5 Jobs to better understand your client's use case? When you've learned the workflow for one use case, you've learned them all because each workflow will operate in a similar way.

Below, we're giving you a granular view of how agencies use Workfront.



Job 1: Centralize Work in One Solution.

The key value for Centralizing Work is visibility into all work. The way you measure the impact of this job is by increasing the throughput of the department.

This job is all about bringing work that exists in spreadsheets, meeting notes, and emails into one platform so the product department has visibility into what's going on. This work looks and feels a lot like project management which means if you understand one workflow, you'll understand them all. Below are examples of this work within agencies.

- Ad-hoc project/work management
- [Agency client/account management](#)
- Agency portfolio and project planning
- Capacity planning
- Creative brief intake
- Demand management
- Executive reporting
- [Global PMO](#)
- Project prioritization

Job 2: Digitize Work Processes.

The key value for Digitizing Work Processes is speed and predictability. The way you'd measure the impact of this job is a decrease in time to market.

Every agency has workflows that are repeatable. This job is about changing those repeatable processes from manual and ad hoc to automated and digitized within Workfront. This means you're taking a manual process and building project templates within Workfront so the handoffs between teams and clients goes smoothly.

- Agile work management
- Collaboration between clients and the agency
- Content/creative production
- [Creative production](#)
- Cross-departmental workflows
- Digital asset management
- Digital workflow management
- [New hire onboarding](#)
- Work routing

How We Help Agencies.

The 5 Jobs are the ways customers use Workfront help them accomplish their own work. The best part about using the 5 Jobs to better understand your client's use case? When you've learned the workflow for one use case, you've learned them all because each workflow will operate in a similar way.

Below, we're giving you a granular view of how agencies use Workfront.



Job 3: Review and Approve Digital Work.

The key value for Review and Approve Digital Work is increasing the quality of market-facing work. The way you'd measure the impact of this job is cutting down the costs of mistakes.

Agencies generate digital content for their clients all the time that needs to be reviewed and approved by internal groups and their clients. This job is all about automating that process within Workfront so the right people give their feedback before something is finalized.

- [Approve digital work](#)
- Client approvals
- Creative work approvals

Job 4: Govern Compliance Workflows.

The key value for Govern Compliance Workflows is control over market-facing materials. The way you'd measure the impact of this job is adherence to compliance processes.

For this job we're taking all of the manual processes around regulations, corporate policies, and security, and privacy compliance and automating them within Workfront. This provides an audit trail and ensures the company is always adhering to their policies.

- Audit trails
- Federal work approvals
- Regulation tracking

Job 5: Deliver Client-Facing Services

The key value for Deliver Client-Facing Services is efficiency. The way you'd measure the impact of this job is an improvement in profit margins.

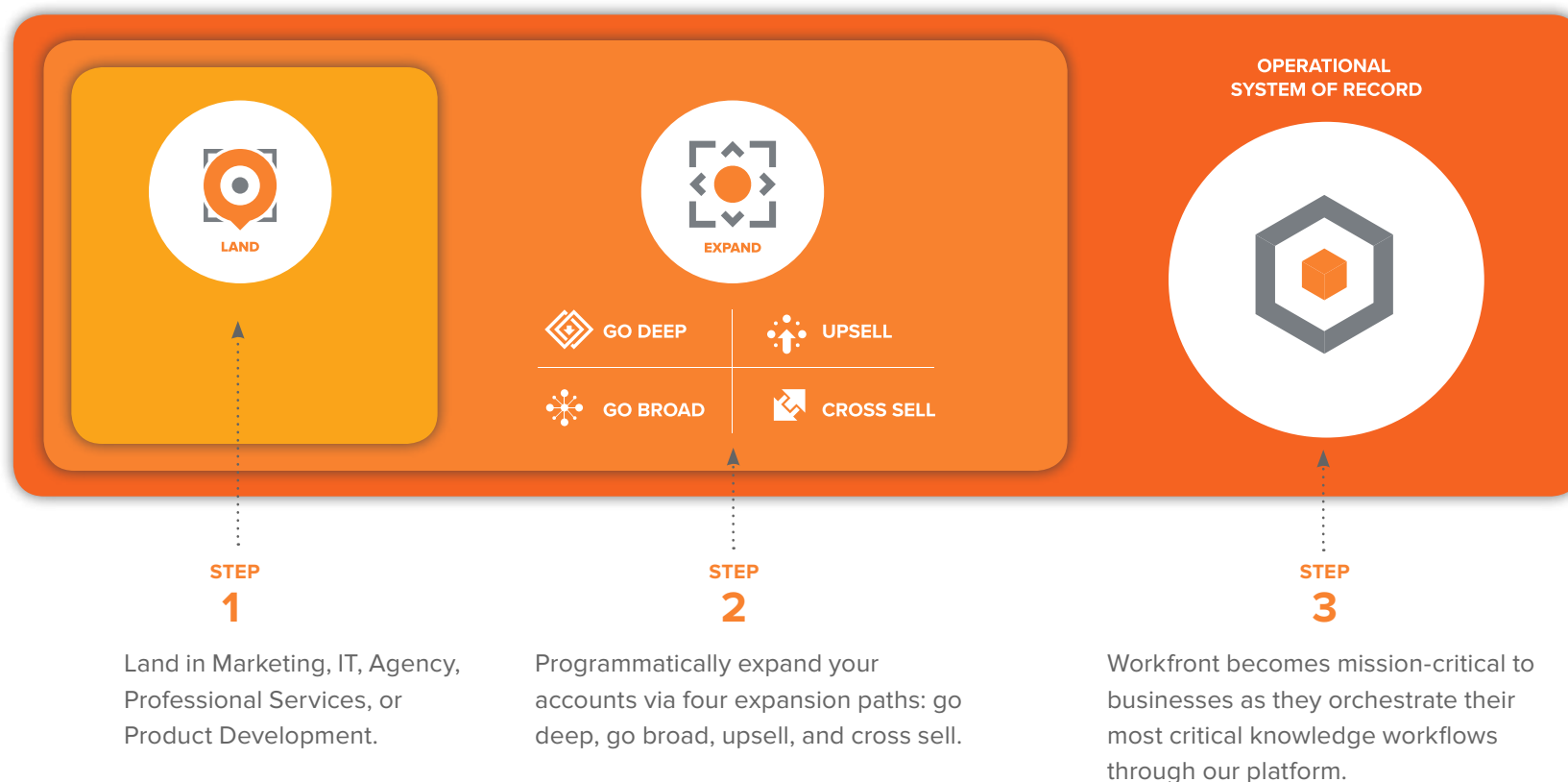
This job is the bread and butter for agencies. Because margins matter, agencies need a way to help their clients while maximizing their internal resources (people and budgets). This job is all about standardizing processes and tracking project budgets within Workfront so work can be delivered on time and within scope.

- [Agency services](#)
- Agency timesheets/time tracking
- Client reporting
- Cross-agency collaboration
- Project budget/cost tracking
- Utilization reporting

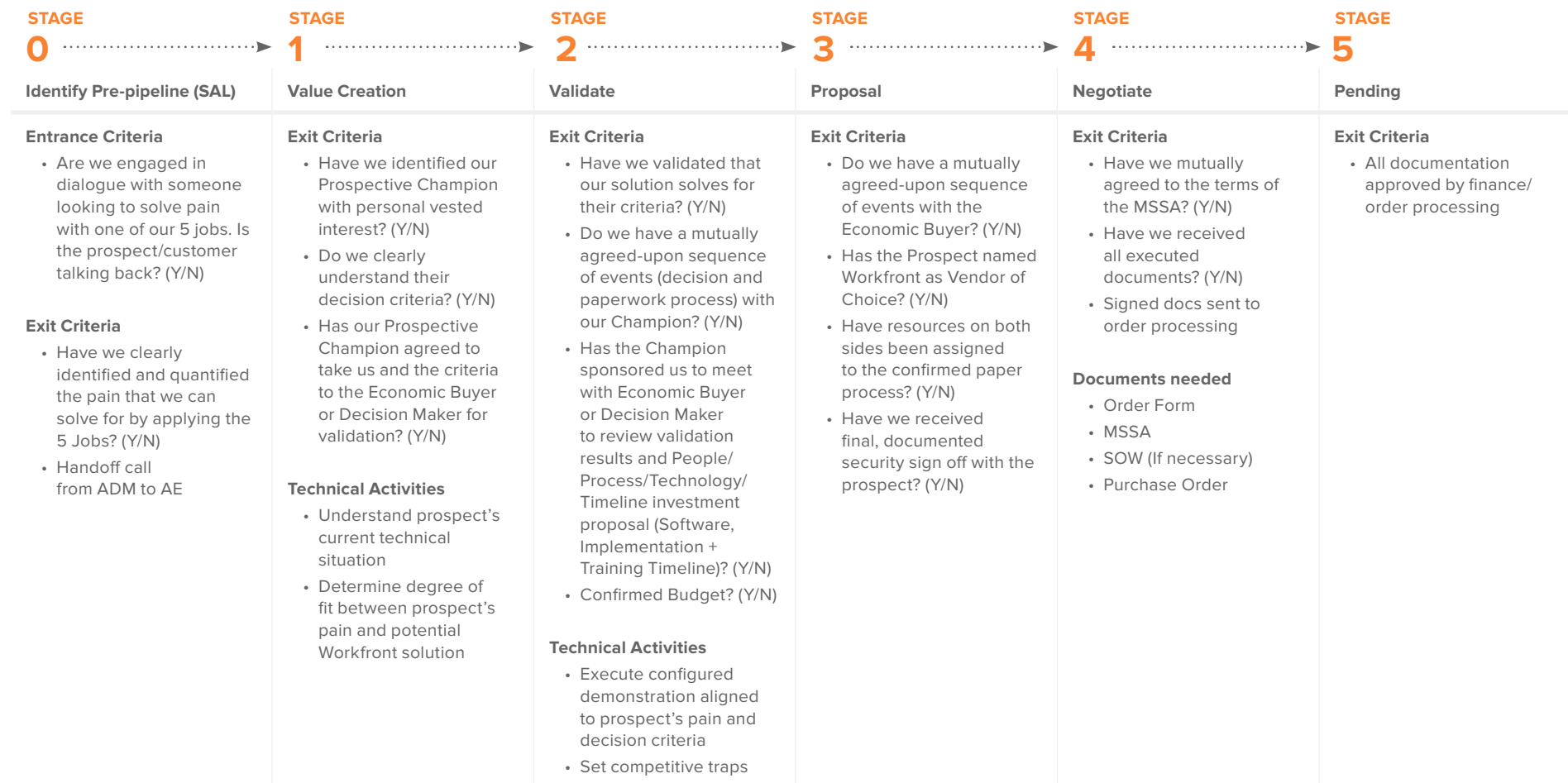
Section 5: How to Land and Expand

Land and Expand Overview.

Workfront is the leading enterprise application platform for modern work management. We help our customers manage knowledge work in the five core jobs of centralizing projects, managing digital work processes, reviewing and approving digital work, delivering client-facing services, and governing compliance workflows.



Sales Process.



Sales Process Resources and Activities.

STAGE 0	STAGE 1	STAGE 2	STAGE 3	STAGE 4	STAGE 5
Identify Pre-pipeline (SAL)	Value Creation	Validate	Proposal	Negotiate	Pending
Sales Resources • Prospecting framework • Qualification framework • Call scripts • TED discovery questions • Social engagement • Champion Letter/VITO • Buying center personas • Mantra & value pyramid • Metrics and case studies • Account planning • Field marketing • User groups • Partners (SI and Tech) • Whitespace analysis	Sales Resources • Account/opportunity plan • Value assessment • Value engineering • Value pyramid • On-demand product tour • Required capabilities • Pre-Call plan • Point drive LinkedIn sales navigator • Metrics and case studies • Field marketing events • Workfront overview • Workfront buyer's guide	Sales Resources • Competitive lockout • Value assessment model • Metrics and case studies • PSA engaged • Services scoping • CX, partner, SI engaged • Field marketing events • Customer Briefing Center • Executive alignment • Sequence of events/mutual close plan	Sales Resources • MSSA • SOW • Proposal template • Quote tool • Value assessment • Customer Briefing Center • CGG team engaged • Executive Alignment • CX, partner, SI engaged • Security overview • Soc1, Soc2, Pen test (with MNDA executed)	Sales Resources • MSSA • SOW • Order form	

How to Land.

1. Identify triggers.

- Changes in leadership
- Merger/acquisition
- Customer health (improve or decline)
- New market regulations
- Industry/company news
- Recent non-compliant fines/bad news
- Buying center is a shared service/a lot of collaborators
- Complex tech stack/purchase of new tech

3. Determine current scenario and identify negative consequences.

Follow the Value Framework on [page 200](#) to determine the current scenario and negative consequences.

See [page 201-202](#) for examples of Qualifying Questions for Current Scenario and Negative Consequences.

2. Identify use case within the buying center.

Marketing

- Campaign management
- Creative production
- Portfolio management
- Review and approve digital work
- New hire onboarding

IT

- Portfolio management
- Vendor onboarding
- New hire onboarding
- Mergers and acquisitions

Product Development

- Stage gate automation
- Market research
- New product development
- Supply chain management
- Quality testing
- New hire onboarding

Professional Services

- New client onboarding
- New client implementation
- Review and approve digital work
- New hire onboarding

Agency

- New client onboarding
- Creative production
- Client account management
- Review and approve digital work
- New hire onboarding

4. Align pain with jobs we do.



Centralize
Work in One
Solution



Digitize
Work
Processes



Review
and Approve
Digital Work

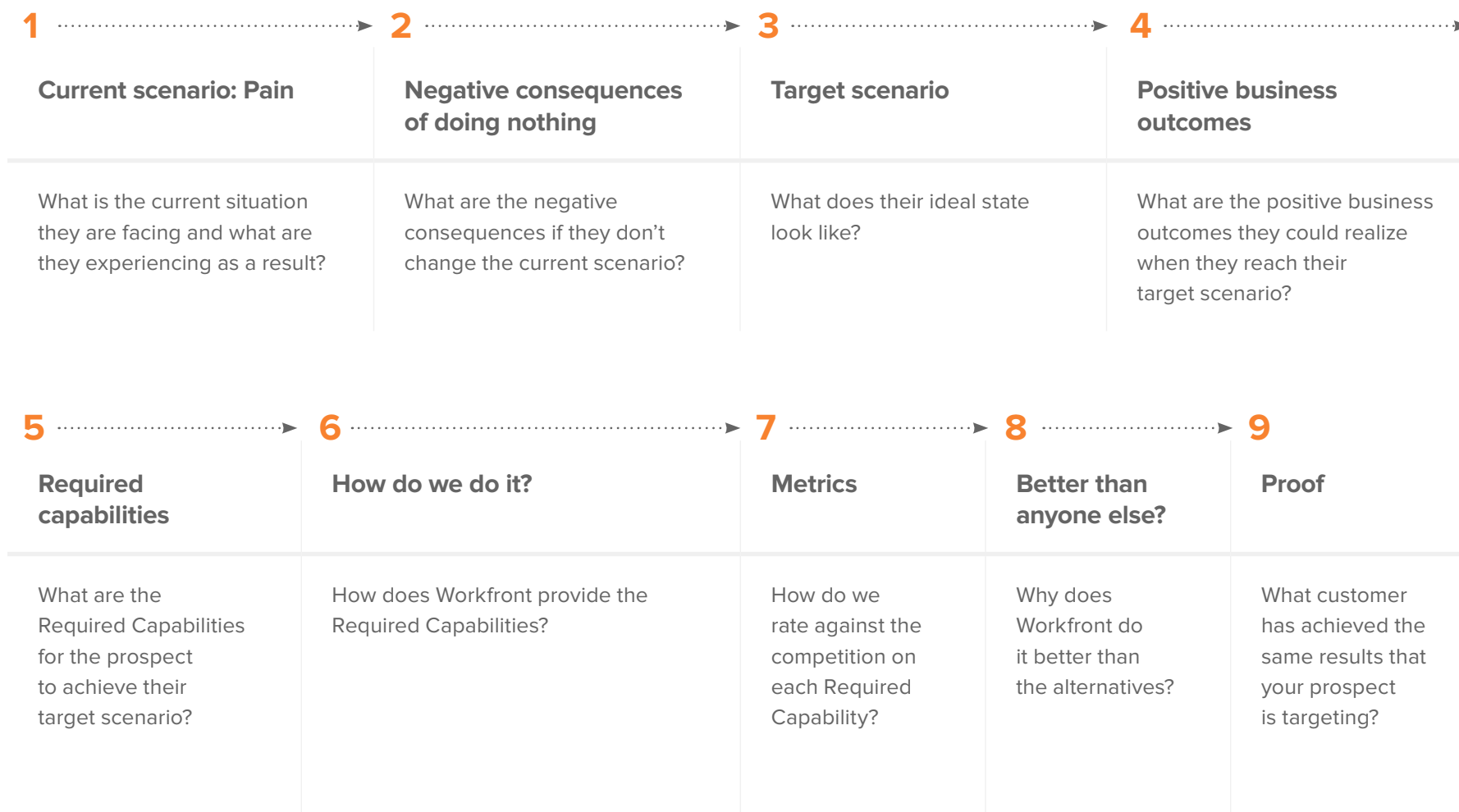


Govern
Compliance
Workflows



Deliver
Client-Facing
Services

The Value Framework.



Qualification and Discovery Questions.

1. Current Scenario

- Tell me how you work today.
- Describe the challenges you and your team face as a result of the way you work today.
- Quite often, we hear that lack of visibility into work is a big challenge. Tell me what that might mean to you and if you believe you have that same challenge.
- Describe to me the types of projects and work your team typically works on.
 - How does your team get that work done?
 - How do you manage that work?
- Tell me how you currently work with other teams in your organization, and what teams are they?

2. Negative Consequences

- Describe the cost of continuing to work the way you are today on you, your team, and your company.
- How does the way you manage work today impact your organization?
- What happens if you don't change the way you work?

Don't be afraid to sit in the pain with your customer until it feels really uncomfortable. These questions are examples; remember to ask questions, listen, and ask clarifying questions to really dig into the prospect's unique situation.



Job 1: Centralize Work in One Solution

- Tell me what your top priority is related to centralize all your work. Note: Answers won't match the following exactly, but should align to one of the jobs we do.
 - Centralize all of your work
 - Digitize work
 - Improve review and approval processes
 - Improve compliance and governance
 - Efficiently deliver client-facing work
- Tell me how you work with other teams.
- Tell me how you currently handle requests for new projects.
- Explain how you capture, track, and report on project updates.
- Describe the tools do you currently use to manage project work and processes.
 - Describe the specific tools you use to collaborate.
- Tell me how your work struggles to get quality work done using all of the systems you have to manage work.
 - How do you feel about managing work in all of these systems?
- Explain ways you've tried to solve this in the past.
 - Describe any previous efforts you've used to consolidate your tools into one system.
 - Tell me how your team members engaged in that process.
 - Tell me how well was that solution adopted.



Job 2: Digitize Work Processes

- Describe the kind/type of work your team produces.
- Explain how you currently manage your digital work process.
 - Complex, multiple teams, different tools, etc.
- Tell me what other teams you work with.
 - How do you manage the work between the teams?
- Describe your current process to capture and prioritize ideas and/or requests.
- How much of your work is repeatable?
 - Follow-up on: Are any of these repeatable work items currently automated?
- Tell me how you currently review your digital work.
 - Please describe that process for me.
- Tell me what percentage of your projects are delivered on time.
 - Describe the challenge this causes for your team/department/business.

Qualification and Discovery Questions.



Job 3: Review and Approve Digital Work

- Describe the kind/type of work your team produces.
- Explain how you currently manage your digital work process.
 - (Complex, multiple teams, different tools, etc.)
- Describe your current review and approval process.
 - How long does a typical review process take?
 - How many people/teams are typically required to review and approve content?
 - How do you currently manage that approval process? How long does that take?
- Describe your typical review process for a piece of content.
- How many reviewers?
- Explain the process for reviewers to provide feedback and how long it takes to get final approval.
- Is that predictable?
- Tell me how many revisions are done on average per asset.
- Describe what happens if there is a mistake.
- How many assets need to go through an approval process?
- Describe your brand management process?
- Is this process documented? Is it followed?
- Tell me who on the team has visibility on all of the feedback.
- Describe the types of assets your team currently reviews (PSD, video, HTML5, websites, pdfs, etc.)
- Explain where and how you archive approved documents.



Job 4: Govern Compliance Workflows

- Tell me what compliance means to you.
- Describe the impact that non-compliance has on you, your team, and your company.
- What happens when there is non-compliance on your brand? Deadlines? Regulatory reports? etc.
- Describe the impact non-compliance has on your team. On your company?
- Tell me how your business is impacted when something non-compliant occurs.
- Explain to me which industry regulations are most impactful to your business.
- Describe your compliance process for me.
 - How is this process documented?
 - Tell me who owns this process.
- Who cares about non-compliance?
- Tell me what tools you are currently using to ensure compliance and manage requests.
- Describe the process you currently use to capture audit information on compliance.
- Tell me who is involved in your approval/compliance process.
- Tell me about your brand management process.
 - How is this process documented?
 - Tell me who cares about the brand management strategy in your company.
- Explain to me how you report on items in the compliance process.



Job 5: Deliver Client-Facing Services

- How does your team get work done? [NOTE: if they work as an agency or an internal shared resource, Job 4 may be very applicable. Ask questions to further explore their business model and work process].
- How do you manage your client-facing work?
- Does your team regularly meet all of their deadlines?
- Describe your client's satisfaction levels of the work your team produces.
- Describe the kind/type of work your team produces.
- Describe your typical client. Are they internal or external to your company?
- How does your team charge for services?
 - Hours or dollars or something else?
- Explain to me how do you currently track client requests.
- Tell me what kind of projects your clients request.
 - Are the types of projects similar?
- Tell me how your team tracks the amount of time it takes to get work done.
 - Do they log hours?
- Explain your billing process. How are the amount of hours worked calculated into billing?
- Describe the process you use to allocate resources to projects.
- Tell me how you report on the status of your projects.
 - Tell me who in your organization is interested or concerned about the status of your projects.
- Describe how you collaborate with your clients.
- Tell me how you track your on-time delivery rate.
- Explain how your organization tracks bench utilization of your consultants. (for professional services organizations)

General Discovery Questions.

Qualifying Questions help you ask questions to better understand their Current Scenario and the Negative Consequence of the way they work today.

3. Target Scenario

- Explain the ideal state for your company/department/team/yourself if you were able to solve that problem.
- Describe what that looks like.

4. Positive Business Outcomes

- Tell me how solving these challenges would benefit the business.
- Tell me who else would benefit if you were able to solve these problems.
- Tell me how you would benefit by solving these problems.

Once you have determined the prospect's current scenario and understand the negative consequences that lack of change will deliver, you'll want to understand your prospect's target scenario and the positive business outcome that will result.

Below are examples of Discovery Questions directly related to each Job We Do that will aid with further discovery and enable you to map a pain directly to something Workfront will solve.



Job 1: Centralize Work in One Solution

- If you could wave a magic wand and have an ideal work management situation, what would that look like?
- Describe what a single source of truth for your work would look like.
- Tell me how realizing this ideal scenario to centralize your projects into one solution would benefit you, your team, and your company.



Job 2: Digitize Work Processes

- If you could wave a magic wand, what would your ideal work process look like one year from now?
- What is your ideal scenario to manage work across all of the teams you support?
- Tell me how this scenario would benefit you, your team, and your company.
- Describe how this ideal work process would improve the quality/volume of work your team produces.



Job 3: Review and Approve Digital Work

- Fast forward to one year from now. What does your ideal review and approval process look like?
- Tell me, how has it changed?
- Describe the benefit that has on you, your team, the teams you support, and your company?



Job 4: Govern Compliance Workflows

- What does an era of compliance look like for you and your company?
- How is this important for you and your company?
- How is it different from the way you work and manage compliance-related work today?
- How can improved compliance and governance benefit your business?



Job 5: Deliver Client-Facing Services

- Describe your ideal situation managing client-facing work. How is it different than what you're doing today?
- If you could fast forward a year, what would you like it to look like? How would you like to be managing your client-facing work?
- Tell me how this would benefit you, your team, your clients, and your company.

Process Discovery Questions (Solution Advisor).

Why?

The Process Discovery Call is a critical step in the Workfront Sales Process which enables the Solution Advisor to gain a better understanding of a prospect's current work processes and needs. This preparation helps the Solution Advisor proactively configure a demo that will highlight the Required Capabilities and set competitive landmines to set the deal up for success.

Preparing for the meeting

Preparation by the Account Executive and Solution Advisor is key to a successful Process Discovery Call. AEs should be prepared with the Requirements for a Process Discovery Call Tool completed before they begin working with the Solution Advisor for this call.

Process Discovery Requirements for Prep Call

This document outlines the high-level questions gathered by an AE to help the SA understand more about an opportunity prior to executing a Process Discovery Call.

WHO?	First, help me understand the high-level business of the prospect and who we will be talking to.
Who is the prospect?	
What is their business?	
What buying center is looking for a solution?	
Who will we be talking to and what is their role?	
CURRENT STATE	Next, help me understand their current business pain/situation.
What are the high-level pains they are looking to alleviate?	
Which of the "jobs we do" aligns with their situation?	
What tools do they currently use?	
Have they indicated anything else that is important for me to know or research prior to our process discovery?	
FUTURE STATE	Have they outlined what future success looks like and what other tools they have indicated are in their future?
COMPETITION	Who else are they looking at? Who is the competition?
TIMELINE	When are we looking to do the call?

Process Discovery Questions.

The questions below are example questions to help you better guide a conversation with a prospect to better understand their business objectives and work processes.

Questions for Understanding Business Objectives

- Tell me about the strategic initiatives that your executive leadership team is focused on.
- Explain how your search for a work management solution fits in with these strategic initiatives.
- Tell us about the groups that are looking for a work management solution and the type of work that they manage.

Questions to Better Understand the Work Process

Intake

- How is work kicked off/ initiated in your organization? (i.e. Do they get requests? Yearly approved projects already approved? PM creates it?)
If Requests →
- Who fills this [refer to intake form they sent over] out?
- How do you prioritize the work?
- Where do requests go when they're submitted?
- Do you have formal approvals? What does the approval process look like?

Portfolio Management

- How do you group or organize your projects?
- How do you ensure the projects align with the company goals/objectives?
- How many of your projects use a business case? Tell me who in your organization cares about the business case for each project.

Work Management

- Will you describe an example of the repeatable work you do?
- Do you have a defined workflow or what are steps need to complete this work? If yes, please describe that workflow process.
- (If they sent over a project plan) Tell me more about your project plan. What is this a project for? [Refer to Project Plan that they sent]
- How often do you use this project plan - every project, big projects?
- How rigorously is this project plan followed?
- Who cares about this project plan?
- What are some names of the projects that you are working on?
- What are some of the skill sets/roles that are completing the steps on this project plan?

People/Resource Management

- How do you forecast resources for 6mo-1 year?
- How do you make individual assignments? Who makes those assignments? Project manager? Resource manager? Team lead?
- How do you currently identify bottlenecks within your work process?
- How do you currently track your users' utilization?

Task Management

- Is there an approval step for your deliverables? What does that look like?
- How do you currently log time?

Agile

- Do you have teams that work in Agile?
- Tell us about your approach to Agile.
- Do you currently use any Agile tools? What are some?

Collaboration

- How do you currently collaborate around your work? Who typically collaborates across your organization to get work done? How effective is collaboration across your organization today? How could it improve?

Intuitive Worker Experience

- Describe the tools your team currently uses. What tools do you plan to keep after you implement a work management tool?
- How do project team members update their progress to the project manager?
- How do you provide an on the go/easy update experience?

Review and Approval

- Who are the individuals that are required to review and approve work?
- Is there an order? What determines that order? Are individuals able to review the work at the same time?
- How is the work validated/approved?

Reporting

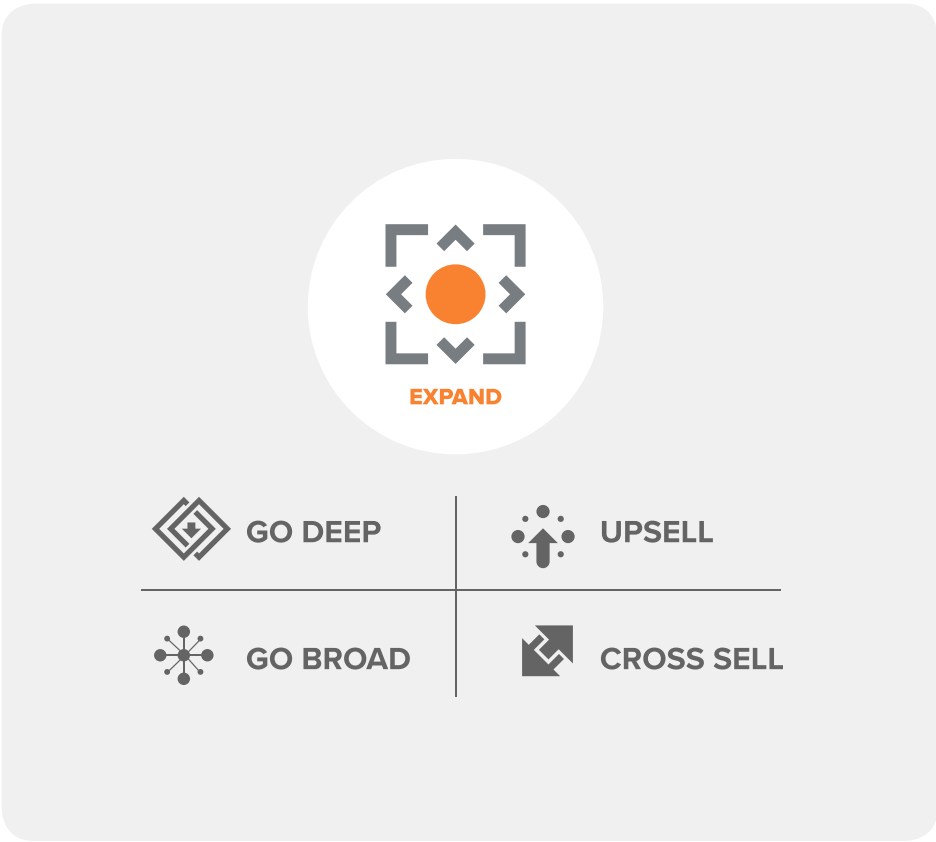
- How do you currently communicate status as a team?
- How are reports created today?
- Tell me what information you struggle to get today.
- How do you keep your executives up-to-date?
- How often do you have to update reports?

Select the Right Package.

TEAM	PRO	BUSINESS	ENTERPRISE
Basic project and work management to get your team started.	Complete work management for a department. Includes premium digital content review and approval.	Complete work management across multiple departments. Includes premium digital content review and approval.	Complete enterprise solution with advanced security. Includes premium digital content review and approval.
RECOMMEND IF:	RECOMMEND IF:	RECOMMEND IF:	RECOMMEND IF:
- Only one team using Workfront. - They are beginning to create and standardize workflows and processes within their team	- A single department will use Workfront. - They have complex workflows and processes that span across multiple teams.	- Multiple departments are using Workfront. - They have complex workflows and processes that span across multiple teams and departments.	- Wall to wall enterprise roll out. - The entire company will use Workfront as their work management system.
KEY VALUES TO HIGHLIGHT:	KEY VALUES TO HIGHLIGHT:	KEY VALUES TO HIGHLIGHT:	KEY VALUES TO HIGHLIGHT:
- Consolidate your requests into one place for greater visibility. - Easily leverage project templates to save time in the planning process. - Automatically assign work based on project and availability. - Unlimited requestors, work reviewers, and reporting viewers	- In addition to Team: - Automatically route new requests and projects for approval. - Build and approve the business case for new initiatives and projects before applying resources to execute. - Use AI to assign work across teams and projects based on a person's role, availability, and priority of work. - Automate the review and approval for over 150 digital content file types. - Consolidate feedback on digital content and easily turn comments into action items. - Access native integrations with popular productivity and content creation tools such as Adobe Creative Cloud, Microsoft Office 365, and Slack. - Connect Workfront to other business applications with our REST API.	- In addition to Pro: - Organize your annual or long-range initiatives and associated budgets in one system with our Portfolio Optimizer. - Ensure the projects your teams take on align with your objectives and with business alignment scorecards. - Monitor projects and work requests from specific departments or groups so you can launch projects at the appropriate time. - Automatically prioritize work based on its alignment to your business goals and the current projects in flight. - Create real-time integrations with all your daily productivity tools. - Test integrations, updates, and new workflows without disrupting work, with a custom refresh sandbox - Premium support available 24x7x365.	- In addition to Business: - Make and receive requests for the entire enterprise and automatically route them to the right team. - Leverage all the capabilities of your teams and business into the one solution that is geared to go enterprise-wide. - Restrict access to Workfront based on approved IP addresses. - Check to see who has access to your instance at any time.

How to Expand.

We have identified four primary expansion paths for Workfront upon landing. These expansion paths are not mutually exclusive of each other and any combination of these can be achieved.



FOUR EXPANSION PATHS FOR WORKFRONT



GO DEEP

This means that we originally landed in a department and are gaining depth within the same department by selling to other teams.



GO BROAD (MAIN PLAY)

This means that we originally landed in a department and we are expanding to a different department.



UPSELL

This means that we originally sold a certain package of Workfront and we are upselling them to the next level of package. For example: Workfront Team to Workfront Pro or Workfront Pro to Workfront Business etc.



CROSS-SELL

This means that we originally sold the core Workfront product and now are cross-selling them other products or integrations like Workfront Library, Workfront for AEM Assets, Workfront Fusion, etc.

How to Go Broad.

1. Watch for triggers.

A trigger is a compelling event or attribute that occurs with the customer that allows you to have a conversation with them about how Workfront can help

- Changes in leadership
- Merger/acquisition
- Customer health (improve or decline)
- New market regulations
- Industry/company news
- Recent non-compliant fines/bad news
- Buying center is a shared service/a lot of collaborators
- Complex tech stack/purchase of new tech

2. Identify current use case(s).

- What is the current use case? What is the pain the current use case is solving?
- Ask: Who else do you work with?

3. Target Go-Broad use case(s).



Centralize Work in One Solution

- Program and Portfolio Management
- Campaign Management
- Content Production



Digitize Work Processes

- Stage-gate Process
- Product Launch
- Onboarding / Offboarding Employees



Review and Approve Digital Work

- Prototyping
- Proofing
- Roadmaps



Govern Compliance Workflows

- Client Implementation Services
- Agency Client Management
- New Client Onboarding



Deliver Client Facing Services

- Regulatory Compliance
- Brand Management
- Audits

How to Go Broad.

4. Engage with your champion.

Together with your champion, develop a plan for how to leverage Workfront to address the trigger and the identified use case. This could include:

- Internal case study
- ROI calculator information
- Value pyramid
- Product tour(s)
- Worksmart days
- Customer stories

Note: In many cases, going broad should be treated like a “land” and you should employ tactics used for landing. Remember that new buying centers may have never heard of Workfront or the value it can provide.

Go Broad Triggers Detail.

Changes in leadership

- Tell me the impact that this change in leadership has on you and your team.
- Describe what adjustments may occur as a result of this change.
- Explain what the top 3 initiatives will be for this new person.

Merger/acquisition

- Describe the benefit this acquisition will provide for your company.
- Explain how you will collaborate with the teams and the newly acquired company.
- Tell me how you will manage the overall acquisition tasks

Customer health (improve or decline)

- Describe your vision of how Workfront will help your organization.
- Explain your current usage of Workfront.
- Describe the main aspects of Workfront that you rely on to get business results.

New market regulations

- Describe how you currently address market regulations.
- Describe how you will address this new regulation.
- Explain why this regulation is important to your company.

Industry/company news

- Tell me how this recent news about your industry will impact your organization.
- Tell me how your business is impacted when something non-compliant occurs.

Recent non-compliant fines/bad news

- Describe the impact that being non-compliant had on your company.
- Explain how you plan to mitigate this risk in the future
- Tell me who was most impacted by your non-compliance.

Buying center is a shared service/a lot of collaborators

- Describe your most critical initiative and the groups you work with
- Explain how you currently manage this process.
- (Complex, multiple teams, different tools, etc.)
- Tell me who else you work with.
- How long does a typical review process take?

Complex tech stack/purchase of new tech

- Tell me about your technology stack.
- Describe the tools you currently use to manage project work and processes.
- Explain the value you could get if these tools and systems were integrated together to get work done.

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