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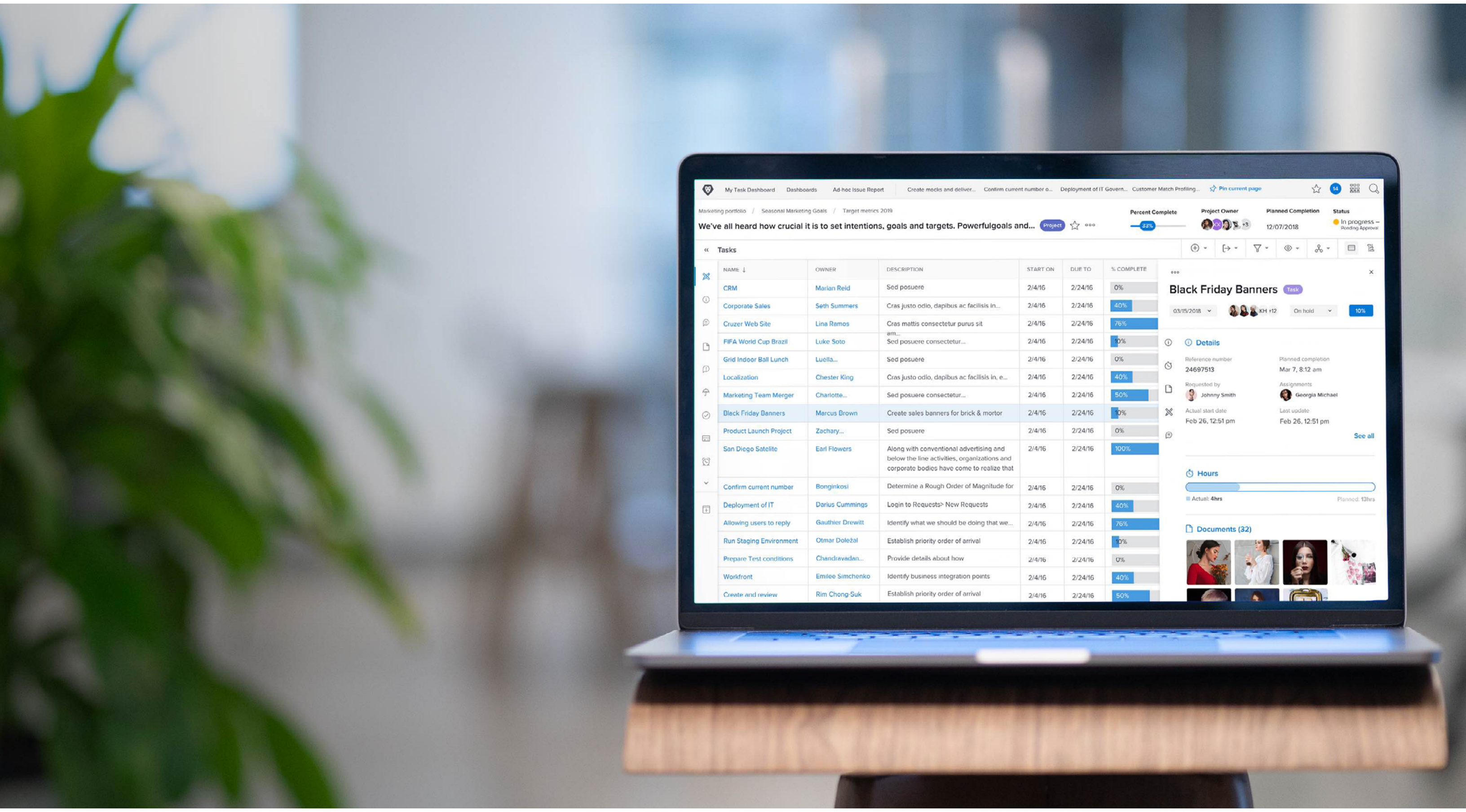

New Workfront Experience Success Guide

1-MONTH PLAN TO SUCCESSFULLY KICK-OFF YOUR TRANSITION

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Week 1

Step 1: Prepare the System Administrator

- [ ] Familiarizing the admin with Workfront by watching this short navigation video.
- [ ] Understand what elements of the interface are different and why. Start by reviewing the resources in the new Workfront experience Resources section.
- [ ] Understand and write out the value of transitioning to the new UI for your team.
- [ ] Review the new Workfront experience Onboarding Guide.
- [ ] Have the admin practice enrolling themselves into the new UI, navigating it and creating a new layout—tap into the new Workfront experience video library for more information.
- [ ] Download the Sample Transition Plan, unzip it and import it into Workfront to start building your project plan!

Step 2: Identify Stakeholders

- [ ] Identify the Executive Sponsor, the new Workfront experience Champion, the groups of users currently using Workfront and their team leads, the global and group system administrators and the enablement team that will help train end-users and drive user adoption.
- [ ] Identify the Pilot Group - a team of core Workfront power users that currently champion Workfront Classic, that have a solid understanding of their work processes as they are used in Workfront Classic and that agree to being the pilot group for the transition.
- [ ] Start generating excitement! (See Step 12.)

TIP: To learn who these stakeholders are, remember to leverage your team and your Workfront platform. Ask end-users and leadership about who is using Workfront the most, who is most excited about it or who finds the most value in using it. Create a utilization report to see what users are logging into and using Workfront most frequently as those individuals are likely some of your power users.

Week 2

Step 3: Align Stakeholders

- [ ] Ensure the Sponsor understands the transition value and communicates it to stakeholder team leads.
- [ ] Meet with stakeholders to align on the pilot team, team transition readiness, team persona and layout needs, risks and assumptions, communication and change management plan needs, timeline, etc.
- [ ] Create a communication plan and a change management plan.
- [ ] To validate the success of the transition consider sending preliminary survey to capture qualitative and quantitative end-user sentiment of their Workfront Classic experience. A similar survey can be sent out after the transition to compare results, validate success and identify room for improvement. Consider getting specific and offering values to responses (i.e. select 1 through 5).

TIP: Remember to align with your governance committee as you prepare to make the transition.

Step 4: Define the Pilot Group Strategy

- [ ] Meet with the subject matter experts from the Pilot Group that understand their processes and layout needs to align on level of effort required, timeline expectations, their desired outcomes, what Workfront elements are needed and what may no longer be needed (i.e. outdated dashboards, custom fields, etc.).
- [ ] Create new Layout Templates in the new Experience for each Pilot Team persona.

TIP: Try to keep the look and feel of the layouts simple. Only include required elements in a layout and hide unused features. Only pin items to the top navigation bar that everyone assigned to the layout will use. Remember to toggle between layout assignments on your own profile to test and validate.

Week 3

Step 5: Update Training Material

- [ ] Identify and update key organizational artifacts that need to be updated using this guide.
- [ ] Determine what self-guided training you will assign. Review the Learning Paths for Planners, Workers, Collaborators and Executives and standalone new Workfront experience training videos.

TIP: Need help creating training materials or training your end-users? Reach out to your Workfront Account Executive to learn about Workfront Custom Training Services that are available.

Step 6: Prepare for In-Person Training

- [ ] Confirm training schedule date(s)/time(s) with pilot team lead. Request that attendees bring laptops.
- [ ] Determine the content that is critical for your Team to consume and prepare an agenda.
- [ ] Prepare some hands-on exercises for end-users to do during training. Consider creating a Project Template - where practice activities as tasks will be assigned to attendees. Use this for each training.
- [ ] Prepare a list of questions or concerns that your team might have and prepare answers in advance.
- [ ] Update the System Administrator Request Queue to include a Queue Topic for transition questions.

Step 7: Practice the Presentation

- [ ] Enroll yourself in the new Workfront experience and assign a Layout Template to your profile that is relevant to the team being trained, so that it appears upon logging in during training.
- [ ] Using your updated training materials, deliver a mock presentation of your introduction.

The rest of the steps for Step 7 are continued on the next page.

Step 7: Practice the Presentation *(continued)*

- [ ] Transition to a mock training walk-through demo. Consider touching on the following:
    - » Log into Workfront
    - » Navigate the landing page and the pinned items and “Pin this page” functionality
    - » Navigate Help, Favorite & Recent Items, Announcements & Notifications and Main Menu
    - » Navigate into Requests, if it wasn’t pinned, and Home, if it wasn’t the landing page
    - » Navigate Search and drill into a Project
    - » Demo Project navigation
    - » Drill into a Task and demo Task navigation
    - » Navigate personalization of left hand panels
    - » Demonstrate how to use Views, Groups and Filters
    - » Demo any changes to the team-specific workflow between Classic and the new UI
- [ ] Prepare your closing / Q&A

> **TIP:** Highlight functionalities or quick wins that will impact the team in a positive way and speak to those throughout the presentation. Consider what features will make your team’s life easier and more efficient.

Step 8: Update & Execute the Communication and Change Management Plans

- [ ] Update and execute the plans with team-specific information.
- [ ] Assign the Pilot Team preliminary homework and invite them to the training session.

> **TIP:** Communicate early and often to ensure that your end-users are informed of upcoming changes, why the changes are happening, how they will be affected and what the transition will look to help drive user adoption.

Week 4

Step 9: Transition the Pilot Group

- [ ] Deliver an interactive training. Make sure to leave time for questions and feedback collection.
- [ ] Assign homework or practice activities to your team, if applicable.
- [ ] Invite the team to submit feedback and questions through the Request Queue.
- [ ] Schedule optional 1-hour office hours for the team trained to drop into with questions and feedback.
- [ ] Send the post-transition survey to customers.

> **TIP:** Tell your story on Workfront Community and learn about transition stories from other Workfront users!

Step 10: Fine-tune the Transition Process After the Training Session

- [ ] If surveys were sent out, collect the data to validate transition success and areas for improvement.
- [ ] Implement recommendations and feedback from the transition group as you see fit.
- [ ] Update your Workfront transition project plan(s), communication plan and change management plan and communicate changes to key stakeholders.

Step 11: Start Planning to Transition the Next Group of Users

- [ ] To successfully transition the remaining groups or teams of users, repeat steps 4 - 10, altering step 4 to be "Define the Group Strategy" moving forward.

Step 12: Generate Excitement

- [ ] Keep an eye out for individuals that quickly pick-up using the new interface and that are sharing positive things about their experience. Celebrate these wins with others!! Get them excited about how much better their work experience will be after they make the transition.
    - » Is the new UI easier to navigate than Classic?
    - » Is the ability to customize your own layout with pins saving you tons of clicks?
    - » Are the new functionalities that are only in the new UI on fire and they never want to go back?

Step 12: Generate Excitement *(continued)*

- [ ] Incorporate wins and values in the Communication Plans and spread the word through other channels (i.e. break room conversations, flyers, internal company site, word of mouth, etc.).

TIP: Give those that are doing well opportunities to be recognized and potentially compensated by growing their knowledge, work management skills and their career path.

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