

Your Onboarding Guide to the New Workfront Experience

MARCH 2020

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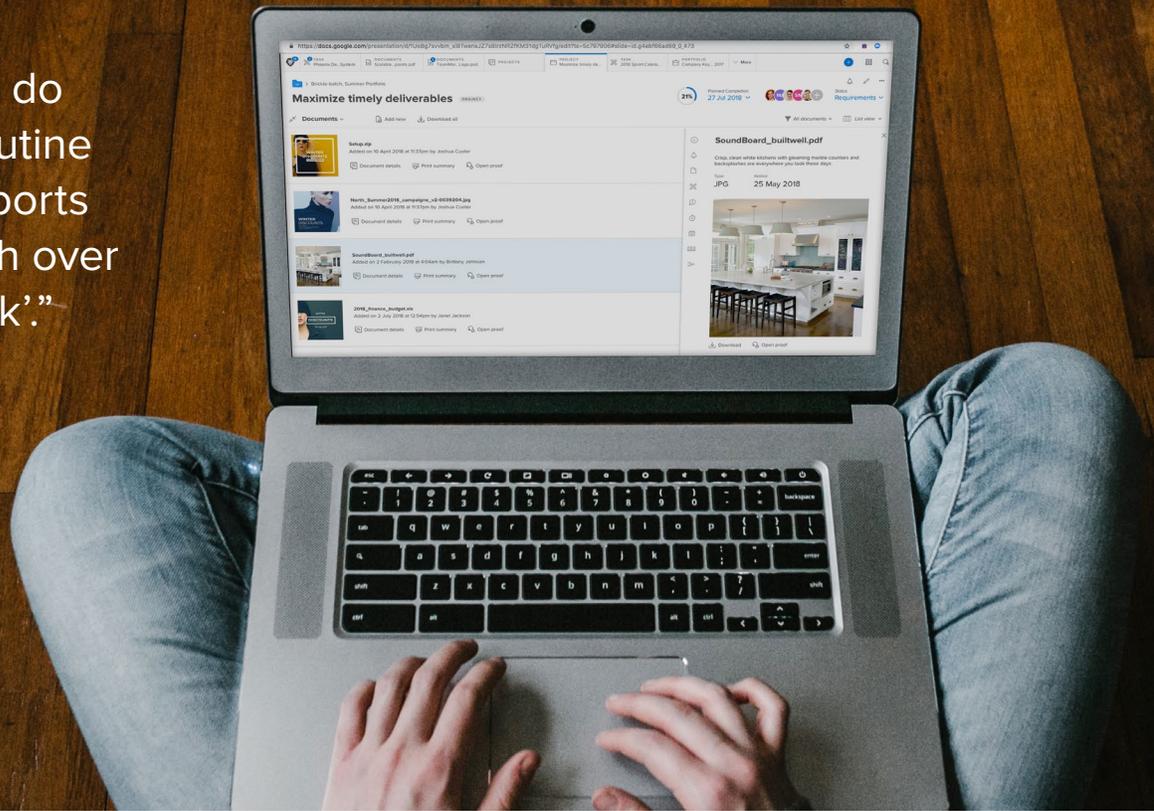
Welcome to the new Workfront experience.

More than 3,000 companies have entrusted their most critical intellectual capital to our modern work management platform—something we don't take lightly. You've helped connect the world by building new trains, saved lives with new medical devices, consolidated major corporations, designed new shoes, produced TV shows, and helped people find joy through your products.

Our hat's off to you.

“Workfront's new UI is cleaner, more modern. I love that it flattens out some of the architecture and that users can create their own personal spaces to do work now.”

“Love this! I can do my morning routine compliance reports and then switch over to my ‘real work’.”



Why did we create the new Workfront experience?

You, our visionary customers, leverage Workfront every day to modernize how you operate and work. You've accomplished more than 500 million hours of work, engaged in over 160 million conversations, and completed 2.5 million projects in Workfront *in just the past year*.

As we've seen the amazing and impactful work you do each day, we wanted to provide an even better experience for you and your teams.

That's why we took our enterprise work management platform and made it even easier for people to better manage and contribute to the important initiatives in their organization.

But the truth is, we couldn't have done it without you.

Our research + your insights.

We've been on a mission for nearly two years to listen and learn from you. You've given us a front-row seat to see how some of the most successful leaders in the world get work done. We've watched you rally your teams, coordinate various timelines, and create structure out of chaos.

We've spent more than 2,000 hours sitting side by side with you, learning how people from every industry, every size of enterprise, and across multiple continents work. We've interviewed thought leaders, analysts, and hundreds of workers from every level in a company.

Then we went to work with you. We designed, tested, and iterated together. And then we did it all over again.

Now it's our turn to share what you, our customers and work visionaries, have helped create.

2,000+

hours of customer
interviews

15,000+

customer feedback
comments

600+

customer
interviews

“I'm back at work and used the new Workfront experience for the first time since it launched. It is really a huge improvement. The info is clean and easy to follow.”

Designed by you, for you.



Together, we took the best modern work management platform and created a new experience that helps you focus on the right work, drive results, and contribute to your company's important initiatives.

As you start to use the new Workfront experience, right away you'll notice the modern, clean interface. The design evokes the familiarity of the Workfront you already know, but offers a simplified and intuitive navigation.



Focus.

The newly re-designed Workspaces, mobile app, and personalized navigation are designed to make it easier to know where you need to direct your efforts today.



Contribute.

When you use the Summary panel, Breadcrumbs, or Search, each feature and functionality was created to help you move the needle and get work done.



Engage.

We know that you want to work your way. Now you have additional features to customize your dashboards, workspaces, projects, reporting, and more.

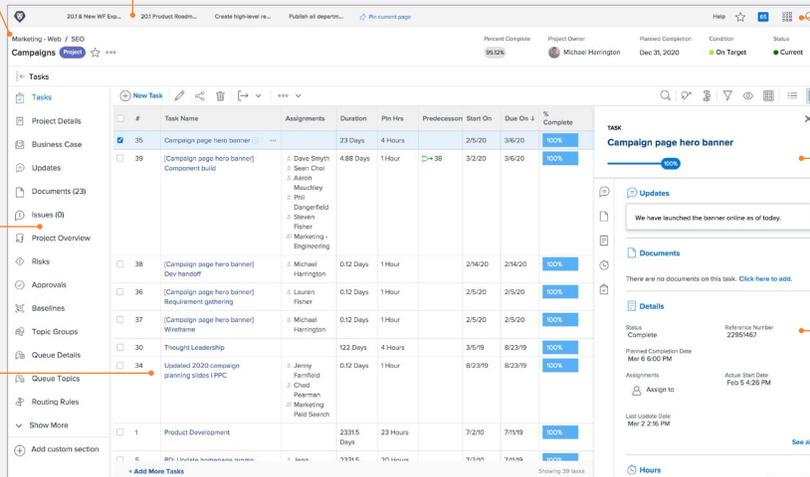
Navigating the new experience.

Connection to strategy
Streamlined headers, including breadcrumbs, simplifies the connection of tasks to your strategic initiatives (also available in proofing view).

Customized navigation
Personalize how you access work that's most important to you.

New list view
Get to your projects and tasks faster than ever before with an improved view of your work lists.

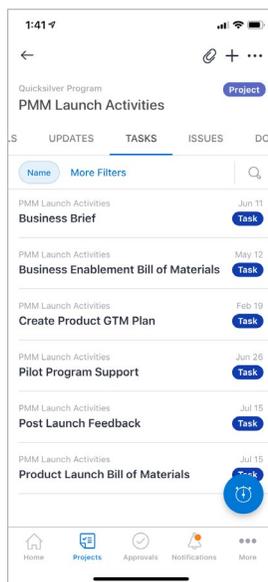
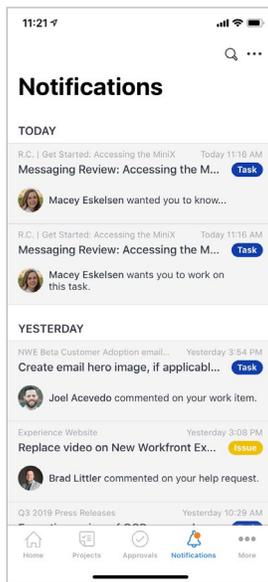
Personalized workspaces
Create a dynamic place to work the way you want.



Simplified navigation
An easier way to find your portfolios, make requests, and much more.

Quick access
Summary panel lets you update your progress or collaborate on a task.

Elevated critical data
Personalize the layout to see detailed information about your work.



Download the mobile app.

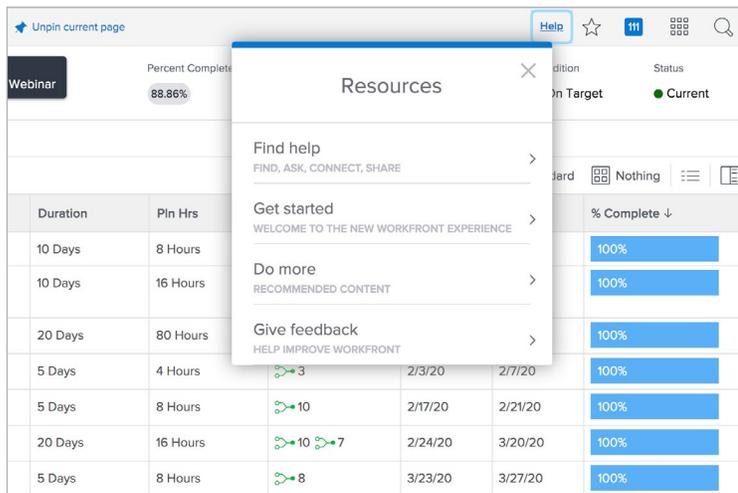
Manage your most important work from the train, coffee shop, hallways, or from anywhere with our redesigned app (available for iPhone and Android).



Getting started with the new Workfront experience.

If you're ready to start using the new Workfront experience, you can start today. To learn how to enroll, refer to the new Workfront experience page on [Workfront One](#).

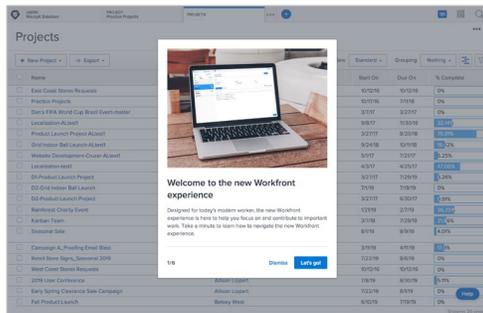
Now, it's your turn to get started. Jump in, try it out, and enjoy what you've helped create. We're proud of what we've built so far, but together, we'll keep making your work better.



“Our end users are going to love the new search, projects, and workspace options.”

Helpful resources to get you started.

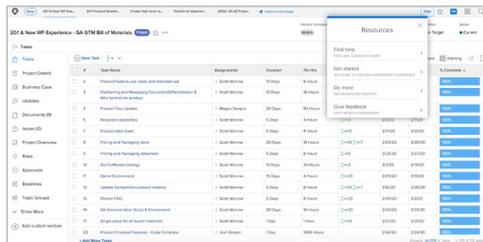
Workfront has a variety of resources to get you started using the new Workfront experience. Tutorials, articles, and in-app guides are among the resources to help you and your users learn what's new and exciting about the changes to Workfront.



In-app guides

Start learning as soon as you log into the new Workfront experience with our new in-app guides. With your first login, you're invited to complete a walk-through that introduces you to the new look.

You can revisit the overview guide through the Resource Center. Additional in-app guides will be available in the near future.



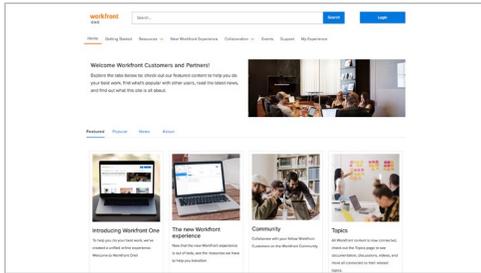
Resource Center

The Resource Center is your one-stop, in-app spot for access to training, product documentation, in-app guides, and customer support. Just click the **Help button** in the top-right navigation to access information.

Connect with Workfront's customer support team, file a help ticket, or share an idea in the **Find help section**. In-app guides are available in **Get started**, and you can provide feedback right to Workfront's product developers with the **Give feedback** section.

As the new Workfront experience improves and grows, so will the offerings in the Resource Center.

HELPFUL RESOURCES



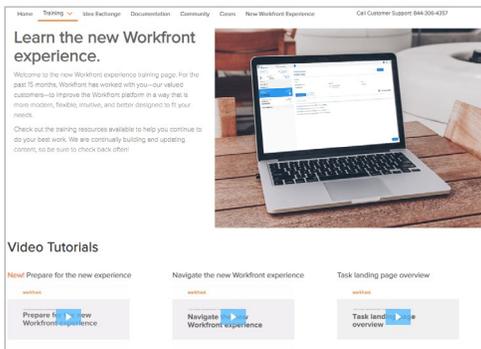
Workfront One

Our new [Workfront One](#) is your launchpad for learning.

Workfront One was built to provide all the resources you need to succeed in enterprise work management—all in one place.

Here, customers, partners, and employees will come together to find solutions, share best practices, and make work more efficient.

Workfront One is the place for you to view learning and training materials, learn from other customers, and see what the topics are on their minds, and see the latest product documentation.



Video tutorials

Kick off your introduction to the new Workfront experience with a video tutorial that walks you through the new interface. Follow that up with more in-depth tutorials about specific updates, so you get a full picture of what the new experience brings to you and your users.

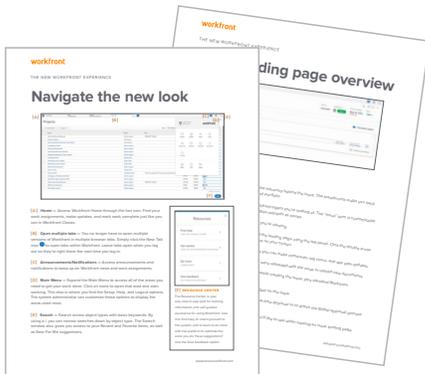
These videos are a great way to give your end-users a sneak peek into the new experience. Don't hesitate building these tutorials into your end-user training plans.

Product documentation

System administrators, core team members, and others who want to know Workfront inside and out can dig into the finer details of the new interface with Workfront's product documentation.

Knowledge base articles about the new Workfront experience help you get more in-depth information on specific topics. The product release page provides an overview of what's currently included in the new Workfront experience. It also keeps you in the loop about functionality that has been removed from Workfront, plus glances at what's in development.

HELPFUL RESOURCES



Guides

As you're exploring the new Workfront, download quick guides to aid your learning.

The comparison guides shows Workfront classic and the new Workfront experience side-by-side. As you can see, the look of Workfront may have changed, but the functionality is still there.

Overview guides orient users to specific updates of the new Workfront experience, such as the task landing page. And single-page instructional guides walk you through the steps of making a request or running a search.

Incorporate these guides into training for your end-users, so they have materials to refer to when you launch the new experience at your organization.

workfront[®] COMMUNITY

Join other Workfront customers in discussions about the new Workfront experience through Workfront's Community on Workfront One.

This is another way to provide feedback to the Workfront team, plus share ideas and solutions with other customers using the new experience. It's also a way to help the Workfront product development team test prototypes and refine new features that may make their way into the software.



INDUSTRY
Healthcare

WEBSITE
iehp.org

LOCATION
Rancho Cucamonga, CA

IEHP finds renewed focus and engagement with Workfront's updated UI.

THE OPPORTUNITY: When Inland Empire Health Plan (IEHP) saw the new Workfront experience, they were excited about the enhancements designed to make users more productive, efficient, and collaborative. System admins are tasked with helping their end-users adopt the new Workfront experience, understand the updates and see the value in them—but change is never easy. To drive better adoption, IEHP created a plan to successfully bring their teams into the new Workfront experience.



“Our end users are going to love the new search feature, in addition to have the ability to work with multiple workspaces in one instance.”

—Dawn Cejudo, Senior Application Support Specialist, IEHP



“If you can use Google, you can use this.”

—Cliff DeJong, Application Support Specialist, IEHP

The IEHP rollout plan.



Identify someone with an affinity for Workfront and make them your champion.

Dawn suggests finding a cheerleader for the new Workfront experience in your team and making them an adoption champion. They may not be hooked from the start—but they could be the person least likely to get on board. “Find your most negative Nancy, have them drive their demos, and you’ll turn them into your biggest champion,” says Dawn.



Create training materials to help your team understand the new Workfront experience.

For IEHP, thorough training was the key to helping teams grasp changes. “People will adapt when they see enhancements that benefit them and understand their purpose,” says Cliff. “Navigation training alone will make it easier to digest.” IEHP also uses side-by-side documentation comparisons to show teams the before and after, emphasizing why things changed for the better.



Have team members keep track of any issues they have in their Workfront experience.

IEHP communicates about issues in two places. First, via the feedback button to Workfront directly. Second, by submitting them within their own internal Workfront instance. Dawn then tracks the issues as she rolls out the new Workfront experience team by team, allowing her enough insight to control the pace. If lots of users report issues, for example, she can slow down, facilitate more training, and then smoothly continue.

Summary

The new Workfront experience brings in intuitive features, like a more user-friendly interface, multiple tabs in one browser instance, and the navigation waffle. After IEHP’s full training and rollout, their users hope to gain more productivity in their day-to-day responsibilities.



FOOTE, CONE & BELDING

INDUSTRY
Advertising

WEBSITE
fcb.com

LOCATION
New York, New York



FCB looks forward to streamlining workflows in the new Workfront experience.

THE OPPORTUNITY: Foote, Cone & Belding (FCB) is a large global advertising agency with thousands of Workfront users. When the system admins at FCB were first introduced to the new Workfront experience, they were thrilled about the sleeker design and streamlined navigation. FCB is taking a proactive and phased approach to introducing their teams to the new Workfront enhancements, getting them excited for the UI updates while planning an effective rollout.



“I am excited that the new Workfront experience feels slicker and takes fewer clicks, while also allowing for more user customization.”

—**Kathy Haven**

VP, Director, Strategic Operations PMO, FCB



“Our team just finds Workfront so incredibly valuable. The UI is modern and fresh, which helps us manage our digital work processes faster and with more predictability.”

—**Anthony Imgrund**

Project Manager, FCB

The FCB plan.



Start with early adopters before rolling out the enhancements in controlled waves.

FCB is bringing users into the new Workfront experience slowly, beginning with selected early adopters, while monitoring the feedback that comes in from these users. Then they'll start expanding the roll out to other teams, such as Project Managers, Producers, and certain Account teams. A paced rollout can help leaders iron out issues before cascading the new experience across the organization.



Meet people where they are and provide ongoing training.

Kathy and Anthony will do walkthroughs with their users in small groups, comparing their current experience to the new one. "We need to meet our users where they are while getting them excited about the changes," says Anthony Imgrund, Project Manager, FCB. "We have control over it, too. We can switch them back and forth between the experiences to help them transition." After a month of open training sessions for those who've opted in, all new hires will be onboarded directly to the new experience.



Deploy the new Workfront experience to all users by October 5.

In order to avoid the year-end rush often associated with enterprise work management, Kathy and Anthony are working to have all of their users using the new Workfront experience by the beginning of October. "People are going to like the new workspaces," Kathy says. "We can't wait to roll out the new Workfront experience across the organization."

Summary

FCB is bringing an excited energy to the rollout of the new Workfront experience while anticipating their users' needs with an action plan. FCB is a global, award-winning and fully integrated marketing communications company with a heritage of creativity and success dating from 1873. FCB focuses on creating "Never Finished" campaign ideas that have the power to transform brands, businesses and communities.

Suggested steps to take next.



Discover new capabilities.

The new Workfront experience is more than just a refreshed user interface. We've added new features and functionality to make it easier to do your work. Check it out for yourself, and see the new features in action.



Determine who is affected.

You know your users. Your administrator knows the system. Together, you can determine how the changes will affect your end-users and your internal processes. You can look at how best to roll out the changes to your organization, starting with who should be enrolled early on, and identify any potential red flags or obstacles.



Create a timeline for making the switch.

Use Workfront to plan out and track the timeline for launching the new experience at your organization. Be sure to include measurement markers, feedback loops, training points, validation sessions, etc.

Don't forget to plan time for [updating your internal Workfront training curriculum](#) and support materials. These will be needed for the initial launch and into the future as new employees come on board. And, of course, make sure the timeline includes [training time for your end-users](#).



Provide information for users.

Communication is key. When they don't know what's coming and just hear rumors, they're not going to adapt to the change well. Getting users involved sooner rather than later helps build interest and excitement about the upcoming changes. We've helped by providing the communications guide below.

Most of the time, users just want to know one thing: Can I do everything in the new Workfront that I could do in the old Workfront? Show them things are pretty much the same using the video tutorials and guides available on the new Workfront experience website.

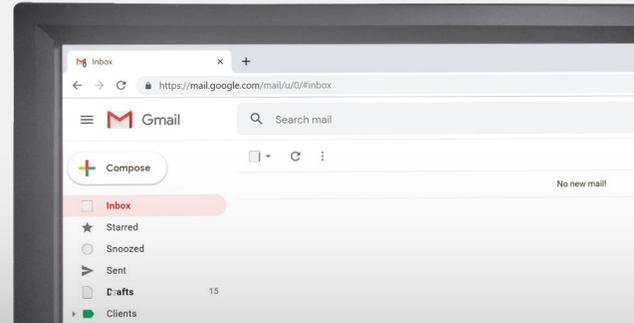
Your guide for communicating the change.

1. Build awareness.
2. Create understanding.
3. Apply changes.
4. Communicate change effectively.



Communicate change to the right people at the right time.

1. Educating your core teams
2. Educating your end users
3. Update on core team activities
4. Rollout to end users
5. Ongoing communication to all teams after rollout



As you make your plan to prepare your company and users for the new Workfront experience—testing, training, roll-out, etc.—don't forget communication. A vital part of every step is communicating with your users.

Just 53% of middle managers and 40% of first-line supervisors say management does a good job of explaining the reasons behind major organizational decisions, according to a [Willis Towers Watson study](#). This means information doesn't cascade down to employees, who are left wondering what value the changes brings to them.

Start setting the stage now by letting users know change is coming. Keep everyone updated during testing, training, launch, and even after launch.

To help you communicate, we've provided some email templates, along with a suggested communication timeline, to correspond with key points on your new Workfront experience launch timeline. Use the templates as they are, or change them around to suit your plans and organization. Communicate with your users more or less than we've suggested—you know how your organization will best ingest the information.



Helpful links to include in your communications:

The [new Workfront experience page](#) on Workfront One—Watch an informational message from Workfront's chief technology officer, join the Workfront Community in talking about the new Workfront experience, and keep up on recent news from Workfront's Product team.

Learn the [new Workfront experience](#)—Video tutorials and downloadable quick guides help get you up-to-speed on the changes in the new experience.

[Product documentation](#)—Dig into the details of the changes with our step-by-step product support documentation.

1. Educating your core teams

Purpose

Introduce the new Workfront experience to your users.

Announce the new experience is ready for a select group of users to try out.

Audience

Early adopter team

Sender

Champion,
System Administrator

EMAIL SUBJECT LINE

The new Workfront experience is here

EMAIL CONTENT

Hello, everyone!

I'm excited to announce that Workfront, our partner in getting work done, has revamped its look and feel to provide all users with an improved modern work experience.

Workfront spent months conducting hundreds of customer interviews and reading thousands of customer comments to find out how you, the user, wanted Workfront to work. The result is a more modern design, but with an underlying familiar feel that lets you know it's still Workfront. It's better designed to fit your daily needs so you can contribute to the projects and initiatives here at [company].

Starting today, the new Workfront experience is available for a group of early adopters at [company]. **We'd like you to be a part of this pilot group**, doing your daily work in the new Workfront experience and providing feedback/recommendations.

[System administrator] will switch the early adopters over by [date]. So, if someone happens to look over your shoulder, let them know what you're doing. If you have time to answer questions or give them a quick tour of the new experience, that would be great. Let's start getting positive messages out there about the change.

We'll hold an initial "get to know the new Workfront experience" session for the early adopters, so you can get up and running quickly. You also can tap into Workfront's online resources:

- The [new Workfront experience page](#)—Watch an informational message from Workfront's chief technology officer, join the Workfront Community in talking about the new Workfront experience, and keep up on recent news from Workfront's Product team.
- [Learn the new Workfront experience](#)—Video tutorials and downloadable quick guides help get you up-to-speed on the changes in the new experience.
- [Product documentation](#)—Dig into the details of the changes with step-by-step product support documentation.

Over the next few weeks, we'll bring additional users and teams into the new Workfront experience to try things out, offer feedback, and prepare for the official company rollout later this year.

I've been trying out the new design, and I've found [positive comment].

If you have questions about the new Workfront experience, please let me know.

Thank you,

[your email signer]

2. Educating your end users

Purpose

Update on the new Workfront experience trial, share feedback. Communicate plans about general availability (GA) release, training, etc.

Audience

All Workfront users

Sender

Champion,
System Administrator

EMAIL SUBJECT LINE

The new Workfront experience is amazing!

EMAIL CONTENT

Hello, everyone!

You've probably heard by now—change is coming to Workfront. After talking with hundreds of users and reading thousands of comments, Workfront has redesigned its look, making it more flexible, modern, and intuitive to use. It may look different, but all the functionality we rely on in Workfront is there.

Our early adopter team started using the new Workfront experience for their daily work [on date]. They have some great things to say about the new look and feel.

[insert positive comment here]

[insert positive comment here]

We're looking forward to the rest of you being able to dig into the new Workfront experience. The workspaces keep you organized, the summary panel gives you task information with just a click, and the streamlined navigation gets you to your work faster.

So, what are the next steps?

First, we'll introduce the new Workfront to select users and teams, adding to our early adopter team. You'll receive an email outlining all the details if you've been selected.

Second, we're developing training and support materials so everyone will be ready to go before making the switch [later this fall].

And finally, our deployment plan will get everyone at [company] up and running on the new Workfront before [your deadline date].

You'll hear more about the new Workfront in the following weeks. To start, you're invited to attend one of the new Workfront experience "sneak peek" demos on:

- [Date, time, location]
- [Date, time, location]
- [Date, time, location]

Keep an eye on your calendar for training opportunities, launch dates, and more.

If you have questions about the new Workfront experience, please let me know. You also can learn more at [here](#).

Thanks,

[your email signer]

3. Update on core team activities

Purpose

Announce training and launch plans as the new Workfront experience official launch nears.

Audience

All Workfront users

Sender

Champion,
System Administrator

EMAIL SUBJECT LINE

The new Workfront is almost here

EMAIL CONTENT

Hello, everyone!

Workfront has announced that, as of [date], the new Workfront experience will be available to all of its customers across the globe.

But don't worry... we're not switching over everyone at [company] right away. We're rolling out the new Workfront across the company over the next [amount of time].

Our early adopter team has been busy, putting the new Workfront experience through its paces since [date] and making sure that everything is in order to make the move over to the new Workfront experience as seamless as possible.

[insert positive comment here]

Now it's time for the next phase of our plan for introducing the new Workfront to the rest of the company.

Phased rollout

The phased rollout gives each group the time and attention it needs to get comfortable using the new Workfront.

Those in the early adopter groups will continue using the new Workfront. Here's the rollout schedule for remaining employees:

[insert rollout plan]

If you have questions about the new Workfront, training, or the roll-out plan, please don't hesitate to ask. We look forward to seeing you in the upcoming training sessions.

Thank you,

[your email signer]

4. Roll out to end users

Purpose

Announce that the new Workfront is available worldwide. Review the rollout plan.

Audience

All Workfront users

Sender

Champion,
System Administrator

EMAIL SUBJECT LINE

Today is the launch of the new Workfront experience

EMAIL CONTENT

I'm excited to announce that today is the day—we start rolling out the new Workfront experience to all users at [company] as Workfront launches its new look and feel to all of its customers across the globe.

As we've highlighted in previous emails, [company] is taking a phased rollout approach to getting everyone switched to the new Workfront experience.

[Team name] is the first set of users to switch, and they'll be using the new Workfront by the end of the day. So when you look at Workfront on their screens, it's going to look different. But don't worry! It's the same Workfront system we've been using for [amount of time], just new and improved. Everyone can keep working as usual.

As a reminder, here's the rest of the rollout schedule:

[insert rollout schedule here]

A few other things:

Training

Everyone will receive calendar invites for new Workfront experience training. These sessions are mandatory, so accept one that works with your schedule. We'll show you how to navigate the new Workfront, find your work, and [something relevant to your organization]—everything you need to get your work done.

- If you haven't watched a demo of the new Workfront experience, watch this video: [URL here].
- Attend the training session that corresponds with your job role/duties. Check your email inbox for an invitation, as the training is mandatory.

Getting help

I'm sure there will be a lot of questions as everyone starts using the new Workfront experience. So where do you go for help?

- If it's a quick question, check the materials you received during training. Search the Workfront support website at one.workfront.com. Look at the support materials we keep on [server/COE]. And if your cubicle neighbor isn't busy, tap into their knowledge!
- [Name] will be the main person for answering Workfront questions. You can [email/call/message] him/her at [email/number].
- If you should be seeing the new Workfront but aren't, contact [system administrator] at [email/number].

I'm really excited about bringing the new Workfront to all of [company]. Everyone should be on the new Workfront by [date].

Thank you to the early adopters for their time testing the new Workfront and for providing feedback. And thank you to the [core team] for creating, organizing, and conducting the training.

As usual, if you have questions, please let me know.

Thank you,

[your email signer]

5. Ongoing communication to all after rollout

Purpose

Announce that all users are now on the new Workfront experience. Share additional information (if applicable).

Audience

All Workfront users

Sender

Champion,
System Administrator

EMAIL SUBJECT LINE

The new Workfront experience is a hit!

EMAIL CONTENT

Hello, everyone!

[insert positive comment]

[insert positive comment]

Those are just a few of the great things I'm hearing about the new Workfront experience at [company].

As of today, [number] of Workfront users at [company] are using the new Workfront. We finished our phased rollout on [date].

Getting help

If you have questions about Workfront, please direct them to [system administrator] at [email/number].

Training

If you missed the training sessions held over the past few weeks, we're holding additional sessions. Look for a calendar invitation in your inbox.

Again, thank you to everyone for making this rollout a success! Thanks to the early adopters for being the testing group and providing feedback. Thank you to [the core team] for conducting the training. And thanks to every Workfront user at [company] for getting involved, learning about the new Workfront experience, and making it a part of your daily work.

Thank you,

[your email signer]

workfront