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6 easy ways to collaborate using Workfront

Collaboration and communication are key to business success. Teams that excel at both tend to innovate better, respond to market conditions faster, and experience higher levels of morale.

TARGETED LEARNING GUIDE

The 3 C's of collaboration.

There's a blog post on the Workfront website called [Collaboration Tips: 40 to Get Your Team Communicating Like Pros](#). They're great tips, but let's boil them down to what we call "the 3 C's of effective collaboration using technology."



Clarity.

Provide as much clarity on the project up front and where possible.

Some customers attach a project charter to the project or task. Other customers leverage Workfront's built-in fields or custom fields to outline the purpose or goal of an initiative, similar to a creative brief.

Project Details Add custom form

Overview

Description

1. Why is the project important?

- Find gaps/needs for improvement
- Provide client facing/internal documentation
- Have company wide visibility to clarify and enhance enablement

2. How will we know if this project is successful?

- Reduce other department trainings from % to %
- Determine LE between Kickoff and Launch (internal awareness)
- JS - engagement on research from the company (Mtg & Product) - get a bunch of reaction
- LE - research is comprehensive. When deploy, its engaging to CXL - the entire CX group - don't know yet.

3. What do we need people to do to achieve the project goals?

- Layout (should) current LE
- Put consultants for standard training %
- Create video with proposed solutions

Talk with Jordan

Realizing a solution over and over. Can't be romantic and greedy about this.

Product (not loaded)
Enablement Engine
CSM (back loaded)
[Show Less](#)

Reference Number
20521476

Priority High	Status Cancelled
Condition Type Progress Status	Condition In Trouble

Use the Description field to outline expectations.



Context.

Share any historical or background information on the initiative before you launch the project or task.

This could be links to old projects, copies of documents that have already been created, or records of prior communications.

Create leap 2019 schedule
Allison Lippert
02/21/2019 At 6:05 PM · 0 · Like

docs.google.com/spreadsheets/d/1qAqR0Zfc5-jcx091UAYgr-buyckIJ7_h-7WUb598I-0/edit#gid=0

Jeremy Flores
02/25/2019 At 10:23 AM · 0 · Like

Thanks for helping out with this, Allison!

[Reply](#)

Betsey West
02/21/2019 At 9:12 AM · 0 · Like

Attached all the adoption material I have and that I had access to in Google. Research is continuous but for the most part I am done putting into a cohesive outline that can be used for Leap.

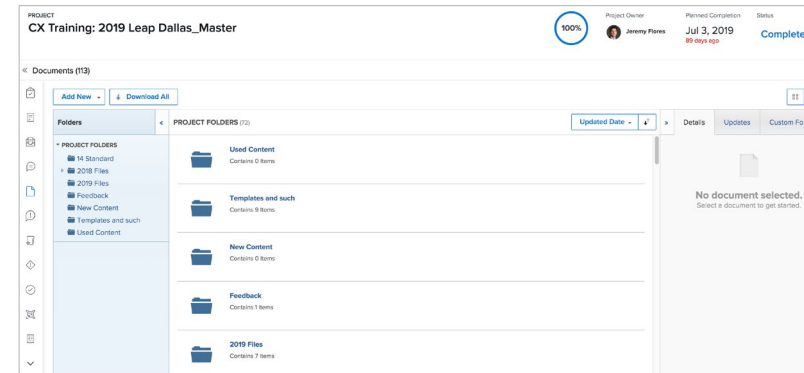
[Reply](#)

Link to other files when you post updates in Workfront.



Consolidation.

Upload or link priority documentation or assets to the project to ensure everyone who needs to get involved has everything they need. This saves time and will pay off in the long run.



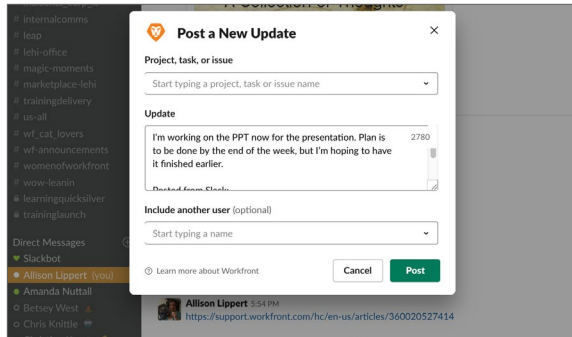
Organize files into folders so they're easy to find.

“Collaboration, at its core, is effective work communication.”

—Collaboration Tips: 40 to Get Your Team Communicating Like Pros blog post

Collaborate with Workfront.

Use Workfront to collaborate in a way that leads to results.



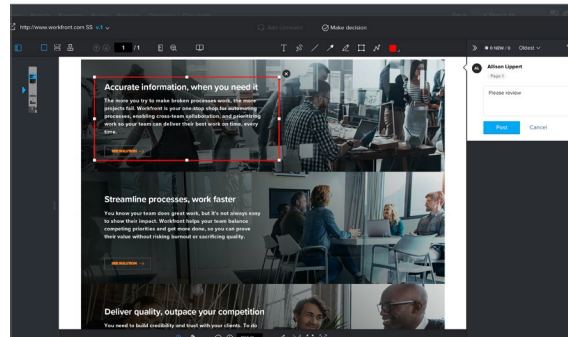
Tip 1

Use Workfront's Slack integration to send the comment to your project, task, or issue.

Select your comment in Slack, use the More option, and pick Post an Update. Fill in the fields and send that Slack message straight into Workfront.

Learn more with the [Workfront for Slack](#) training.

Result: Keep assignments and projects updated using Workfront native integrations.

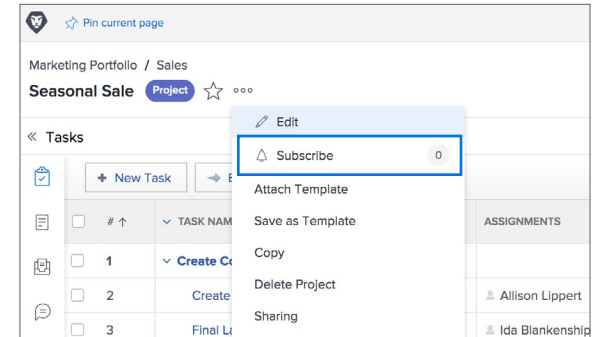


Tip 2

Review content digitally using Workfront's proofing tool.

With proofing, multiple people can look at the proof at the same time, make markups, and leave comments. The proof viewer gives everyone a chance to collaborate digitally because comments, and replies, appear in real time.

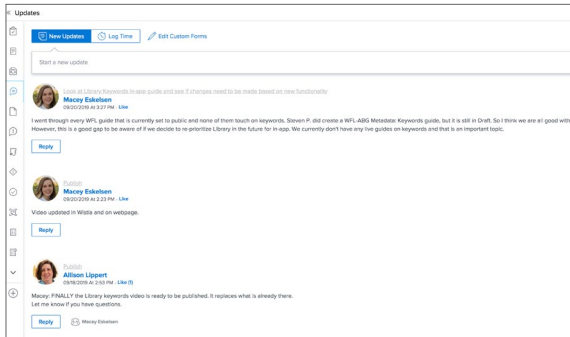
Result: Stay organized with everyone's comments in one place.



Tip 3

Subscribe yourself, or others, to a specific project, task, or issue in Workfront. Then every time a comment is made on the item, all subscribers get a notification.

Result: Relevant notifications are proactively sent to you. Sit back and stay apprised.

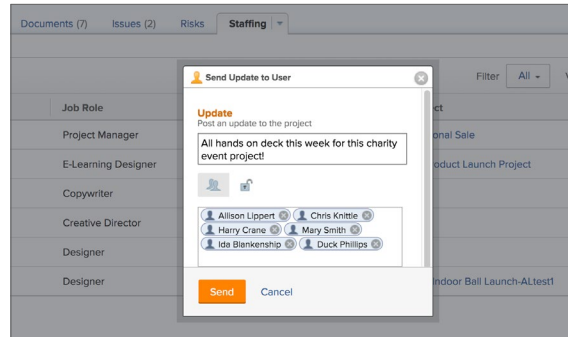


Tip 4

Make updates on your projects, tasks, and issues. And tag people in these updates.

This is Workfront's best practice recommendation for visibility, communication, and collaboration.

Result: How many hours do we spend cobbling together emails to understand what's really going on? When communication threads are kept in context of the work, staying up to date is quick and easy.



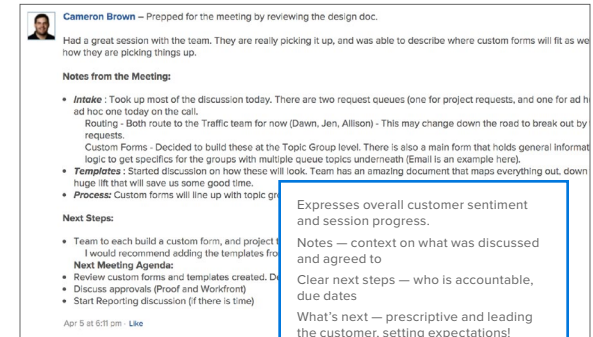
Tip 5

Communicate with everyone working on the project.

It's possible all of the people on a project don't belong to the same team in Workfront, so you can't just post an update and tag a specific team.

Go to the People section on your project, then click the Update All button.

Result: Send a notification to everyone assigned to the project at one time.



Tip 6

Make collaboration the norm on your team and in your organization.

One of our global customers updates their projects once a week using a standard format. These updates then show up in a report.

We do this at Workfront, too. A project manager created a guide on how to collaborate with her. She lists criteria she expects on internal updates and customer-facing updates. This way, everyone on the project knows what's expected.

Result: Get the information you need, when you need it.

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