

End of Year Reporting: Looking Back & Planning Ahead

Adobe Workfront Customer Success – November 20, 2024



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Available to all customers,
you can find or contact us:

- During our free virtual events. View the calendar of Events on Experience League. [Register now!](#)
- On Experience League. Tag us on the [Community](#)
- Send us an email at csatscale@adobe.com
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Agenda

2024 is winding down and it's time to reflect on the past year, communicate successes and identify improvements for 2025.

How do we do that in Workfront? With reports and dashboards of course!

Join us for an interactive discussion on how to best leverage reporting sharing your End of Year narrative, including a hands-on demo of our favorite reports.

Start Time	9:00 a.m. PT/12:00 p.m. ET
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5 minutes	Welcome & Introductions
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15 minutes	Looking Back & Planning Ahead
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20 minutes	Example Reports
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10 minutes	Live Demo
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10 minutes	Q&A – Open Discussion
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End Time	10:00 a.m. PT/1:00 p.m. ET
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When we talk about EOY Reporting...



Show what's possible

Identify the message objective

- What do you want to accomplish with this message - inform, persuade, educate, motivate, update, etc.?

Capture the data for that message

- Update or build processes, forms, queues, reports, etc. to collect the information and to ensure it is up-to-date and accurate

Communicate the message

- Craft a clear and concise message that focuses on key points, uses language that is easily understood, and is tailored to the appropriate audience
- Share your plan along with how things are going, or what you're hoping to achieve



Looking Back – Yearly Reflection

1

Aim to find 3-5 things that you, your team, your department, etc. accomplished. What you are most proud of? Where did you make great progress?

2

Reflect on your lessons learned to identify areas of improvement. And, what are things that you'd like to STOP doing?

3

Consider your target audience. Is this for personal or team benefit vs executive visibility? How is the data going to be used? How should the information be presented?

4

Provide a summary – in written form – of what the metrics mean. Think about the thought nuggets you want your audience to remember and take away.

5

Deliver an action plan for next year. What are your goals – small or BHAG – that you are hoping to achieve?

What are three words to describe the past year, and why?

Planning for the Future – 2025 Wishlist

Focus on automation and efficiency

- Calculated fields
- [Making the Case for Workfront Fusion](#) (check out the ROI calculator)

Cross-functional collaboration & communication

- New dashboards & streamlined custom forms

Clear objectives & prioritization

- Governance & COE

New methodologies or processes

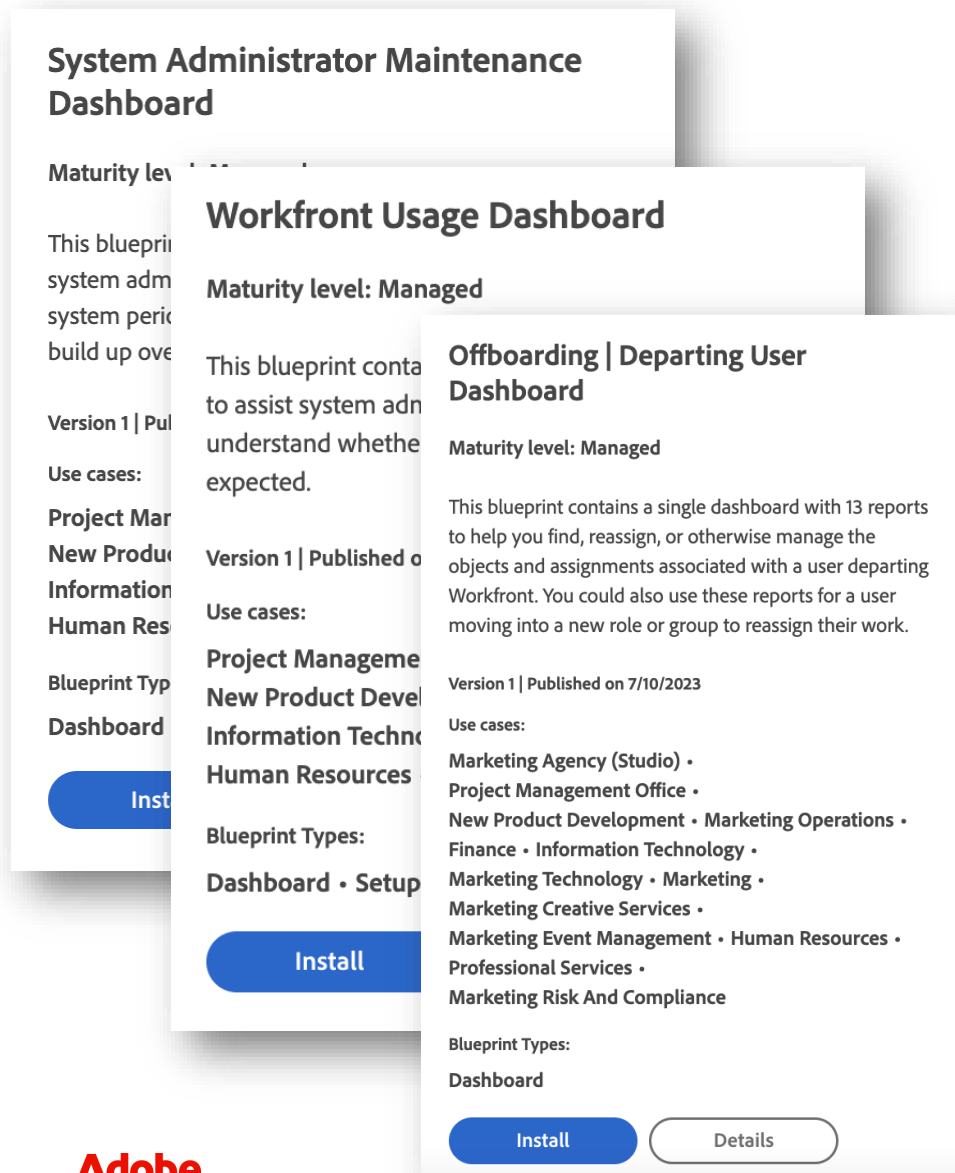
- Onboarding new departments
- [Resource management prep checklist](#)

Whatever is on the Wish List, consider the following:

- Does your reporting reflect the narrative of last year?
- What reports will need updating?
- Who else should receive these reports and when?
- What org changes (people & processes) took place last year? Are they reflected in Workfront?
- What's working well that you want to continue doing and expand to others?
- What really hasn't been working? Should it change?
- What's the one thing that feels like it's missing?

What's on your wish list for 2025?

Blueprints and Built-ins – Don't Start from Scratch



- What are Blueprints? [Blueprints](#) is a catalog of ready-to-use project templates, dashboards, and organizational structures. You can customize the Blueprint prior to [install](#).
- Who has access to Blueprints? Blueprints can only be installed by System Administrators. They can be installed in either the Production or Sandbox environment.
- I don't see Blueprints in my Main Menu. How do I get access to the catalog? Customize the Main Menu via your layout template.
- What are some recommended Blueprints? [A full list of available Blueprints can be accessed here.](#)
 - Workfront Usage Dashboard
 - Offboarding | Departing User Dashboard
 - Inherited Instance Basics | Checklist
 - People Manager Dashboard
 - Value Realization | Core Value Dashboard

Capturing Baselines

- What are [baselines](#)? Think of baselines as a fixed reference point – your original project plan. Baselines capture key pieces of project information included in the initial plan that you can use for comparison at a later date.
- How do I capture them? You can create a baseline manually or automatically.

☒ Create baselines automatically ?



- How can I use them?
 - Track progress and compare status to see if you are on time, late, etc.
 - Clearly communicate progress/potential challenges to stakeholders.
 - Evaluate project performance to identify areas of improvement.
 - Leverage the data from a completed project's baseline to better estimate timelines, costs, and resources for similar projects in the future.



Communicate often and openly

- Make it public
 - Pin it
 - Dashboards
 - Internal site (ex: SharePoint)
 - Everywhere!
- Make it consistent
- Make it informative and actionable
- Seek feedback

Reporting can absolutely spotlight org challenges, but it can help solve them too. Embrace and share that power!

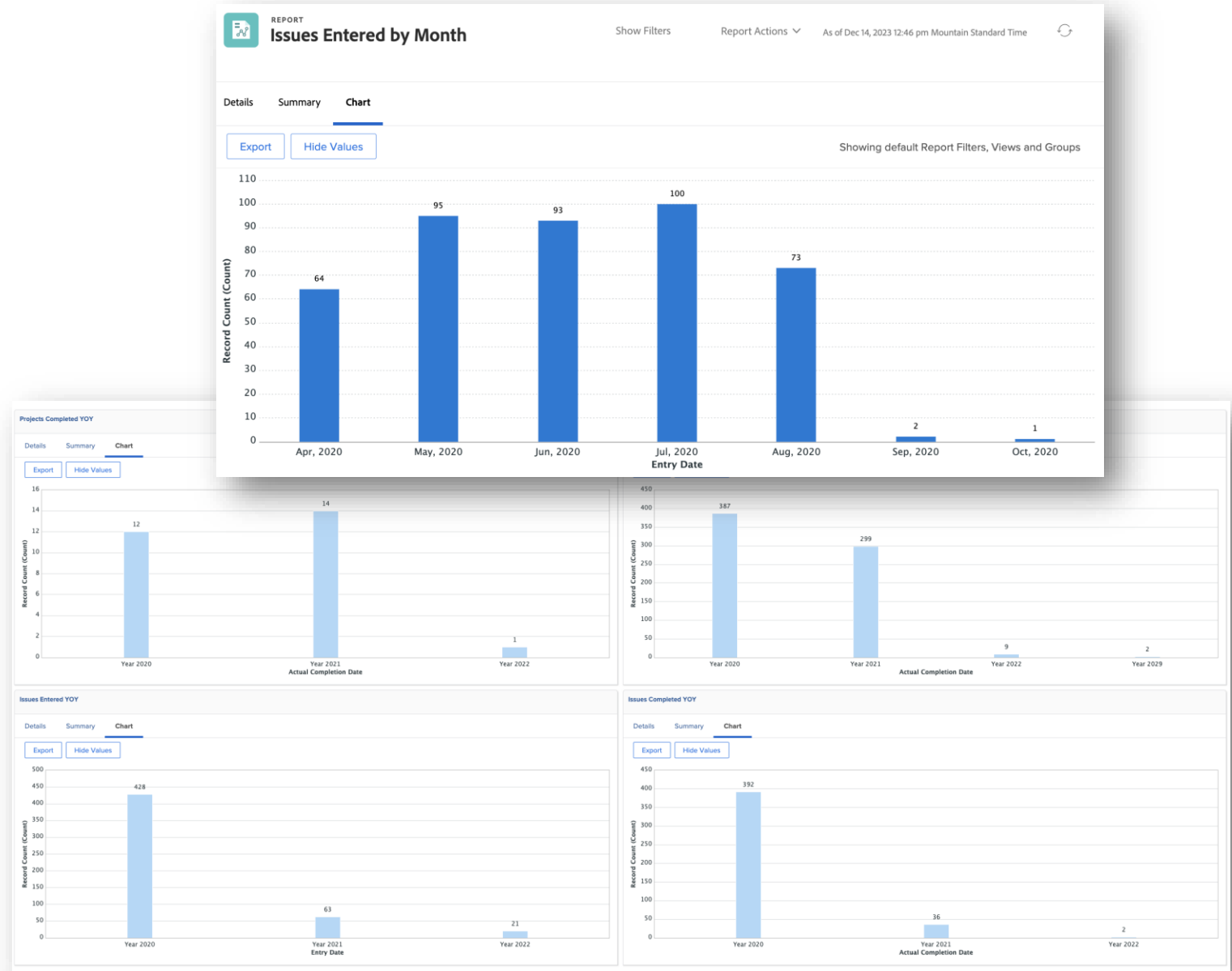


Comparison Reports

MoM / YoY Comparisons

SAMPLE REPORTS:

- # of projects created by month / year
- # of projects completed by month / year
- # of tasks completed by month / year (by team)
- # of issues submitted by month / year
- # of closed issues by month / year
- Hours logged by user by month / year
- Proofs approved
- New users added / login count



Step-by-step instructions

Example: Issues Entered by Month
Report Type: Issue

GROUPINGS

- First by Entry Date > Month of Year
- Second by Entry Date > Year

CHART DETAILS

- Bottom x axis = Entry Date Month of Year – this will be the first option in the dropdown menu
- (Optional) Show in 3D
- Group Columns > Stacked
- Group Data by > Entry Date Year –this will be the second option in your dropdown menu

Issues Entered by Month

Columns (View) **Groupings** Filters Chart

Group your Report:

First by: Issue >> Entry Date

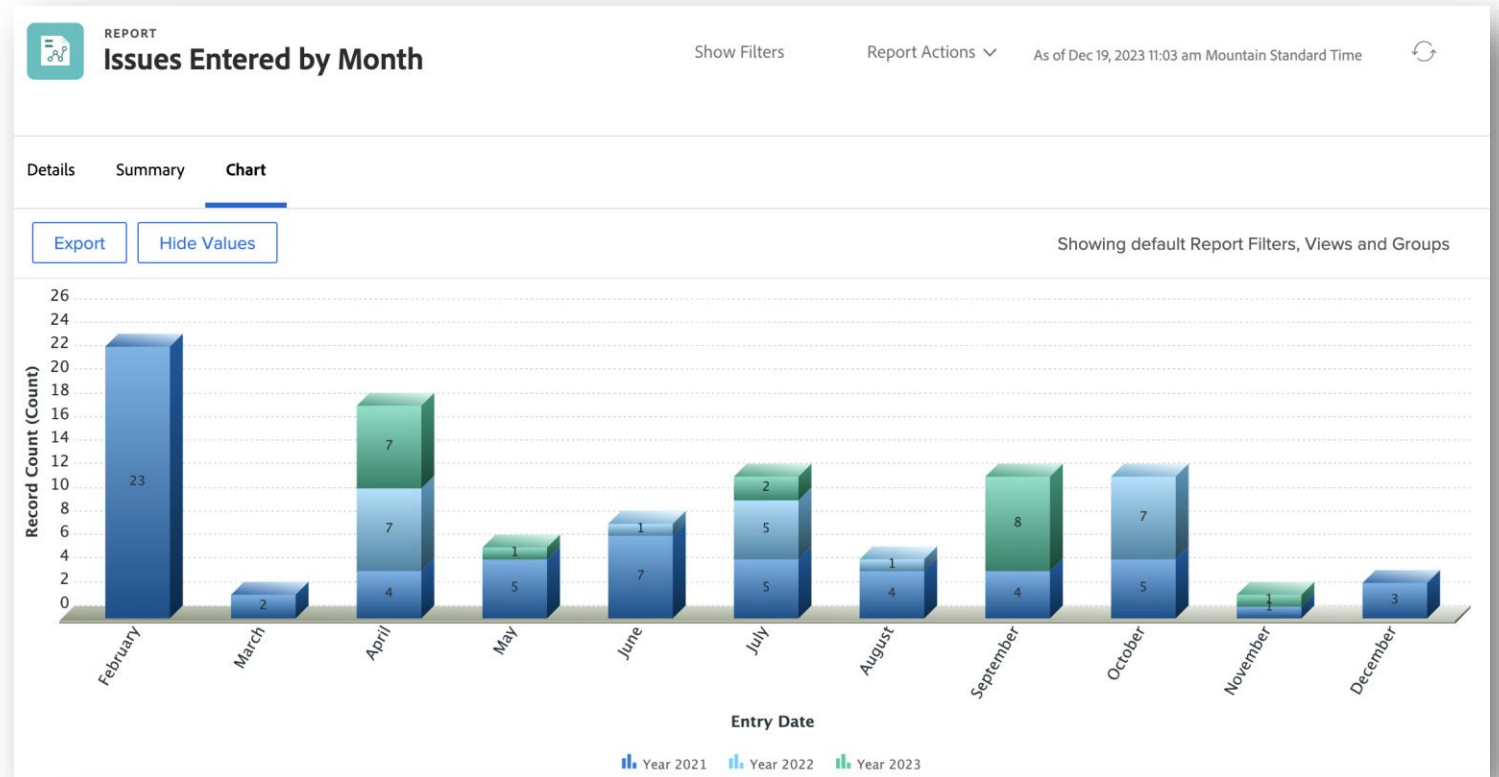
And then by: Issue >> Entry Date

Group Dates by: Month of Year >

☐ Collapse this grouping by default ?

Group Dates by: Year >

☐ Collapse this grouping by default ?



Process Improvement Reports

Actual vs Planned

Compare what really happened to what you thought would happen and then use that real-world-data to review and adjust forecasts.

POSSIBLE COMPARISONS:

- Actual vs Planned Hours
- Actual vs Planned Cost
- Actual Start vs Planned Start Date
- Actual Completion vs Planned Completion Date

REPORT

Actual vs Planned Task ...

Show Filters

Report Actions ▾

As of Dec 6, 2022 11:53 am Mountain Standard Time

This report compares the planned vs actual for all tasks - planned vs actual completion date and planned vs actual hours.

Details

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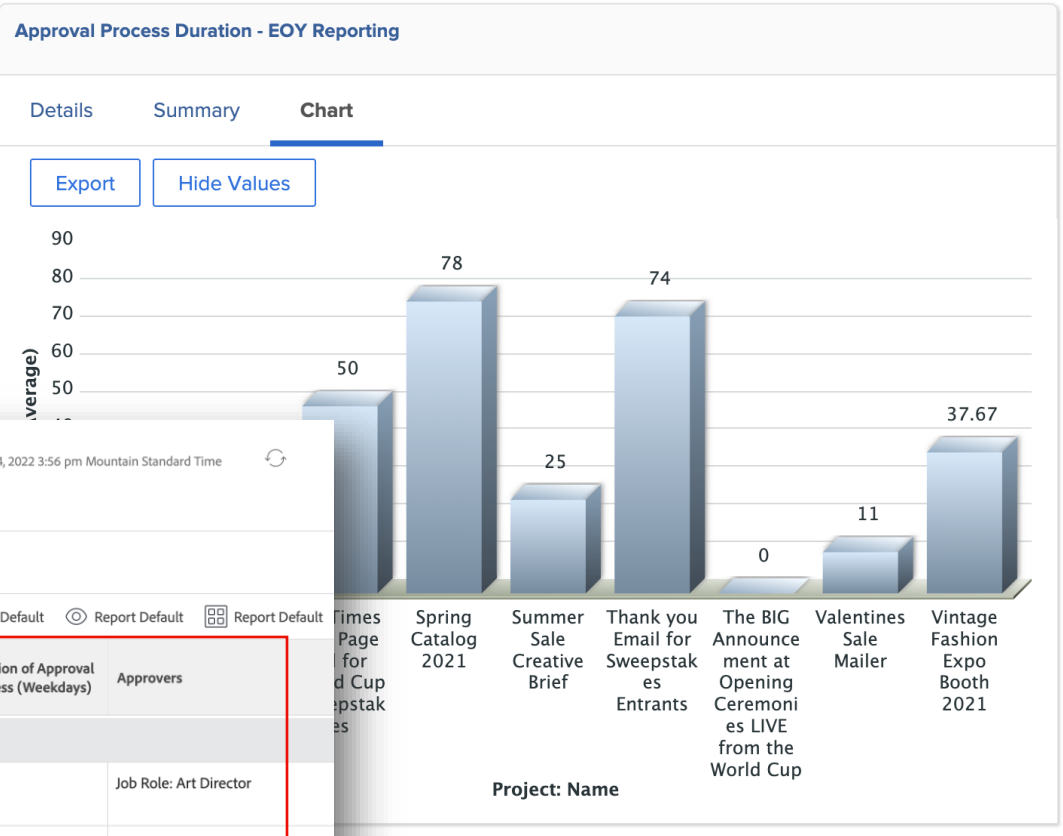
🔧

<input type="checkbox"/> Task Name	Planned Completion Date	Actual Completion Date	Pln Hrs	Actual Hours	Difference in Hours
apher					
<input type="checkbox"/> Create Layout	5/6/20	5/3/20	40 Hours	41 Hours	1 Hours
<input type="checkbox"/> Photoshoot	5/7/20	5/6/20	32 Hours	8 Hours	-24 Hours
<input type="checkbox"/> Photo Review	5/12/20	5/9/20	64 Hours	16 Hours	-48 Hours
<input type="checkbox"/> Photoshoot	5/13/20	5/10/20	120 Hours	44 Hours	-76 Hours
<input type="checkbox"/> Final Layout	5/23/20	5/22/20	80 Hours	108.5 Hours	28.5 Hours
<input type="checkbox"/> Review Stock Images	5/27/20	5/24/20	20 Hours	38 Hours	18 Hours
<input type="checkbox"/> Create Layout	5/23/20	5/25/20	40 Hours	40 Hours	0 Hours
<input type="checkbox"/> Initial Copy	6/3/20	5/31/20	40 Hours	28 Hours	-12 Hours

Documentation: [How to compare fields in conditional formatting](#)

Approval Duration

Look at trends to identify possible bottlenecks for your project timelines. How long are approvals taking? How can that process be expedited? Calculate average duration using a calculated custom field or text mode.



REPORT

Approval Process Duration - EOY Reporting

Show Filters Report Actions As of Dec 14, 2022 3:56 pm Mountain Standard Time

Details Summary

Task Name	Assignments	Duration	Pln Hrs	Start On	Due On	Approval Path Start Date	Approval Path Completion Date	Duration of Approval Process (Weekdays)	Approvers
Project: Name: The BIG Announcement at Opening Ceremonies LIVE from the World Cup (2)						0			
Booth Drop Design	Dwayne Ball Sal Romano	4 Days	20 Hours	6/11/21	6/18/21	6/23/21	6/23/21	0	Job Role: Art Director
Program Guide Layout	Rick Kuvec	5 Days	40 Hours	2/10/21	2/18/21	6/23/21	6/23/21	0	Job Role: Art Director
Project: Name: Vintage Fashion Expo Booth 2021 (3)						37.67			
Program Guide Layout	Joey Baird	5 Days	40 Hours	3/30/21	4/9/21	2/5/21	5/26/21	78	Job Role: Art Director
Booth Graphics Design	Mary Smith	5 Days	5 Hours	6/24/21	7/2/21	5/5/21	5/26/21	15	Job Role: Art Director
Program Guide Copy	Stan Rizzo Bert Cooper	5 Days	10 Hours	3/22/21	3/30/21	5/26/21	6/23/21	20	Job Role: Art Director

Step-by-step calculated custom field setup and report/chart instructions are included in the appendix

Proof Duration

REPORT TYPE: Proof Approval Report

Calculate the number of weekdays between Proof Creation and Proof Decision date.

```
displayname=# of Days Between Creation and Decision
textmode=true
valueexpression=ROUND(WEEKDAYDIFF({proofCreationDate},{decisionDate}),2)
valueformat=HTML
```

REPORT TYPE: Proof Approval Report

Calculate the number of weekdays between Proof Deadline and Decision Date to understand how late (or early).

```
displayname=# of Days Between Proof Deadline and Decision Date
textmode=true
valueexpression=WEEKDAYDIFF({documentVersion}.proofDeadlineDate,{decisionDate})
valueformat=HTML
```

<input type="checkbox"/>	Document Name	Approver	Proof Owner	Approver Decision	Proof Creator	Proof Creation Date	Decision Date	# of Days Between Creation and Decision
<input type="checkbox"/>	Marketo ATE Template	Jared Bates-Baker	Nichole Vargas	Changes required	Nichole Vargas	5/13/20	5/15/20	2
<input type="checkbox"/>	Havasupai	Nichole Vargas	Nichole Vargas	not relevant	Nichole Vargas	2/22/19	3/15/19	15
<input type="checkbox"/>	D'oh	Nichole Vargas		approved	Rachel Dunderdale	2/7/18	2/7/18	0
<input type="checkbox"/>	TEST PROOF	Nichole Vargas	Nichole Vargas	Not relevant	Nichole Vargas	6/19/19	5/15/20	237

User Performance Review

When it comes to merit increases, performance reviews, or end of year check-in's, allow users to tell their own story. Do you have a dashboard to help support that story?

THINGS TO CONSIDER:

- What did they accomplish over the past year – completed projects, deliverables, tasks, issues?
- What fell short? What goal(s) did they not meet and why?
- Can you quantify communication and team collaboration using updates?

Ask your users what they want or need to support their business case.

Late vs On Time Delivery – Calculated Custom Field

- Create or edit a task custom form
- Attach to all tasks in system
- Group/chart reports by this field
- Add a calculated field
`IF({actualCompletionDate}>{plannedCompletionDate},"Late","On Time")`

Calculation Maximize

1 `IF({actualCompletionDate}>{plannedCompletionDate},
"Late","On Time")`

System Admin Performance Review

You have A LOT of responsibilities as a System Admin. Do you have a way to showcase your value to leadership? This is a great way for you to build your business case for additional headcount if you're feeling overwhelmed!

- Do you have a formal queue to track incoming requests?
- Are you tracking / logging your own actual hours on work items? Can you use this data to justify a new resource?
- Do you have any metrics to support a user adoption rate or score? Are users actually using the tool?
- What are some process improvements that you implemented that have made a huge impact on driving the business forward?
 - Did time-to-market plunge to a mere 2 weeks?
 - Did customer acquisition cost drop to \$35?
 - Did on-time delivery skyrocket to 97%?
- What applications did you integrate or what automations did you implement to boost productivity, efficiency, and reduce duplicative work?

What else are
you tracking



Customer Best Practices & KPIs

PEER REVIEWED

What KPIs/metrics are you capturing in Workfront


- Issues submitted by group or team
- Turnaround time
 - Issue entry date to completion
 - Project entry to completion
- User login count
- Hours logged by Hour Type
- Projects without a request
- Projects with 0 actual hours
- Project slippage (baseline vs. actual complete)
- Completed projects by size – using a calculated custom field to score it S, M, L, XL based on hours or other criteria

Best practices for sharing data with users or leadership

- Meet them where they are in terms of applications – do they need a PowerPoint?
- Don't just report on data at the end of each year. Keep the conversation going throughout the year. We do "quarterly data dives" that show year of and YOY trends. Love that it's now an ongoing conversation vs. end of year surprise!
- Consistency is key - both reporting the same information each time, and consistently providing a report on a regular cadence
- Don't assume that people are looking at the reports because they have access to them – look at report usage (Last 10 views, for example)
- Emphasize the most important data points. Use colors or graphics to draw attention to critical information.

A solid red vertical bar is positioned on the far left side of the image, extending from the top to the bottom.

Live Demo

A solid red vertical bar is positioned on the far left side of the image, extending from the top to the bottom.

Open Discussion/Q&A

Resources & Upcoming Events

Sign up for EOY Customer Interviews

- Do you want to share feedback on events or have topics you'd like to see added to the lineup? Send us an email at csatscale@adobe.com to schedule a 30-minute call.
- This is a very informal conversation and honesty is encouraged. You can expect questions like:
 - What do you like most about Customer Success events?
 - How can we make these events more valuable in the future? What do you suggest we do differently?
 - What topics/areas would you like us to cover in FY25?

Your suggestions and ideas will be used to create new digital experiences for Adobe Workfront System Administrators in 2025!

We're looking for 5 more volunteers



Perspectives

Strategic Success Guide – Value Realization

This new playbook walks you through 3 distinct phases – defining the value you are attempting to achieve, translating that “why” into measurable outcomes, and communicating those outcomes to stakeholders to showcase your success and learnings. [Download the guide here.](#)



FREE Virtual Events

- December 3 at 8:00 a.m. PT – [Learn: From Workfront Rants to Workfront Raves: How Avalara Transformed User Confusion into User Confidence](#)
- December 6 at 9:00 a.m. PT – [Connect: Admin Chat for Marketing & Creative](#)
- December 16 at 6:00 a.m. PT – [Connect: Workfront Collective](#)

Admin 101 series

- December 10 at 8:00 a.m. PT – [Admin 101: Getting Workfront Data](#)
- December 17 at 8:00 a.m. PT – [Admin 101: Bring Your Workfront Questions](#)

All events are published to the [Events](#) page on Experience League. Check back often for the latest updates and to register.

Adobe Summit

March 17-20, 2025 | Las Vegas, NV
The Venetian Convention & Expo Center

Early bird pricing is still available! Save \$300 on a full conference in-person pass through December 13. [Register here.](#)

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Appendix

Sample Report #1 – Actual vs Planned Instructions

Option for Filter Comparisons (FIELD:ID)

- Actual vs Planned Hours

```
actualWorkRequired=FIELD:workRequired
actualWorkRequired_Mod=gt
```

- Actual Completion vs Planned Completion Date

```
actualCompletionDate=FIELD:plannedCompletionDate
actualCompletionDate_Mod=gt
```

Calculate the difference between Planned vs Actual Hours (Text Mode Column)

```
displayname=Difference in Hours
textmode=true
valueexpression=CONCAT(DIV(SUB({actualWorkRequired},{workRequired}),60)," Hours")
valueformat=HTML
```

REPORT

Actual vs Planned Task ...

Show Filters

Report Actions

As of Dec 6, 2022 11:53 am Mountain Standard Time

This report compares the planned vs actual for all tasks - planned vs actual completion date and planned vs actual hours.

Details

[→ ▼]

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<input type="checkbox"/> Task Name	Planned Completion Date	Actual Completion Date	Pln Hrs	Actual Hours	Difference in Hours
<input type="checkbox"/> apher					
<input type="checkbox"/> Create Layout	5/6/20	5/3/20	40 Hours	41 Hours	1 Hours
<input type="checkbox"/> Photoshoot	5/7/20	5/6/20	32 Hours	8 Hours	-24 Hours
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<input type="checkbox"/> Initial Copy	6/3/20	5/31/20	40 Hours	28 Hours	-12 Hours

Sample Report #1 – Actual vs Planned Instructions

Column Rule – Actual Hours

Highlight red if actual hours are greater than planned hours

```
displayname=  
linkedname=direct  
namekey=actualworkrequired  
querysort=actualWork  
styledef.case.0.comparison.icon=false  
styledef.case.0.comparison.leftmethod=minutesAsHoursString(actualWorkRequired)  
styledef.case.0.comparison.lefttext=actualWorkRequired  
styledef.case.0.comparison.operator=gt  
styledef.case.0.comparison.operatortype=double  
styledef.case.0.comparison.rightmethod=minutesAsHoursString(workRequired)  
styledef.case.0.comparison.righttext=FIELD:workRequired  
styledef.case.0.comparison.trueproperty.0.name=fontstyle  
styledef.case.0.comparison.trueproperty.0.value=bold  
styledef.case.0.comparison.trueproperty.1.name=textcolor  
styledef.case.0.comparison.trueproperty.1.value=d30519  
styledef.case.0.comparison.truetext=  
textmode=true  
valuefield=actualWorkRequired  
valueformat=compound  
viewalias=actualworkrequired
```

Column Rule – Actual Completion Date

Highlight red if actual completion date is past the planned completion date

```
linkedname=direct  
namekey=actualCompletionDate  
querysort=actualCompletionDate  
styledef.case.0.comparison.icon=false  
styledef.case.0.comparison.leftmethod=actualCompletionDate  
styledef.case.0.comparison.lefttext=actualCompletionDate  
styledef.case.0.comparison.operator=gt  
styledef.case.0.comparison.operatortype=date  
styledef.case.0.comparison.rightmethod=plannedCompletionDate  
styledef.case.0.comparison.righttext=FIELD:plannedCompletionDate  
styledef.case.0.comparison.trueproperty.0.name=fontstyle  
styledef.case.0.comparison.trueproperty.0.value=bold  
styledef.case.0.comparison.trueproperty.1.name=textcolor  
styledef.case.0.comparison.trueproperty.1.value=d30519  
styledef.case.0.comparison.truetext=  
textmode=true  
valuefield=actualCompletionDate  
valueformat=atDate
```