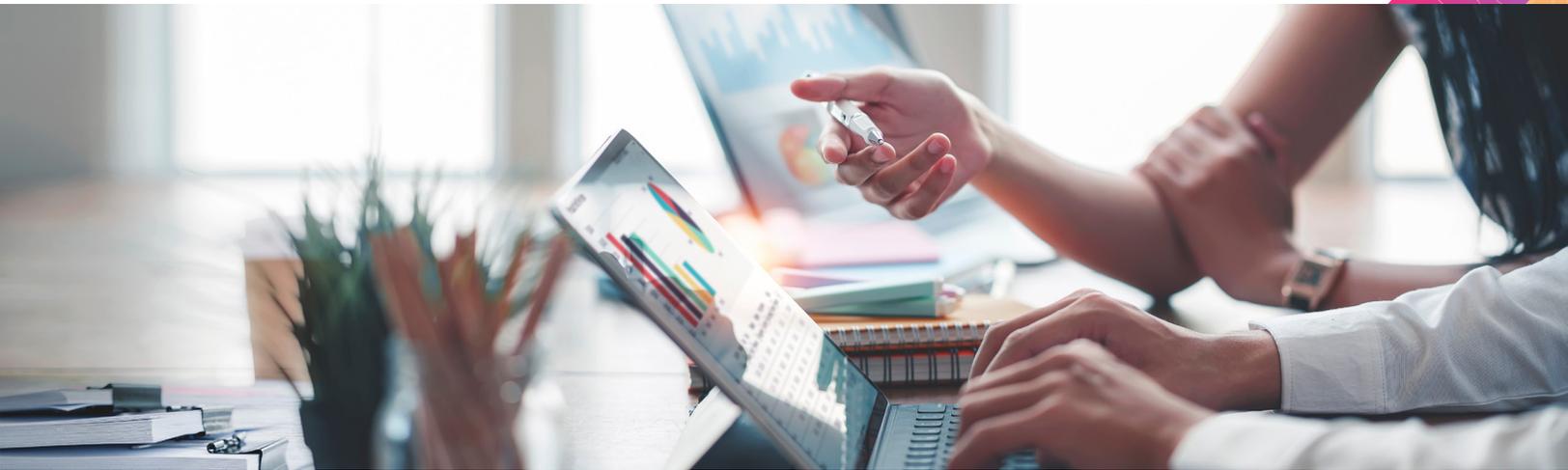




Understanding Usage

Guide to Adoption Surveys



INTRODUCTION

How to use this Guide to Adoption Surveys

As you use Workfront, it's important for you to have an awareness for, and understand, how your users are working in the solution.

Our most successful customers have developed a regular cadence for collecting feedback to understand what might be standing in the way of better adoption of the Workfront solution. Perhaps your teams would benefit from additional training in Workfront, process, or best practices.

The purpose of this Guide to Adoption Surveys is to give you a toolkit which you can use in your own organisation to implement a system of feedback and continuous improvement. We've included example questions, survey tool suggestions, benchmarking, methods of surveying, and next steps.

Collecting feedback data will empower you to find the right resources to help you make improvements. After you've conducted the surveys, we can help with both resources and an improvement plan that will demonstrate improved usage and a deeper adoption.

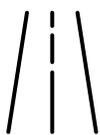
We want to hear your ideas and feedback. If you would like to discuss any of the ideas you have read in this guide, please contact a member of the Workfront team.

'Work Smart, Work Happy'

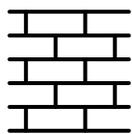


GUIDELINES

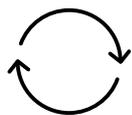
Things to consider



OBJECTIVES Make sure you set a clear objective as to why you are conducting an Adoption Survey and what you want to achieve. Are you conducting the survey as part of the implementation and rollout to set a baseline for usage? Are you doing a retrospective to see how a particular period of usage has gone? Or are you looking to conduct the survey to address a problem with adoption or another area of concern? Understanding this will help you set the tone and structure of your surveys.



STRUCTURE When it comes to the length of the survey, don't over complicate it with too many questions. Keep it simple and to the point. Shorter surveys will generate a better response. If you have more you want to explore, save it for a future survey. There will always be more to learn, so you'll need to prioritize.



FREQUENCY You should plan to send your standard adoption survey every six months, and you can consider sending two additional "special interest" surveys to establish baselines pre-implementation, or explore key topics post-implementation more deeply in the interim.



INCENTIVE To encourage your recipients, try offering an incentive for respondents to return quality responses in a timely manner. For example, you could offer the first 10 respondents drawn at random a pizza lunch. If you don't have budget for such an initiative then think of ways to encourage participation.



Survey Monkey
surveymonkey.com



Typeform
typeform.com



Survey Planet
surveyplanet.com



EXECUTION

Technology

Setting up your surveys shouldn't be a big task. Remember, if you're following the guidelines then you should be keeping the surveys relevant and to the point, but you also want them to look professional.

There are a whole raft of survey tools out there. It may be that your company already uses surveys for other purposes, so you might be able to use those solutions to design and deliver your surveys. We've suggested the three above simply based on the ease of use and the cost of execution (free). You can even build your survey directly in Workfront.

Try to avoid asking people to respond via email or another manual method, like filling in a document and returning it to you. You don't want to have the added administrative burden of having to enter everything into a spreadsheet.

When building the survey, use open ended questions if you want to get comments, feedback or insights from your users. Use closed questions, where respondents need to pick from a list of options, if you want to narrow down the range of responses that may be given.

Following the survey you're going to want to summarize and represent the data as clearly and informatively as possible using as much quantitative data as possible.

PLANNING

Survey Cycle



Surveying users for the purpose of continuous improvement should not just be a one time only event. It should be, well, continuous.

The above timeline shows the Workfront Implementation Methodology with flags indicating when a survey should occur. During the initial stages of Engaging with Workfront, and Preparing for implementation, it's unlikely you will survey your users. You should send your first survey 4-6 weeks after the initial Launch. After that, surveys should be sent every six months in what will be an ongoing Enhance phase activity.

During each 6 month survey cycle, break down the plan of your activities into four main groups:

EXECUTE

Having built a plan of action, execute on it. It doesn't necessarily have to be completed in full, before the next survey cycle starts, but ensure your execution results in some incremental and noticeable improvements that can be measured. Also be sure to communicate the results to your users.

PLAN

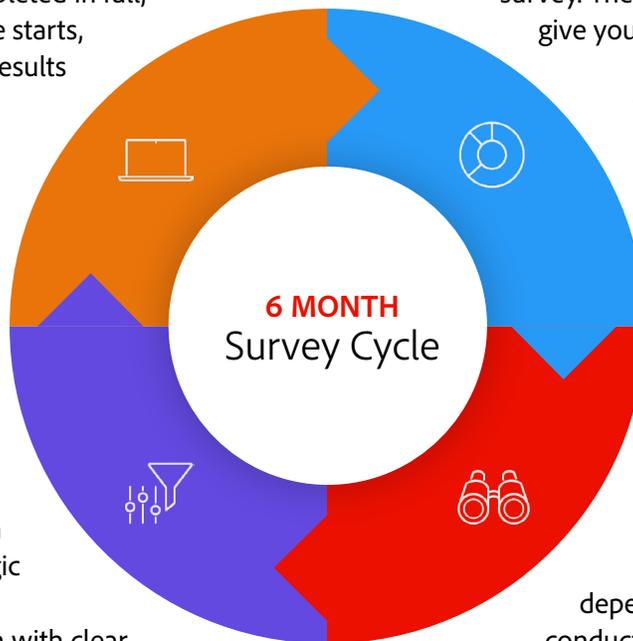
Distill the responses and feedback down to common themes and topics. Through the lens of your own strategic roadmap, develop a short, medium and long term plan with clear actions and next steps for improvement.

MEASURE

Measure usage and sentiment by conducting a survey. The first survey you conduct will give you your baseline against which you can track progress over time. Measurements may be quantity, time or ratings.

REVIEW

Review the responses objectively and with an open mind. The feedback you receive may differ depending on when the survey is conducted in the implementation or usage lifecycle.





COMMUNICATION

Email Template #1

Guide For Use



PURPOSE	Kickoff the initiative and send out the first adoption survey
AUDIENCE	All internal users of Workfront holding a Plan or Work license
SENDER	Executive or Senior Leader who sponsors the use of Workfront
TIMING	4–6 weeks after initial Launch

EMAIL SUBJECT LINE

Help Us Make Workfront Better!

Hi All

We have been using Workfront since [\[launch date\]](#) in the [\[team/department name\]](#). It has been a great addition to our working practices and we've seen improvements in visibility and collaboration across the work we do. We want to ensure that we are continually improving the solutions we provide, to enable you get your best work done, effectively.

This is your tool! Help us improve the way we use Workfront. Please take a few minutes to complete this brief survey [\[add the link to your survey\]](#) and share your feedback about how we could make it better.

I appreciate your candor and constructive feedback. It won't take long to complete and we promise it won't hurt.

Once [\[champion\]](#) has brought everything together, the core team and I are going to be working on a plan of action. We will present this back to you as soon as we have it finished.

I really appreciate your support in this. If you have any questions please let me or [\[champion\]](#) know.

Thank you





COMMUNICATION

Email Template #2

Guide For Use



PURPOSE	Follow up on the initial email that was sent out
AUDIENCE	All recipients of the previous adoption survey email
SENDER	Workfront Champion
TIMING	1–2 weeks after the previous email

EMAIL SUBJECT LINE

I Need Your Feedback on Workfront

Hi All

A couple of weeks ago, on [\[date of previous email\]](#), [\[Sponsor, who sent the first email\]](#) sent you an email inviting you to submit your feedback and thoughts on how we could make our use of Workfront better.

There has been a great response so far, and some really useful insights. Thank you!

I know how emails can sometimes get buried in your inbox so, for those that haven't yet responded, I wanted to send the link out [\[add the link to your survey\]](#) again and encourage you to take a few minutes to complete the survey. Doing so will really help us be better.

As a thank you we will be having [\[donuts, cake, cookies, pizza, treats\]](#) in our next team meeting.

If you have any questions please let me or [\[Sponsor\]](#) know and we'd happy to have a chat with you.

Thank you for all you do



COMMUNICATION

Email Template #3

Guide For
Use



PURPOSE	Final call for survey responses
AUDIENCE	All recipients of the previous adoption survey email
SENDER	Executive or Senior Leader who sponsors the use of Workfront
TIMING	1–2 weeks after previous email

EMAIL SUBJECT LINE

FINAL CALL for Workfront Feedback

Hi All

This is the final call for your chance to submit feedback on the Workfront experience.

In a couple of days we're going to be closing the survey so that we can collate all of the data and feedback from the survey responses we've received. If you haven't yet responded, please do so [\[add the link to your survey\]](#). If you have already, thanks!

This is really important to us, so we can ensure we are providing the most effective solutions to help you manage your work.

Once we've brought everything together, the core team are going to be working on a plan of action. We'll present this back to you as soon as we have it finished.

As always [\[champion\]](#) would be happy to help you with Workfront if you have any questions.

Regards,



SURVEY

Sample Questions

The next couple of pages will give you some example questions to choose from. They are questions we have seen used before but perhaps you're inspired to write your own. Remember to choose a mix of open and closed questions and to limit your survey to no more than 20 questions. Questions are written with the responses provided below.

Getting to know the respondent

Name. Please provide if you wish to be contacted further about your response?

Text field for name

Which Department do you report to?

List the departments in your user base for respondents to select an option from

Email Address. Please provide if you wish to be contacted further about your response?

Text field for email address

Understanding the respondent's knowledge

How did you first hear about Workfront?

Comment box

Do you know why you've been asked to use Workfront?

Yes, No, Comment box

What Workfront training did you receive?

In-house training, online/on-demand training, instructor led

Do you know who to contact if you need help with Workfront?

Yes, No

Are you familiar with the process you need to be following in Workfront?

Yes, No, Comment box

Have you used Help articles from the Workfront Help site?

Yes, No, Comment box

Have you visited or participated in a discussion or user group on the Workfront Community site? (select all that apply)

Visited site to read comments, Participated in a discussion in a discussion group, Have not yet participated in a discussion group, Didn't know about the Workfront Community Site

Do you think you have enough knowledge to use Workfront?

Yes, No, Comment box





Promoting the use of Workfront

Did you participate in any launch activities, games, or events when Workfront went live? (select all that apply)

Yes, No, Comment box

What have you seen informing you about Workfront internally? (select all that apply)

Promotional Posters, Emails, Events, Other Comms Promoting Workfront, Comment box

Which method of communication would you find most effective to hear about new Workfront news?

Email, in Workfront, company intranet site, poster around the office, freebies on my desk, Other (Comments box) Understanding the usage of Workfront

How often do you use Workfront?

Every hour of every day, Less frequently but on a daily basis, a couple of times a week, a couple of times over a couple of weeks, once or twice a month, less than once a month, never or rarely

What do you use Workfront for? (select all that apply)

Managing a project or piece of work, receiving task assignments or requests, reviewing and approving documents or digital work, viewing reports or dashboards, accessing documents, submitting requests to others, collaborating with others on work, logging time or completing a timesheet, resource allocation/management/reporting, financial tracking/reporting

What do you use Workfront for the MOST? (select one)

Managing a project or piece of work, receiving task assignments or requests, reviewing and approving documents or digital work, viewing reports or dashboards, accessing documents, submitting requests to others, collaborating with others on work, logging time or completing a timesheet, resource allocation/management/reporting, financial tracking/reporting

In addition to Workfront, what other software do you use to manage your work?

Comment box

Has Workfront helped you improve communication with your manager about the work you do?

Very useful, somewhat helpful, not that helpful, it hasn't at all

Has using Workfront given you greater visibility into other people/teams work?

Yes, No, Comment box

Has Workfront made you more efficient in your job?

Yes, No, Comment box

How much of your working week is spent doing admin work in Workfront?

Less than 5 hours, 6-10 hours, 11-15 hours, 16-20 hours, More than 20 hours

How easy is it for new people, joining the team, to learn how to do their job in Workfront?

Very easy, Fairly easy, Not very easy, Not easy at all, Comment box

How much time in a working week has using Workfront saved you?

Several hours in a week, An hour here and there, no time saved, it now takes me longer to do my work, (Comments box)





Improving the Workfront experience

What is your favourite part of Workfront and why?

Comment box

How has Workfront improved the way you do your work?

Comment box

Is there a part of your work or process, that you do not have in Workfront but need or would like?

Comment box

Are there any ways of working in Workfront that you would like to improve?

Comment box

Please add any additional comments and suggestions relating to Workfront or its implementation?

Comment box

Do you have any feature requests or changes that you would like us to suggest to Workfront?

Comment box

If you use other software solutions to manage your work, would it be helpful if they were integrated with Workfront?

Yes, No, Comment box

Wrapping up the survey

Generally, do you think that Workfront is a useful tool to get your work done?

Yes, No, Comment box

Overall, how would you rate Workfront?

Great, OK, not that good, Hate it

Would you recommend to a colleague or friend?

Scale of 0-10, 10 being Absolutely! 0 being Definitely Not.

Many of the questions we have suggested here are fairly generic to the launch and usage of Workfront within any organisation. To make the responses even more valuable you might like to include questions that are specific and tailored to your company, perhaps ask questions about specific processes, jobs, or teams and people.





REVIEW

Organize your responses

Read every single comment and response. Make notes. Share your thoughts with the rest of the core team and have them share their own thoughts to check and validate you understand the responses.

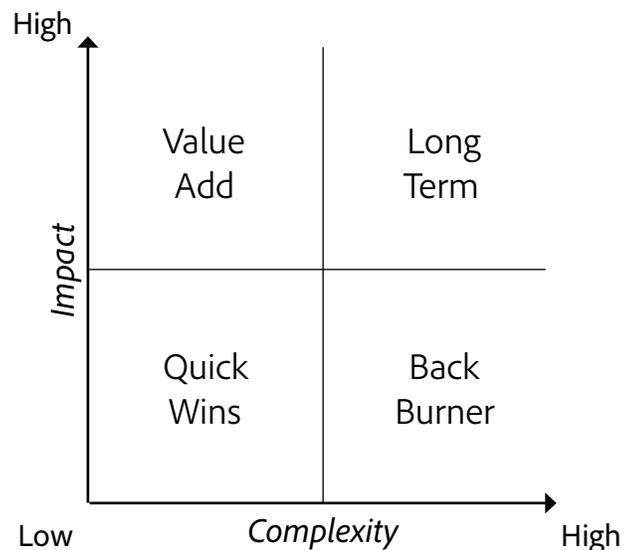
With all of the survey responses in a spreadsheet, within each surveyed question, organize them into common themes and topics so you can go on to build a plan.

You might decide to group all of the responses by the job role or system user role so you can see if there are common themes from certain groups of people.

You may also group both positive and negative feedback by topic so you can identify strengths and weaknesses.

Having reviewed the responses, plot them on a two by two matrix with complexity on one axis and impact on the other axis.

Those that have a high impact and are of low complexity will add the most value. Those that are high impact and high complexity may take a bit longer to execute, so consider them long term goals. Don't overlook the quick wins; those with low impact and low complexity might easily change just one or two users' perspective. Those items which have low impact and high complexity can sap your time. Move them to the back burner to look at another day.





PLAN

Building an action plan

You now need to start planning the remediation and improvement work.

As you begin to plan, consider the maturity of the user base within the Workfront solution, and look at how much change can reasonably be consumed. Bear in mind that to make some big changes, you have to shrink the change and consider the 'crawl' actions and changes that need to occur before the 'run' changes. If you have a larger user group, things may naturally take longer to implement.

Consider these ideas when creating a plan of action:

- 1. Create a Roadmap.** Your plan should address what is going to be done in the next 3, 6 and 9 months. Much beyond that and you're making guesses. Given you are likely to be surveying your users every 6 months, there should be some overlap.
- 2. Categorise Your Plan.** Categorise parts of your plan of action so that you can effectively define the different workstreams. Your categories might be: *Training, System Changes, Organisational Changes, Communication, Process Improvement, External Technical Changes, Governance*. Different owners may taken on different categories depending on their functional role or skills as a Workfront Champion.
- 3. Build Graphs and Charts.** If you can represent your plan using graphs and charts then you can show improvement from one survey round to the next. Visually it also helps to represent where some of the problems lie, by indicating the majority responses to each question.
- 4. Q&A Structure.** When presenting a plan, restate the question posed to respondents, aggregate the answer and give the most common response, and conclude what the resulting action or outcome will be.
- 5. Share the Plan.** Having created a plan, make sure you share it with the Core Team, the Workfront Sponsor or Executive, and especially with the User Group that you survey. It's important that you are seen to be responding to concerns and following up with next steps.



EXECUTE

Celebrate the wins

As stated earlier, the purpose of conducting Adoption Surveys is to look at the continuous improvement of your Workfront solution. It should not be a one time only event.

As you continue to connect with your users, and put their feedback into action, don't forget to celebrate the wins. Show what has been achieved, and changed, with their help.

The Workfront Customer Experience organisation has a number of resources that can assist you in the continuous improvement of your solution, as you seek to gain greater efficiencies and return on investment from your purchase. Please reach out to the Workfront team and they would be delighted to help you.

Below are just a few of the online Workfront resources that you may find useful.

Useful Links

Workfront Community <http://community.workfront.com>

Workfront Training <https://experienceleague.adobe.com/docs/workfront-learn/tutorials-workfront/home.html?lang=en>