



THE NEW WORKFRONT EXPERIENCE

Guide to training Workfront users

Pave the way for a smooth transition to the new Workfront experience with targeted, persona-specific training.

It may feel like a lot is happening with the new Workfront experience. Remember—basic Workfront functionality has not changed. You can still create projects, submit requests, and manage your work assignments. New features have been added to enhance user focus and efficiency when getting work done. With just a little bit of training, you can successfully orient your teams to Workfront's modern look and keep work on track to achieve your company's initiatives.

Find additional transition and training resources on the [New Workfront Experience](#) page on Workfront One.

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Five steps to user training

Create a training experience for every job persona at your company by following these milestones—prepare, develop, deliver.

PREPARE

1. **Understand the WHY behind the new Workfront experience.** Knowing the intent and value behind Workfront's new user interface will help you champion the changes to your users. Download our [onboarding guide](#) to learn more.

This is where our guide picks up ...

2. **Learn the new Workfront experience yourself.** Log into your Preview environment to try out the new Workfront experience. Or switch to the new experience in your Production instance. Use Workfront's [learning paths, guides](#), and [product documentation](#) to learn about the changes, so you can assess how they will affect the daily work of each job persona or license type using Workfront.
3. **Make a Workfront plan.** Start with our [project template](#) for developing your training and adjust it to meet your organization's deadlines.

DEVELOP

4. **Create training plans and content.** Decide who needs to be trained and set learning objectives to define what they need to know. Training should focus on what's needed for users to get their work done.

DELIVER

5. **Conduct the classes.** Make sure you're ready, the classroom is ready, and the system is ready for your live training sessions. Brush up on your teaching style so you keep everyone engaged.

Studies have found that training for employees helps employee retention rates and keeps employees engaged in the work they're doing. Training also helps with user adoption. Design your training to engage and educate your users, which ultimately will enable them to embrace modern work and propel your organization forward.

WHAT ABOUT UPDATING MATERIALS?

To help users transition to the look and feel of the new Workfront experience, you'll want to make sure all of your training and support materials are updated. See our [Guide to updating support and training materials](#) for recommendations.

Online learning resources

Use these links to online learning paths, guides, and articles to become familiar with the new Workfront experience.

ALL WORKFRONT USERS

(any license type)

- Navigate the new Workfront experience [video](#)
- Navigate the new look [guide](#)
- System icons [guide](#)
- Pin pages to customize your workspace [article](#)
- Recents and Favorites comparison [guide](#)
- Search comparison [guide](#)

REVIEWERS/REQUESTERS

(Collaboration license)

- Workfront for Collaborators [learning path](#)
- Home and My Updates [guide](#)
- Requests area overview [guide](#)
- Requests area comparison [guide](#)
- Make a work request [guide](#)
- Update a work request [guide](#)
- Issue page comparison [guide](#)
- Issue page overview [guide](#)
- Home overview for Reviewers [guide](#)

TEAM MEMBERS

(Work license)

- Workfront for Workers [learning path](#)
- Task page overview [guide](#)
- Task page comparison [guide](#)
- Workfront Home overview [guide](#)
- Curate the Work List [guide](#)
- Log hours on work [guide](#)
- Update work status [guide](#)

SYSTEM ADMINISTRATORS

(Plan license)

- Workfront for Administrators [learning path](#)
- Enroll users in the new Workfront experience [article](#)
- Layout templates [article](#)
- Editing user profiles [article](#)
- Collaborators: Getting started [training materials](#)
- Workers: Getting started [training materials](#)
- Planners: Getting started [training materials](#)

PROJECT MANAGERS

AND TRAFFIC COORDINATORS

(Plan license)

- Workfront for Planners [learning path](#)
- Project page overview [guide](#)
- Project page comparison [guide](#)
- Task page overview [guide](#)
- Task page comparison [guide](#)
- Convert a request [guide](#)
- Get started with resource management [article](#)
- Resource management [learning path](#)

Plan your work with Workfront

Start with a project plan you can use to track development of training content.

#	Task Name	Assignments	CE Asset Type	Duration	Pts Hrs	Predecessors	Start On	Due On	% Complete	Status
1	New Workfront Experience Training_Content Updates and Creation			21 Days	59 Hours		8/21/19	9/19/19	0%	New
2	Prepare			5 Days	11 Hours		8/21/19	8/27/19	0%	New
3	Kickoff meeting			1 Day	1 Hour		8/21/19	8/21/19	0%	New
4	Learn the new Workfront experience			5 Days	10 Hours		8/21/19	8/27/19	0%	New
5	Develop			16 Days	37 Hours		8/28/19	9/19/19	0%	New
6	Determine which job personas, license types, etc., need training: Reviewers, Requesters, Team Members, Project Managers, System Administrators, Traffic Managers, Resource Managers, etc.			1 Day	2 Hours	2 > 3 > 4	8/28/19	8/28/19	0%	New
7	Develop training content/curriculum plan for each job persona			5 Days	15 Hours		8/29/19	9/5/19	0%	New
8	Create a sub-task for each job persona that will have training content/curriculum created			5 Days	10 Hours	7 > 6	8/29/19	9/5/19	0%	New
9	Review/approval of training content plans			5 Days	5 Hours	7 > 8	8/29/19	9/5/19	0%	New

When Workfront's Customer Enablement team creates/updates new training or plans an administrator boot camp, they track their work using a Workfront project. Kick things off quickly with the sample project plan we've provided.

1. Download the [New Workfront Experience Training_Content Updates and Creation](#) xml file.
2. Create a new project by going to the Projects page, selecting New Project, and then choosing Import MS Project.
3. Navigate to and select the New Workfront Experience Training_Content Updates and Creation.xml file. This imports the project plan into Workfront and creates a new project.
4. Rename the project, if desired, and update the project details (make sure the project is in the right portfolio, adjust the start date, etc.).
5. Assign a project manager. This person is in charge of the main initiative project and making sure everything gets done.

The project has three main sections—Prepare, Develop, Deliver. Sub-tasks represent the work to be done to fulfill each milestone. Add sub-tasks when you find other things that need to be done.

Identify who needs training

Organize users by job persona and let their Workfront needs guide the training curriculum.

Look at the different job personas at your organization. These could include:

- Requesters
- Team members
- Resource managers
- Traffic coordinators
- Reviewers
- Project managers
- System administrators



The goal is that everyone at your organization knows how to complete their work using the new Workfront experience. Users whose jobs are most affected by the new experience should attend a live training session.

Use the information on [page 10](#) to identify what types of changes each persona will see in Workfront.

The trainers on Workfront's Customer Enablement and Professional Services teams have found it's most effective to organize training based on job persona. Dividing users by what they'll be doing in Workfront then drives the course curriculum.

Now you're ready to start planning the training curriculum. First, pick one job persona. Then begin filling out a [training plan](#) for that persona. We'll cover how to complete a content plan in the next sections of this guide.

Fill in the training plans

Use this method to define what users need to know.

TRAINING PLAN FOR [JOB PERSONA]	
Revision date	When was this plan last updated?
Audience	Who is this for? What role/persona/license type? Are they new users or exiting users?
Learning objective	What do you want the learners to be able to do? What is the need? Why do we need to engage, educate, and enable this learner?
Content type	What content are you creating to help your learners fulfill the learning objective or take action? List all deliverables. (Instructor-led training, video, quick guide, how-to article, etc.)
Delivery and communication	How will you distribute the learning materials to your users? Who will communicate to users that the information is available?
Notes, etc.	

COURSE OUTLINE

1. Introduction
 - Why is Workfront changing?
 - Class objectives/expectations
2. Main learning point (duplicate as needed)
 - Supporting information for main learning point (duplicate as needed)
3. Main learning point (duplicate as needed)
 - Supporting information for main learning point (duplicate as needed)

The Customer Enablement team fills out a training plan for each course they develop at Workfront. This plan helps the curriculum developers define and address the learning objectives, so they don't stray from the intended purpose of the course.

You'll have a training plan for each persona.

Download our [training plan](#) template (a sample is shown above) to walk you through each step in the process.

From this content plan, you'll be able to develop your course outline/curriculum.

USE WHAT YOU HAVE

Leverage existing materials as much as possible. You probably identified some training materials during your inventory of support and training assets, as described in [Workfront's Guide to updating support and training materials](#).

Refer to these materials, as well as Workfront's video tutorials and guides, as you fill out your content plan and develop your curriculum.

Establish learning objectives

What should users be able to do after they've completed training?



SET LEARNING OBJECTIVES

When creating learning objectives, focus on what you want users to be able to do when they're done with the training session. List these on your training plan for each job persona. The training outline/curriculum you design should fulfill these objectives.

See the [next page](#) for suggestions about what your different job personas/license types might need to know about the new Workfront experience.

Remember ... you're designing training to help your teams transition between Workfront Classic and the new Workfront experience. The expectation is that your users already know how to use Workfront—file a request, create projects, update work, etc. This means your class content can focus on navigating the new look and highlight the benefits they'll receive.

SAMPLE LEARNING OBJECTIVES

What could the learning objectives be for a project manager? What does that user need to know about the new Workfront experience to allow them to do their jobs?

For example, project managers need to:

- Find their projects
- Navigate the project page
- Use the side summary to quickly access information about tasks
- Make the Workfront window easy to navigate and manage by pinning items and using Favorites

LEARNING OBJECTIVES VS. AGENDA

There's a difference between learning objectives and a class agenda. The objectives are what you want users to be able to do after they attend a class. The agenda outlines the class structure and topics (introductions, overview, using the Projects page, opening the Summary panel, etc.) to help users achieve the learning objectives.

Changes affect daily work for users.

Below are different roles, personas, or license types that you might find at your organization. With each is a list of things that have changed with the new Workfront experience that could affect the way your users work.

These lists don't contain everything that users need to know. Nor do they contain every change in the new Workfront experience. Rather, the focus is on areas where the changes are likely to affect the user's daily work.

REVIEWERS/REQUESTERS

(Collaboration license)

- Basic navigation and finding the Requests area
- Make a request
- Navigate the request/issue page (make an update, view updates, header changes, etc.)
- Subtabs become the left panel and Filters
- Review and approve items in the Home area

TEAM MEMBERS

(Work license)

- Basic navigation and finding Workfront Home
- Navigate the task page (update, log hours, header changes, etc.)
- Subtabs become the left panel
- Search
- Recents and Favorites

SYSTEM ADMINISTRATORS

(Plan license)

- Basic Workfront navigation
- Find the Setup menu from the Main Menu
- Enroll users in the new Workfront experience
- Adjust layout templates in the new Workfront experience

PROJECT MANAGERS

(Plan license)

- Basic Workfront navigation
- Find the Projects area from the Main Menu
- Use Filters to find My Projects, etc., on the main Projects page
- Navigation within a project (subtabs become the left panel)
- Summary panel for tasks in a project
- Find dashboards and/or reports
- Search
- Recents and Favorites

RESOURCE MANAGERS

(Plan license)

- Basic Workfront navigation
- Find the Resourcing area from the Main Menu
- Find the different resource management tools

TRAFFIC COORDINATORS

(Plan license)

- Basic Workfront navigation
- Find dashboards and/or reports
- Navigate the request/issue page (update, convert to project, etc.)

Pick the type of training

Will live training, video tutorials, or written materials best convey the objectives you've established?



You know your users and understand how they respond to training. This helps you determine what type of training each group will need—instructor-led training in a classroom; video tutorials to watch; guides to read, etc.

CONTENT TYPE: WHAT KIND OF TRAINING?

The Workfront Customer Enablement team has found that team members and project managers benefit most from live, instructor-led training. This allows them to complete hands-on exercises and ask questions.

However, requesters and reviewers may be OK watching Workfront [video tutorials](#) or [downloading a guide](#).

As you design the training, some things to consider:

- Will you incorporate Workfront's video tutorials and guides as part of your courses?
- Will a combination of training methods—such as a live class supplemented by printed guides—best serve your teams?
- How will you train remote users?

HOW MUCH LIVE TRAINING?

Workfront trainers have found it's most effective to structure training based on job personas. Dividing the training sessions by persona drives the course curriculum, making sure that project managers learn what they need to know, team members get information relevant to their jobs, etc.

Because the training curriculum will differ for each job persona, the length of the training will differ. Workfront recommends the following class lengths:

- Requesters/Reviewers — 15-30 minutes
- Team members — 30 minutes
- Project managers — 45-60 minutes
- Resource managers — 30 minutes
- Traffic coordinators — 15-30 minutes

Because your users already know how to use Workfront, that means class times can be shorter than when you were doing initial Workfront training during your implementation.

Create the course content

Let the learning objectives for each persona be the guide as you outline and script the topics you'll present on in class.

TIPS FOR WRITING COURSE CONTENT

- Start with a bullet point outline. The learning objectives will be the main points, then fill in the sub-points with supporting information—how-to instructions, things to remember to mention, how it affects the workflow, etc.
- Make sure the bullet points are in a logical order, matching the workflow the users follow.
- Don't demo with generic scenarios. Use examples from daily work—if a project manager regularly views task information, show the summary panel vs. opening a task landing page.
- Try scripting out the curriculum, based on the outline. Writing out what to say solidifies how you're going to explain certain concepts and ensures topics are in a logical order.
 - Periodically read the script out loud to yourself. Is the language awkward? Does one section flow smoothly into the next?
 - Do not just read the script during the training classes. You'll bore your class attendees and they'll tune out. Use the script as a guide when you're practicing and as a reference when you're teaching.
- Make the classes interactive, leaving time for questions and discussion. Allow at least 10-15 minutes for Q&A per 60 minutes in the classroom.
- Do a dry run (or two or three) of each course with your fellow trainers. Solicit feedback and adjust your content, class length, presentation style, etc., before you start training users.
- Give everyone a hands-on experience during training. Design exercises or activities to support and reinforce what you're teaching.
 - Allow plenty of time for the exercise. Workfront's trainers find that most exercises take twice the time planned!
 - If hands-on practice isn't practical during class, send each attendee an assignment in Workfront to complete right after class. The more quickly people apply what they have learned, the better they remember.
- Stay within the time limit. If you plan for a class to be 60 minutes and your dry run shows the course content takes 90 minutes, then take a serious look at how you can cut back on content. Ask yourself: Is all of the content necessary for this persona to do their job?



Communicate and deliver

Give teams notice that training is coming up. Then conduct classes so everyone is ready to use the new Workfront experience.



COMMUNICATION

Give your users plenty of notice that Workfront training is coming up. Try for at least a week's notice, but more time might be ideal at your organization.

Live training

Workfront recommends that you sign up users for training, then send them a meeting invitation to add to their calendars. This ensures everyone is slated to attend the proper class, based on their job persona.

If your employees need a bit more flexibility, provide a list of class times/locations and let each of them sign up for a time that works best with their schedules.

Self-paced training

If users just need to watch a video tutorial or read a quick guide, include URLs and attachments in your email communications.

You may want to set up a quick online quiz to test the users about what they learned. This also will help you keep track of who completed the self-paced training and who didn't.

Remote employees

Don't forget your remote employees. Let them know how they can participate in sessions that focus on the new Workfront experience.

DELIVER

The time has come ... it's time to conduct the new Workfront experience training sessions! Organizing content and users by job persona ensures each group gets the information they need to do their daily work.

See the [Tips for successful live training](#) sheet for ideas and recommendations when holding live training.

