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CUSTOMER PLAYBOOK

Strategic Success Guide: Value Realization for Adobe Workfront

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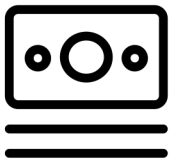
How do you define and communicate value when “value” is often subjective?

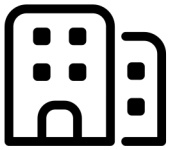
We interviewed Adobe Workfront customers who lead the strategy for Workfront at their organizations to learn how they define the value they are achieving and how they communicate that value to support growth and scale. While there are some unique challenges, we found a surprising number of trends and commonalities across organizations.

Two of the most common ways customers define the value they are achieving with Workfront is through time savings and cost savings. In addition, nearly everyone we interviewed shared a third, more business-specific value (work visibility, cross-functional collaboration, content supply chain optimization, auditing and compliance, employee satisfaction, etc.).

Time Savings



Cost Savings



Business-Specific

Before you can demonstrate that you've achieved value, you must first define what value means to you. Once you’ve done that, you can translate that value into measurable benefits, track it over time, and communicate your specific outcomes back to the business.

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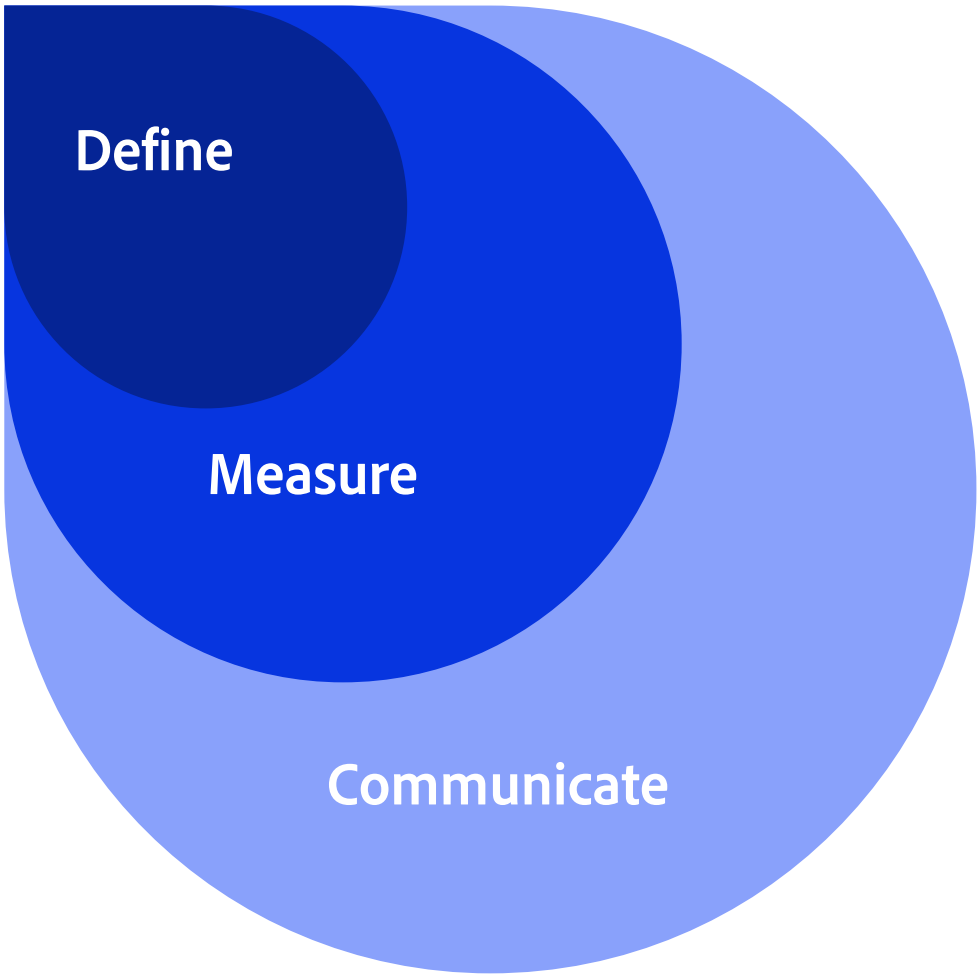

Defining Value
What is your "why" for using Workfront? What are you trying to achieve?

Measuring Value
How can you translate your "why" into measurable outcomes?

Communicating Value
Are you communicating your outcomes up, down and across the business?

Workfront Value Realization

This playbook will walk through 3 distinct phases – **defining** the value you are attempting to achieve (i.e. "Why Workfront"), translating that "why" into **measurable** outcomes, and **communicating** those outcomes to stakeholders to showcase your success and learnings. Along the way, we'll share common roadblocks and tips for overcoming them from your Workfront peers.

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Your "Workfront Why" will naturally evolve over time - that's a good thing! As you begin to incorporate new processes or expand with other teams, it's critical to continue investing in dedicated resources that match and enable your platform's growth aspirations.

Joshua T. Maldonado
VP, Strategic Platform & Transformation Leader
Synchrony

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Defining Value

The first step in the value realization process is to be crystal clear on what you are intending to achieve with Workfront. What is your vision? Why did you originally decide to purchase Workfront?

In the Executive Guide to Success with Adobe Workfront, we encourage new executive sponsors of Workfront to create a two to four sentence statement describing their "Why Workfront." Craft this in a way so it can easily be communicated during departmental and staff meetings, shared with peers and direct reports, and reinforced regularly. Here is example from that guide:

> *"Our organization has invested in Adobe Workfront to manage employer-based requests via intakes and project assignments and validating employee data to increase operating efficiencies and to minimize redundancies across teams through intelligent automations."*

In addition to your "Why Workfront" statement, help your teams connect the dots to how Workfront will support their own team and more broad organizational goals.

Expert Tip: To show progress, it is critical that you first set a baseline. You can use baseline to compare the current plan to the original to identify problems, scope creep, and other trends over time. Learn more about baselines.

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EXAMPLE

Defining Value Worksheet

Use this worksheet to draft or refine your "Why Workfront" statement and specific Workfront outcomes. From there, determine how these Workfront goals will support your team and organizational-level goals. We recommend creating SMART (Specific, Measurable, Achievable, Relevant and Time-bound) goals whenever possible.

"Why Workfront?" Statement

By adopting agile methodologies and using Adobe Workfront, we're streamlining work and transforming manual processes into more efficient and productive ways to collaborate. Our goal is to reduce assessment process time from weeks to hours, improve purchasing's ability to deliver on service-level agreements by 500%, and increase marketing's efficiencies by 15-20%.

Workfront Goals

- Digitize 3 manual, paper-based processes in Workfront by end of year
- Decrease assessment process time from weeks to hours by Q4
- Over the next 12 months, improve purchasing's ability to deliver on SLAs by 500%
- Increased efficiency in campaign production by 20% vs. previous year

Marketing's Objectives

- 25% increase in pipeline in 2H to support revenue growth goals
- Optimize marketing technology stack to reduce redundancies
- Launch multi-year campaign to support of product launch in 2H

Business Objectives

- Increase revenue by $1 billion in the next 3 years
- Improve customer experience to reduce customer churn by 5% by end of 2H
- Attract and retain top talent to support a 2x growth plan over the next 3 years

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Defining Value Worksheet

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"Why Workfront?" Statement

Workfront Goals

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-
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Team's Objectives

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Business Objectives

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Measuring Value

In the previous section, we explored the importance of defining your "why" for using Workfront—establishing the core reason behind your efforts and the specific value you're striving to achieve. With that foundation in place, it's time to take the next step: translating your "why" into concrete, measurable outcomes that align directly with your broader objectives.

This step is key in transforming your vision into actionable, trackable results that can guide your team's progress, help you make informed decisions, and ensure your success is clear and demonstrable.

For example, if one of your Workfront goals is to increase efficiency in campaign production by 20% compared to the previous year, you will need a way to report on and show year over year volume of campaigns.

By focusing on measurable outcomes, you'll not only see your team's success more clearly but also be able to share those wins back with your team and with stakeholders.

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EXAMPLE

Measuring Value: Volume

Workfront Goal:

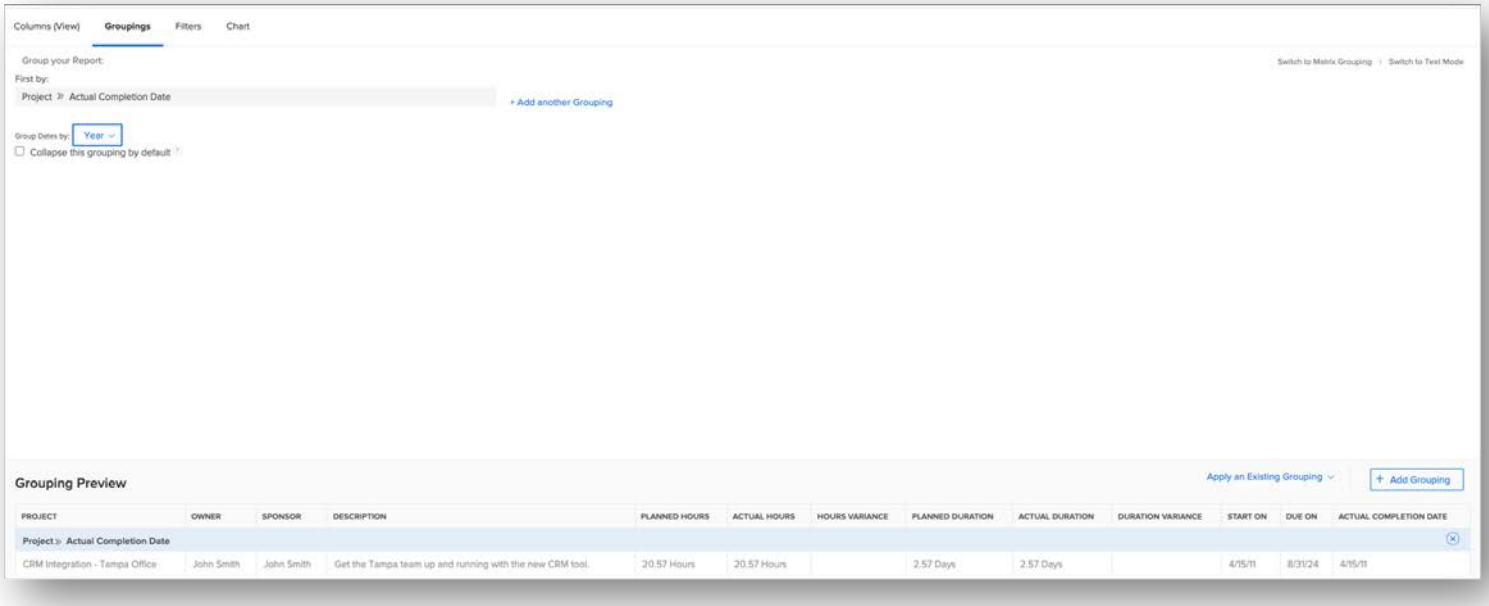
Increased efficiency in campaign production by 20% vs. previous year

Translate the goal into measurable impact:

To show how you are trending against campaign production goals, start with a simple "Year over Year Campaign [Project]" report. This will help you visualize the total output of campaigns completed each year, making it easy to report on goals or identify possible risks. This post on the Workfront Community goes beyond volume, encouraging you to also look at the velocity of work being completed to pinpoint where roadblocks (or efficiencies) might be occurring.

Instructions:

1. Create a Project report
2. Add the Filter for Project > Status Equates With > Complete
3. Add the Grouping for Actual Completion Date > Year
4. Add a bar chart with Actual Completion Date as your Left (Y) Axis and Record Count as your Bottom (X) Axis. Add a report name, a description, and add in any other relevant columns



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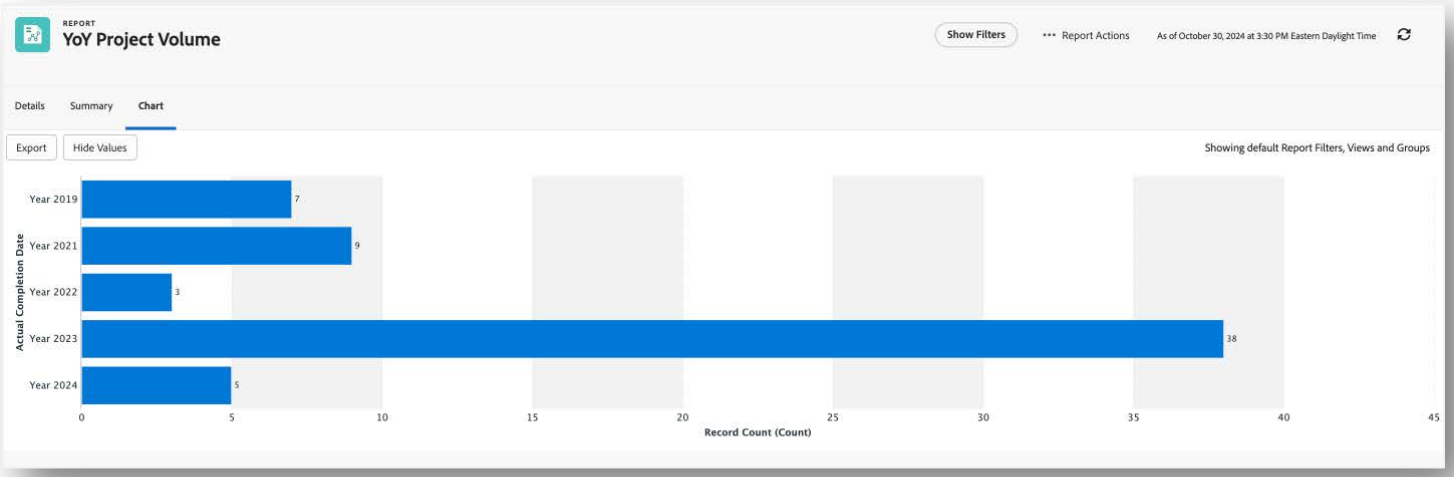
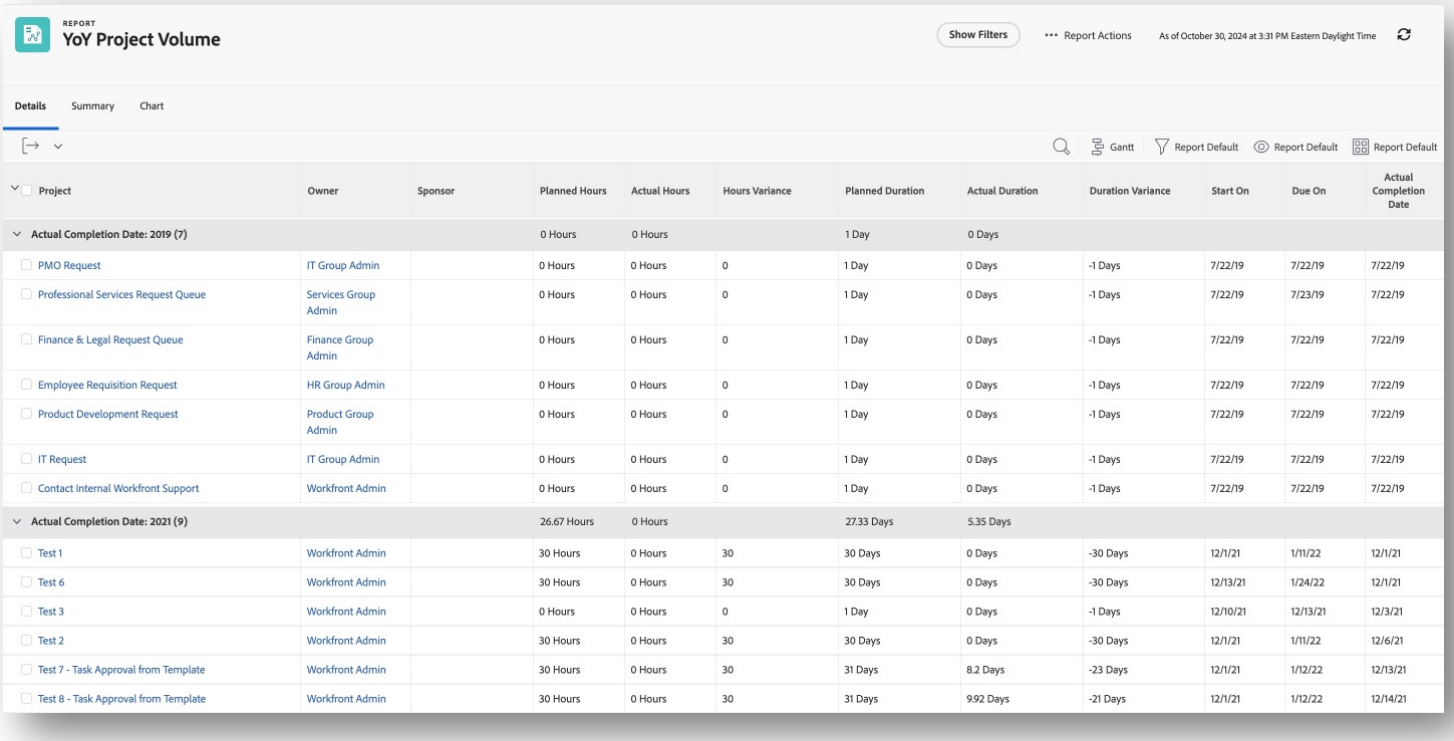
Measuring Value: Volume (cont.)

Report Display Examples:





Project	Owner	Sponsor	Planned Hours	Actual Hours	Hours Variance	Planned Duration	Actual Duration	Duration Variance	Start On	Due On	Actual Completion Date
Actual Completion Date: 2019 (7)			0 Hours	0 Hours		1 Day	0 Days				
PMO Request	IT Group Admin		0 Hours	0 Hours	0	1 Day	0 Days	-1 Days	7/22/19	7/22/19	7/22/19
Professional Services Request Queue	Services Group Admin		0 Hours	0 Hours	0	1 Day	0 Days	-1 Days	7/22/19	7/23/19	7/22/19
Finance & Legal Request Queue	Finance Group Admin		0 Hours	0 Hours	0	1 Day	0 Days	-1 Days	7/22/19	7/22/19	7/22/19
Employee Requisition Request	HR Group Admin		0 Hours	0 Hours	0	1 Day	0 Days	-1 Days	7/22/19	7/22/19	7/22/19
Product Development Request	Product Group Admin		0 Hours	0 Hours	0	1 Day	0 Days	-1 Days	7/22/19	7/22/19	7/22/19
IT Request	IT Group Admin		0 Hours	0 Hours	0	1 Day	0 Days	-1 Days	7/22/19	7/22/19	7/22/19
Contact Internal Workfront Support	Workfront Admin		0 Hours	0 Hours	0	1 Day	0 Days	-1 Days	7/22/19	7/22/19	7/22/19
Actual Completion Date: 2021 (9)			26.67 Hours	0 Hours		27.33 Days	5.35 Days				
Test 1	Workfront Admin		30 Hours	0 Hours	30	30 Days	0 Days	-30 Days	12/1/21	1/11/22	12/1/21
Test 6	Workfront Admin		30 Hours	0 Hours	30	30 Days	0 Days	-30 Days	12/13/21	1/24/22	12/1/21
Test 3	Workfront Admin		0 Hours	0 Hours	0	1 Day	0 Days	-1 Days	12/10/21	12/13/21	12/3/21
Test 2	Workfront Admin		30 Hours	0 Hours	30	30 Days	0 Days	-30 Days	12/1/21	1/11/22	12/6/21
Test 7 - Task Approval from Template	Workfront Admin		30 Hours	0 Hours	30	31 Days	8.2 Days	-23 Days	12/1/21	1/12/22	12/13/21
Test 8 - Task Approval from Template	Workfront Admin		30 Hours	0 Hours	30	31 Days	9.92 Days	-21 Days	12/1/21	1/12/22	12/14/21

Expert Tip: With Workfront Data Connect, customers can access their data directly in a business intelligence tool to create data visualizations or export data to a data warehouse. Learn more in this overview on Experience League.

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EXAMPLE

Measuring Value: Efficiency

Workfront Goal:

Decrease assessment process time from weeks to hours by Q4

Translate the goal into measurable impact:

To demonstrate time saved, we'll compare the hours planned vs. hours worked, providing concrete evidence that your team's efforts (through automation, process improvements, training, etc.) have yielded tangible results. This can also help identify discrepancies in forecasting, resource allocation, and planning, crucial for further optimizations.

Instructions:

Rather than starting from scratch, leverage the pre-built Core Value Dashboard Blueprint that is designed to help you identify value realized by centralizing your work and streamlining your processes.

1. Install the Core Value Dashboard Blueprint
2. Once installed, scroll down to the report, Planned Hours & Duration vs. Actual on Completed Projects by Group, and make the following edits:
    1. Rename the report (ex: Planned vs Actuals on Completed Projects by Year)
    2. Remove the text mode grouping (it's okay to click Continue!) and replace it with Project > Actual Completion Date (Year)
    3. Add a bar chart with Actual Completion Date as your Left (Y) Axis and Project > Planned Hours, Summarized by Sum as your Bottom (X) Axis
    4. Toggle on Combination Chart and set the value to Project > Actual Hours, Summarized by Sum
    Note: Actual Hours is the SUM of hours logged. If no time has been logged, Actual Hours will be 0.

Expert Tip: Want to dig deeper into turnaround time? In the report, Planned Hours & Duration vs. Actual on Completed Projects by Group (within the Core Value Dashboard Blueprint), review the columns for Planned Duration, Actual Duration, and Duration Variance to identify efficiencies and bottlenecks.

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EXAMPLE

Measuring Value: Efficiency (cont.)

Report Display Examples:

REPORT

Planned Hours & Duration vs. Actual on Completed Projects by Actual Completion Date

Show Filters | Report Actions | As of October 30, 2024 at 3:26 PM Eastern Daylight Time

Shows the variance of planned vs. actual of both hours and duration on completed projects. Use this report to analyze project cycle time and level of effort. In the variance columns, negative numbers indicate early completion or lower leve ... More

Details | Summary | Chart

Gantt | Report Default | Report Default | Report Default

Project	Owner	Sponsor	Description	Planned Hours	Actual Hours	Hours Variance	Planned Duration	Actual Duration	Duration Variance	Start On	Due On
Actual Completion Date: 2019 (7)				0 Hours	0 Hours		1 Day	0 Days			
PMO Request	IT Group Admin			0 Hours	0 Hours	0	1 Day	0 Days	-1 Days	7/22/19	7/22/19
Finance & Legal Request Queue	Finance Group Admin			0 Hours	0 Hours	0	1 Day	0 Days	-1 Days	7/22/19	7/22/19
Employee Requisition Request	HR Group Admin			0 Hours	0 Hours	0	1 Day	0 Days	-1 Days	7/22/19	7/22/19
Product Development Request	Product Group Admin			0 Hours	0 Hours	0	1 Day	0 Days	-1 Days	7/22/19	7/22/19
IT Request	IT Group Admin			0 Hours	0 Hours	0	1 Day	0 Days	-1 Days	7/22/19	7/22/19
Contact Internal Workfront Support	Workfront Admin			0 Hours	0 Hours	0	1 Day	0 Days	-1 Days	7/22/19	7/22/19
Professional Services Request Queue	Services Group Admin			0 Hours	0 Hours	0	1 Day	0 Days	-1 Days	7/22/19	7/23/19
Actual Completion Date: 2021 (9)				240 Hours	0 Hours		27.33 Days	48.13 Days			
Actual Completion Date: 2022 (3)				45 Hours	305 Hours		14 Days	41.98 Days			
Actual Completion Date: 2024 (5)				500 Hours	37 Hours		27.4 Days	299.54 Days			
Actual Completion Date: 2023 (38)				0 Hours	0 Hours		1.28 Days	259.83 Days			

REPORT

Planned Hours & Duration vs. Actual on Completed Projects by Actual Completion Date

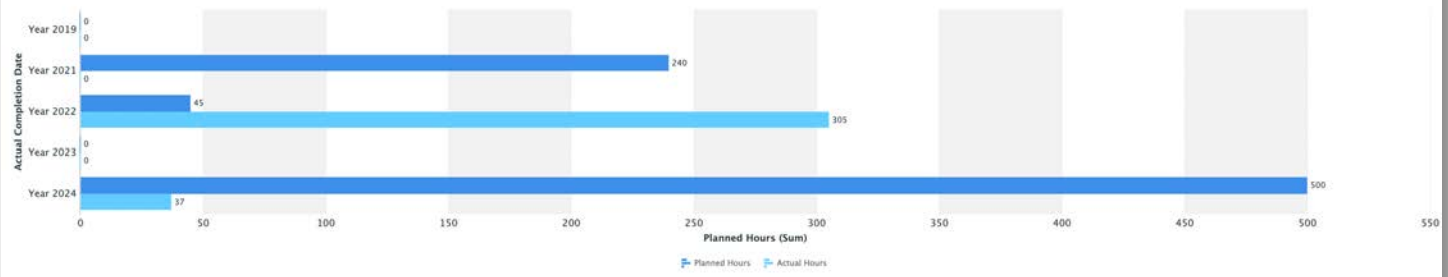
Show Filters | Report Actions | As of October 30, 2024 at 3:28 PM Eastern Daylight Time

Shows the variance of planned vs. actual of both hours and duration on completed projects. Use this report to analyze project cycle time and level of effort. In the variance columns, negative numbers indicate early completion or lower leve ... More

Details | Summary | Chart

Export | Hide Values

Showing default Report Filters, Views and Groups



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EXAMPLE

Measuring Value: Advanced

In addition to the example reports showcased on the previous pages, you may want to leverage custom data. Calculated custom fields allow you to create your own data expressions using existing Workfront fields. Like using a formula in Excel, you could create a field that shows the difference between how long a task was planned to take and how long it actually took. These custom fields help you track specific information, like time saved or task efficiency, without doing manual calculations every time.

Example #1: Timelines

- Calculate the number of weekdays between the entry date and actual start date of a project
  Custom form type: Project
  ROUND(WEEKDAYDIFF({entryDate},{actualStartDate}),2)

- Calculate the number of weekdays between request entry date and date project was converted.
  Custom form type: Request/Issue
  ROUND(WEEKDAYDIFF({entryDate},{resolveProject}.{entryDate}),2)
  ***NOTE: This calculation will only work if issues are kept during the conversion process.*

Example #2: Approval Duration

- Calculate the number of weekdays between an object's approval path start date and approval path completion date
  Custom form type: This can be attached to Projects, Tasks, Issues, etc. Be sure to set the format to 'Number .'
  ROUND(WEEKDAYDIFF({approvalStartDate},{approvalCompletionDate}),2)

Expert Tip: Want to learn more? Read about calculated custom fields and the different date-based expressions on Experience League.

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Communicating Value

In the previous section, we dug into the very specific ways you can translate your Workfront "why" into concrete, measurable outcomes that align directly with your broader objectives. Now that you've done that, it's time to communicate the impact of your work to stakeholders.

Communicating value is crucial because it bridges the gap between raw data and meaningful insights, showing how your efforts directly contribute to the company's broader goals.

When communicating results, tailor your message to your audience—executives may care more about high-level metrics, while end users need practical takeaways. Visual aids like charts or dashboards can make complex data more digestible and highlighting success stories or specific improvements helps to make the value relatable and memorable.

Lastly, it's important to align your message with the strategic priorities of the business, so your results feel relevant and timely. Regular communication helps keep the momentum going and reinforces the ongoing value of using Workfront.

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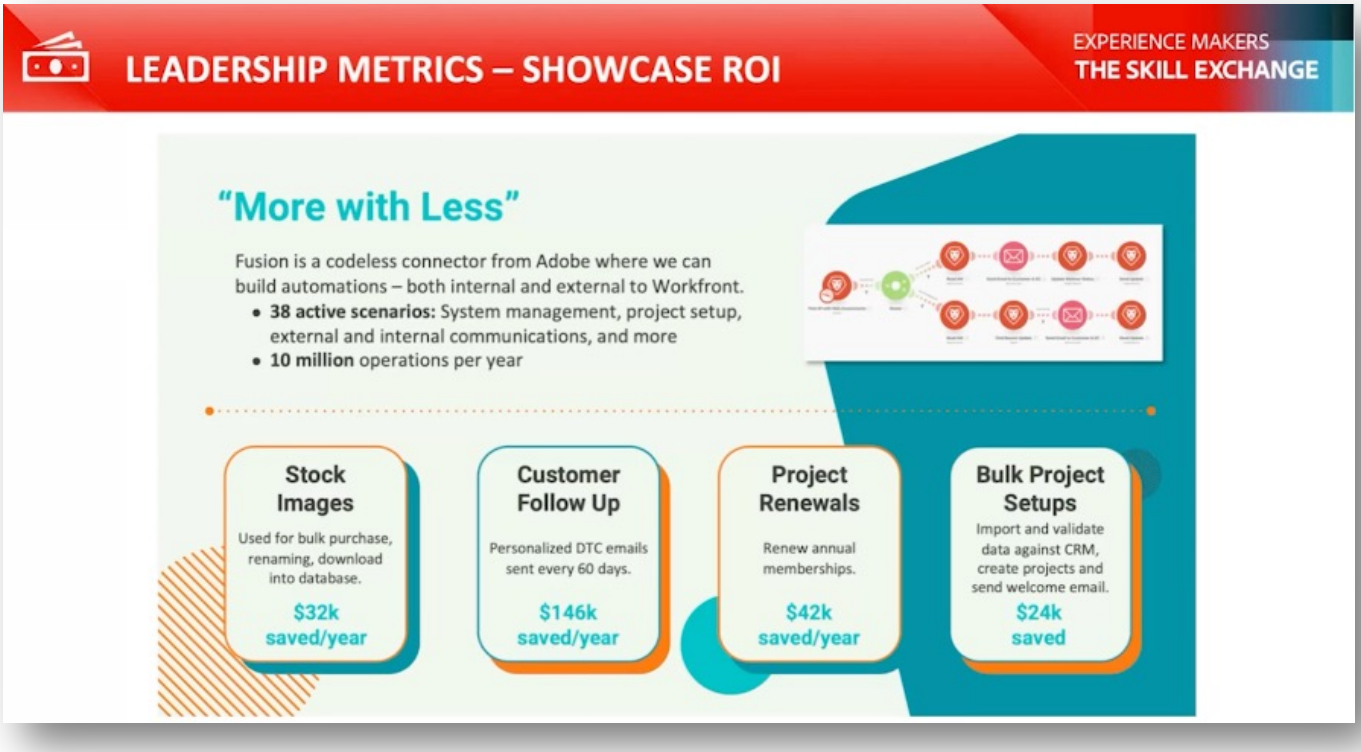
Communicating Value – Leadership

Customer Story: Daniel Clarke, EMMsphere

In the on-demand Adobe Skill Exchange presentation, *Experience Makers Spotlight: Process Enhancements & Operational Efficiencies*, Daniel Clarke, a Senior Workfront Consultant at EMMsphere, shared how he removed bottlenecks in a previous client's processes using automation to save time, money, and resources. Daniel provided regular communication to leadership that not only demonstrated the value his team was bringing to the business, but it also allowed him to secure additional resources for future enhancements.

- Workfront goals:
  - Introduce automation to the intake process to eliminate manual steps that cause delays
  - Leverage automation to validate customer data and create personalized emails
  - Utilize the continuity of the Adobe ecosystem to easily integrate and share data



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In the current environment it is not enough to just add value, you must be able to communicate and share that value to all your stakeholders and leaders. Set yourself up for success by identifying the KPIs your leaders care about, tracking data from the origin to current (improved) state, and finally, share it in a format that resonates for them.

Daniel Clarke
Senior Workfront Consultant
EMMsphere

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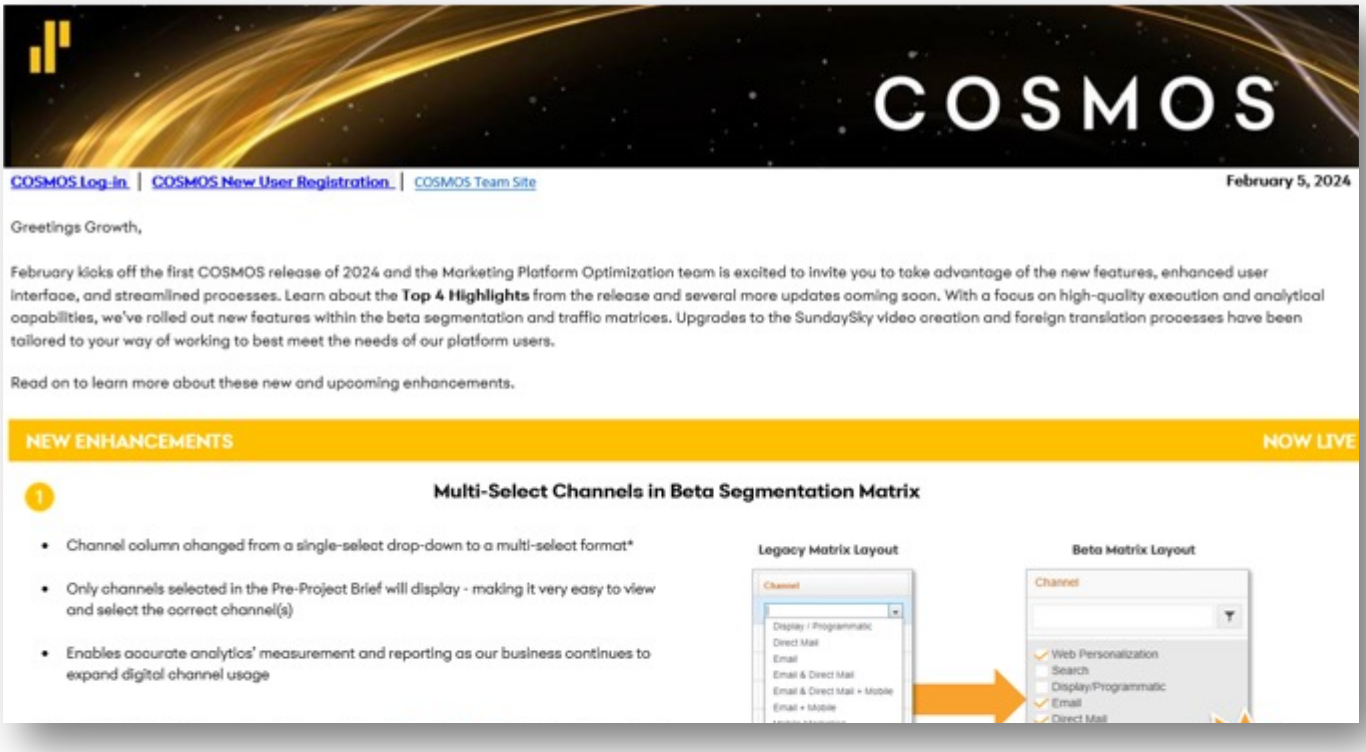
Communicating Value – End Users

Customer Story: Ellen Saltmarsh, Synchrony

Ellen Saltmarsh, Vice President and Change Management Leader at Synchrony, knows that regular communication with end users is paramount for adoption. She shared her "recipe" for how they communicate with end users in the *End User Communications Cookbook for Workfront*, hosted on Experience League. Her team sends a regular newsletter to active, internal Workfront users with a high-level summary of all upcoming enhancement impacts and benefits. This format allows users to quickly review and understand what changes have been implemented and how each one affects their daily work.

- Workfront goals:
  - Minimize disruption in work by informing end users of updates and enhancements
  - Increase confidence in Workfront by clearly communicating the benefits of changes



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Summary

Understanding and demonstrating value is a process that evolves over time. Whether you're new to Workfront or stepping into an existing instance, here are some steps to guide you:

- Collaborate with Stakeholders. Work together to define your "Workfront Why" and how it connects to broader organizational and/or team goals.
- Use Resources. Leverage the worksheets and examples in this playbook for inspiration on what to measure and how to get the data you need from Workfront.
- Communicate Milestones. Regularly update stakeholders on milestones and outcomes to help them make informed decisions. Remember to tailor your message to your audience and use visual aids to make complex data more digestible and success stories to make it more memorable.

Collaboration and communication not only builds trust, but also demonstrates the practical and tangible value of the work you and your team are doing and helps to secure support for your initiatives. While the definition of value may sometimes feel subjective, you now have the tools to realize it's very attainable – and *measurable*!

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