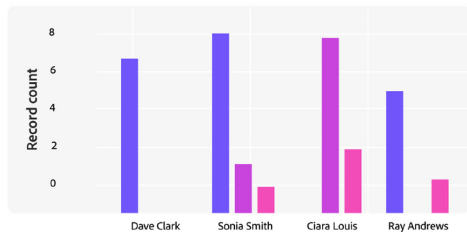


CUSTOMER PLAYBOOK

# The project manager's playbook for Workfront.

Project owner and condition

● On target ● At risk ● In trouble



## Monthly Reports 2026

▼ Mainstage project



75%

Adobe

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# Introduction: Why visibility to leadership matters.

True success with Adobe Workfront isn't about knowing every feature, it's about how project managers create transparency and make work visible to leadership. The most effective project managers (PMs) don't just manage projects — they lead by example, set clear expectations, and foster a culture where visibility and accountability are non-negotiable.

## Why does this matter?

If you can't show executives where projects stand, what's at risk, or where help is needed, your team's hard work may go unnoticed. Visibility isn't just a technical outcome — it's a leadership responsibility that earns trust, secures resources, and drives better business decisions.

### **Time savings.**

Reduce manual tracking and status chasing so your team spends time on high-value work.

### **Team alignment.**

Standardize workflows so every contributor knows priorities, deadlines, and expectations.

### **Stakeholder communication.**

Surface real-time project health to executives in the format they need to act.

This playbook is built for project managers who want to lead with visibility and accountability. Inside, you'll learn how to:

- Align your Workfront practices to executive priorities.
- Turn those priorities into practical routines and reporting habits that make your team's work visible at every level.
- Communicate results in ways that build engagement, accountability, and trust — from your team to the C-suite.

You'll find actionable expert tips and real-world examples, designed to help you turn your organization's Workfront goals into stronger execution, healthier adoption, and more visible, measurable impact as a project manager.



The PMs who succeed are the ones who teach people how to work in Workfront, not just tell them to use it. As your team's needs grow and change, your approach to Workfront should evolve too — adoption is an ongoing leadership journey, not a one-time setup.

**Agency Project Manager Leader**  
Omnicom

## 01

### **Get oriented.**

Understand the Workfront environment you're stepping into and the expectations that shape how work is managed in it.

## 02

### **Build stronger habits.**

Use reporting, status habits, and project routines to make work easier to monitor and manage.

## 03

### **Share what matters.**

Communicate progress, risks, and results in ways that help your team and leaders stay aligned.

#### **Expert tip:**

Start by clarifying the expectations that matter most in your environment — what needs to stay visible, what habits keep work current, and what your team and leaders need to see to trust the data.

# The project manager's role in the Workfront ecosystem.

Project managers are not just another Workfront user type. In most organizations, they sit between the system administrator and the end user, translating process into day-to-day behavior. They are often responsible not only for project delivery, but also for the quality of the data that leadership sees.

That means project managers often carry three responsibilities at once:

- Delivery coordination — to keep work moving.
- Behavior enablement — to teach contributors how to use Workfront effectively.
- Visibility management — to ensure project data is accurate enough to support reporting and decision-making.

When Workfront adoption is strong, project managers are usually the people reinforcing update expectations, identifying stale work, translating process into team habits, and helping others understand why project hygiene matters. When adoption is weak, project managers often feel the impact first because they are the ones trying to run projects with incomplete or outdated data.

## Role definitions.

| Role                          | Primary focus                           | What they typically do in Workfront                                                                                                        | What they need most                                                      |
|-------------------------------|-----------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------|
| <b>Project manager</b>        | Delivery, visibility, and team behavior | Create and manage projects, assign work, maintain timelines, monitor status, reinforce task hygiene, surface risk, and communicate results | Reliable updates from contributors and a usable system from admins       |
| <b>End user / contributor</b> | Completing assigned work                | Update task status, percent complete, dates, fields, documents, approvals, and comments tied to their work                                 | Clear expectations, simple workflows, and context for why updates matter |
| <b>System admin</b>           | System design, governance, and scale    | Configure workflows, templates, forms, permissions, reporting structures, automations, governance rules, and enablement support            | Feedback from PMs about what is and is not working in execution          |

## Why this distinction matters.

A project manager is often held accountable for project outcomes and reporting accuracy, even when the root issue sits elsewhere:

- Contributors may not update work consistently.
- Leadership may want visibility without understanding the discipline required to maintain it.
- Admins may own the setup but not see the day-to-day friction inside active projects.

This playbook is written specifically for PMs because they're often expected to connect those three worlds. How your organization type changes your project manager role. Project managers do not all operate in the same environment. The way your organization is structured can influence how much authority you have, how adoption is encouraged, and how much support you can expect from leadership or administrators.

The examples below represent common project manager org types, though they may not cover every variation. Use them as a guide to identify the environment that most closely matches your own.

| Org type                                    | What it looks like                                                                                     | What it means for the PM                                                                                                 | What to emphasize in this playbook                                                                      |
|---------------------------------------------|--------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------|
| Embedded / Functional PM                    | PMs sit inside a business function like marketing, finance, or product and report into that team       | PMs are close to the work, but often lack organization-wide authority to enforce standards                               | Focus on influence, clear team norms, lightweight reporting, and strong partnerships with admins        |
| Centralized Project Management Office (PMO) | PMs report into a formal PMO with shared standards and portfolio-level visibility                      | PMs usually have stronger process alignment, but may still struggle with contributor behavior and cross-team consistency | Focus on governance, standard reporting, reusable templates, and leadership communication               |
| Dedicated PM team (non-PMO)                 | A centralized PM team exists, but without full PMO governance authority                                | PMs often become the strongest Workfront champions, even if standards vary across business lines                         | Focus on peer examples, repeatable team habits, contributor enablement, and scalable reporting routines |
| Doer-PM                                     | One person manages projects, setup decisions, intake, reporting, and often QA or final execution tasks | PMs carry both process and delivery work, which creates speed but also burnout risk                                      | Focus on simplification, reuse, minimal viable governance, and high-leverage dashboards                 |

## How to use this lens as you read the playbook.

As you move through the rest of this playbook, adapt the guidance to your environment:

- If you are an **Embedded PM**, you may find this playbook most useful as an influence guide.
- If you are in a **PMO**, you may find it most useful as a standardization and reporting guide.
- If you are on a **dedicated PM team**, you may find it most useful as a team enablement and scaling guide.
- If you are a **Doer-PM**, you may find it most useful as a prioritization guide focused on the highest-leverage actions.

# Understanding the Workfront context around you.

As a project manager, it is important to understand the role Workfront plays in your organization, because that context shapes how work is prioritized, how success is measured, and which behaviors and data matter most over time.

This playbook does not ask project managers to define the organization's direction for Workfront. That direction may already be established by leadership, administrators, or existing ways of working. The project manager's role is to understand that context and apply it in day-to-day execution.

If expectations for Workfront are already clear, start there. If not, partner with leadership and your Workfront team to understand the priorities, workflows, and success measures that should guide your work. The [Value Realization Playbook](#) can help provide additional context for how organizations define and communicate the value of Workfront.

Once that foundation is clear, the rest of this playbook can help you translate it into stronger execution habits, healthier data, and more visible project impact.

## **Tracking project manager impact.**

Now that you understand the Workfront context around you, the next step is to identify how project managers turn that context into visible, measurable execution. This means translating expectations into consistent practices, healthier project data, and reporting habits that help teams and leaders make better decisions.

### **A note on shared accountability.**

Although this section focuses on project manager impact, PM results in Workfront are always shaped by three groups:

- **Project managers** create structure, visibility, and follow-through.
- **End users** keep task and project data current through timely updates
- **Admins** make sure the system is configured in ways that support real execution

If one of those groups is misaligned, reporting quality drops. As you define metrics, be careful not to treat project health as a PM-only outcome. It is usually a shared outcome, with the PM acting as the coordinator and translator.

### **Org type tip: Start with the right measures.**

Not every project manager should measure impact the same way at first. If you're a Doer-PM, focus on a small number of high-signal measures that help you manage workday, such as overdue tasks, stale updates, bottlenecks, or project status accuracy. If you are part of a Dedicated PM Team, use this section to identify measures that can be applied consistently across projects — so your team can create clearer patterns, reporting, and visibility over time.

## Managing outcomes — volume.

**Project manager goal:** Increase the number of completed campaigns by 20% compared to the previous year.

### How to track progress.

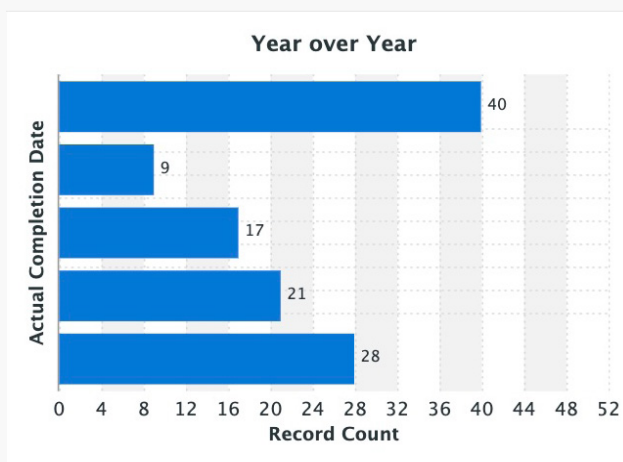
To understand how your team is trending against campaign delivery goals, create a year-over-year completed campaigns report in Workfront. This will help you visualize your team's output each year, making it easier to track progress, celebrate wins, and identify risks early. Consider also monitoring the velocity of work to pinpoint where roadblocks or efficiencies are impacting delivery.

### Instructions.

- Create a project report in Workfront.
- Add the filter: Project > Status Equates With > Complete.
- Add the grouping: Actual Completion Date > Year.
- Add a bar chart with Actual Completion Date as your left (Y) axis and Record Count as your bottom (X) axis.
- Name your report, add a description, and include any other relevant columns (such as Project Owner or Project Type) to help you analyze results.

### Report display examples.

Example Chart Report



Year-over-year completed campaigns — bar chart view

### Example Chart Report



Year-over-year completed campaigns — line chart view

#### **Expert tip:**

Use this report in team meetings or stakeholder updates to show progress, set expectations, and start conversations about capacity or recurring challenges.

## **Managing outcomes — efficiency.**

**Project manager goal:** Reduce assessment process time from weeks to hours by Q4.

### **Why it matters.**

Demonstrating efficiency gains is a key way to earn executive trust and unlock future investment. When you can show concrete improvements — such as faster assessments, reduced manual work, and smarter resource allocation — you position yourself as a strategic leader, not just a task manager.

### **Value statement.**

"As a PM, making efficiency visible — by quantifying time saved and process improvements — enables me to prove the impact of my leadership, secure buy-in for future initiatives, and help leadership make data-driven decisions."

### **Pay special attention here if you're a doer-PM.**

If you're managing both project delivery and day-to-day execution, be careful not to create a reporting burden that is harder to maintain than the work itself. Start with a few repeatable indicators that help you make decisions quickly and keep work moving. The goal is not to measure everything — it's to make project health, effort, and risk easier to see and act on.

### **How to track and showcase efficiency.**

#### **1. Use pre-built analytics for fast results.**

Leverage the Core Value Dashboard Blueprint in Workfront, which is purpose-built to help PMs identify trends, surface inefficiencies, and drive continuous improvement.

#### **2. Build your efficiency report.**

- Install the Core Value Dashboard Blueprint.
- Locate: "Planned Hours & Duration vs. Actual on Completed Projects by Group."
- Customize: Rename the report (e.g., "Planned vs. Actuals on Completed Projects by Year") for clarity.
- Group: Remove any text mode grouping and instead group by Project > Actual Completion Date (Year).
- Visualize: Add a bar chart with Actual Completion Date as your Y-Axis and Project > Planned Hours (summed) as your X-Axis.
- Compare: Toggle on Combination Chart and add Project > Actual Hours (summed) to directly compare planned vs. real effort.
- Note: Actual Hours is the sum of all hours logged. If no time has been logged, Actual Hours will show as 0.

#### **3. Analyze and act.**

- Spot gaps: Quickly identify where projects consistently run over (or under) planned hours.

- Root cause: Drill into outliers to understand whether issues are due to process, scope, or resource mix.
- Take action: Use these findings to adjust future estimates, provide targeted training, or automate recurring tasks.

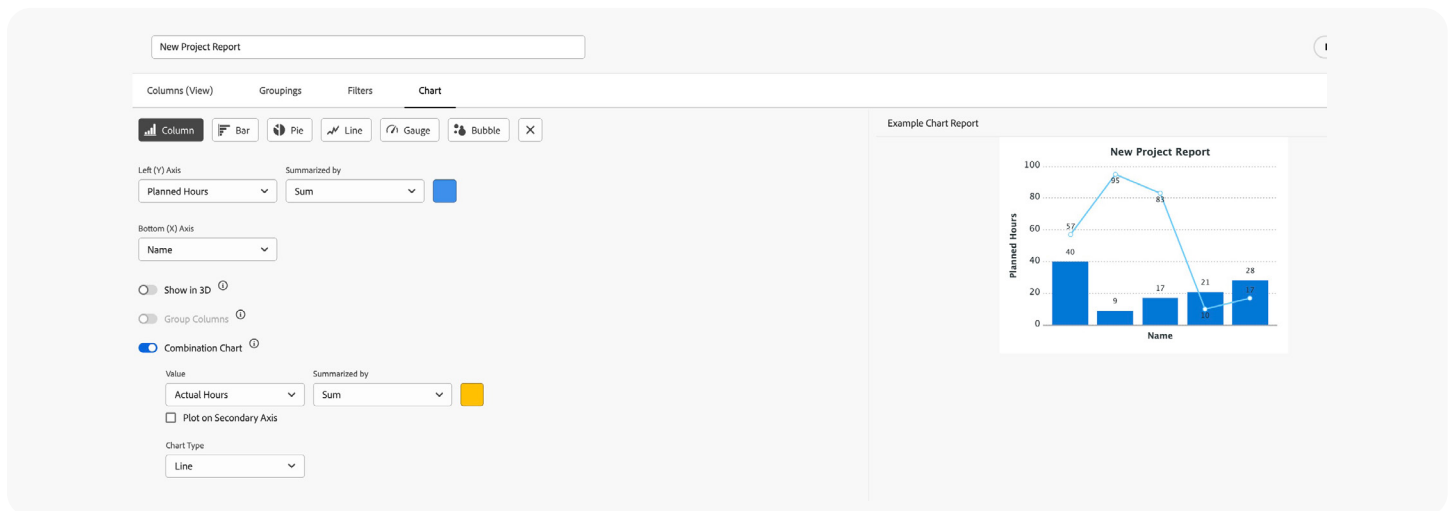
#### 4. Communicate results to leadership.

- Present before-and-after snapshots to highlight efficiency gains.
- Quantify total hours saved and translate that into business value (e.g., "We saved 120 hours this quarter — equivalent to three full workweeks redirected to high-value projects.")
- Share wins in executive dashboards and quarterly business reviews.

#### Expert tip:

Don't just report the numbers — tell the story of how process changes (like new templates, automation, or better training) leads to measurable results. This narrative builds credibility and momentum for further improvements.

#### Report display examples.



Planned hours vs. actual hours — bar + combination chart

#### Managing outcomes — advanced.

As a project manager, you may need to go beyond standard reports to answer specific questions about your team's performance or project timelines.

### Cross-Project Predecessors

**What:** Link tasks across multiple projects, making dependencies and bottlenecks visible to leadership.

**Why:** If Project A slips, Project B's timeline updates automatically, so executives see true portfolio impact.

**Value Statement:** "Cross-project predecessors ensure leadership sees not just isolated project status, but the ripple effect of delays across the business."

### Calculated Custom Fields

**What:** Track unique metrics (approval durations, time saved) and surface them in dashboards.

**Why:** Enables custom KPIs for your team and leadership.

**Value Statement:** "Custom fields help measure the metrics that matter most to our business, enabling tailored executive reporting."

### Business Case, Portfolio Optimizer, and Resource Management

**What:** Evaluate work using business cases, alignment scorecards, portfolio optimization, and resource planning.

**Why:** Helps leadership compare competing initiatives using value, cost, risk, ROI, and available capacity — so prioritization decisions are based on business impact, not gut feel.

**Value Statement:** "Portfolio optimization helps leadership fund and staff the work that delivers the greatest value, while making tradeoffs visible before delivery risk increases."

### Reporting Canvas and Advanced Views

**What:** Build tailored, executive-friendly visualizations of project health and resource utilization.

**Why:** Ensures leaders see what matters most, in the format that drives action.

**Value Statement:** "Custom dashboards put the right data in front of the right people, driving faster and better decisions."

## Communicating project results.

In the previous sections, you learned how to translate the Workfront context around you into specific, measurable outcomes for your team. Now, it's time to communicate the impact of your project management efforts to all stakeholders.

As a project manager, effective communication bridges the gap between raw data and actionable insights. It shows how your practices as a project manager — and the routines your team follows — are driving real results and supporting broader business goals.

## When you share results:

- Tailor your message: Executives want high-level outcomes and trends, team members need actionable takeaways, and admins value feedback on usability and adoption.
- Use visual aids: Charts, dashboards, and infographics make complex data easier to understand.
- Highlight stories: Share specific examples or success stories to make the results relatable and memorable.
- Align with strategy: Frame your updates around business priorities so your results feel timely and relevant.
- Communicate regularly: Keep momentum by providing consistent updates. This builds trust and reinforces the value of using Workfront as your team's system of record.

## Communicating by audience.

Project managers need to communicate differently depending on who they are trying to influence.

### For leadership

Focus on:

- Delivery trends
- Risk visibility
- Workload or bottleneck patterns
- What decisions or support are needed

### For end users

Focus on:

- What needs to be updated
- What “good” task hygiene looks like
- Why timely updates help the team, not just the PM
- What habits are expected every week

### For admins

Focus on:

- Where users are confused
- What fields, templates, or workflows are breaking down
- What causes reporting inconsistency
- Which friction points are process problems versus configuration problems

When project managers tailor communication this way, they stop broadcasting generic updates and start using Workfront data to drive clearer decisions and better behavior.

### Org type tip: Tailoring leadership reporting to your environment.

How you communicate results to leadership may look different depending on your organization type. If you are an Embedded PM, leadership communication may need to focus on project risk, team needs, and work visibility within your function.

If you are in a PMO or on a Dedicated PM Team, this is a stronger opportunity to reinforce consistency, trends, and cross-project visibility. Keep the story focused on what leaders need to understand, where support is needed, and what the data clearly shows.

## Communicating value — leadership.

### Customer Story: Tim Wyckoff, Shaw Industries, Workfront Champion

Tim Wyckoff, Creative Workflow & Operations Manager at Shaw Industries, saw that inconsistent templates, user setups, and workflows were holding back leadership visibility into project work. He led an effort to standardize project templates, fix role-based layout templates, and connect work across projects using cross-project predecessors. By giving leaders self-serve dashboards and real-time project views, Tim helped Shaw establish a formal PMO and shift leadership from asking "Where are we at?" to finding answers directly in Workfront.

#### Workfront goals:

- Standardize core project templates so non-PMs can manage work consistently.
- Use cross-project predecessors to make dependencies and delays visible to leadership.
- Give executives self-serve views (dates, status, risks) so they check Workfront before asking for updates.
- Establish a PMO to govern project management standards, best practices, and training in Workfront.



Workfront is an incredibly powerful tool, but its value comes down to how users and administrators use it. If configurations aren't set up properly and templates behave wildly, people avoid it. But if teams work through those difficulties because they see the potential on the other side, there's a tremendous amount of opportunity to grow.

**Tim Wyckoff,**

Creative Workflow & Operations Manager  
Shaw Industries

#### Pay special attention here if you are an Embedded PM or Doer PM.

If you do not have strong formal authority over every contributor, this section matters even more. In these environments, accountability usually comes from clear expectations, consistent follow-through, and repeated reinforcement of team norms — not just process design. Focus on simple behaviors contributors can repeat, such as updating task status, flagging risks early, and keeping work current enough for the project data to be trusted.

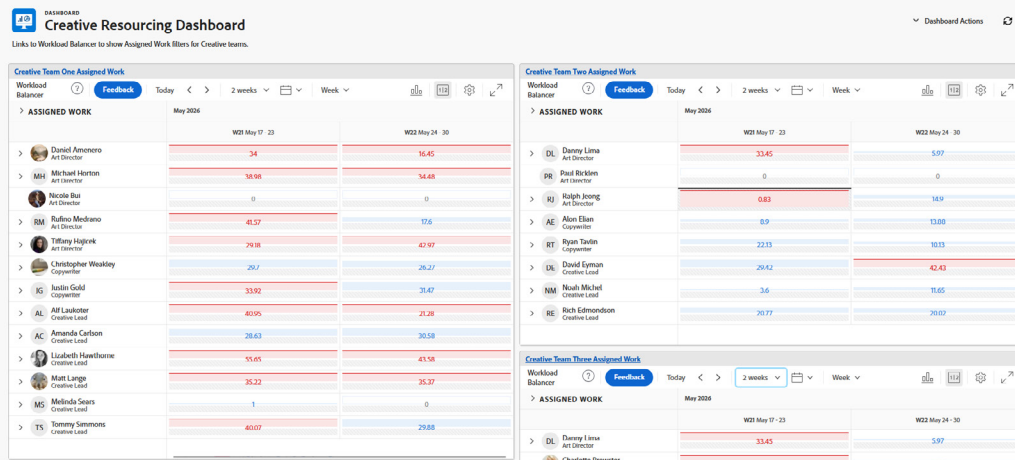
## Communicating value – accountability for end users.

### Customer Story: Carol Majewski, RAPP (Omnicom Agency), Workfront Champion

Carol Majewski, Director of Program Management at RAPP, recognized that people managers often struggled to quickly access and understand team resourcing data in Workfront. To address this, Carol created an "Instant Insights" dashboard that embeds real-time Workload Balancer views directly into a Workfront dashboard. This approach eliminated the need for manual navigation and filter updates, giving managers and end users a single, interactive view of allocations across teams. The result was faster, more confident decision-making and greater engagement with resource management tools of Workfront.

#### Workfront goals:

- Make real-time resourcing data accessible to people managers and end users.
- Reduce confusion and manual effort by centralizing allocation information.
- Empower teams to make faster, better-informed decisions with up-to-date insights.



Resourcing dashboard using Workload Balancer

# Summary.

Driving effective project management in Workfront is an ongoing practice. Whether you're new to Workfront or stepping into an established environment, these principles can help you create stronger visibility, healthier execution habits, and more consistent project outcomes.

## **01. Visibility depends on consistent execution.**

Accurate reporting starts with strong daily habits like timely updates, clear ownership, and proactive follow-through.

## **02. Healthy data strengthens accountability.**

When project information stays current and reliable, teams can respond faster and leaders can make better decisions.

## **03. Project Managers turn priorities into trusted execution.**

PMs create value by reinforcing accountability, improving visibility, and communicating results in ways that help teams and leaders stay aligned.

Project managers play a critical role in translating organizational priorities into visible, measurable execution. By reinforcing strong work habits, maintaining healthier project data, and communicating results clearly, PMs help create the visibility, accountability, and consistency that allow Workfront to support better decisions across the organization.

**Adobe**