



workfront[®]

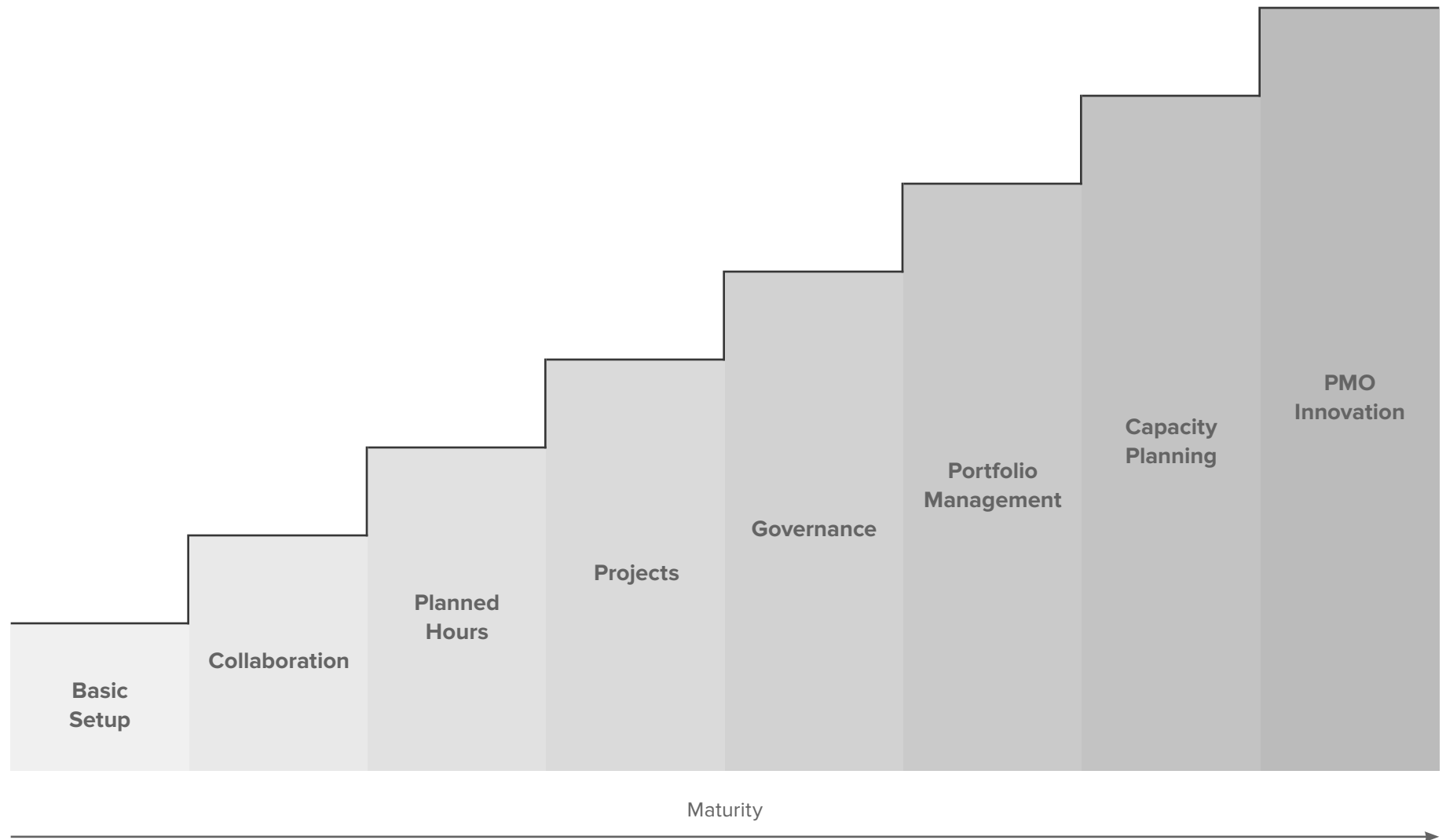
Configuration and maturity

As you configure Workfront for your organization's current needs, you'll also want to plan ahead for growth and maturity. Use this overview of the configuration and maturity phases to start your own path to Workfront maturity.

TARGETED LEARNING GUIDE

Building blocks.

Grow your Workfront system configuration along with your people and processes. These configuration phases build on each other.



Lay the foundation.

Start your plans for Workfront maturity with a solid foundation of system configurations and Workfront usage.

1. Basic Setup Phase

- Access levels
- Email notifications
- User roles
- Layout templates
- Scorecards
- Custom forms
- Configure Statuses
- Approvals
- Milestone paths
- Global settings review (project, task, and issue preferences; schedules; review and approval)

2. Collaboration Phase

- Set up Operations projects
- Complete resource loading
- Request queues
- Initial user training
 - ◆ Workfront Home or simple personal dashboard
 - ◆ Filters, Views, and Groupings
 - ◆ Updates
 - ◆ Assignments and allocation of resources to tasks
 - ◆ Calendar
 - ◆ Conduct training class



3. Planned Hours Phase

- Templates
- Role allocation
- Effort estimation
- Reporting
- Project scheduling
- Resource utilization

Pro tip: Establish norms as you go along to maximize efficiency.

Take the next steps.

Using the foundation you laid, take your organization to the next level using Workfront to solve problems and plan ahead by optimizing configurations.

4. Projects Phase

- Issue management program
- Communication plan
- QA Plan
- Ad hoc project life cycles
- Managing hybrid projects
- Encapsulated (modular) templates
- Standard project management
- Buffering
- Completing the business case
- Completing business canvas

5. Governance Phase

- Managing the body of knowledge
- Establishing best practice projects
- Risk management programs
- Project roadmaps
- Project reports
- Stand up reports
- Program and portfolio status reports
- User utilization reports
- Workfront Home reports

6. Portfolio Management Phase

- Ranking projects
- Prioritizing projects
- Budgets
- SMG reports
- Efficient frontier development
- Portfolio mix reports
- Boston group matrix
- Strategic alignment reports



7. Capacity Planning Phase

- Identify optimal start dates
- Enterprise roadmap management
- FTE forecasting
- Utilization reports

8. PMO Innovation Phase

- Market sensing
- Problem definition
- Opportunity analysis
- Feature definition
- Roadmap definition and integration
- Requirement definition
- Launch definition

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