



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. 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.

## **WHY CHANGE WORKFRONT?**

Mastering modern work requires a modern work platform that is personalized to the way people work today.

Workfront worked with dozens of visionary leaders and knowledge workers who use the platform daily. We want to make it even easier for people to manage and contribute to the important work at their organizations.

See the [new Workfront experience page](#) for a message from Workfront's chief technology officer about the change.

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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. Use Workfront's [video tutorials](#), [quick guides](#), and [knowledge base articles](#) 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 video tutorials, 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, Favorites, and New For Me [guide](#)
- Recents and Favorites comparison [guide](#)
- Run a search [guide](#)
- Search comparison [guide](#)

## REVIEWERS/REQUESTERS

(Collaboration license)

- Requests area overview [guide](#)
- Requests area comparison [guide](#)
- Make a work request [guide](#)
- Update a work request [guide](#)
- Issue landing page comparison [guide](#)
- Issue landing page overview [guide](#)
- Home area for Reviewers in the new Workfront experience [article](#)

## TEAM MEMBERS

(Work license)

- Task landing page overview [video](#)
- Task landing page overview [guide](#)
- Task landing page comparison [guide](#)
- Simplified left navigation in the new Workfront experience [article](#)
- Breadcrumb overview in the new Workfront experience [article](#)

## SYSTEM ADMINISTRATORS

(Plan license)

- Enable the new experience [guide](#)
- Layout Templates in the new Workfront experience [article](#)

## PROJECT MANAGERS

(Plan license)

- Project landing page [video](#)
- Task side summary [video](#)
- Summary Overview in the new Workfront experience [article](#)
- Task landing page overview [video](#)
- Task landing page overview [guide](#)
- Task landing page comparison [guide](#)
- Breadcrumb overview in the new Workfront experience [article](#)
- Simplified left navigation in the new Workfront experience [article](#)
- Subtabs replaced by new main areas or filters in the new Workfront experience [article](#)

## TRAFFIC COORDINATORS

(Plan license)

- Project landing page [video](#)
- Simplified left navigation in the new Workfront experience [article](#)
- Subtabs replaced by new main areas or filters in the new Workfront experience [article](#)

# Plan your work with Workfront

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

PROJECT									
New Workfront Experience Training_Content Updates and Creation							0%	Planned Completion Sep 6, 2019	Status Planning
Tasks									
<div> <div>New Task</div> <div>Export</div> <div>Filter: All</div> <div>View: Standard</div> <div>Grouping: Nothing</div> <div>Autosave</div> </div>									
#	Task Name	Assignments	Duration	Pin Hrs	Predecessors	Start On	Due On	% Complete	
1	New Workfront Experience Training_Content Updates and Creation		21 Days	62 Hours		8/21/19	9/19/19	0%	
2	Prepare		5 Days	11 Hours		8/21/19	8/27/19	0%	
3	Kickoff meeting		1 Day	1 Hour		8/21/19	8/21/19	0%	
4	Learn the new Workfront experience		5 Days	10 Hours		8/21/19	8/27/19	0%	
5	Develop		16 Days	37 Hours		8/28/19	9/19/19	0%	
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	3 → 4	8/28/19	8/28/19	0%	
7	Develop training content/curriculum plan for each job persona		5 Days	15 Hours		8/29/19	9/5/19	0%	
8	Create a sub-task for each job persona that will have training content/curriculum created		5 Days	10 Hours	6	8/29/19	9/5/19	0%	
9	Review/approval of training content plans		5 Days	5 Hours	8	8/29/19	9/5/19	0%	
10	Develop training outline for each job persona		12 Days	20 Hours		9/4/19	9/19/19	0%	
14	Deliver		3 Days	14 Hours		8/21/19	8/23/19	0%	
15	Classroom and environment preparation		3 Days	13 Hours		8/21/19	8/23/19	0%	
16	Determine which Workfront environment to use during training		1 Day	1 Hour		8/21/19	8/21/19	0%	
17	Verify there is enough data in Workfront to use during training		2 Days	2 Hours	16	8/22/19	8/23/19	0%	

When Workfront's Modern Work Enablement team creates/updates new training or fulfills a custom training engagement, 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 tasks—Prepare, Develop, Deliver. Sub-tasks represent the work to be done to fulfill each milestone. Add additional 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 9](#) to identify what types of changes each persona will see in Workfront.

The trainers on Workfront's Modern Work Enablement team 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]		COURSE OUTLINE
Revision date	When was this plan last updated?	1. Introduction <ul style="list-style-type: none"> <li>Why is Workfront changing?</li> <li>Class objectives/expectations</li> </ul>
Audience	Who is this for? What role/persona/license type? Are they new users or exiting users?	2. Main learning point (duplicate as needed) <ul style="list-style-type: none"> <li>Supporting information for main learning point (duplicate as needed)</li> </ul>
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?	3. Main learning point (duplicate as needed) <ul style="list-style-type: none"> <li>Supporting information for main learning point (duplicate as needed)</li> </ul>
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.		

The Modern Work 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 (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.

## DIY RESOURCES

Workfront's Modern Work Enablement team presented a session called [DIY: Build your Workfront training toolkit](#) at Leap 2019 in Dallas.

Although designed for training end-users before an initial Workfront launch, the worksheets and suggestions also apply to getting users ready for the new Workfront experience.

# Establish learning objectives

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



## SET LEARNING OBJECTIVES

The “things people need to know” are your learning objectives. 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 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 (Projects area and Search)
- Navigate project landing page (find custom form, view documents, etc.)
- Use the side summary to quickly access information about tasks
- Create workspaces so the Workfront window is easy to navigate and manage



# 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 landing page (make an update, view updates, header changes, etc.)
- Subtabs become the left panel
- Review and approve items in the Home area

## TEAM MEMBERS

### (Work license)

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

## SYSTEM ADMINISTRATORS

### (Plan license)

- Basic Workfront navigation and finding the Setup menu
- Enroll users in the new Workfront experience
- Adjust layout templates in the new Workfront experience
- Workspaces

## PROJECT MANAGERS

### (Plan license)

- Basic Workfront navigation and finding the Projects area
- Workspaces
- Use Filters to find My Projects, etc.
- Navigation within a project (subtabs become the left panel)
- Side summary on Tasks tab
- Find dashboards and/or reports
- Search
- Recents and Favorites

## RESOURCE MANAGERS

### (Plan license)

- Basic Workfront navigation and finding the Resourcing area
- Find the different resource management tools
- Workspaces

## TRAFFIC COORDINATORS

### (Plan license)

- Basic Workfront navigation
- Find dashboards and/or reports
- Navigate the request/issue landing 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 Modern Work 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.

And 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 side summary 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.



# 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.

Share your feedback about this guide with [allisonlippert@workfront.com](mailto:allisonlippert@workfront.com).

