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Workfront and Clarity PPM, Complementary Tools

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Part I: Introduction

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Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself
- Business Cards



Open Mic

- Does your Marketing Organization have an application they are using to manage work? To review and approve their digital work?
- For those who've had a successful implementation of a work management tool for Marketing – what are some of your best practices? Does your marketing work management tool integrate with Clarity?
- For those who have not had a successful implementation or whose marketing team is not adopting the work management tool – what prevents success?

Identifying best practices for implementing a marketing work management tool leads us into our topic today, which is exploring the option of integrating Workfront with Clarity to complement and optimize a company's PPM solution.

Agenda

- Introductions
- Workfront Overview
- Workfront Integration With Clarity
- Workfront Demo
- Questions

Part 2: Workfront Overview

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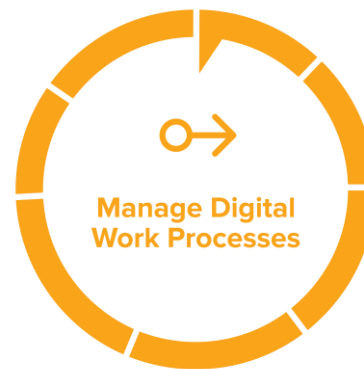
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What Is Workfront?

Workfront is a **modern work management platform** that gives organizations everything they need to be more productive, in one location – a connected platform where strategy, resources, and work align.

It combines project management, intelligent work automation, digital asset management and proofing to **empower teams to collaborate and do their best work faster.**

Workfront plays in **five spaces**:



Who Uses Workfront?

Workfront has over **4,000 clients**, is used across industries and **targets five key groups** within a company.



Marketing

Help your team balance competing priorities, get more done, and show their impact.



Information Technology

A one stop shop for automating process, prioritizing work, and enabling collaboration so teams can deliver on time.



Professional Services

Take on more work and deliver business critical services to customers without risking employee burnout or increasing overhead.



Agencies

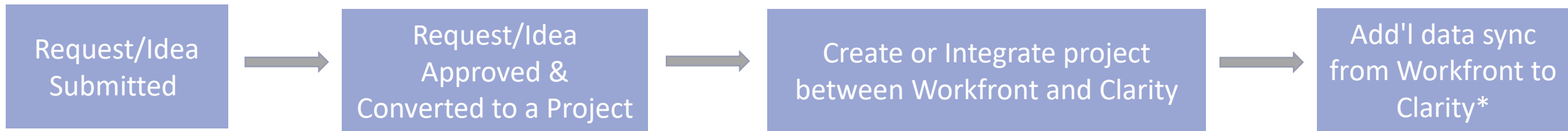
Automate your workflows – including approval cycles with clients - and get real time insight into the status of your team's work.



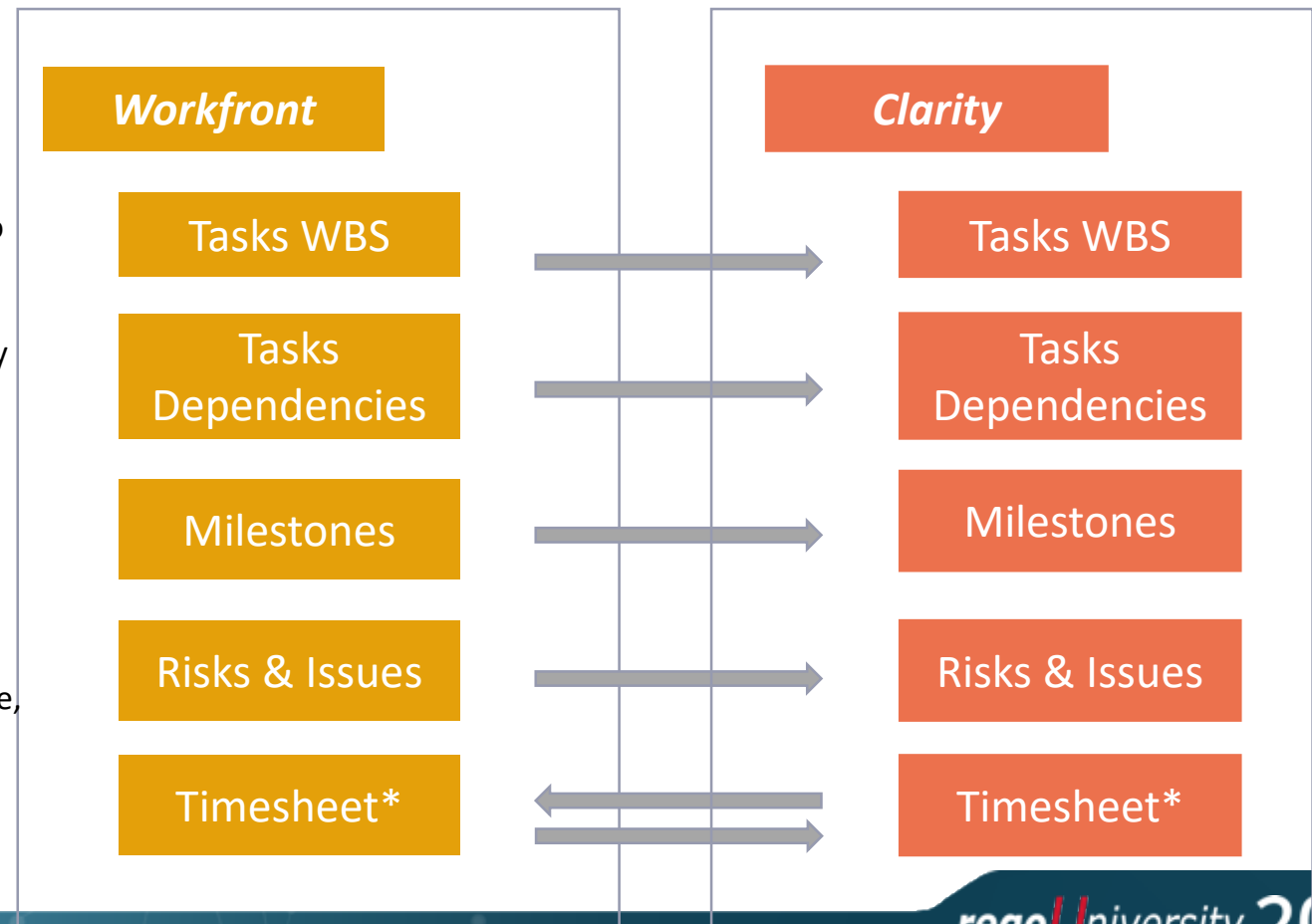
Product Development

Manage work in a single location to get products to market with speed and quality.

Workfront Integration With Clarity



- **Projects can be created from either system.** Projects can be created in either source system or linked to existing projects. If Clarity initiates the new project request in Workfront, the tasks WBS will be created in Workfront.
- **Workfront is the system of record.** Clarity Project data can be pushed to Workfront and Workfront Project data can be pulled to Clarity.
- **Integration is triggered when 'Sync Now' is selected or via a Scheduled Job** from the Workfront Integration sub-page of Clarity project.
- Project level, task level, and timesheet integration settings are provided in the **'Sync Settings' section**.
- **Full WBS support or option to sync Milestones** Tasks associated with the Milestone Path In Workfront can be sent over as Clarity Milestones
- There will be a global setting (Connection Manager object) to **choose directionality for Timesheets***, Customer needs to choose, in which direction the time should flow.
- The integration can also be plugged into **Workfront Request to Clarity Idea integration scenario**.



Part 3: Workfront Demo

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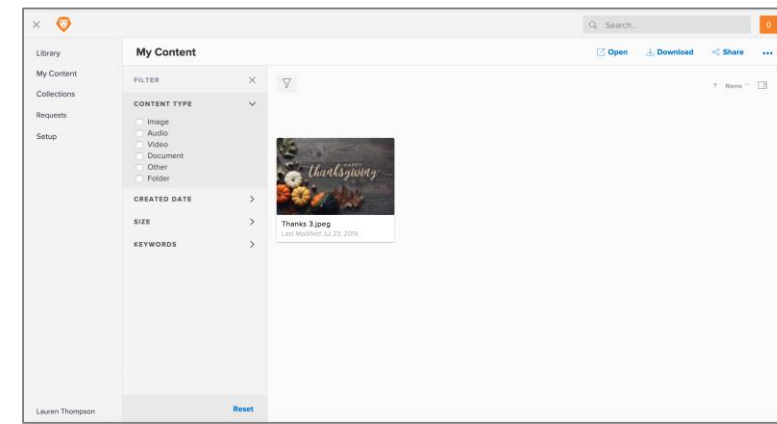
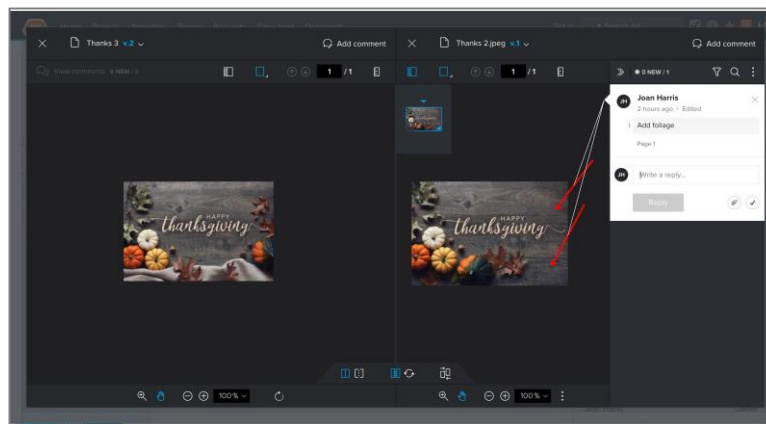
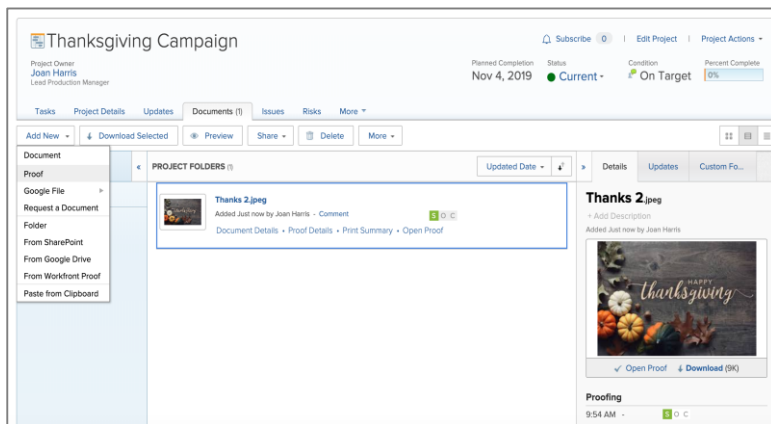
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Workfront Differentiator – Content Management

Workfront has strong capabilities in content management, which includes a seamless experience for moving content from development through to team reviews, leadership approval and document storage.

- Easily add and **create a proof** of a document
- **Review and approve** over 150 files types in Workfront Proof, with the ability to make comments and review versions side by side
- **Store and quickly retrieve documents** in Workfront Library



Questions?



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