

Learn From Your Peers Webinar | Adobe Workfront

Beyond the Basics: Project Management in Workfront

September 16th, 2026

Our webinar will begin shortly.

While we wait, say hello to your fellow attendees in the chat!

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Beyond the Basics: Project Management in Workfront

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Today's Agenda:

Time (PST)	Topic
8:00 a.m.	Welcome and housekeeping
8:05 a.m.	Project Management and Communication within Workfront
8:45 a.m.	Audience Q&A
8:55 a.m.	Wrap-up and next steps

Our Speakers



Host

Jenna Martinez

Adoption Marketing
Manager
Adobe



Tim Wyckoff

Marketing Operations
Senior Project Manager



Karen Castens

Workfront Implementation
Manager–U.S. Marketing,
BMO



Hello!

Share in chat:

- Where are you joining us from?
- What are you hoping to learn today?
- What is your favorite ice cream flavor?



**Use the chat to
ask and answer
questions**



**This webinar is
being recorded
– we'll send you
the link**



**We'll share the
slides on the
Community**



**Tell us how
we did in
the survey**

Meet our presenters



Tim Wyckoff

Workfront Champion
Marketing Operations

- Workfront Architect, Project Management Aficionado
- 20+ years of project management experience - Creative, Events, Construction
- Fun fact: I've broken more bones and had more stitches than most people I know, but I swear I'm not uncoordinated.



[linkedin.com/in/tim-wyckoff](https://www.linkedin.com/in/tim-wyckoff)



Karen Castens

Workfront
Implementation
Manager

- 20+ years of experience as a Creative Director, with 15 of those spent Project Managing with Workfront
- Recently transitioned to full-time Workfront management
- Fun fact: I met Lindsey Buckingham at the Art Institute of Chicago and he kissed me on the forehead. I did not pass out.



[linkedin.com/in/karencastens](https://www.linkedin.com/in/karencastens)

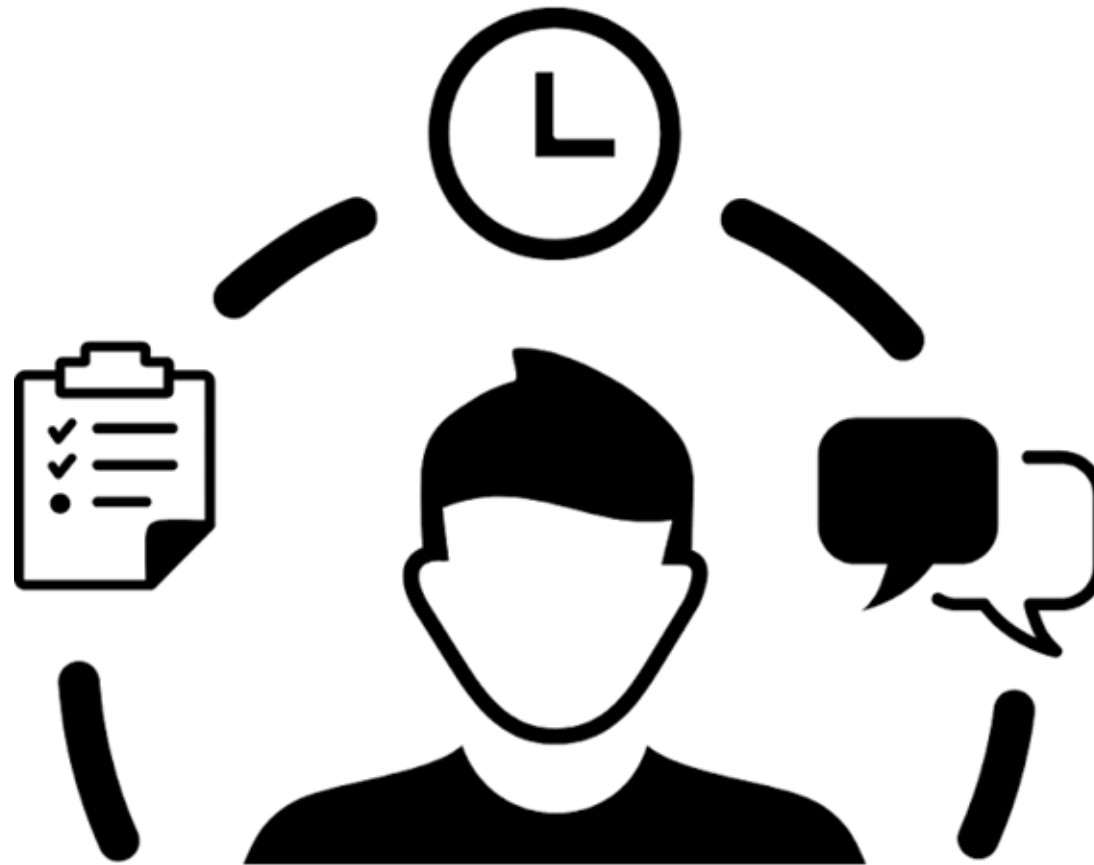
Project/Traffic Managers

We ARE:

- Facilitators of communication
- Hovering just above the weeds

We are NOT:

- A secretary
- Your mom



What is our role in Workfront?

There are many different roles within Workfront, from designers, copywriters and business partners to Project Managers.

We all have a part, and everyone is responsible for their own communication.

Log time

Hour Type
Task Time

Sun Aug 30	Mon Aug 31	Tue Sep 01	Wed Sep 02	Thu Sep 03	Fri Sep 04	Sat Sep 05
<	0.25	1	3	0.75		>

Total Hours: 5

Cancel Log time



Description
Write a draft of content for social channel posting. Follow character-count guidelines and social best practices.

@Tim Wyckoff Thanks for sending me the documents! I'll review today and should have an answer

Tag people or teams

Submit Cancel



Name	Type	Add...	Creator	Last mo...
Screenshot 2026-05-02 at 1.23.24 PM	png	9/3/2026	karen castens	9/3/2026

Overview

Workfront does so much more than simply “track projects”. The true value lies in what you can get out of that project information.



**Single source of truth
for every Project**



**Cross-team
communication**



**Reporting
and data**

What can we communicate in Workfront?

A simple report can answer the basic questions that everyone might need to know. Drill down into the project for details for more information.

REPORT
Tim's New Project Report

Show Filters ... Report Actions As of September 14, 2026 at 4:45 PM Eastern Daylight Time ↺

[→ ▼]

☐	Name	Owner	Due On	Project Priority	% Complete	Last Update Information
☐	Mail Template - Project	tim wyckoff	10/12/26	Low	50.26%	Entered by: Allison Smith Note: Condensing review phase to account for additions - this should keep project on track for original timeline. @tim wyckoff
☐	Mail Template - Project A-team	tim wyckoff	10/12/26	High	87.04%	Entered by: tim wyckoff Note: Murdoch and Face will be OOO until the end of the week. Will continue with production once they return. T pity's the fool.
☐	Mail Template - Project MacGyver	tim wyckoff	10/12/26	Urgent	68.7%	Entered by: tim wyckoff Note: Email campaign can be put together with a variety of tactics. Delivery set for 11/11.

Last Update Information

Entered by: Allison Smith Entry Date: 9/14/26
Note: Condensing review phase to account for additions - this should keep project on track for original timeline. @tim wyckoff

Entered by: tim wyckoff Entry Date: 9/11/26
Note: Murdoch and Face will be OOO until the end of the week. Will continue with production once they return. T pity's the fool.

Entered by: tim wyckoff Entry Date: 9/11/26
Note: Email campaign can be put together with a variety of tactics. Delivery set for 11/11.



Tip: Use “Last Note: Note Text” on reports to see the latest update on the project/task.

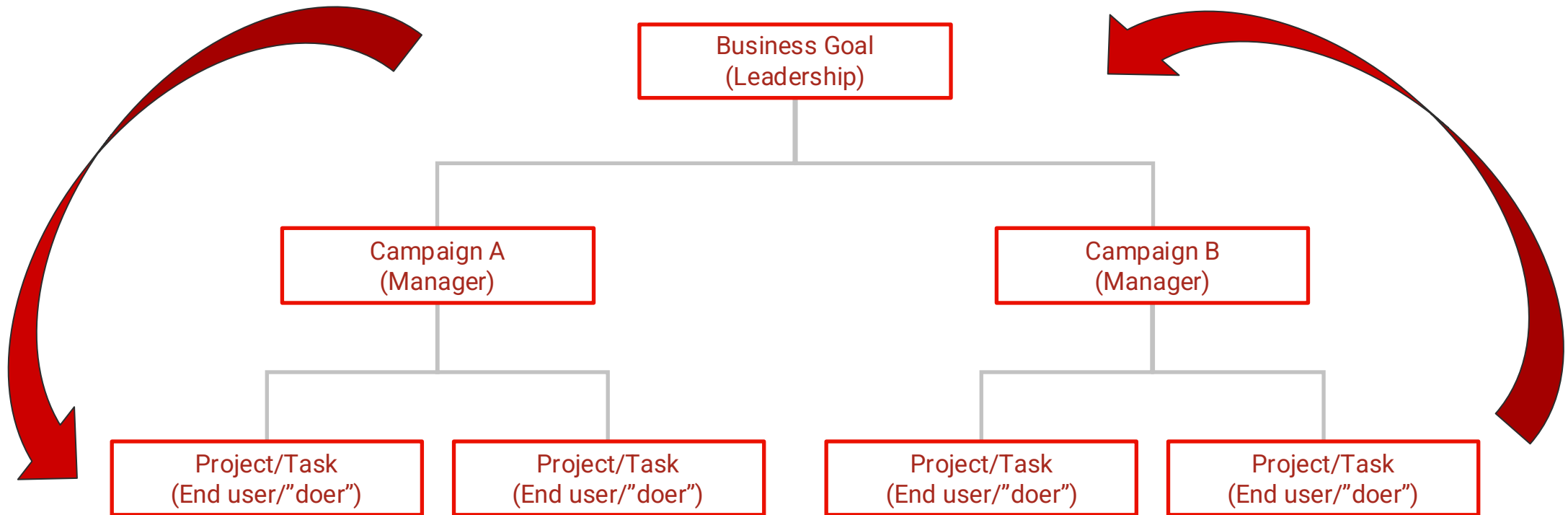
Explore text mode to discover advanced options.

Level-up your information



Why is communicating this information important?

Communication is not a one-way street. It's facilitated through Workfront, but everyone is responsible for communicating how to get the job done.



Project Organization

Creating Portfolios and Programs helps sort Projects into “like” buckets, ensuring the work that is being done matches business goals and strategic initiatives



Portfolios

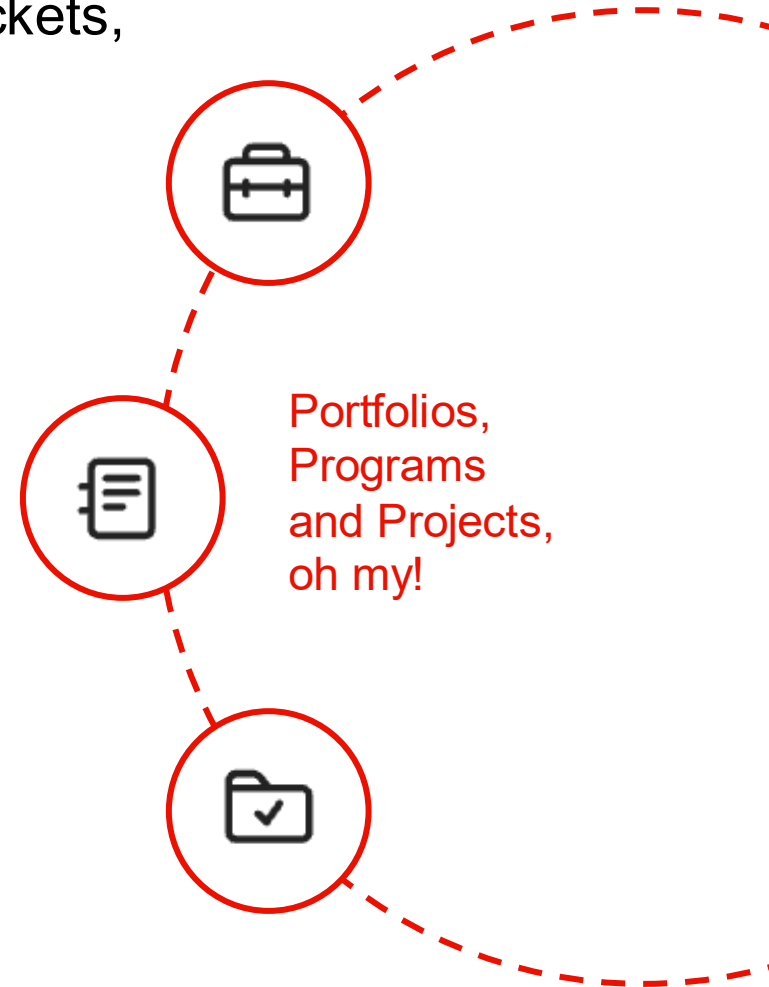
A collection of Projects with common business goals.

Programs

A collection of Projects with unifying characteristics; sits within a Portfolio

Projects

Contains tasks to work a process from initiation to launch; sit within Programs



Project Tiering

Creating a Tiered project structure can help identify if teams are spending time on the right initiatives.

Tier 1

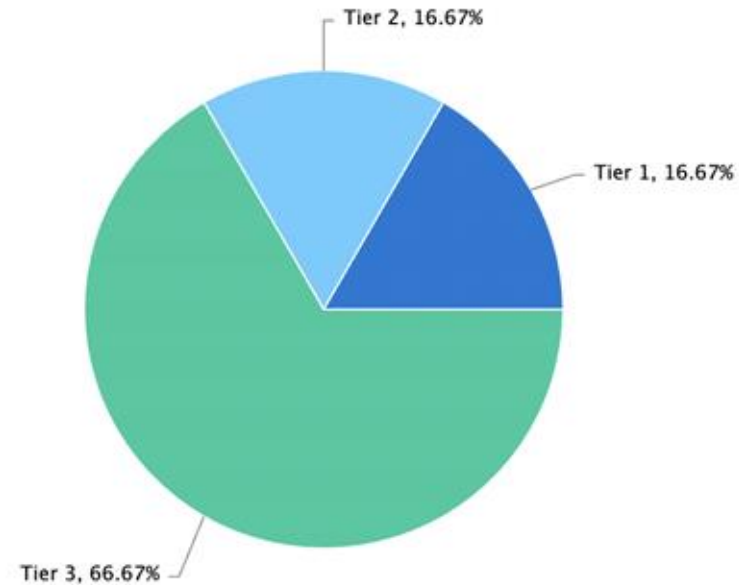
Critical, time-sensitive, multi-team, cross-channel campaigns. Top Priority.

Tier 2

Strategic, planned priority work that involves multi-team, cross-channel initiatives that advance strategy with some time sensitivity. Important, but not AS critical as Tier 1.

Tier 3

Smaller, limited scope NEW & BAU work, often limited team partnership required. Also single tactic/channel executions.



Tip: Use your brand colors in charts and graphs, it gives people one small “ooh” factor and helps them focus on the data & not the “look” of something..

Leverage the Home Screen

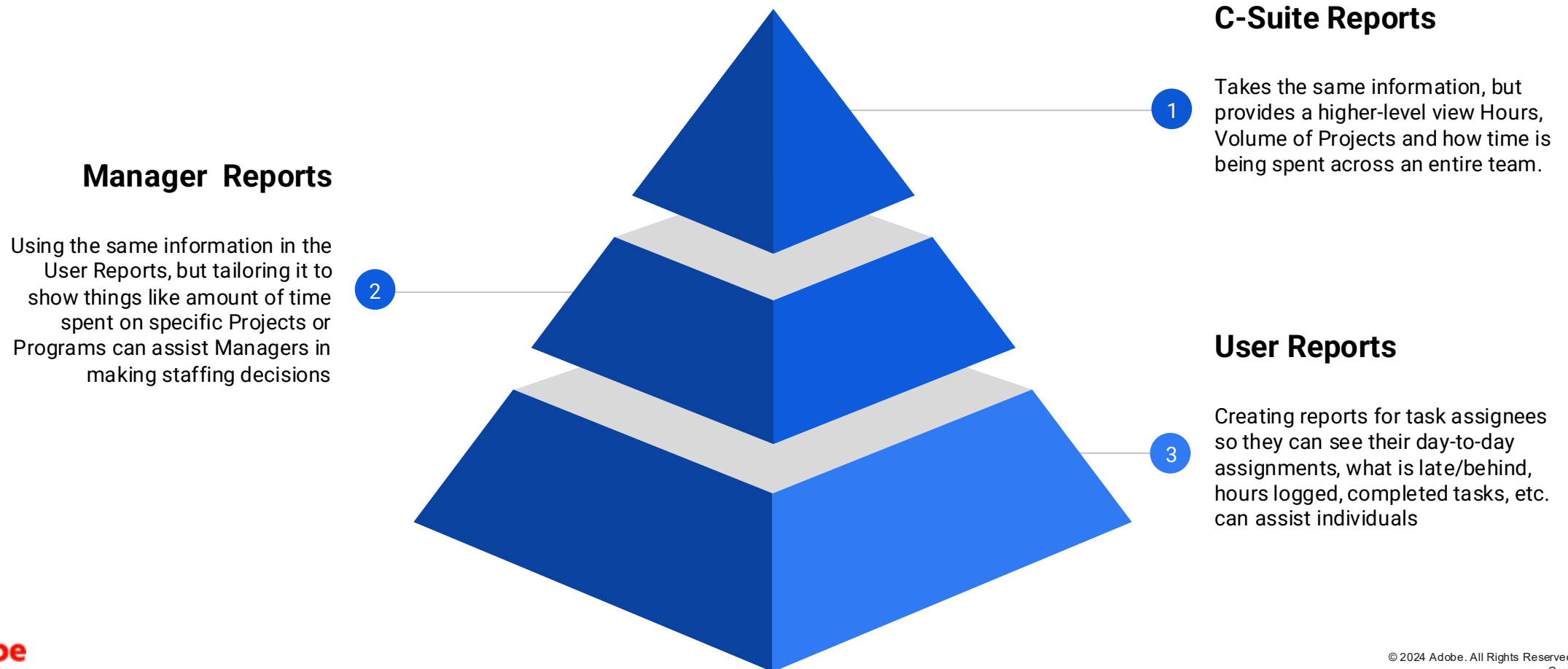
The screenshot displays the Adobe Home Screen with four main sections:

- My Projects**: A table listing projects. The first row shows a project named "Mail Template - Project MacGyver" owned by "tim wyckoff", with a status of "Current", priority of "Urgent", and a due date of "10/12/26".
- My Tasks**: A table listing tasks. The first row shows a task named "Final Review" with a status of "In Progress" and a due date of "10/18/26".
- To-dos**: A list of tasks to be completed. The first two items are "Email marketing department" and "Call CX requestor".
- My Approvals**: A section showing pending approvals. The first approval is from "tim wyckoff" requesting approval on a "Screenshot 2026-09-11 at 12.56.22 PM" for the "Mail Template - Project MacGyver".

Each section includes a "New" button and a "Filter" icon. The "My Approvals" section also includes a "Go to Proof" button.

Communicating to different levels of management

Tailoring communications to specific audiences helps ensure the right information is reaching the right level of user.



Communicating without words

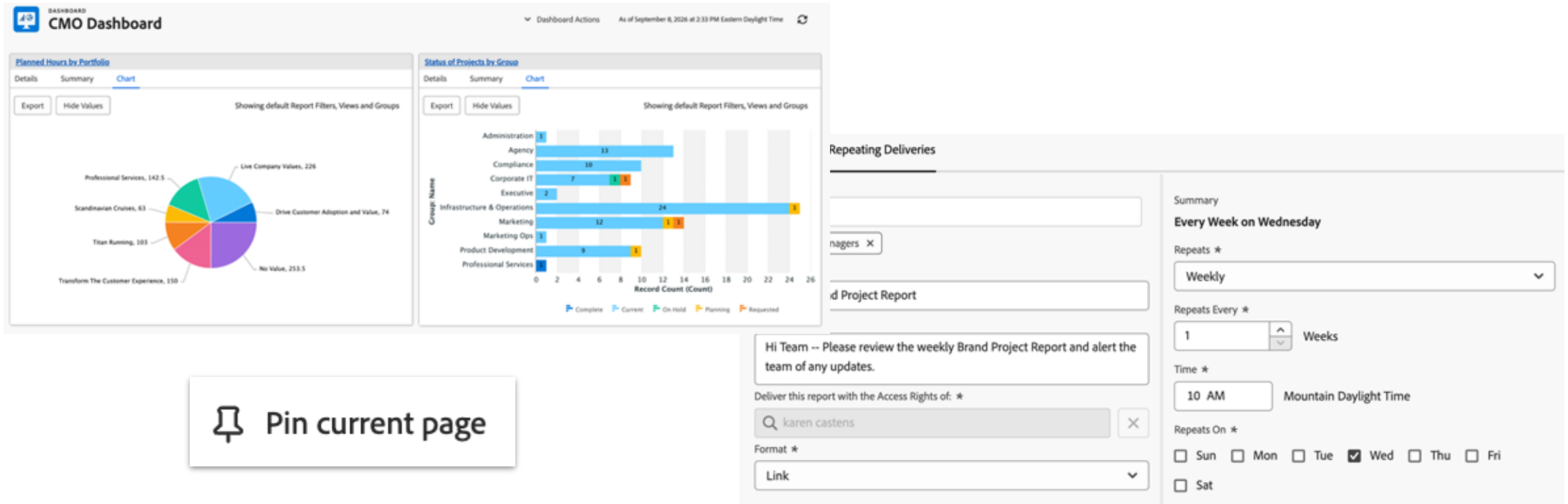
Using built-in visual communication tools is an easy win in Workfront. Use things like font styles, color coding, etc. to tell a story at a glance.

The screenshot displays the Adobe Workfront 'Requests' interface. The top section includes a search bar with the placeholder text 'What request do you want to submit?'. Below this is a toolbar with options: 'All Requests', 'Filter', 'Columns', 'Grouping', 'Format cells', and 'Row Height'. The main table lists requests with columns for 'Subject', 'Created object', 'Object type', and 'Status'. The table is color-coded: 'Advocate Notes' is grey, 'Basic Campaign Re...' is green, and 'New Campaign Brief Re...' is blue. A detailed view of the 'Basic Campaign Re...' request is shown on the right, featuring a table with columns: 'Name', 'Owner', 'Desc', 'Start On', 'Due On', '% Complete', 'Condition', 'Status', and 'Last Update'. The table contains several rows of requests, each with a progress bar indicating completion status. The progress bars are color-coded: blue for 'At Risk', green for 'Current', and red for 'In Trouble'. The status column also uses color coding: green for 'Current' and red for 'In Trouble'.

Name	Owner	Desc	Start On	Due On	% Complete	Condition	Status	Last Update
NASCAR Bingo	Tim Wyckoff		7/14/26	10/1/26	28%	At Risk	Current	Bingo cards generated will need to be 4x4 instead of 5x5.
60 Years of Business (45 seconds)	Claudia Jones	Video promoting our 60 Years of unmatched services.	6/9/25	7/25/25	95.65%	In Trouble	Current	Changes are in.
Industry Marketing Campaign	Tim Wyckoff		7/14/26	8/4/26	53.42%	In Trouble	Current	Cheryl - can you please send updated documentation for the industry trade magazine?
Titan New Product Launch Popup Event	Cory Thompson		9/4/25	9/11/25	0%	In Trouble	Current	Claire Stevens got it
Single/Standalone Marketing Requests	Harry Sterling		7/9/25	7/9/25	0%	In Trouble	Current	Claire Stevens got it
Easton Manufacturing - HR Solution Implementation	Mei Tamura		6/25/25	8/7/25	0%	On Target	Current	He has the cube that is decked out with Shark Week stuff.

Communicating effectively

While some information should be available daily at user fingertips, other types of information can be communicated to specific audiences, on a cadence.



Pin current page

Meet people where they are

Using out-of-the box integrations like the Microsoft Teams plugin is an easy way to ensure users are able to access Workfront information where they are most comfortable.

The rightmost screenshot displays the 'Requests' tab with the following table:

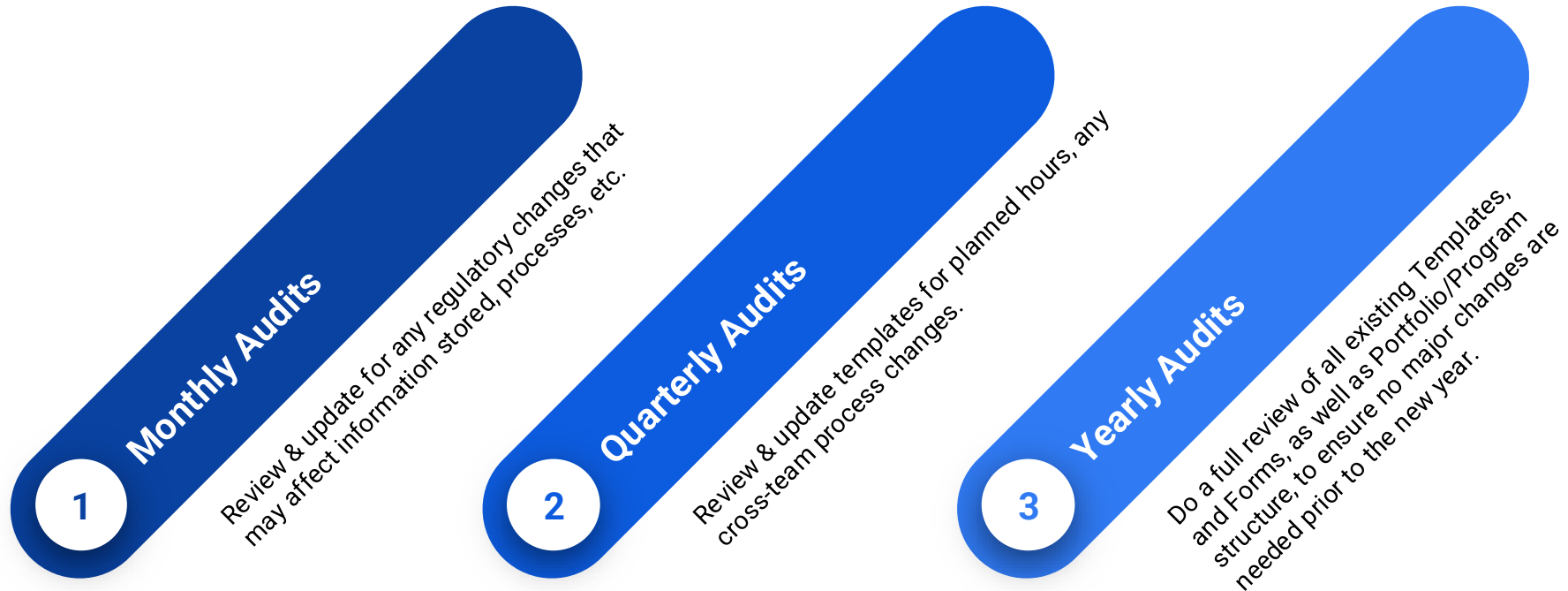
Subject	Ref. number	Request type	Status	Submitted on	Assigned to
Tim Event TEST	2364298	Residential Proj...	Awaiting Fee...	May 14, 2025	
EBX test	2121050	Operations Sup...	In Progress	Jan 8, 2025	
Training docum...	2014300	All Shaw Enterp...	In Progress	Oct 1, 2024	Resi - Intake Ro...

An ever changing network of information



Final thoughts

There is always maintenance to be done. Whether there be process, regulatory or internal team changes, audit on a specific cadence to ensure alignment.



Questions?



Upcoming Events

WORKFRONT USER GROUPS (WUGs)

- Check the WUG event calendar often for upcoming events and topics
 - <https://usergroups.adobe.com/events/>

WEBINARS & COMMUNITY EVENTS

- **September 23:** Workfront Fusion Wednesday Forum
- **September 29:** Workfront AI Collaborators: New Capabilities & Use Cases
- **October 28:** Making the Switch: Completing Your Move to Unified Review and Approvals
 - https://experienceleague.adobe.com/en/events#f-el_product=Workfront
- Monthly Office Hours with our knowledgeable Workfront Champions. Check this link often for the monthly schedule.
 - <https://workfront-augs.adobe.com/adobe-workfront-champion-office-hours/>



JOIN A
CHAPTER
TODAY!

Adobe Workfront User Groups

Workfront User Groups (WUGs) bring people together to network, share ideas and best practices, collectively problem-solve, and provide ongoing education.

Have you joined yet?

- ▶ Find your chapter
- ▶ Connect with your people
- ▶ Join the conversation

Adobe

Visit the [User Groups site](https://usergroups.adobe.com) and
join a chapter!

<https://usergroups.adobe.com>



Check back often as new chapters and events are always being added!

A solid red vertical bar is positioned on the far left side of the image, extending from the top to the bottom.

Thank you!

