

CASE STUDY

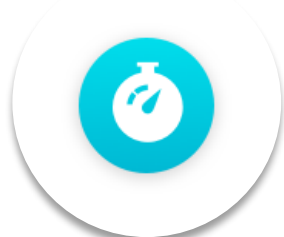
J.P.Morgan

JP Morgan has launched a new 400-person marketing organization to better serve their Payments business line.

"JumpSeat has allowed us to take our user onboarding and training to a new level. The addition of Workfront Fusion creates a very automated and efficient training process that has increased our users' knowledge and overall usage of Workfront and allowed us to achieve our CMO's goal of keeping our users in Workfront."

– Kurt Jones, VP Marketing, Delivery Lead

Outcomes



54%

Increase in **Monthly Logins**
(User Onboarding & Training)

82%

Increase in **Work Requests**
(Better understanding of the request process)

14%

Increase in **Completed Tasks**
(Knowing how to work with tasks)

Challenge

- A new marketing organization comprised of people from 4 different business lines
- 20% of the team were familiar with Workfront, 80% were new users
- The new organization was rolled out into an existing Workfront existence without a defined user training process
- With 4 different lines coming together they each brought their legacy views on how they should use Workfront
- Low adoption of Workfront due to a lack of application knowledge and processes
- CMO mandate to increase overall usage of Workfront

Solution



- Launched a redesigned user onboarding and training program using JumpSeat, Workfront projects, and Workfront Fusion
- Workfront Fusion automates set up of a training project in Workfront with tasks directly connected to JumpSeat guides
- Developed a library of guides specific to the Payments Marketing team roles and processes
- Sync Workfront user roles with JumpSeat which allows guides to be targeted to specific users and groups.
- Leverage Workfront project reporting to provide training compliance reports to team managers

Creating a Workfront User Account

The image shows two parts of the user creation process. On the left is a 'User - Legal Entity' form with fields for 'User's Legal Entity', 'Department', 'What cost center is going to be billed for any letter printing and posting?', 'Marketing Team Lead', and 'RSAM'. At the bottom of the form, there are two radio button options: 'Send Requester/Reviewer Email?' (with 'No' selected) and 'Send Training Project?' (with 'Yes' selected and circled in red). On the right is an email from 'Workfront Automation' titled 'Training Bot'. The email content includes a welcome message, a link to visit the project, and the URL 'https://jpmcwp.my.workfront.com OR go/wpmworkfront'.

Personalized Training Project Plan

The image shows a Workfront project plan for 'Workfront Training - Training Bot'. The project is 5.88% complete and has a planned completion date of Nov 6, 2023. The plan includes several tasks with detailed instructions and links. Numbered callouts highlight key features: 1. 'Training View' icon in the top right; 2. 'How-to' field for rich-text and links; 3. Links to JumpSeat guides & Experience League content; 4. JumpSeat icon in the bottom right.

| # | Task Name | How-to | Assignments | Duration | Pin Hrs | Predecessors | % Complete |
|----|---|--|-----------------|-----------|------------|--------------|------------|
| 7 | Pin This Project Workfront Navigation bar | As you use Workfront more and more, you'll find you go to, or use the same pages. You can save (Pin) pages you go to on your Workfront Navigation bar. | Project Manager | 0.03 Days | 0.25 Hours | 5 | 0% |
| 8 | Understanding Workfront Navigation & Search | | | 0.06 Days | 0.5 Hours | | 0% |
| 9 | Review how Navigation is used in Workfront | Follow the JumpSeat guide, Workfront Navigation Overview, to learn the basics. PRO TIP: Click on the Star icon to the right of the Project Name, or click on "Pin current page" in the Navigation bar, to a quick link back to this project. | Project Manager | 0.03 Days | 0.25 Hours | 7 | 0% |
| 10 | Ask for help from our internal Workfront Admins | Follow the JumpSeat guide, How to Submit a Help Request, to learn the basics. You can use that queue to input tickets to the Workfront Admins for additional help when needed. | Project Manager | 0.03 Days | 0.25 Hours | 9 | 0% |
| 11 | Understanding Requests | | | 0.09 Days | 0.75 Hours | | 0% |

JumpSeat & Workfront Fusion User Onboarding & Training

Use Case:

- Automate new user training set up in Workfront
- Deliver and track training using Workfront and JumpSeat
- Very low-touch training process
- Track progress with Workfront and JumpSeat Analytics