

# CASE STUDY

## New and Existing Workfront User Training

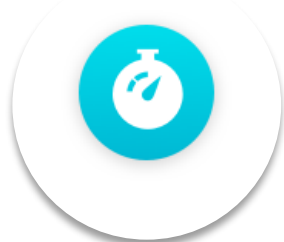


Improving Workfront adoption and expertise

*"The JumpSeat tool continues to evolve to better meet the needs of our organization. The JumpSeat team has done a great job taking our wish list and making it a reality within the tool so we can create a best-in-class training experience for new and existing users."*

– Ellen Saltmarsh, VP Change Management Leader

## Outcomes



**Enhanced new user onboarding with a more seamless training process and a higher user satisfaction rating**

**Role-specific guides quickly deliver in-platform assistance to users when and where it's needed**

**Shorter adoption times for new policies and procedures with the use of JumpSeat Guides**

**Increased user efficiency ultimately leading to less time on administrative tasks**

## Challenge

### Use Case 1: New User Training - Workfront

- New user onboarding is complex, resulting in a high abandonment rate and a less than optimal initial user experience.
- Set-up and oversight of training is time intensive for COSMOS User Support team.

### Use Case 2: Existing User Training - Workfront

- COSMOS User Support services over 1300 Workfront users of various license types and roles. This makes it impossible to provide in-person support to all users 24/7/365.
- Users have difficulty navigating Workfront and knowing where to begin a process within the platform.
- Job aids are stored in a separate shared site and users often have difficulty locating the correct document(s) for their need.

## Solution



### Use Case 1: New User Training - Workfront

- With JumpSeat's ability to sync role data in our sandbox environment, we were able to shift our approach to training New Users and utilize the JumpSeat tool.
- Using the "Branching" feature within JumpSeat, we were able to create a series of interchangeable "Modules" that can be assigned to various users based on roles and/or teams.
- This new training approach is currently being piloted with one role and will be phased onto additional roles this year.

### Use Case 2: Existing User Training - Workfront

- Leveraging JumpSeat, we have been able to create a library of guides specific to our company's various roles and teams.
- JumpSeat's ability to automatically sync user roles with profile data has allowed us to target guides to users that are applicable to their role.



**JUMPSEAT & WORKFRONT**

# **USER TRAINING & ADOPTION**

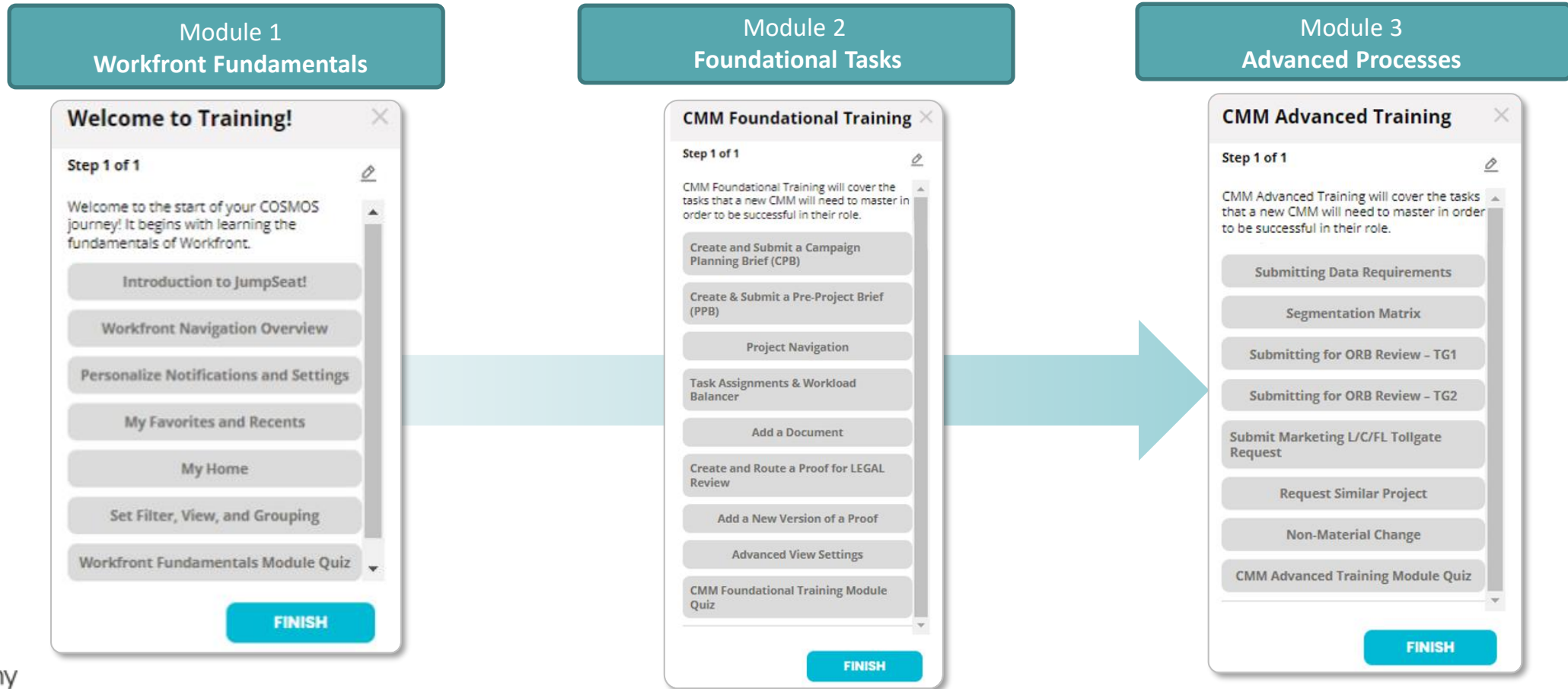
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JANUARY 2024

# JumpSeat Guides: New Workfront User Training

New marketing managers are trained in Workfront through a series of guides, organized into 3 JumpSeat modules.

- Training is conducted in a sandbox environment to allow users to freely learn and experiment
- Users create test programs/projects and complete tasks to gain understanding of Workfront navigation and processes
- Links to sample campaign forms are included within guides for easy reference



Module format allows for added flexibility when training a variety of business roles

# New Workfront User Training: Module Quizzes

- Each module contains a quiz at the end, which requires an 85% accuracy score to pass
- New users are only granted access to the production environment of Workfront after successfully completing all required guides and passing each quiz

### Workfront Fundamentals Module Quiz

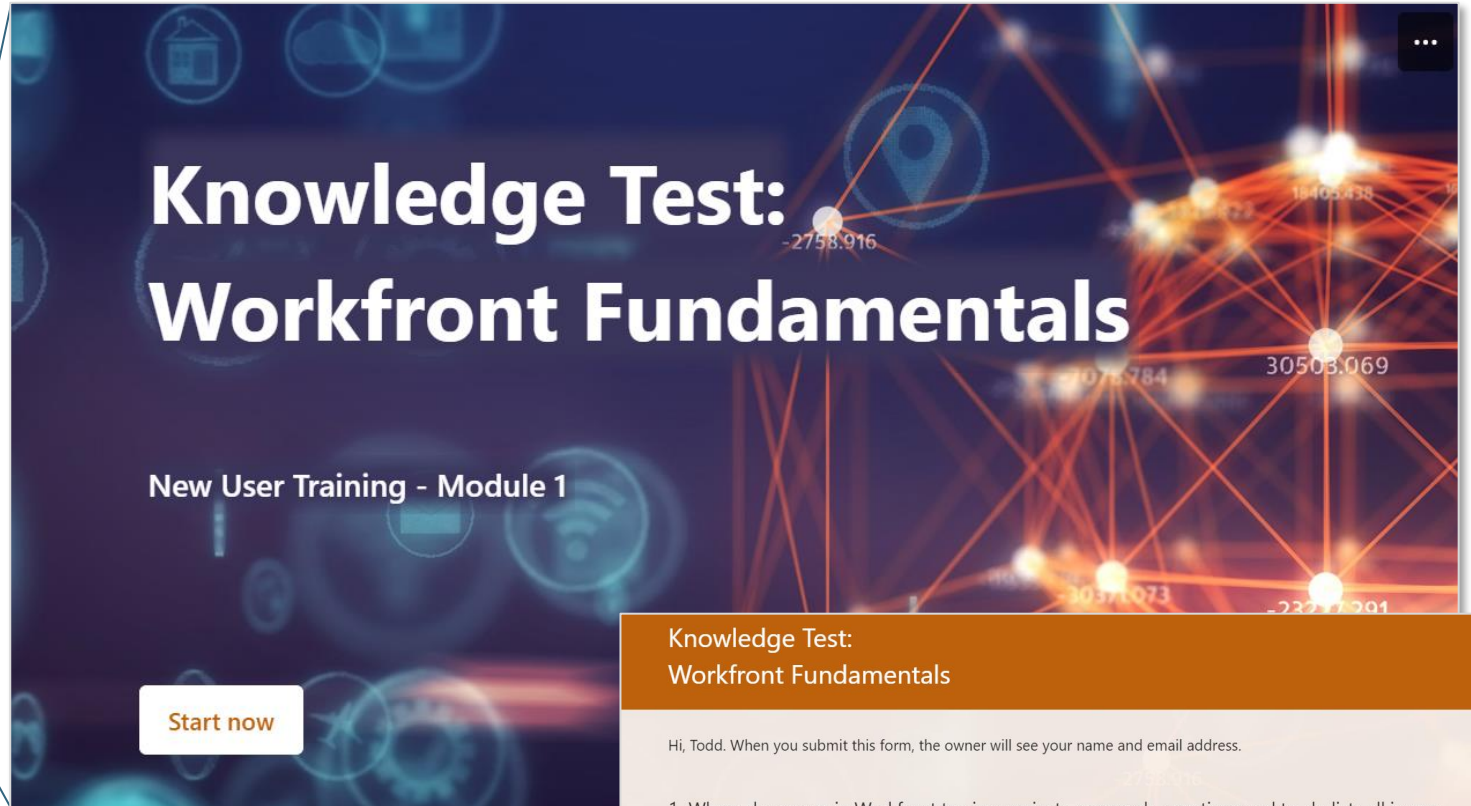
Step 1 of 1

**Congratulations on Finishing the Workfront Fundamentals Module!**

Please click the link below to take the End of Module Quiz. You will need to score an 85% or higher to be given access to Workfront Production. You can retake the quiz as many times as needed. Good Luck!

[Link to Workfront Fundamentals Module Quiz](#)

**FINISH**



**Knowledge Test:**  
**Workfront Fundamentals**

New User Training - Module 1

**Start now**

### Knowledge Test: Workfront Fundamentals

Hi, Todd. When you submit this form, the owner will see your name and email address.

1. Where do you go in Workfront to view projects, approvals, mentions and to-do lists all in one place?

- The dashboard
- My reports
- Home page
- Request page

# JumpSeat Guides: Existing Workfront Uses

Synchrony leverages JumpSeat's on-screen, step-by-step guides to aid our 750 existing users in a variety of Workfront activities and process.



45 Guides

From basic Workfront navigation to detailed, multi-stage processes



Navigate Workfront

- Clearly guide users through detailed processes, which span across multiple Workfront areas



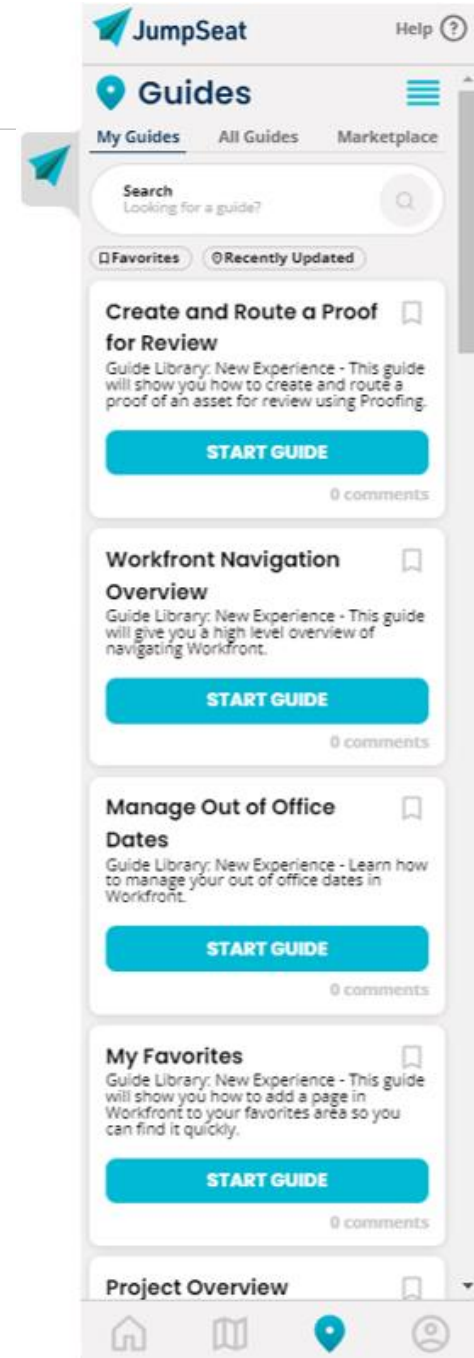
Available 24/7/365

- On-Demand Guides are always accessible, regardless of day or time zone



Guides Grouped by Role

- Displays relevant information to user
- With almost 150 roles, we must tailor JumpSeat to users' needs
- Custom guides continuously added to support new processes and roles





CHANGING WHAT'S POSSIBLE

