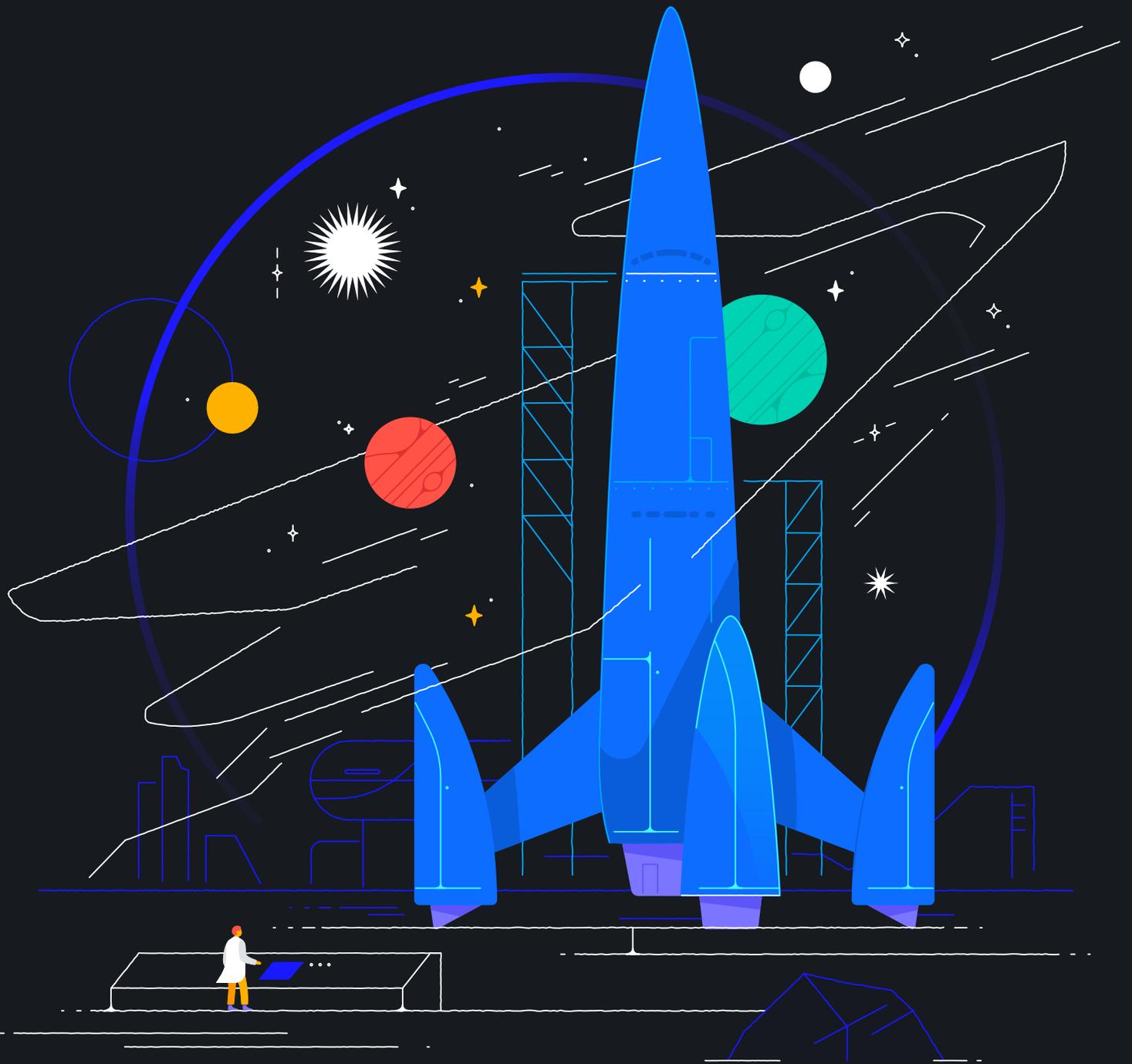


Customized & Configured:

The Secrets Behind How Leading Companies
Achieve Consistent Growth



Wrike

Introduction

Just months into 2019, more stores have closed their doors in the U.S. than the entire previous year — nearly 6,000 total. The phenomenon is called the “[retail apocalypse](#).” Dozens of the country’s biggest, most successful and cherished brands are going the way of the dodo with no end in sight.

And it’s not just retail either. Across industries, companies that were previously market leaders are going bust. Even promising startups with [nearly 1.4 billion dollars in capital](#) are shutting their doors. So what’s eating these companies alive?

Self-destruct mode

While challenges like increased competition, supply issues, market drops, or even natural disasters taking out key infrastructure are responsible for bringing some of these brands down, in many cases, the seeds of failure have been sown from within.

“Without a robust and resilient innovation strategy, no company can survive,” says [Phil McKinney, CEO of CableLabs](#).

It’s not always changes in environment that bring companies down — sometimes it’s their own ability or unwillingness to change. Without adaptability, growth and even survival are impossible.

Table of Contents

The 4 enemies of adaptability	4
Inefficient processes	5
Rigid tools	5
Siloed teams	6
Low value, repetitive work	7
The 4 keys to cultivating adaptability in your organization	8
Incorporate flexibility into your processes	9
Align your teams	10
Make use of automation and integrations to connect system and streamline processes	12
Build your organization on customizable and configurable tools	14
Using adaptability to fuel growth in 3 steps	16
Read and act on signals	17
Experiment	18
Mobilize	19
How leading companies are using customizable and configurable tools and processes to scale	21
A tool that grows with you	33

The 4 enemies of adaptability

Adaptability means being willing and able to change as needed. Change is hard enough to manage as an individual. It gets exponentially harder as you try to change an entire organization. Here are some of the most common roadblocks organizations face in fostering adaptability.



Inefficient processes

Work processes are the glue that holds things together and ensure that tasks are completed in a way that's systematic and organized and involves as few dropped balls as possible.



But they can easily grow stagnant if they aren't reevaluated as the scale and nature of work changes.

When a team begins to take on new tasks, they determine the best ways to accomplish them. Once those processes have been identified, they stop looking at alternative ways of doing things and work to optimize that process. While this yields a ton of great benefits such as predictability, improved productivity, and reduced costs, it's easy for better alternatives to go unnoticed or unexplored. People get into comfortable rhythms and stop asking themselves if the process could be improved, or even if there's a better way to accomplish the task altogether.

Additionally, processes that are too rigid and have no built-in flexibility can make it impossible for teams to adapt or respond quickly to changing needs. In our era of disruption, it's critical for organizations to be able to break from routine when necessary and respond creatively to any changes in the environment.

Rigid tools



Tools that aren't flexible can inhibit growth and innovation, becoming shackles if they can't adjust to your organization's changing demands. The average enterprise company now uses over 900 cloud applications to manage its processes, and 59% of workers say the number of tools they use has increased in the past year, according to [Symantec](#).

While many of these SaaS tools are designed to improve efficiency, the workflow fragmentation has, in many cases, led to a decline in productivity. Workers are spending more time searching for, and aggregating, information than actually working.

Tools are selected to accomplish a specific task or carry out a specific purpose. All too often though, multiple teams are forced to adopt a common tool that wasn't built to meet their specific needs. In an effort to cut costs or make maintenance easier, tools are crowbarred into a variety of workflows. These ad-hoc systems require a ton of patch work just to get them to work. Data doesn't flow freely between disparate systems. Ironically, additional tools may become necessary to make the whole thing work, increasing fragmentation and complexity.

Siloed teams

It's difficult to adapt when data can't move between tools; it's absolutely detrimental when it can't move between teams. Siloed teams that aren't in alignment can't work together to take on new or even existing problems effectively.

Modern buyers interact with companies across multiple channels. With no organizational unity, visibility, or even awareness of project statuses, teams are unable to drive a unified customer experience. These inconsistencies build up and chip away at brand trust, making the overall brand message confusing and ineffective.

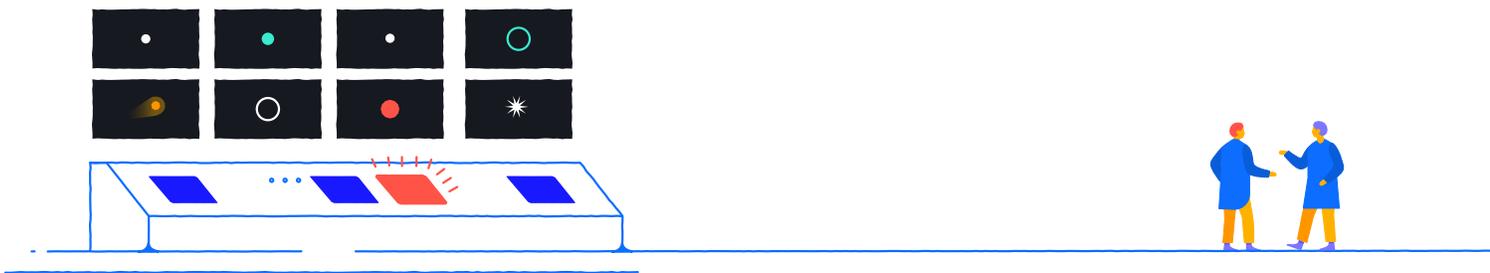
Without proper communication or collaboration, projects are delayed, work is unnecessarily repeated, and resources are wasted. Organizations begin losing ground to smaller, more nimble competitors that are better able to adapt and mobilize resources.



Low value, repetitive work

Huge amounts of time can be wasted on routine, low-value work that doesn't move the needle. As much as [61% of a worker's time](#) is spent doing non-role-specific tasks. Most workers admit they're only really productive for 2 hours and 53 minutes per day.

When workers are only given low-value assignments, morale is crushed. Monotonous, uninteresting tasks cause people to lose focus. [Boredom is the greatest cause of human error in the workplace](#). Without any challenge, people may begin to just “go through the motions” and take fewer precautions. While repetitive work may improve productivity initially, it dulls a team's ability to react effectively to any unexpected changes. It also opens organizations up to increased security risks.



The 4 keys to cultivating adaptability in your organization

The keys to addressing each of these 4 challenges and building a growth focused, adaptable organization are flexible tools and processes.



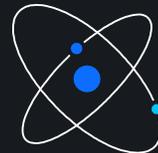
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1 Incorporate flexibility into your processes

Processes are essential to maintaining consistency and become increasingly important as your organization scales. While workflows should be clear and well defined, this doesn't mean they should be rigid and unyielding. Every plan should have opportunities built in that allow teams to evaluate progress and course correct when needed.

Templates are a great tool for maintaining consistency by providing a unified starting place, but they're still flexible enough to enable teams to explore new paths.

The challenge here is to promote ongoing experimentation and exploration even when a set of processes have yielded success in the past. Teams can easily become blind to processes that they feel comfortable with but that are no longer as effective as they once were.

The key to maintaining flexibility is visibility. When a process is mapped out and everyone on the team understands each component and how they fit together, they can begin to identify opportunities for improvement. Without visibility, roadblocks and bottlenecks are difficult to spot.



Additionally, a form of the bystander effect can take hold. With no clear person or piece to hold accountable, it's rare for someone to take action and improve the situation. Regularly evaluate your processes as a team to ensure their efficiency, and encourage the exploration of new tools and methods periodically. Collaborative work management tools can help you build visibility into your organization, map out your processes, and identify areas where flexibility can be introduced.

2 Align your teams



When teams work in silos, it not only zaps productivity but actually puts your organization at risk by rendering it unable to effectively adapt to new challenges.

Visibility smashes siloes. Keep project-related information in a single, shared source of truth where it's easily accessible to everyone involved. When conflicts arise, everyone is aware and can accurately gauge the issue's impact on their work, as well as work toward a joint solution, rather than moving forward (or falling behind!) in silos. A collaborative work management solution like Wrike can help your organization break down silos by increasing visibility across teams, making it easier to execute on a shared vision.

Aim to create a culture where sharing, collaborating, and working as a team becomes second nature. Founder and President of Candid Culture Shari Harley gives [5 communication tips](#) designed to help deal with a breakdown in teamwork. She recommends creating opportunities for co-departments to communicate regularly and ask the following questions:

- What are you working on?
- What challenges are you having?
- What are you trying to change?
- How can we help you?
- What are you working on that we could do together?
- How could our departments work better together?

Simple actions like this foster a culture of trust and collaboration. Have a remote or [international team](#)? These interactions don't have to take place in person — find a [work management tool](#) that offers flexible, real-time collaboration anytime, anywhere and watch teamwork improve.

[Adopting a growth mindset](#) can help your team thrive in the face of uncertainty. People with a growth mindset believe their talents can be developed and that new skills can be learned. Not everyone is born with a growth mindset, but it can be taught. [When an entire company](#) adopts this way of thinking, little can hold the organization back from reaching its goals and objectives. Obstacles are seen as temporary, and solutions can and will be discovered.

	Fixed Mindset	Growth Mindset
Basis	Intelligence is static	Intelligence can be developed
Challenges	Avoid challenges	Embrace challenges
Obstacles	Give up easily	Persist in the face of setbacks
Effort	See effort as fruitless or worse	See effort as the path to mastery
Criticism	Ignore useful feedback	Learn from criticism
Success of others	Feel threatened by the success of others	Feel lessons and inspiration in the success of others

A useful tool for building problem-solving skills within your team are the [5 Whys](#). Asking “Why?” 5 times gets us past the assumptions, logic traps, and distractions that surround problems to uncover the root cause of the issue, not just the symptoms. And once the actual cause of a problem is exposed, it can be addressed more successfully. Getting your team in the habit of solving challenging problems will give them the confidence to pursue growth and adapt when necessary.

3 Make use of automation and integrations to connect systems and streamline processes

Keeping all project-related information in a single, accessible place makes it easy for employees to find what they need so they can react quickly. It also helps prevent teams from working with outdated data or creating version-control issues with files.

Rather than require a team to manually copy information from one platform to another, make use of any [integrations](#) or connectors to automate the exchange of data. Wrike's integrations and powerful API can automatically exchange data between systems and programs. This reduces the time it takes for data entry and search and maintaining your single source of truth. The Wrike [developer site](#) provides quick access to API documentation and allows developers to request API keys directly from the site without having to contact support.

Automation can help your organization scale. The magic of automation is that, when implemented correctly, it can increase a team's output and quality exponentially without the need to increase head count. Automation also increases the predictability of work, empowering executives to make more accurate forecasts and strategic long-term decisions while freeing up teams to respond to more challenging problems.



A few of the most common problem areas ripe for automation are:

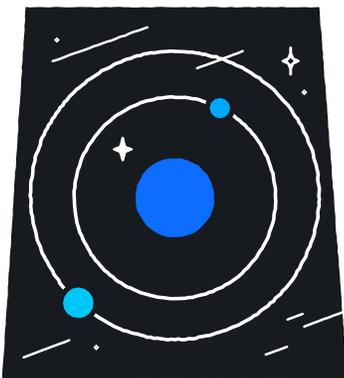
- **The work intake process and project assignment:** Standardize the work intake process into a single input that captures all necessary project details so work can begin immediately. Route requests to the appropriate individuals or teams to reduce the amount of unnecessary back and forth.
- **Inputting information/searching for information:** Leverage APIs to reduce manual data entry and time spent searching for information.
- **Repetitive tasks:** Create templates for the most common tasks/workflows so new projects start from a basic foundation instead of from scratch. All relevant project information like dependencies, task durations, assignees, and reports can simply be copied over. Templates also make it easier to measure and improve performance over time, driving repeatable wins for your team.
- **Project status updates:** Minimize human error and keep all shareholders informed by automating task reminders and notifications.

Leading teams use automation to make their work easier, specifically for: scaling and replicating their efforts; accomplishing the menial, manual work; integrating all their tools; and improving the review and approval process.

4 Build your organization on customizable and configurable tools

Companies have to be forward thinking and select solutions that they can build on for years or decades to come, while at the same time keeping pace with a rapidly changing market.

Every new piece of software or technology adds new complexity to existing systems and threats compound. More often than not, it's better to reduce the number of moving parts when possible.



IT leaders have the opportunity to not just maintain and protect company data and technical infrastructure, but also help organizations make critical decisions and investments in technology that can impact overall competitive strategy. Instead of just being responsible for the creation of the technical systems companies rely on, IT leaders are increasingly accountable for the business outcomes those systems can help deliver. Selecting tools that enable innovation and can scale with the org are critical for consistent growth.

Choosing a tool that is flexible enough to meet evolving market demands, fits well into an existing tech stack, and can scale team workflows is critical. Wrike's collaborative work management platform is both customizable and configurable, enabling companies to stay nimble and rapidly adapt to change. It's gives both organizations and the different teams within them the ability to establish defined processes that meet their unique needs, while connecting cross-functional tools and workflows. This balance of personalization and flexibility helps organizations become truly agile.

There's a misconception that customizable and configurable mean the same thing in the software world, but there are some critical differences that need to be understood.

Customizable

Customize means “to modify or build according to individual or personal specifications or preference.” This requires technical expertise and may require additional code and development. The benefits are that organizations with very specific use cases can get the maximum benefit from using the tool.

Configurable

Configure means “to design or adapt to form a specific configuration or for some specific purpose.” Right out of the box, the tool enables teams and individuals to work the way they want. Preconfigured options and workflows allow multiple teams to quickly and easily set the tool up for a variety of uses and applications.

Using adaptability to fuel growth in 3 steps

With the infrastructure necessary to be adaptable in place, it's important to identify when and how it should be done effectively. Leading organizations use adaptability to fuel growth using a 3 step sequence.



Read and act on signals

With tools that enable complete visibility in use, your team is able to identify new opportunities, challenges, or threats, and respond accordingly. But in order to do this and act, the lines of communication need to be open at all times. All must feel able to share their thoughts, feedback, and insights.

Steve Jobs once said, “It doesn’t make sense to hire smart people and then tell them what to do; we hire smart people so they can tell us what to do.”

Encourage your team to voice their input before you set course and any time during a project. This will only happen if they feel the psychological safety to express their views, no matter what they are. Additionally, people need visibility into the work and have to feel that they have the ability to influence it before they’ll be motivated to speak up. [Continuous feedback](#) is necessary to keep work from straying too far off course.

Once a new or better course of action has been decided, move quickly to act as a unified team. Collaboration tools like Wrike can help you communicate new information quickly and easily to even a distributed team. Having a single source of truth for projects and a consistent workflow helps team members understand expectations, know what tasks they own, and communicate internally.



Experiment

Even when it's obvious a change is necessary, it may not be clear what specific change is needed. Consistent experimentation is necessary to find the right solution to new or complex problems. It's only by working through a [volume of ideas](#), good and bad, that true innovation can take place. Failure becomes necessary to success.

When the fear of failure runs rampant, people withhold their thoughts and opinions. They become more concerned with avoiding being wrong and rocking the boat than with changing things for the better. These attitudes are dangerous. The best ideas come from having a multitude to choose from, good and bad. For more fruitful brainstorming, give people time to come up with ideas before the meeting. The goal is to have everyone show up armed with dozens of ideas you can quickly comb through.

[Promote divergent thinking](#) and avoid closing problems down too early. Balance this with the need to push the team to think bigger if they've settled on something too early. Assign someone the role of devil's advocate. Make it this person's job to challenge the top ideas and the integrity of the plan. And remember, diversity can be one of your greatest strengths — promote it as much as possible. Ensure that everyone involved has an opportunity to speak.

After each experiment, circle back with the team to see what learnings can be applied to the next project. Invite everyone to share what did, and more importantly, didn't work. If people seem reluctant to share, start with a few ways you're going to try and improve next time.



As a manager or team lead, you should do what you can to minimize risk but help the team come to terms with the fact that not everything can be anticipated. Instead, it's better to fail fast and often. Consistent, small failures help you avoid painful big ones. This is not to say that failure is the goal, but the learning that comes along with it is.

Mobilize

Once a change or strategy has been decided, now is the time to execute.

Determine your scope of work

Start by writing a short [project scope statement](#).

Your statement should include:

- **Objective:**
Provide some context for why this project is happening and what it's supposed to accomplish.
- **Deliverables:**
Explain what you'll be producing as part of this project.
- **Acceptance criteria:**
Describe the criteria that need to be met in order for deliverables to be considered complete.



Many scope statements also include things like budget, stakeholders, constraints or limitations, exclusions, and assumptions.

Create your work breakdown structure (WBS)

Now that you've identified your main deliverable, it's time to break that down into even smaller deliverables using a [work breakdown structure](#). Think about what milestones eventually lead up to your completed project. Don't confuse these with individual tasks or responsibilities — they should be actual, tangible deliverables related to your project.

List out your tasks

Identify which tasks are involved with each of those smaller deliverables. What steps need to be taken in order for each of those to be completed? List each task out and repeat for each of the deliverables that you identified. You'll end up with a comprehensive list of tasks that come together to create your project.

Identify any task dependencies

Armed with your list of tasks, take a look at how they're connected to each other. By understanding what tasks are dependent on each other, you can lay out a project order that's far more sensical and efficient.

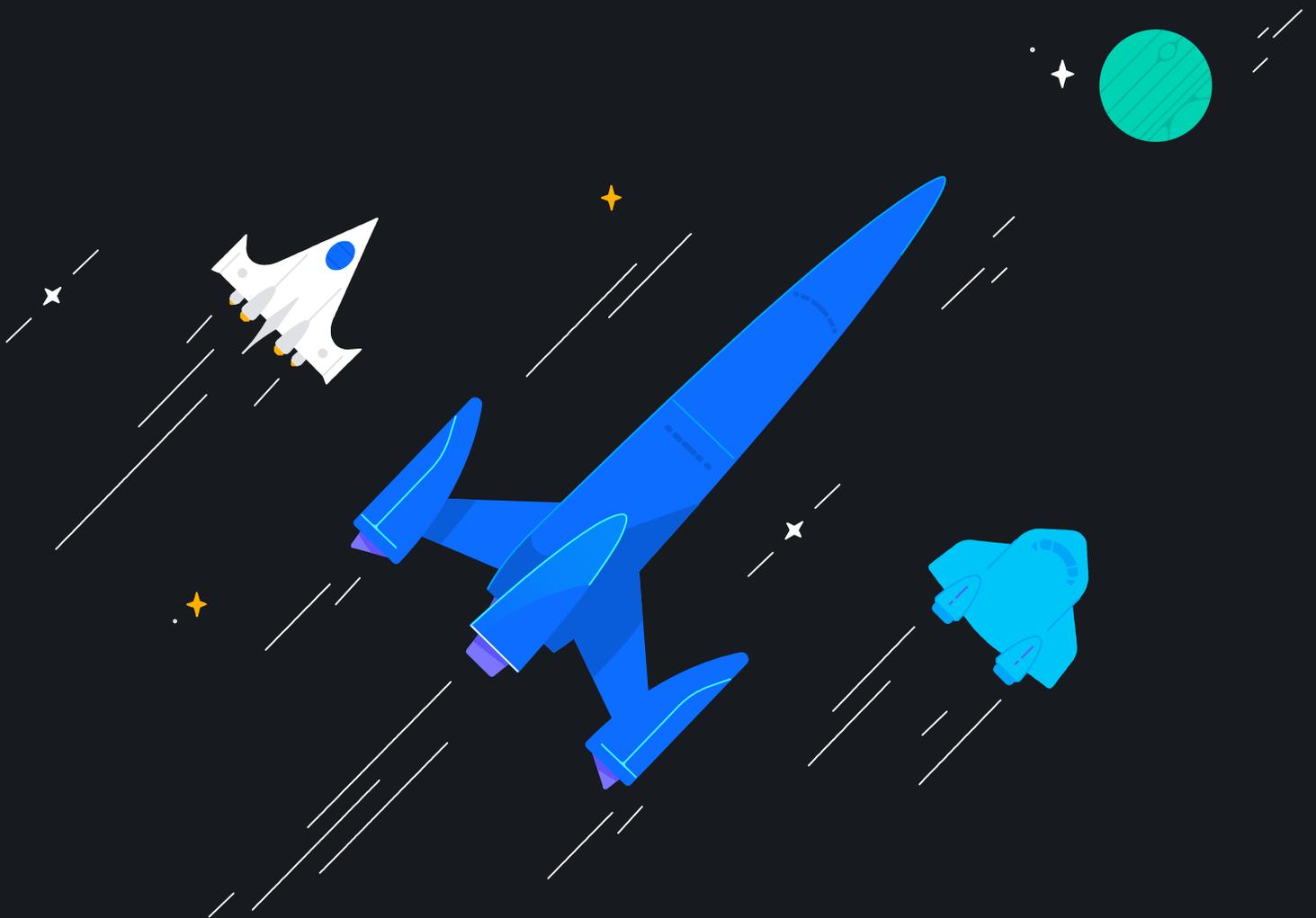
Estimate time required for tasks

In order to create a project timeline that's as accurate as possible, you need to have at least a rough understanding of how long each of these tasks will take. By doing so, you can be more realistic about your schedule and your deadlines.

Map out your Gantt chart

[A Gantt chart](#) displays project-related tasks compared to time. On the chart, tasks are represented by horizontal bars. The length of those bars indicates the estimated amount of time that task should require to complete. This chart is a helpful visual for understanding and tracking your timeline, as well as understanding the overall flow of your project. During the project life cycle, utilize your Gantt chart to adjust durations, deadlines, and dependencies to align with changing priorities and avoid potential delays.

How leading companies are using customizable and configurable tools and processes to scale





Miguel Colomer

Head of Technology at BMind

Key Wrike customization and configuration features used: **Wrike API**

BMind is a digital-marketing company based in Spain that uses data and cutting-edge technology to guide clients through digital transformation.

They developed a powerful internal tool called Brain to monitor and optimize campaign delivery. To fully leverage the power of their tool, they needed a work management platform that allowed seamless communication between Sales, Ad Ops, and Finance teams that could be synced with Brain through the API integration.

Wrike’s flexible API ties together multiple systems

They looked to Wrike to help them create their single source of truth, integrate with Brain, and bring together their different teams and systems.

“We use Wrike’s API to update Wrike tasks in real-time from our platform, and to regularly sync information between Brain and Wrike,” explains Miguel Colomer, Head of Technology at BMind.

“From BMind’s beginning 3 years ago, we believed in the automation of processes and the limitation of what we call ‘monkey tasks.’ Therefore, the API capabilities of Wrike were one of the features that made us choose Wrike over other project management solutions.”

A single source of truth helps teams move quickly

In addition to tying together teams and systems, a single source of truth keeps all project details in one place, which allows organizations to move quickly. This can be

incredibly important for not only increasing output and delivering projects on time to clients, but in staying in line with legal requirements and compliance.

“Due to fiscal regulations, we have to deliver the billing records to Spain’s Tax Agency in less than 4 days after the invoices are issued,” explains Colomer. **“To achieve this, we had to automate the process with Wrike’s API. Whenever a new invoice is generated in Brain, a new task is created through the Wrike API with all the data, and then automatically assigned to the accountant, so that he can add the invoice to the accounting system and inform the Tax Agency.”**

Using Wrike as a single source of truth and leveraging its powerful API to automate critical functions, BMind has been able to tie together multiple teams and systems, automatically route work to specific team members, and reduce manual data entry.



Chelsea Scholz

Marketing Manager of Brand Promotion

Key Wrike customization and configuration features used: **Work Views**

Founded in 2009, Unbounce helps marketers and digital agencies increase website and campaign conversions. Unbounce's customized landing page platform has powered more than 250 million conversions for 14,000+ companies across the globe.

The marketing team at Unbounce was growing at a rapid pace. In just 2 years, their team tripled in size, and it became clear they needed a collaborative work management platform that could scale with them.

“I’d heard good things about Wrike from our friends at Hootsuite, as well as from people in our operations department who had experienced Wrike at previous companies,” explains Chelsea Scholz, Marketing Manager of Brand Promotion.

The team ultimately chose Wrike, based largely on its flexibility. It provided the marketing team with easy-to-use organizational tools, while allowing project managers and leadership to view both the big picture and team activities in greater detail.

Wrike’s work views help teams work the way they want

The faster Unbounce grew, the more requests and projects the marketing team had to juggle. Lack of organization and poor visibility across efforts took a toll on the team’s productivity.

“When I started at Unbounce, the marketing team was about eight people. Now, we’re 24,” explains Scholz. **“When you’re working on a big team, in a big company, with big goals to hit, and you’re unorganized, the output is very low. Wrike has helped our team grow and scale production.”**

Thanks to Wrike's flexibility and multiple project views, the marketing team at Unbounce has been able to limit tool proliferation.

“Wrike makes it possible for each person on the team to work the way they want,” says Scholz. **“I want to see a time log, a workload list, and Gantt charts. But I want people who want just a task list to feel comfortable too — without having to use eight different tools.”**

Visibility leads to better collaboration

According to Scholz, **“I no longer have to search for project details across notebooks, Google docs, spreadsheets — everything is in Wrike.”**

Keeping every marketer in one tool has effectively established a single source of truth for most projects. **“We wanted a tool that also worked for people outside of marketing to maximize ROI and unlock better collaboration,”** says Scholz.

In addition to Unbounce's core marketing team, the customer success, operations, IT, and product marketing teams also use Wrike. **“The ability for other teams to get visibility into what marketing is working on is huge. We're a big team, and we work on a lot of different things at once. Wrike allows anybody to check in and see exactly what's progressing at any given time, as long as I've shared it with them.”**

Using Wrike, the team at Unbounce is able to collaborate across departments, streamline complex processes, and execute at scale.



Sean Amster

Digital Strategy & Operations Manager

Key Wrike customization and configuration features used: **Wrike BI Connector**

Frontline Education is an integrated insights partner supporting more than 12,000 educational organizations in their efforts to develop the next generation of learners. The award-winning Frontline Insights Platform brings together dedicated K-12 human capital management solutions to meet the unique needs of the education community.

Frontline relies on Wrike to streamline communication across the organization, do more work in less time, and zero in on high-impact projects. While marketing was the first team to use Wrike, nearly every department at Frontline has since adopted the platform. The company now boasts 180 Wrike users and 160 collaborators.

A single source of truth that provides visibility and clarity

Frontline uses Wrike’s real-time, custom reports to monitor employee workload and progress.

With all project details and communication stored in Wrike, Frontline employees have a clearer view of their schedules, workloads, and expectations. **“People are less stressed because they understand what work they need to get done and have ahead of them,”** says Sean Amster, Digital Strategy and Operations Manager.

The ability to plan ahead, collaborate effectively, and access information quickly has made the marketing team extremely productive.

“It has been amazing,” he says. **“We do more, and we do it faster. Projects that used to take us eight days now take us only five. We’ve also been able**

to handle about 80 more projects per quarter. That's a 20% increase in workload that marketing can take on because of Wrike."

Wrike integrations tie systems together and expose roadblocks

Frontline is committed to integrating systems for clients to provide them with the best data and insights. This passion for data starts at home — they've used Wrike's integration features to connect their teams and tools together to optimize performance across the company.

The marketing team is integrating Wrike with its business intelligence tool, Microsoft Power BI, to gain deeper, actionable insight into performance.

"Over the last month or two we've really been able to dive pretty deep into some of our front-end analytics to be able to address bottlenecks and training opportunities," says Amster. **"We're looking at workload, which types of projects are normally delayed, which types of projects are behind, which owners of projects are typically delayed, and those types of things."**

Data helps drive more strategic and impactful work

Frontline hopes to tie projects to leads and ultimately to revenue in the near future. **"We don't want to be just a department that's busy. We want to be a department that's doing meaningful work,"** Amster explains. **"And Wrike combined with our other business intelligence allows us to focus on the things that add the most value to our company."**



Jake Sorofman

CMO at Pendo

David MacLaren

Founder and CEO of MediaValet

Key Wrike customization and configuration features used: **Wrike Publish**

Founded in 2013, Pendo is a powerhouse in the analytics software industry, boasting 400% year-over-year revenue growth and labelled one of the World's Best Cloud Companies in 2018 by Forbes.

Offering in-platform user insights, guidance, and communication, Pendo enables over 800 customers to improve product usage insights, collect user feedback, onboard users, and announce new features.

Wrike Publish helps ensure brand consistency during fast cycles

Pendo has been using both Wrike and MediaValet, a digital asset management system. With the launch of Wrike Publish, the tool that connects the two systems, the Pendo marketing team jumped at the chance to reap even greater benefits from their investment.

Using Wrike Publish, Pendo can now seamlessly access MediaValet from within Wrike, saving time, ensuring brand consistency, and improving workflows for both work in progress and final assets, including automatic metadata mapping from Wrike to MediaValet.

Accessing and uploading assets in MediaValet is now embedded into the designer's Wrike workflow, allowing users to easily and proactively curate their high-value content using MediaValet DAM.

“MediaValet plus Wrike is a powerful combination for fast-cycle marketing projects. With one click, a Wrike workflow lands a finished asset within MediaValet for management, global access and distribution,” stated Jake Sorofman, CMO at Pendo.

“This makes a substantial difference in ensuring production teams never feel compelled to shortcut the end of the lifecycle because of time-consuming extra steps.”

“Marketers and creatives are incredibly busy and work on tight timelines. This means that every portion of their workflow needs to be streamlined — including accessing and uploading assets in their corporate DAM,” commented David MacLaren. **“We look forward to enabling more organizations like Pendo to power their entire content lifecycle with the market-leading capabilities of MediaValet and Wrike.”**

Consistency is difficult to achieve when teams are focused on growth. With Wrike Publish and MediaValet, Pendo is able to maintain consistency and quality without sacrificing speed of delivery.



Pedro Da Palma Rosa

Digital Operations Director

Steven Dunn

Integrated Project Manager

Ashley Risstrom

Senior Production Manager

Key Wrike customization and configuration features used: **Dynamic request forms, workflow statuses, and mobile apps**

Ogilvy is one of the largest and most influential advertising agencies in the world. Boasting top tier clients like BMW, Coca-cola, and KFC, Ogilvy is known for crafting iconic campaigns that create massive impact.

With 450 offices in 169 cities worldwide, Ogilvy was on the hunt for ways to improve their processes and scale their output. After researching a variety of solutions they decided to pilot Wrike with their teams.

Pedro Da Palma Rosa's, Digital Operations Director of Ogilvy-Australia, first target was to improve their process by digitizing the Creative Brief and project management workflow.

Dynamic request forms help kick projects off right

Ogilvy's client projects always start with a creative brief: the summary of the client's needs, goals, target audience, and desired change in consumer behavior. Account managers typically receive client needs through meetings or email and clarify missing or unclear items before a Creative Brief was submitted to Production. The process was time-consuming because of the back-and-forth, and only the account manager had visibility into the status.

“You would be emailing someone and you never knew what happened in the email communication between those two people,” says Steven Dunn, Integrated Project Manager.

To solve these issues, Ogilvy took advantage of Wrike’s dynamic request forms. These custom forms ask different questions and change depending on how clients fill them out. The impact of using these forms was felt immediately.

“Customers are able to complete the form at their convenience, with less back and forth, and Production is able to start the project faster,” says Dunn. **“I think the biggest benefit with the forms has been for our Production departments, our Print departments, and our Digital department,”** says Dunn.

Dynamic Request Forms are now used for all projects, with specific review and approval stages where team members are required to provide their feedback and/or sign-off at each key stage.

“There has been the improvement in quality, in making sure things are getting signed-off, which is so key to our business,” says Dunn.

Custom workflows help track projects in real-time

Given the high volume of active projects, Da Palma Rosa wanted to track each stage of the approval process for deliverables, internally and externally. Custom workflows were created with specific review and approval stages where team members are required to provide their feedback and/or sign-off at each key stage.

Unlike a paper or email-based process, statuses, assignees, schedules and all details are there for everyone, inside projects, tasks, and every message.

“Everything I see now in Wrike is live and in its current status, which is a big plus to me,” says Ashley Risstrom, Senior Production Manager.

Wrike's mobile app keeps teams productive while on-the-go

The new digital process not only ensures each step is completed in order, but also that everyone sees the same project information at the same time.

“Transparency is handled a lot better,” says Risstrom. **“From a management perspective, being an integrating person, having a clear view of each department, clicking through departments on Wrike, is fantastic. I’ve been able to implement a process for people to just log on to Wrike in the Table view, for instance, and see the status of their jobs,”** says Dunn. **“If they are in a pinch and out of the office, they just log onto Wrike from their phone and see what’s going on.”**

By taking full advantage of Wrike's configurable options, the team at Ogilvy is able to manage an increasing number of projects and maintain consistent growth.

A tool that grows with you



These leading companies are scaling output, maintaining quality and consistency, and focusing on growth by adopting customizable and configurable tools that support flexible processes.

Wrike is the customizable and configurable tool for the enterprise.

A few key customization and configuration tools and add-ons that leading companies love include:

- **Wrike API** Build custom applications on top of existing Wrike software features.
- **Work Views** 9 different ways to see the tasks in a folder or project.
- **Wrike Integrate** An integration and automation engine with more than 400 cloud or on-premise applications that allows users to seamlessly automate complex workflows at scale across people and teams.
- **Wrike Spaces** An enhancement to your Wrike interface that provides tools to better organize and configure your Wrike platform for individual teams and departments.
- **Wrike BI Connector** A business intelligence (BI) connector to Tableau, the leading analytics platform.
- **Dynamic request forms** Forms that change based on the response options someone selects when submitting a request.
- **Custom workflow statuses** Match each stage of your organization's unique process and business in Wrike.
- **Personal dashboards** Manage and monitor your tasks at a glance with this customizable dashboard.

- **Templates** Pre-configured workspaces and workflows designed to help users instantly plan and launch common projects.
- **Wrike Publish** A digital asset management (DAM) integration that allows digital assets to be moved to and your DAM platforms from within Wrike.
- **Wrike Technical Services Team** Our highly skilled technology strategists and developers who can help build customizations and integrations to meet your unique needs.

Wrike is flexible enough to grow along with your organization and adapt to your changing needs. This enables your team to focus on your own unique abilities and strengths, resulting in increased ROI. Can your team benefit from a customizable, configurable, and secure solution? Start your free trial today.

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