How to Get it Wrike

Your simple playbook for success.

This document is intended to provide you and your team with guidelines for success in Wrike. It will ensure that everyone is following the same workflow and that expectations are transparent and clear.

As the Wrike champion, answer the questions listed below and share them with your team. You can find an editable version of the document here. (INSIDER TIP: Create an FAQ folder in Wrike for your team and include the questions below in a task for your team to reference.)

☐ **Why Wrike?**

It's essential to communicate your goal to end users. Often times users feel your pain points as well.

Ex.: *Our goal for using Wrike is to unite disparate teams in a central workspace, hit project deadlines, and report project statuses out to management. This will help resolve over allocation and budget constraints by painting a clear picture for management.*

☐ **What is the expectation for Wrike usage?**

How often should users log into Wrike? What tools should users use versus Wrike?

Ex.: *Wrike should become the main platform for users to work on tasks and to check for any upcoming work. Salesforce will house all contact and opportunity information but we will use Wrike to track projects.*

☐ **How is work initiated?**

Define how new work requests are created and accepted. Is it a request that comes in via email? Initiatives that trickle down from management? Client requests? Where can users request work? Is there a Form in Wrike they can use?

Ex.: *All projects in Wrike are initiated based on a Form that can be filled out within Wrike. All required fields must be filled out to request work and a project will be created once the request is approved.*

☐ **Are users responsible for creating tasks and projects or is an admin?**

Identify which users are responsible for creating what. This helps prevent chaos and disorganization within the folder structure which will ensure long term success. If you prefer that an admin create projects and tasks, specify that from the beginning to set expectations.

Ex.: *Account Admins will create the folders and projects in the workspace. Tasks will be in the projects for the most part, but users can also create tasks where they see fit. Be sure to share the task with your team and manager for reference.*

☐ **Is there a specific naming convention?**

If users are able to create tasks and/or projects, is there a specific naming convention they should stick to?

Ex.: *When creating tasks within projects, be sure to add the name of the region as a prefix to keep the workspace organized.*

☐ **Where do I go to see my tasks?**

Some folks recommend using My Work, which allows users to set their own prioritization and some direct their users to a personal Dashboard, which gives hard deadlines based on the due date of the task. It's important to specify where users can find their work. Wrike will also send out daily To-Do emails with a list of all tasks due that day.

Ex.: *In addition to the daily To-Do automated email from Wrike, use the personal Dashboard to see all upcoming and overdue tasks assigned to you. You can organize your workload within the My Work section, but be sure it aligns with the personal Dashboard.*

☐ **Where is work done?**

Outline the location of work to mitigate any confusion. Should users be working out of their department folders or any specific folders? Should users log their work into the task description? Should users track their time? Who is responsible for marking the task complete?

Ex.: *All work should be documented in the task description. There is a team specific folder that you can check for the list of projects. Once work is ready for review in the task with attachments uploaded, @mention your manager for review and mark the task Complete upon sign off.*

☐ **BEST PRACTICE FOR YOUR TEAM: Run team meetings with Wrike**

We recommend all team meetings are run out of Wrike. Have a specific folder for Meetings and have a task per meeting. Put the agenda in the task description and take notes on that meeting. Any follow up items can be immediately turned into tasks to prevent items slipping through the cracks and increase adoption of Wrike for the team. Reference commonly shared dashboards during the meeting to stay on the same page.

Ex.: *Our Monday morning all-team meeting will be run out of Wrike. A task with the meeting date will be in the Meetings folder and an agenda set by Friday afternoon. Jan will take notes from the meeting in Wrike and include any follow up items as subtasks with assignees. These may be moved to the appropriate department folder afterwards.*

☐ **Do you have additional questions?**

Contact your company champion!

Wrike Help Center | Email Support at support@team.wrike.com | Wrike Community