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Overview

Operations Product is currently evaluating future enhancements to the Workflow Dashboard, to understand how it might evolve to better serve internal user needs and align with the ways they work.

Goals

- Understand how various teams are currently leveraging Workflow Dashboard
- Understand pain points impacting or preventing engagement with the dashboard
- Understand opportunities that would add value to how workflows are organized and actioned

Hypotheses

- Users may have diverse opinions on how they'd like to organize their work
- The complexity and sheer volume of data in the Workflow Dashboard's default state might be a barrier to adoption among teams
- Users may be reluctant to track work, since the dashboard is adding a logging step to their process instead of automatically updating status based on platform data

Methodology

- Conduct both 1:1 moderated user interviews and focus groups with operational teams that interact with workflows tracked by the workflow dashboard
- Synthesize findings in a report that highlights themes across participants and their respective teams

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Other Workflow Tools



Additional Feedback



Alerts

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Participants

11 users participated in this research study, from the following teams:

- Fund Finance (US & International)
- Fund Origination
- Platform Specialists (EIG)

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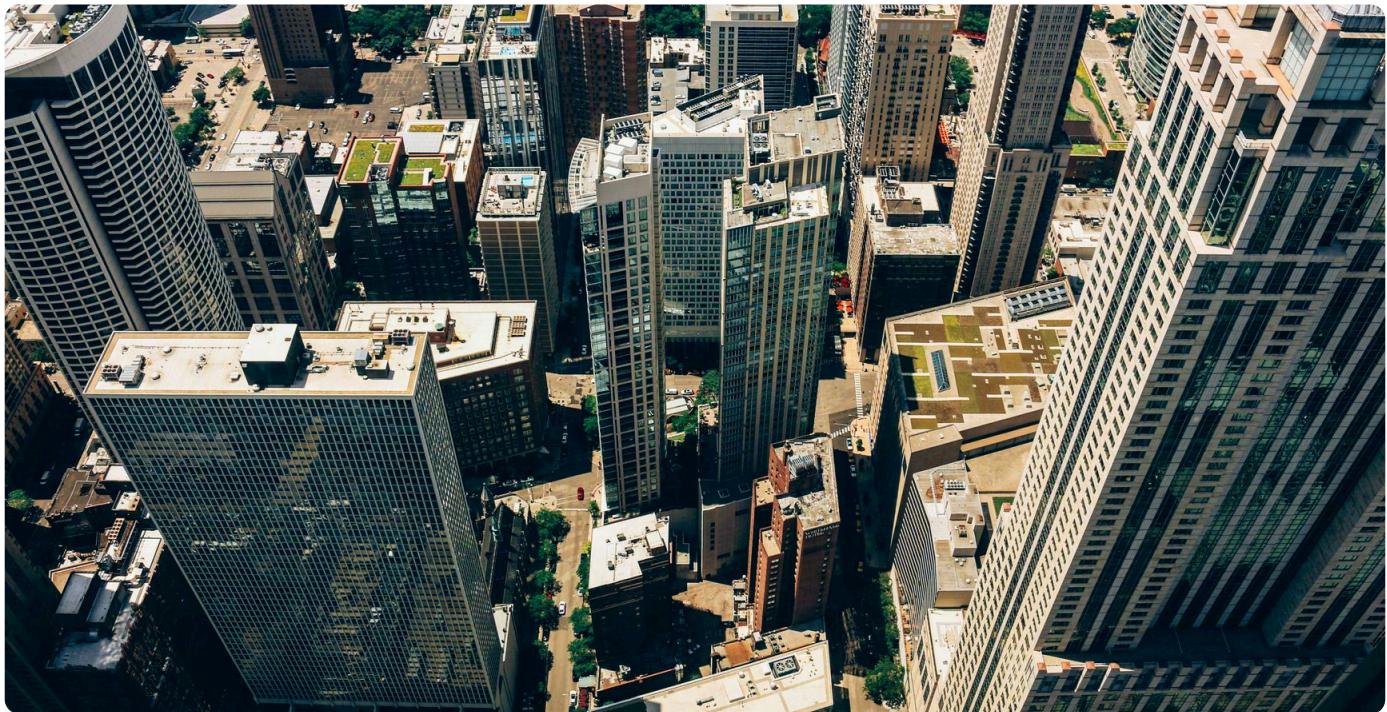
Other Workflow Tools

Additional Feedback



Alerts

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High Level Findings

- Participants wanted a means to **see the tasks they need to action in the short term more easily.**
 - The initial state of the Workflow Dashboard's home was often overwhelming, and narrowing down to what each team wanted to see required a lot of filtering and customization to get to useful.
- **Notifications**, both via email and in the system, were something participants felt would help them more efficiently manage workflows.
- Participants wanted additional means to visualize workflow data, such as with **Gantt charts** or **Kanban boards**.
- Teams were **not always diligent about immediately updating task status**, which sometimes left the next person in the workflow unaware that a task was ready for them to pick up.

- The updates themselves were in some cases, just another thing they had to do among many.
 - When those tasks were actioned on platform, some wished the **status updates were automated**.
 - Participants **did want to be able to report on data from the Workflow Dashboard**, but perhaps in a time series or something more compelling than just a breakdown of tasks by status.
-



Katie Kelly (left) and Jason Martin (right) are shown in separate video feeds during a call. Katie is on the left, wearing headphones and a dark top, with a city skyline in the background. Jason is on the right, wearing headphones and a blue checkered shirt, with a blurred background.

KK - 4-18-2024

It's complicated. I think it needs to be simplified.

💡 Opportunity 999+ Simplicity 3 EIG 189

Workflow Dashboard 29 ❗ Pain 691

More insights in this project

[View insights](#)



Other Workflow Tools

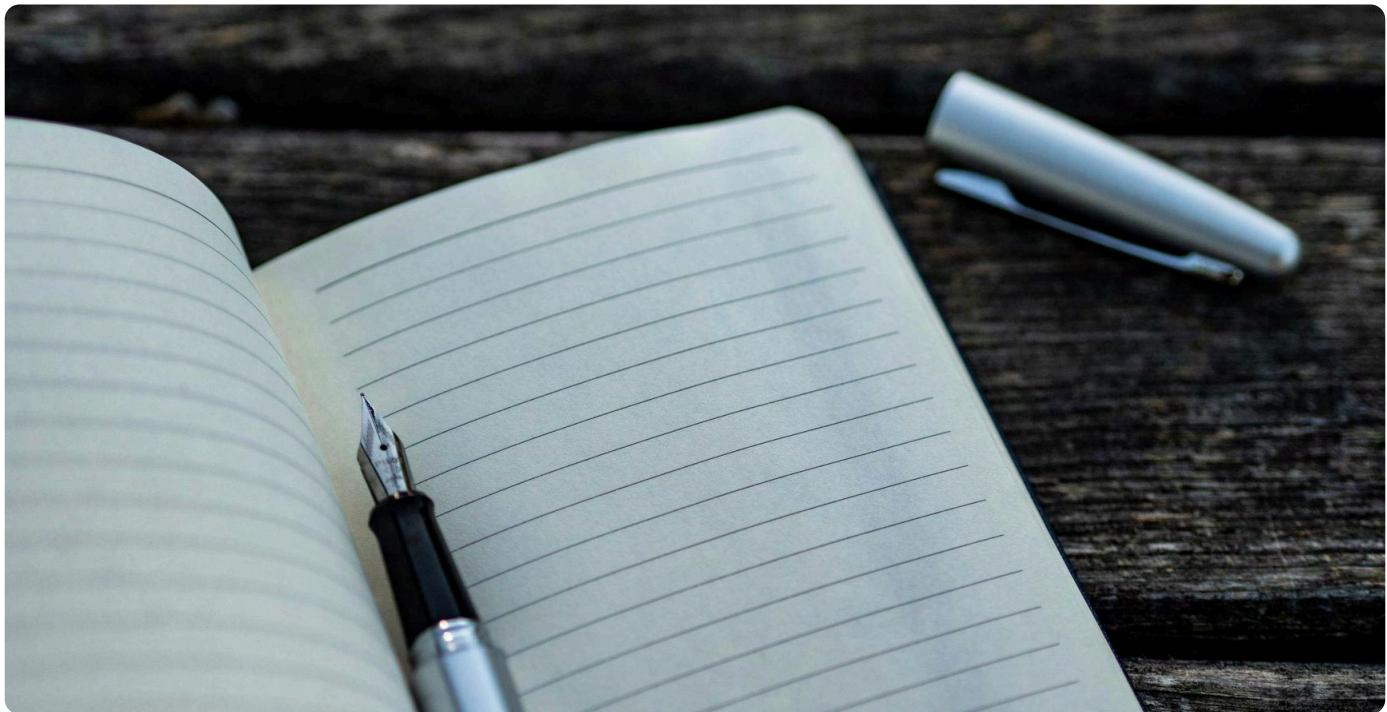


Additional Feedback



Alerts

👁️ 10 views ❤️ Like 💬 Comment



Tracking Tasks

Participants had a diverse set of tools and preferred methods of prioritizing their tasks at iCapital. Some tools that came up included:

- **Spreadsheets**
- **Monday**
- **Asana**
- **Notes, Checklists, Pen & Paper**
- **FreshService Tickets**



CW - 4-18-2024

When we're talking about fund launches in particular because I think that's what the focus is, right? At least from, from my understanding, I have my Monday checklist and it stays with me and like I share it with my manager and like that's, that's how I track everything,



KK - 4-18-2024

Wait, did I filter this correctly to catch what I need to do? And then it's like I'm gonna go back to my Excel Sheet because I know I've tracked it right there and then you backtrack off of the Excel and then click off what needs to in the workflow manager. And I know like we've just been kind of like backfilling check check boxes that you know, for some purchases that have already happened on your Excel sheets.

Efficiency 350

Workflow Dashboard 29

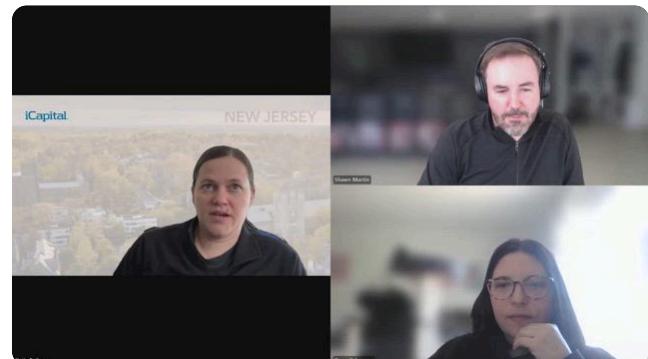
EIG 189

Checklist 2

Other Tools 6

SC-4-24-2024

I think, you know, just more anecdotally when people look at a work flow system. Unfortunately, I think a lot of us have used something like Asana or Monday or, you know, just a system that is built as a workflow that looks really good and people come in here having toggling between those two



KB & DC - 4-26-2024

I guess like, like here's what you should work on like today or something. Like here's what's upcoming kind of a thing, like maybe based on dates or whatever, Like here's what's at risk of not being completed on time, something like that where it's very specific to me.



JM - 4-29-2024

But I think a lot of the team just treats that as a task (updating status in Asana). We have to complete, mark off and we still have our own checklist that we follow. You know, I might rely heavily on Excel, somebody else might rely on Word, maybe somebody handwrites all their things and stuff that they need to do.

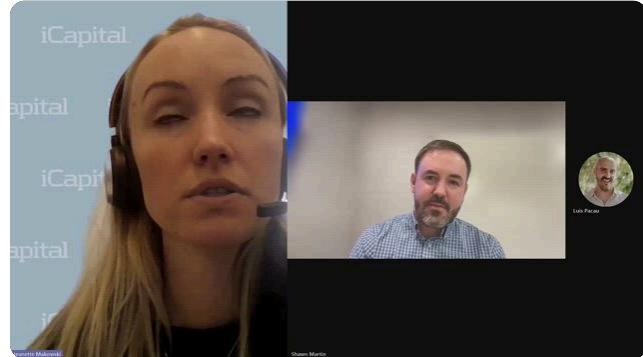
EIG 203 Workflow Dashboard 94

Other Tools 13 Checklist 9



JM - 4-29-2024

I think for tracking, it would be great if we could all have access to all the information regarding a launch, for example, my call and was just out the office and something came in So this is actually a maybe this is what I'm gonna mention is probably a results of the new GP admin role that we have for

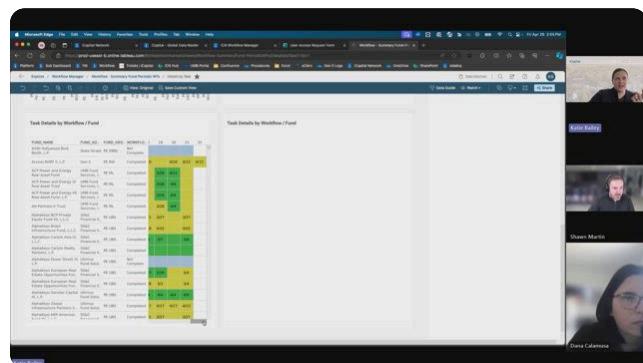


JM - 4-29-2024

If something slips, it's because it wasn't in the tracker. So I don't think it's anything that we would rely fully on the dashboard. To be quite honest. I think a lot of people are still treating it as like a check box exercise, which I know is not something that organization wants to hear, but it's just if we're going to be talking about usability and like is anyone using this for its intended feature? I think it's like, I think we all feel like, hey, maybe its intention is to give everybody visibility into some of the larger points. But if you want to get the granular of all the things that go into launches for the different distributors or white labels , it's just so, so, so, so much (information) that it could (have).

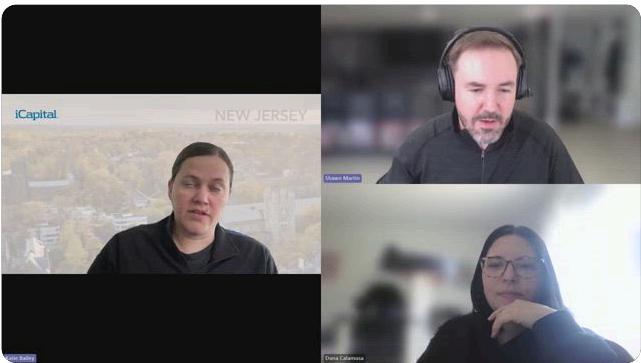
Transparency 266 Workflow Dashboard 94

Checklist 9 EIG 203



KB & DC - 4-26-2024

And I just feel like it's easier to see where you are (in a custom Tableau report) instead of



KB & DC - 4-26-2024

It used to be in a spreadsheet and, I don't know when it was, but some time ago we got rid of the spreadsheet and, like, fully got into the workflow. But it was different in terms of, we sort of always tracked things. It's like, ok, in one line, like here's your fund and then in columns, here's your tasks, you sort of could,

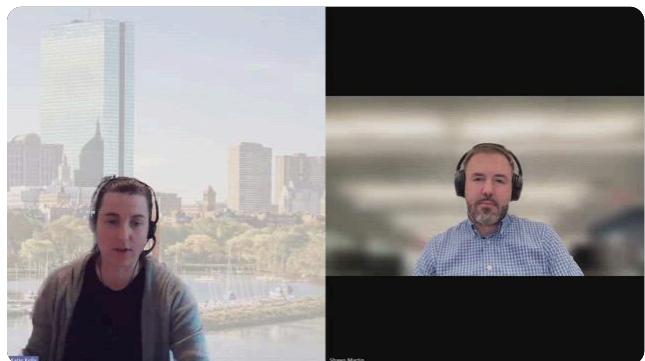
going in the workflow and having to like filter on a million things and try to see like where, where things stand sort of. And unfortunately, you can't even get this in Excel or anything like that. Like if you export it, you get the detail behind it as opposed to this picture.

Task Location 2 Insight 115

Fund Finance 129 Tableau 8

Opportunity 999+ Workflow Dashboard 94

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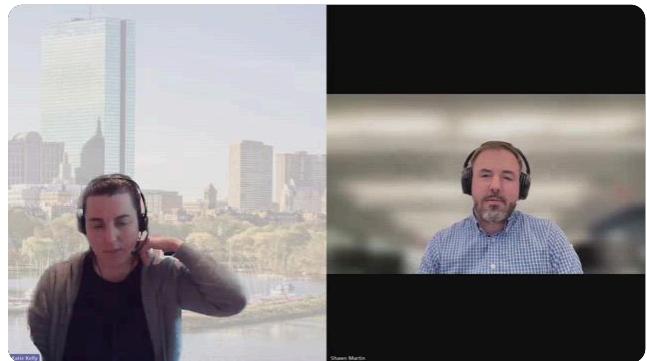
KK - 4-18-2024

They're supporting like checklists and then before it's launched, whether it's an implementation or a fund launch, it then goes through the, you know, the final QC check before it goes out to market. So depending those are all being the pipelines being tracked in Excel and the you know, the task list or the to do is being handled by Excel too.

Operations 18 Workflow Dashboard 29

Other Tools 6 EIG 189

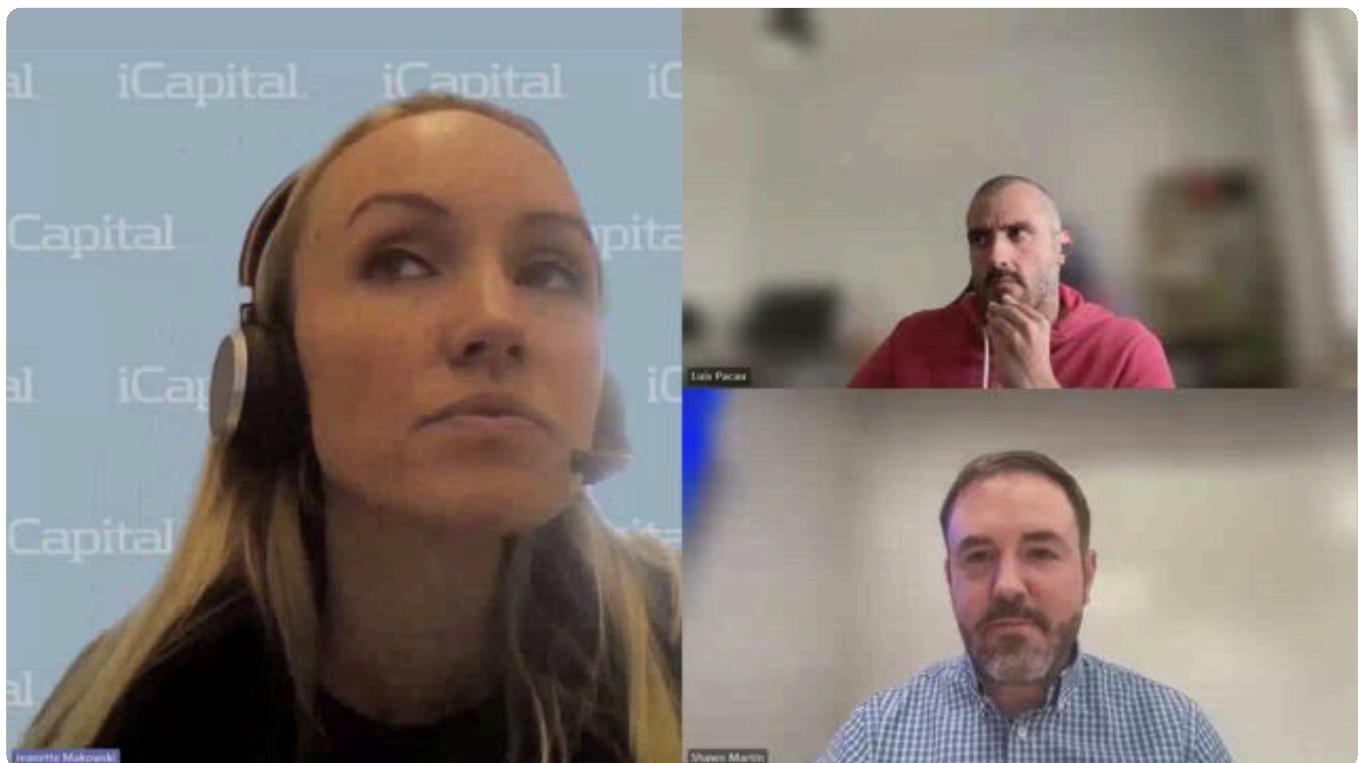
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KK - 4-18-2024

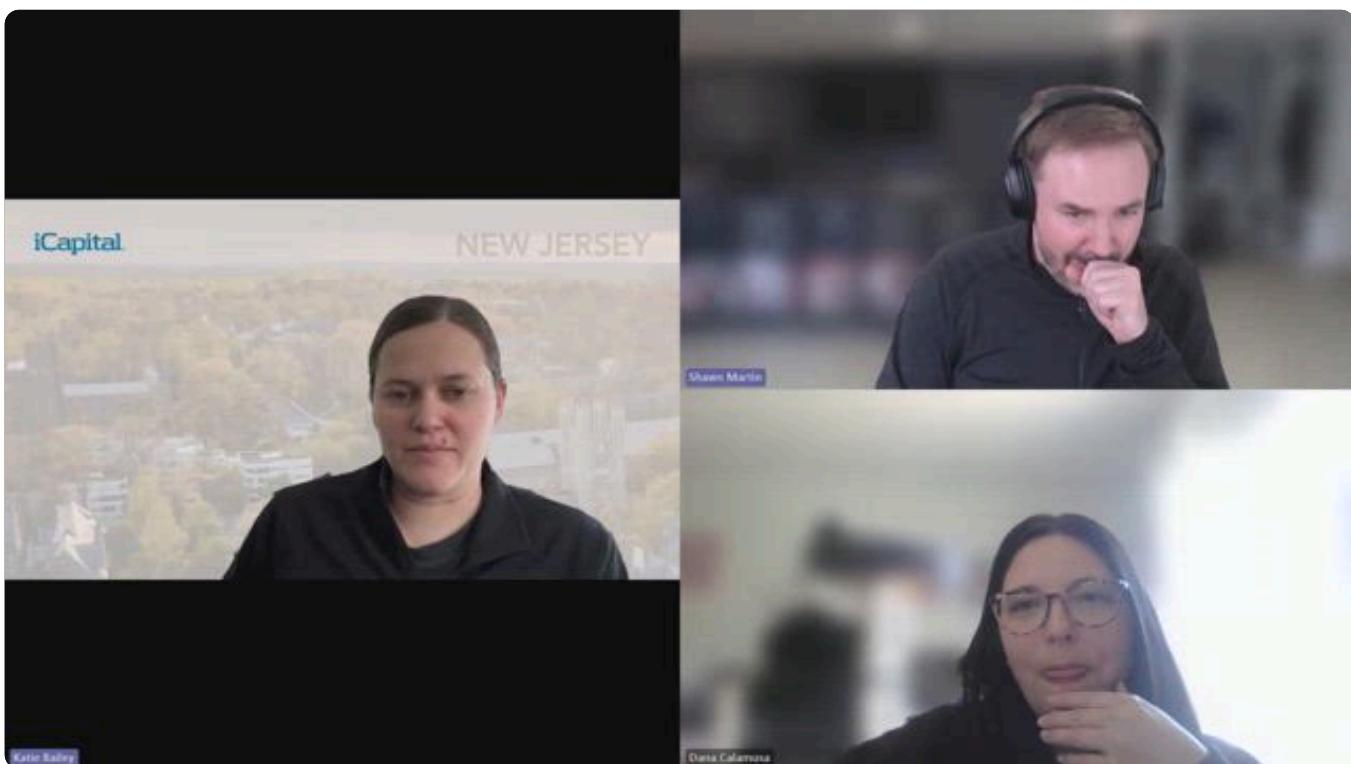
But everybody is kind of all over the place. What we have to do is get like where we are now everybody onto a singular, which is supposed to be the workflow dashboard, which is why like haven't, you know, migrated to any, a different tool.

Workflow Dashboard 29 Operations 18



JM - 4-29-2024

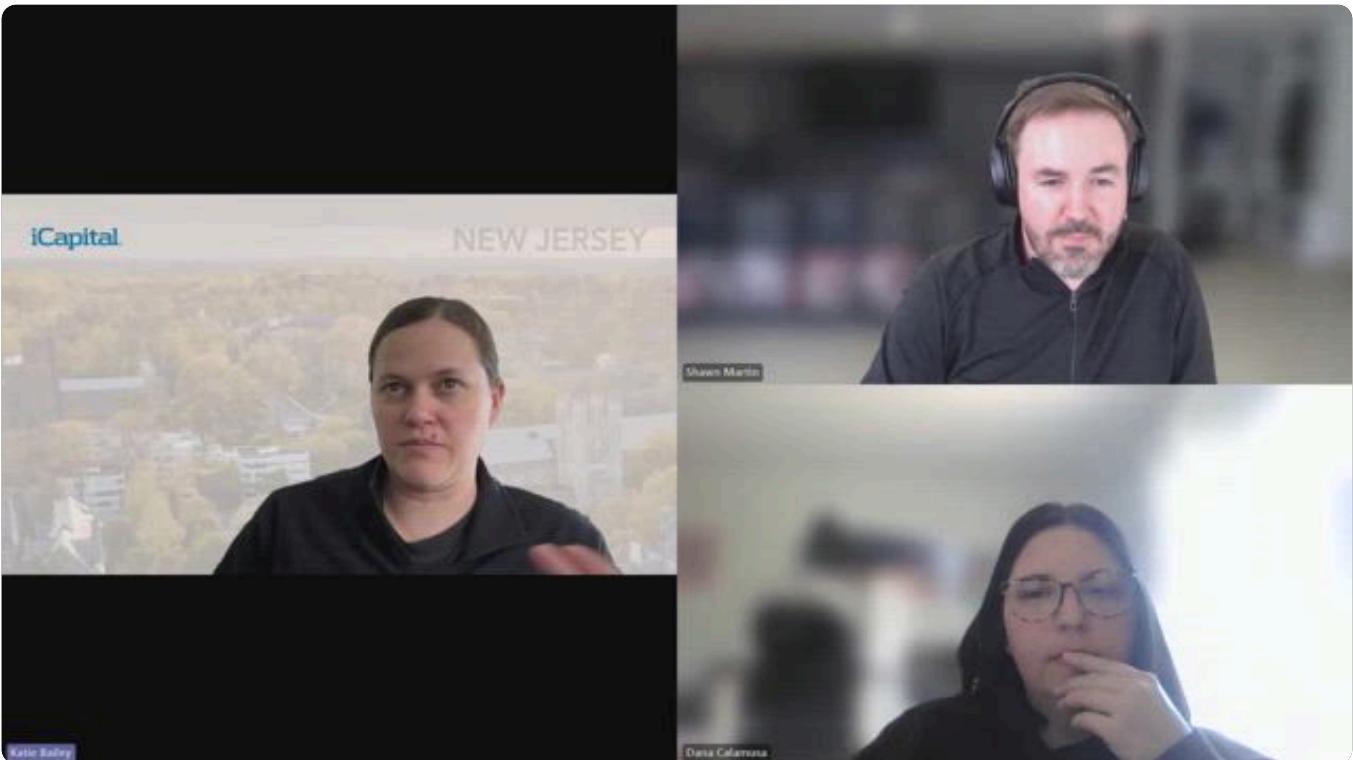
Because I look at it as the high level, what's in workflow manager, workflow dashboard and then like the really detailed level which all of the EIG folks were doing on their own. So to answer your question, I do that on an Excel spreadsheet. And I think everyone probably just keeps their own version of some checklist of sorts that other people can't see here on workflow dashboard.



KB & DC - 4-26-2024

the issue is that the way that they create the tasks, the owner of it is just whoever the fun finance rep is in fun master. So it's one person. So like what I've had Dana do in the past and like other people who are responsible for their tasks is go in whenever the workflows are created, pick the tasks you know, are going to be yours and like, assign them to yourself. But then to Dana's point, like, I don't, I don't know why, like some funds are created, like the workflow is created after and like, you'd have to go in and check every day and be like, OK, was anything assigned to someone else that I need to assign to me?





KB & DC - 4-26-2024

I think like, they maybe were trying to accomplish that with like our home screen because it's sort of like everything and I guess you could theoretically like filter on your name, but it takes a lot of filtering. I feel like to see what you actually need to work on. Like, that's sort of like my biggest complaint, like all the data is there. It's not, it's not like an issue with the data. It's just, I feel like there's a lot of work to really see like what you need to work on.

🧐 Pain 748

Efficiency 368

Fund Finance 129

Task Discovery 16

Workflow Dashboard 94

Filter 66





Katie Kelly

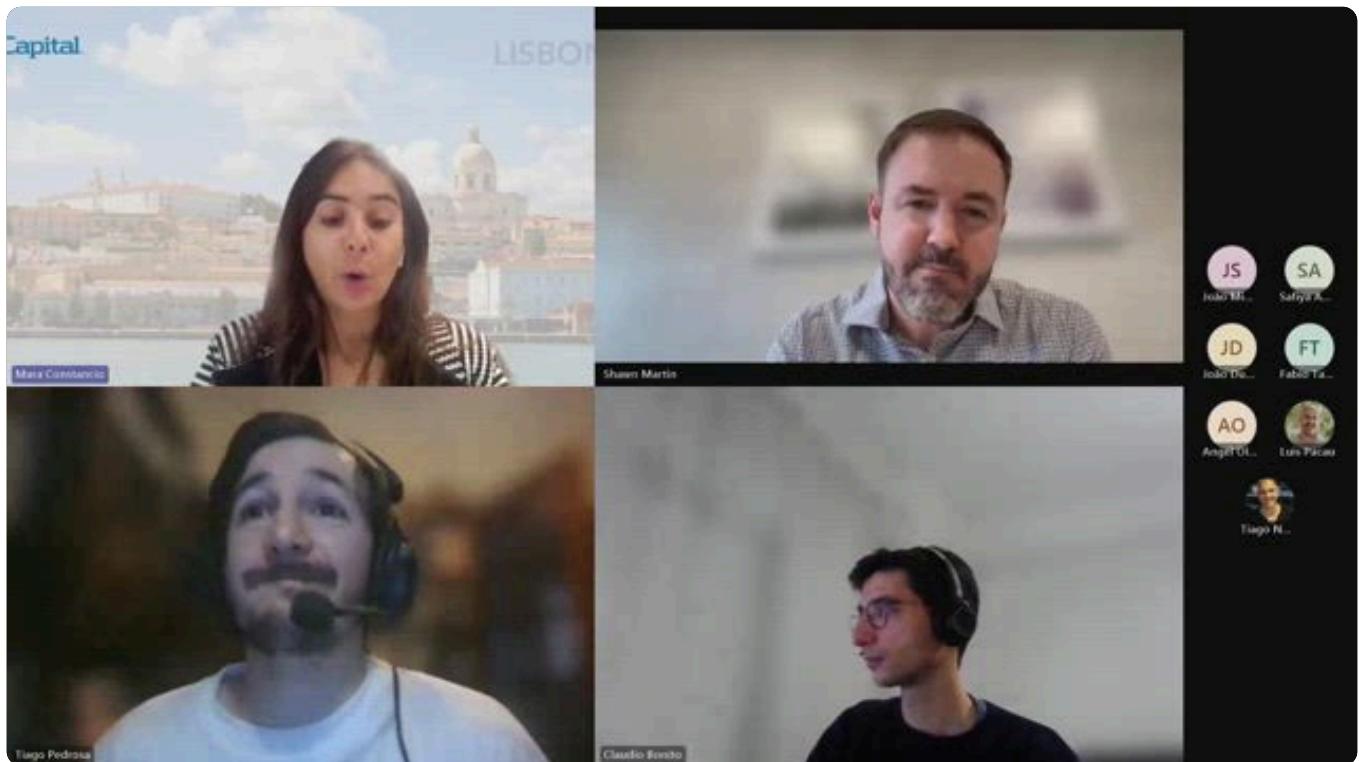


Shawn Martin

KK - 4-18-2024

I don't think anyone's everyone's been kind of, they have the deliverables checked, they're just using a different medium or modality to, to track those different steps. Which is, has not been ideal, but it's been because the department while it was one department, it was like it was a little fragmented or siloed like there were pockets, right?

[Other Tools 6](#)[Workflow Dashboard 29](#)[EIG 189](#)[🤔 Pain 691](#)[Consistency 53](#)



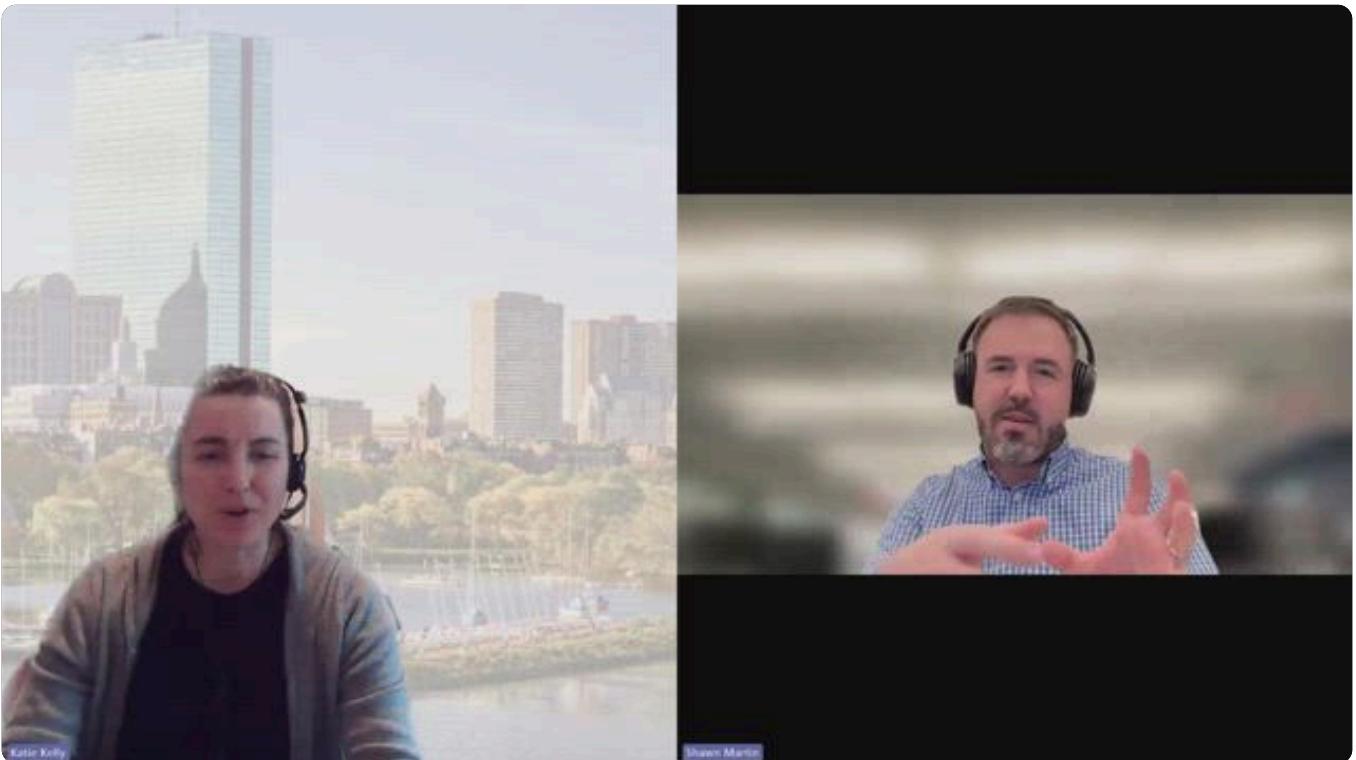
MC, SA, TP, CB, JMS - 4-24-2024

We still work with an Excel sheet due to some limitations on the workflow data that we need to keep track of. One of them is for instance, the final NAV that we are approving the amount, the AUM that we can't insert there.

Fund Finance 105

Workflow Dashboard 56

Other Tools 9



KK - 4-18-2024

some people got Monday access. So they moved it to that we have to consolidate because some people were using Asana some people are using Excel,

Workflow Dashboard 29

EIG 189

Operations 18

Other Tools 6

More insights in this project

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Other Workflow Tools



Additional Feedback



Alerts

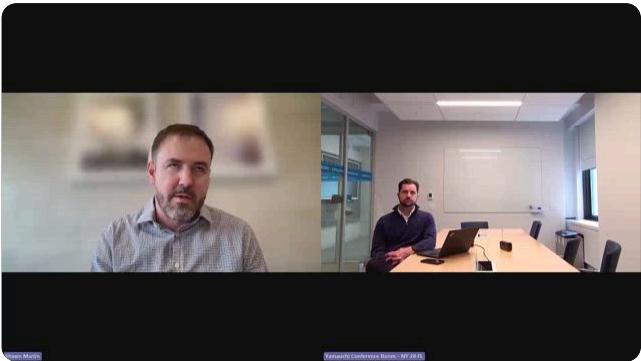
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Alerts

Participants widely recognized the **need for and expansion of notifications**, both via e-mail and in system. In their current state, notifications often **didn't find their way to the person that had to action something**.

- Sometimes people weren't checking the PAF Admin accounts they were using to access AWM.
- Sometimes a task owner had a number of people doing sub-tasks not visible on the workflow, who were filtering the dashboard by that task owner and not themselves. In those cases, they weren't set to receive notifications.
- In other cases, teams weren't diligent about updating task status, or waiting to batch update end of week.
- Notifications are something participants often wished were visible on homepages and more universally so they can easily identify what to do next in the course of their workday, without losing context.



SC-4-24-2024

Would you or your team want any sort of notifications, whether that's in the platform itself or email? Have you heard any kind of request for that sort of feature? Yes. It's actually been the number one requested feature since I started trying to get one launch flow off the ground like a year ago.

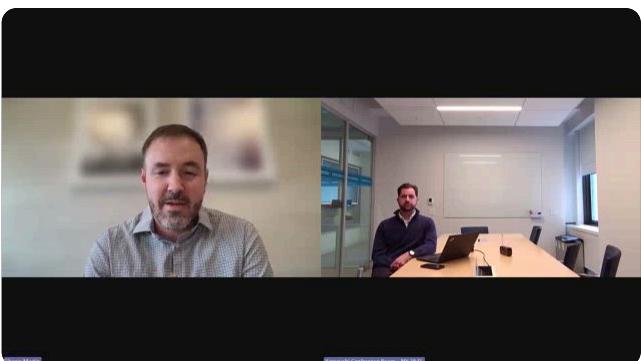
Opportunity 999+

Alerts 16

Workflow Dashboard 126

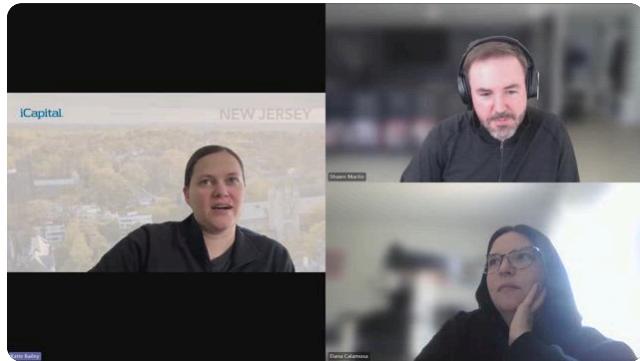
Notifications 64

Fund Origination 84



SC-4-24-2024

When we rolled out our launch workflow, it was really the first time most of the teams that were involved had ever used workflow dashboard. And almost everybody said they wanted that as a feature, they wanted an email and they would prefer to get an email

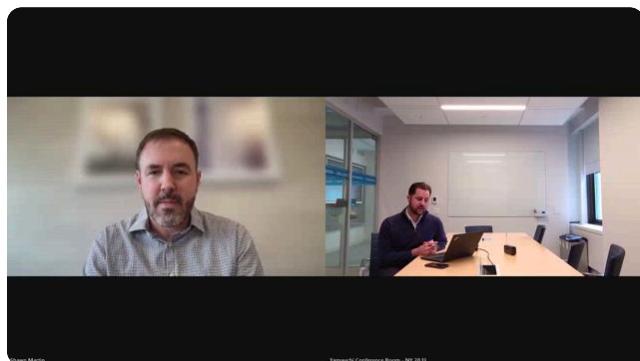


KB & DC - 4-26-2024

I don't know if, like, the emails are getting lost somewhere if they're really going out. I, I don't know, or, would it be helpful to have some sort of alert, like in the system? Yeah, I think I, I was gonna mention that to you

Opportunity 999+

Alerts 8

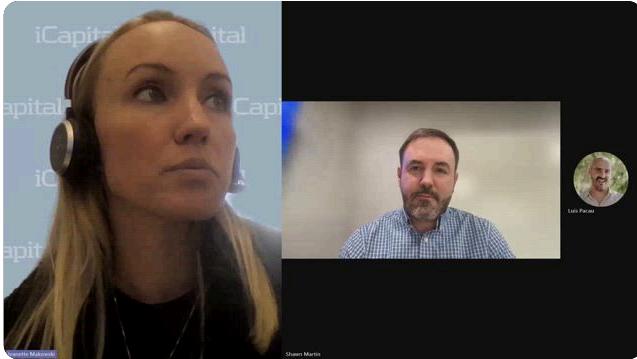


SC-4-24-2024

And it's pretty normal for teams to kind of batch their updates. So maybe they get a bunch of things done and kinda on Friday afternoon, they go in and check off everything they've completed pretty normal for people to do things off line and just completely forget to do their work in the

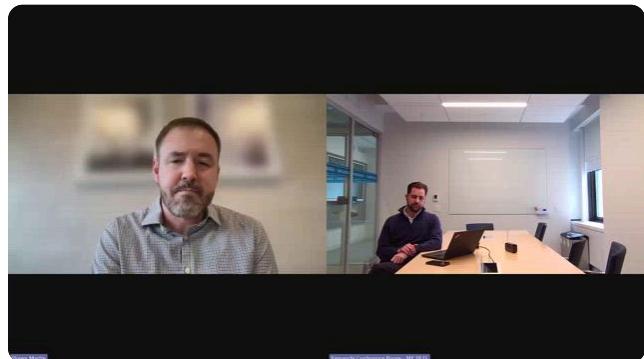
when their task was ready and have it so that they could immediately action that email in some way, whether that link the task or whether is you respond to the email or whatever it was. They would prefer to be proactively alerted that it's time to do something as opposed to have to go into the system.

Alerts 16 Workflow Dashboard 126
Fund Origination 84 Notifications 64
Opportunity 999+



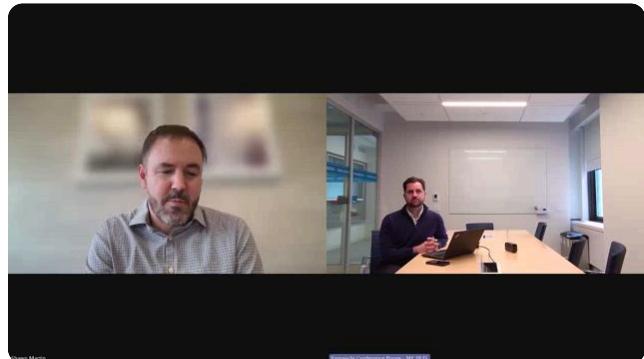
JM - 4-29-2024

But to be honest, I if I just have to be honest, I don't think it's just myself, I think the majority of the team uses it as like a we're tasked to do this. So we're, we're gonna check it off here, but we're still keeping track of things and the lower layers that I was talking to you about. And so how do I keep track? Well, yeah, sure, I get these emails that something is ready for me. But to be quite honest, I'm still relying on my inbox and, and tickets and fresh service. I maybe that's a good point to is, you know, I'm relying on tickets and fresh service that are related to the launch and maybe it would be a good idea if they were in this work flow dash for it. I don't know if that's like AAA point of feedback, but now that I think about it out loud, I have to rely on my tickets and the, the email chains that split off regarding the topic,



SC-4-24-2024

And I use the alert, the blocker feature pretty heavily to get people to move things forward. One thing that is tough, at least in fund launch workflow is that are we have dates defined for like when things are due, but they're fairly loose because launching a funds, the timing for launching a fund is



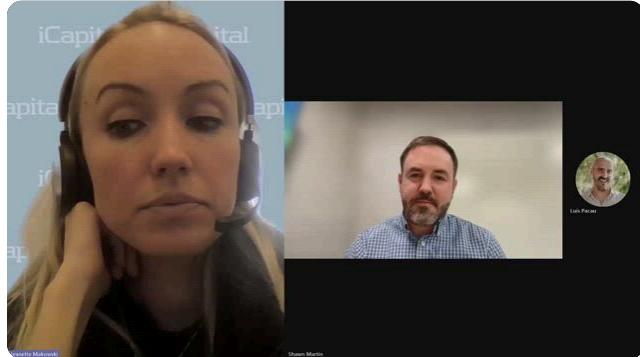
SC-4-24-2024

Would you say that other teams or your own team are diligent about updating the status of tasks in the dashboard? It's definitely an issue.

Pain 757 Fund Origination 84
Workflow Dashboard 126 Accountability 7

which can get tricky. I have folders within my outlook to draw anything related to that email. So that fun launch into that folder. So now that I think about it out loud, it might be nice to have something like that in the dash so everybody could have an audit of any specifics or things that change their points that were raised.

Workflow Dashboard 94 Notifications 59
Efficiency 368 EIG 203
Opportunity 999+ Time Savings 230
Alerts 8



JM - 4-29-2024

Maybe for me, I've been a little bit lucky because it's consistently coming from the same parties. Either usually I'm working with (one employee) or (another). So if I have to, I just search my box for them, but if they, if we had a lot more people, I don't know, somehow I kind of just remember who I



SC-4-24-2024

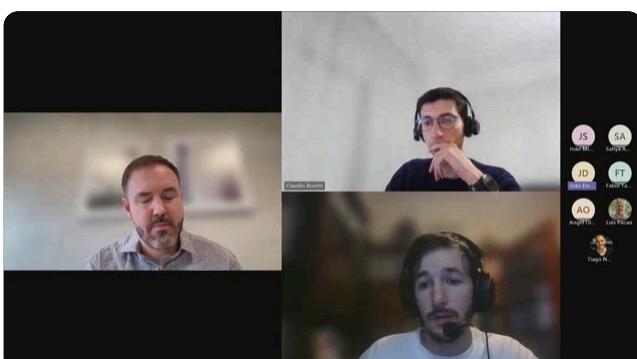
we do have a lot of work flows where the timing requirements are pretty tight and there are handoffs between teams.

Blockers 5 Fund Origination 84
Workflow Dashboard 126 😢 Pain 757



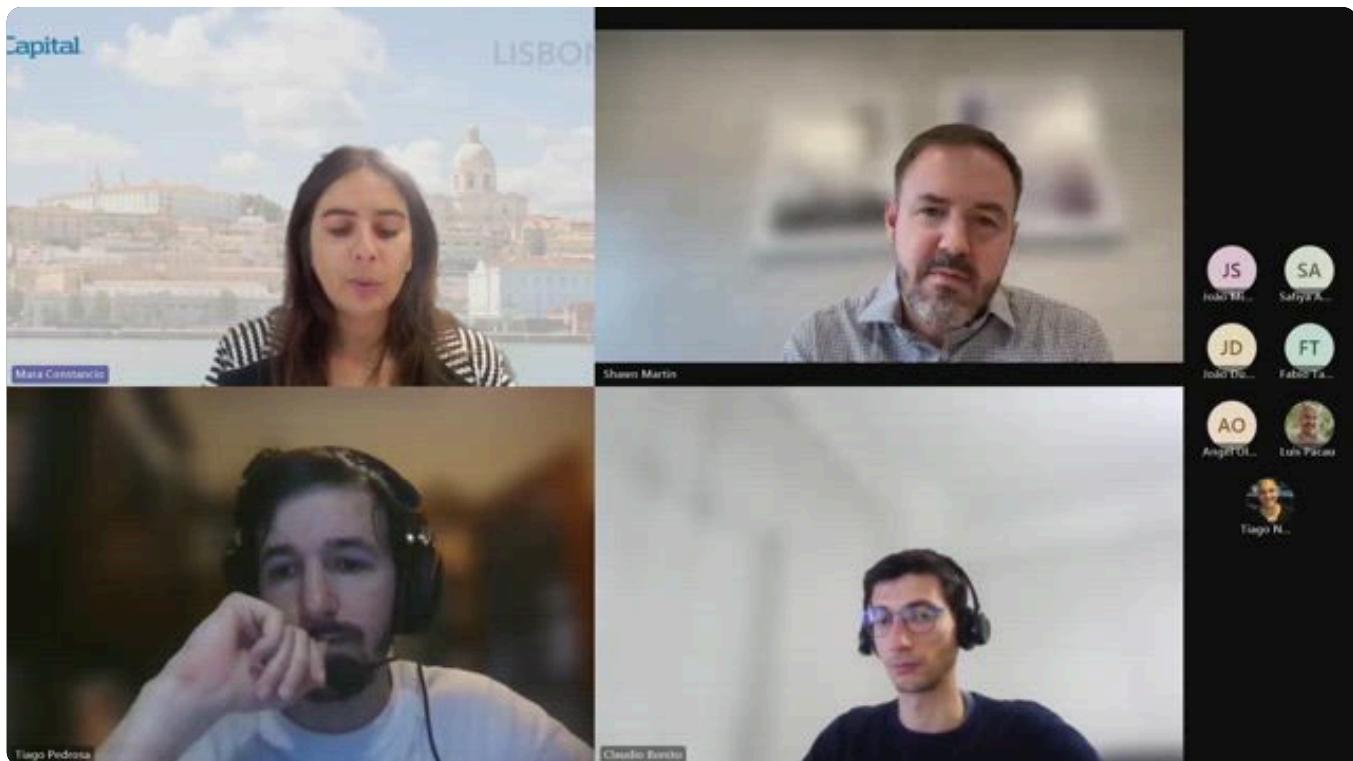
SC-4-24-2024

So like for myself, I publish something around 80 fact cards a month. I know our reporting team publishes some other fairly significant number. These all have to go out on a monthly basis. On a defined timeline to various different places. And there's no real method to make sure that we're on track that it's time to get our work started. It's time that it's required by X date. Sort of just like we hope that we get the data when we need to and you know, if it's time to start work immediately.



Alerts 16 Workflow Dashboard 126
Reduce Risk 115 😢 Pain 757

she was trying to implement some kind of notifications or some kind of email to, to us when something is assigned to us. For instance, let's say we usually accelerate the fund calendar. We do things before they are actually due. So this, it could help if she somehow could send a assign a task earlier



MC, SA, TP, CB, JMS - 4-24-2024

at least having like a home page on the workflow that we can show like either notifications or just this task, just got ready for you.

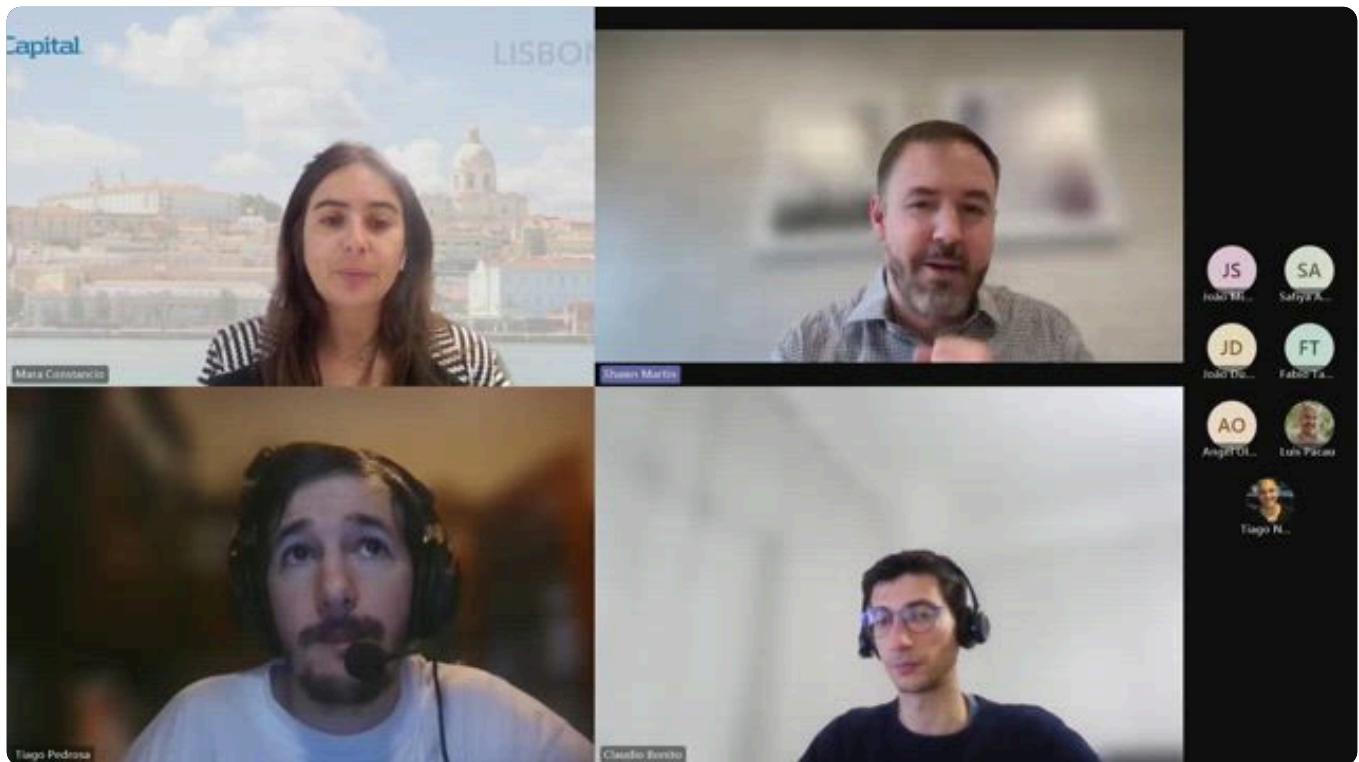
Task Discovery 9

Fund Finance 105

Opportunity 999+

Workflow Dashboard 56

Alerts 5



MC, SA, TP, CB, JMS - 4-24-2024

You don't have any alert whatsoever.

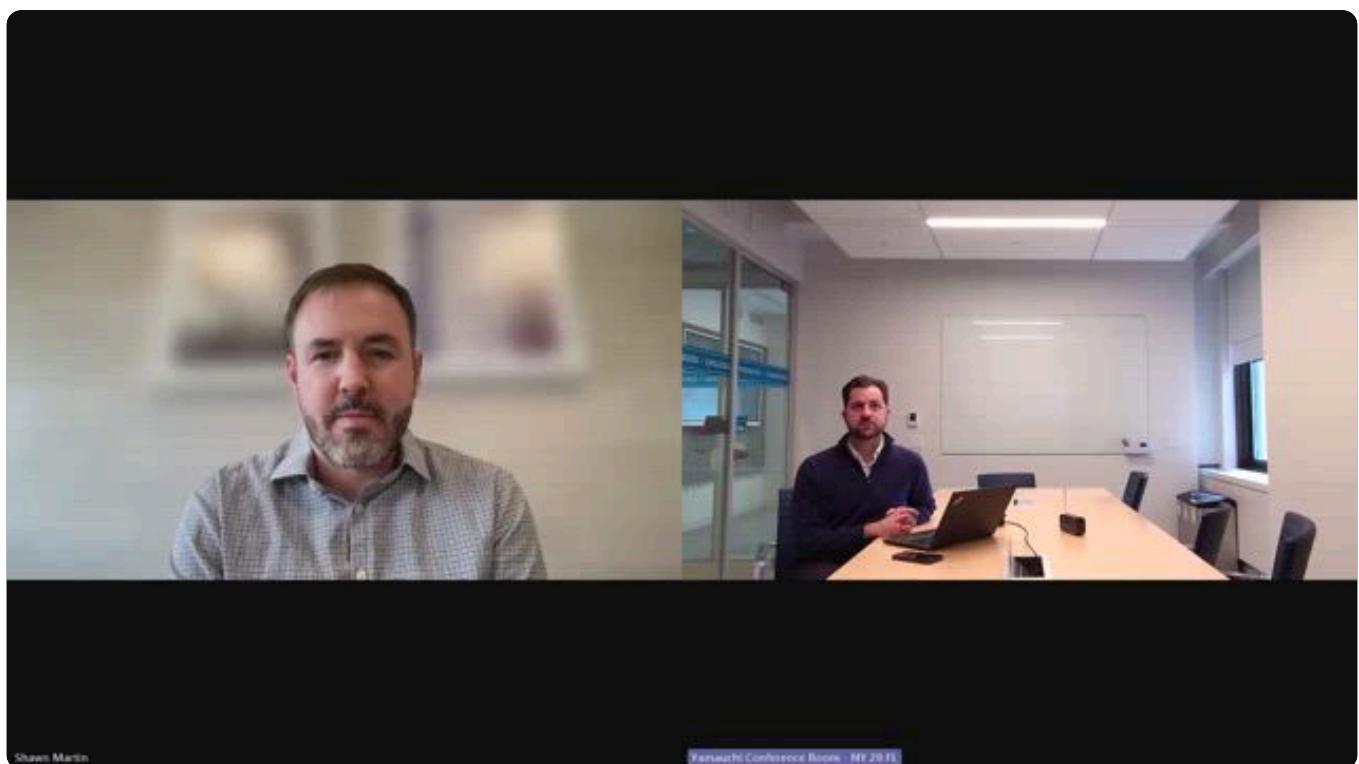
Notifications 56

❗ Pain 695

Fund Finance 105

Alerts 5

Workflow Dashboard 56



SC-4-24-2024

There's a lot of coordination that happens over email, you know, for myself with my 80 or so fact cards, I send out an email to like pretty much the entire fund finance team every month saying like

here are the dates I expect things. Can you prove that you're actually gonna send them by this date? And then I'm sending out an email around to senior executives saying here's where we're on track, here's where we're behind so that everybody knows, like these are actually gonna go out of time on time. These are not here, the issues we have. So there's a pretty significant exercise in just providing visibility on, on a pretty manual basis, right?

Alerts 16

Accountability 7

Fund Origination 84

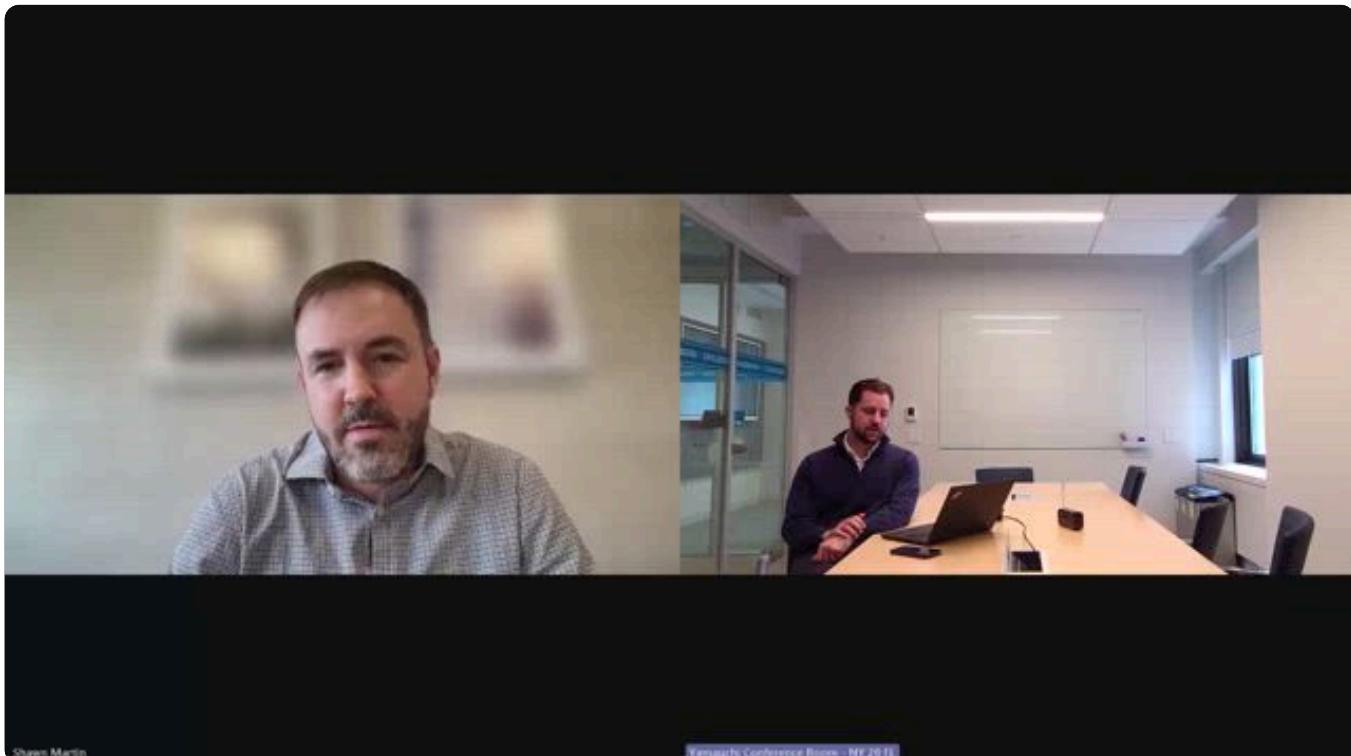
Time Savings 232

Pain 757

Reduce Risk 115

Workflow Dashboard 126

Efficiency 370



Shawn Martin

Yammer Conference Room - NY 2011

SC-4-24-2024

I think at the time, there was a lot of thought that we should be using workload dashboard as the like the base of operations for your daily work. And so instead of providing that significant level of detail in an email, we should be telling people you should just be living in the dashboard and you'll be able to see it. And while I agree with that sentiment, I think the last year has shown that people just don't do that. We haven't been able to get them to do that. So I think personally, I would say better notifications that are more actionable would be only beneficial.

Opportunity 999

Fund Origination 84

Notifications 64

Workflow Dashboard 126

Alerts 16



Shawn Martin

Yamashé Conference Room - NY 20 fl.

SC-4-24-2024

for like fund launch very rarely is anything due to the day that it is ready, right? Like nothing happens that fast in launching a fund. But for a lot of other work flows, I think there are a lot of steps where it's, hey, your thing is ready, it's time to action it like now, now, whether that's because we have fast turnaround times or, you know, maybe the next step in the process is whether it's like a maker checker process. And so, you know, no one wants to wait an entire day for your checker to realize that it's their turn to do their job.

Opportunity 999

Fund Origination 84

Alerts 16

Notifications 64

Workflow Dashboard 126

More insights in this project

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Other Workflow Tools

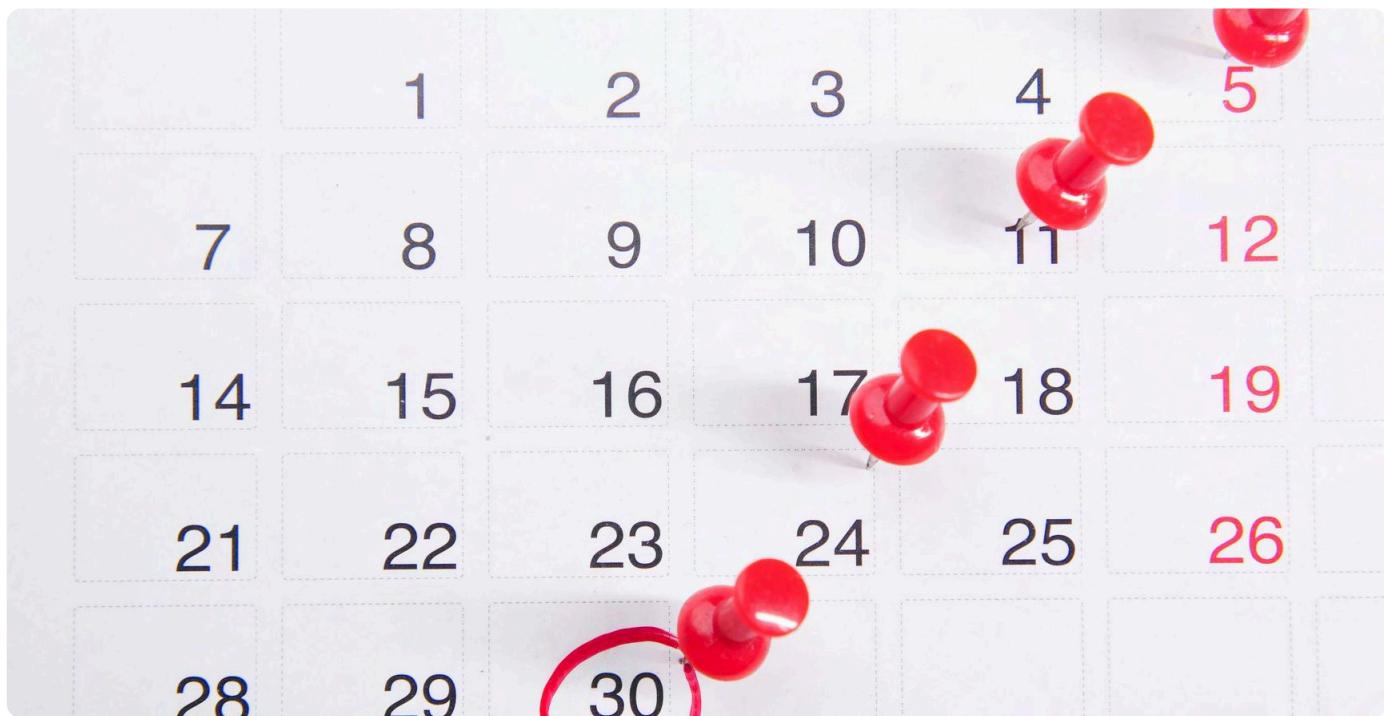


Additional Feedback



Task Metrics & History

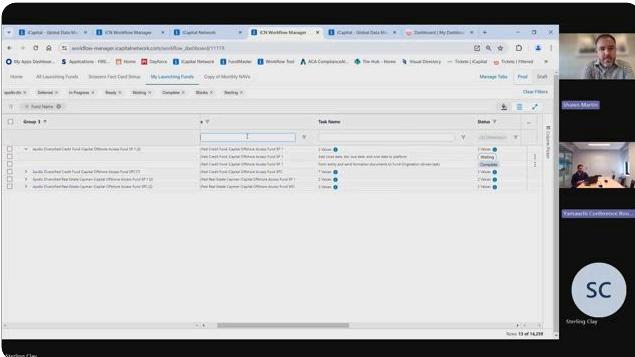
8 views Like Comment



Organization

Participants had **diverse opinions on the best ways to visualize tasks**. While some did view things in context of tables and spreadsheets, others found that different views better allowed them to identify priority tasks, dependencies or understand where things are in the broader workflow:

- **Gantt charts** (for workflows with general timelines or due dates)
- **Kanban/boards**
- **Calendar/agenda views**



SC-4-24-2024

Yeah, so gantt chart would be hugely helpful.

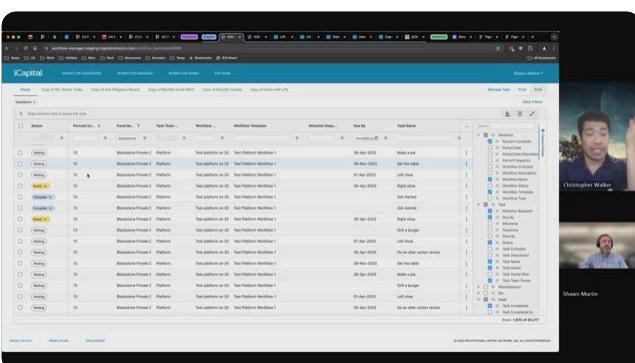
💡 Opportunity 999+

Fund Origination 84

Workflow Dashboard 126

Transparency 268

Gantt 4



CW - 4-18-2024

it would also be, I think visually helpful if I forget what these, the charts are called. Is it a Gantt chart?

EIG 189

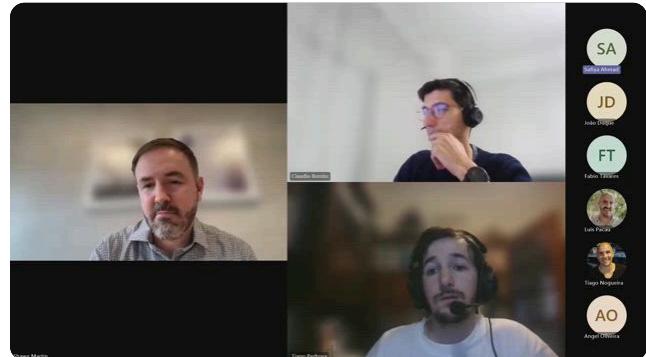
Flexibility 42

💡 Opportunity 999+

Workflow Dashboard 29

Gantt 2

^



MC, SA, TP, CB, JMS - 4-24-2024

So maybe when we log in, perhaps a better view would be a more simplified one. So mostly with the funds that we work with and probably the stage that we are with the funds. So if we're in the beginning stage, middle or end for that month, we have received enough or we are analyzing the NAV or have completed the NAV because I feel like it's got a lot of information and a lot of tasks and sometimes that can be overwhelming.

💡 Opportunity 999+

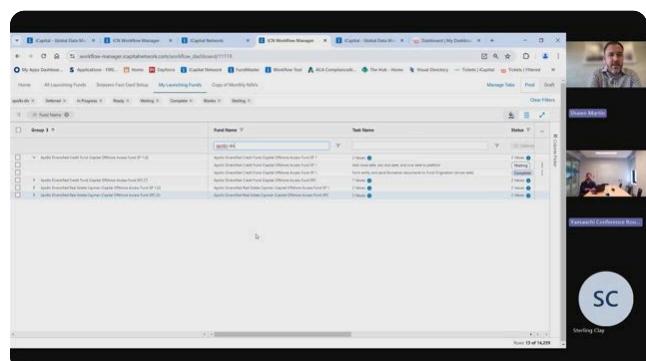
Fund Finance 105

❗ Pain 695

Simplicity 4

Workflow Dashboard 56

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SC-4-24-2024

I think we've always had a dream that we could use this for external reporting, whether or not that's necessarily (done) systematically. But I mean, if you look at my my fund launch work flow, this is like truly



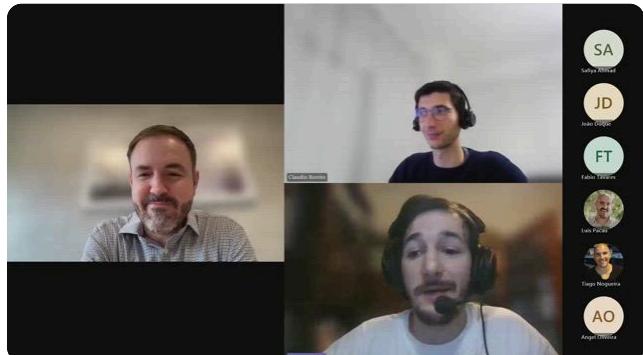
MC, SA, TP, CB, JMS - 4-24-2024

It's directly directly the fund calendar because we mostly manage the whole NAV process from A to Z.

Workflow Dashboard 56 Task Discovery 9
Fund Finance 105 Transparency 249
Calendar 2

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everything that it takes to launch a fund, it's like all of the major steps. And this is what

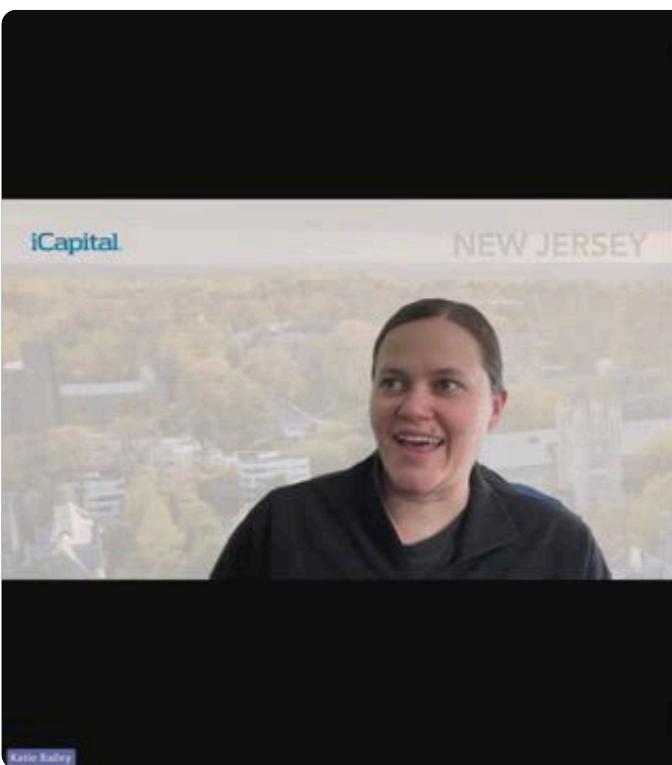


MC, SA, TP, CB, JMS - 4-24-2024

I think it will be good as well on the home page to have some view on due dates that are today, due dates that are past due dates that are for the next day.

Workflow Dashboard 56 Task Discovery 9
Fund Finance 105 Opportunity 999+
Task Priority 5

^



KB & DC - 4-26-2024



I use it now, like, on my own. I have like tables set up in one note and I sort of like, put all my tasks and then I move it. It's really helpful. I like that a lot.

Kanban 1

Workflow Dashboard 94

Fund Finance 129

Opportunity 999+

The screenshot shows the iCapital software interface. At the top, there's a navigation bar with tabs like Home, Copy of My Team's Tasks, Copy of One Efficient Report, Copy of Monthly Fund Alerts, Status of Periodic Checks, Status of Close with LPs, Manage Tabs, Print, and Help. Below the navigation bar is a search bar with placeholder text "Search iCapital". The main area is titled "Dashboard" and contains a "Task List" table. The table has columns: Status, Percent Done, Fund Name, Task Name, Workflow, Workflow Template, Attention Req'd, Due By, Task Name, and Details. There are 15 rows in the table, each representing a task related to Blackstone Real Estate PE Fund, such as "Approve PCAFs" and "Send valuation summaries". To the right of the table is a sidebar with a tree view of "Available Fields" under "Task". A large video call window on the right shows two men: Christopher Walker and Shawn Martin. The video call window includes a progress bar at the bottom.

CW - 4-18-2024

But if you could like, focus in on a fund, right? And you could see a gantt chart.

EIG 189

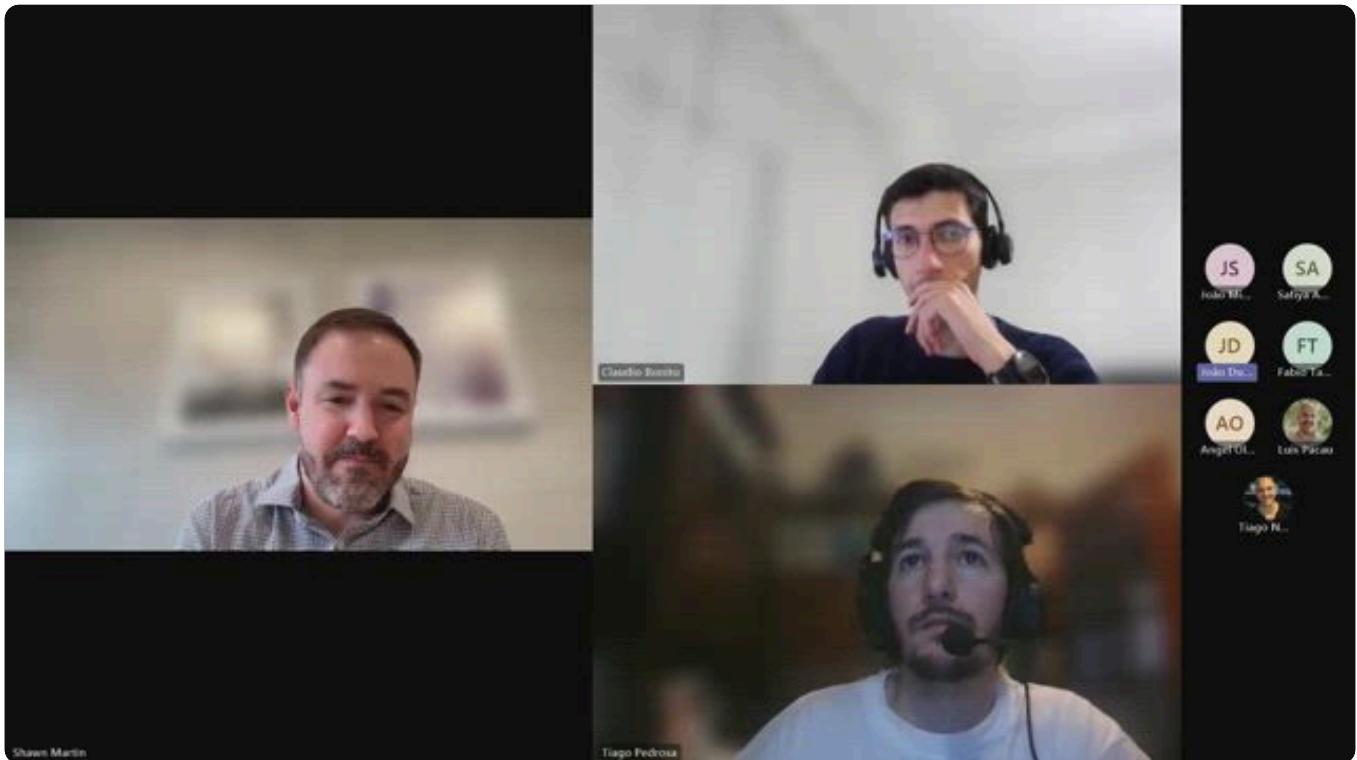
Workflow Dashboard 29

Gantt 2

◆ Opportunity 999+

Efficiency 350

Flexibility 42



MC, SA, TP, CB, JMS - 4-24-2024

We don't use the workflow that much for future tasks because we, we actually know what we have to do and we know our funds calendar. So it's not the best practice.

Workflow Dashboard 56

Fund Finance 105

Calendar 2

Not Interested 65



More insights in this project

[View insights](#)



[Other Workflow Tools](#)



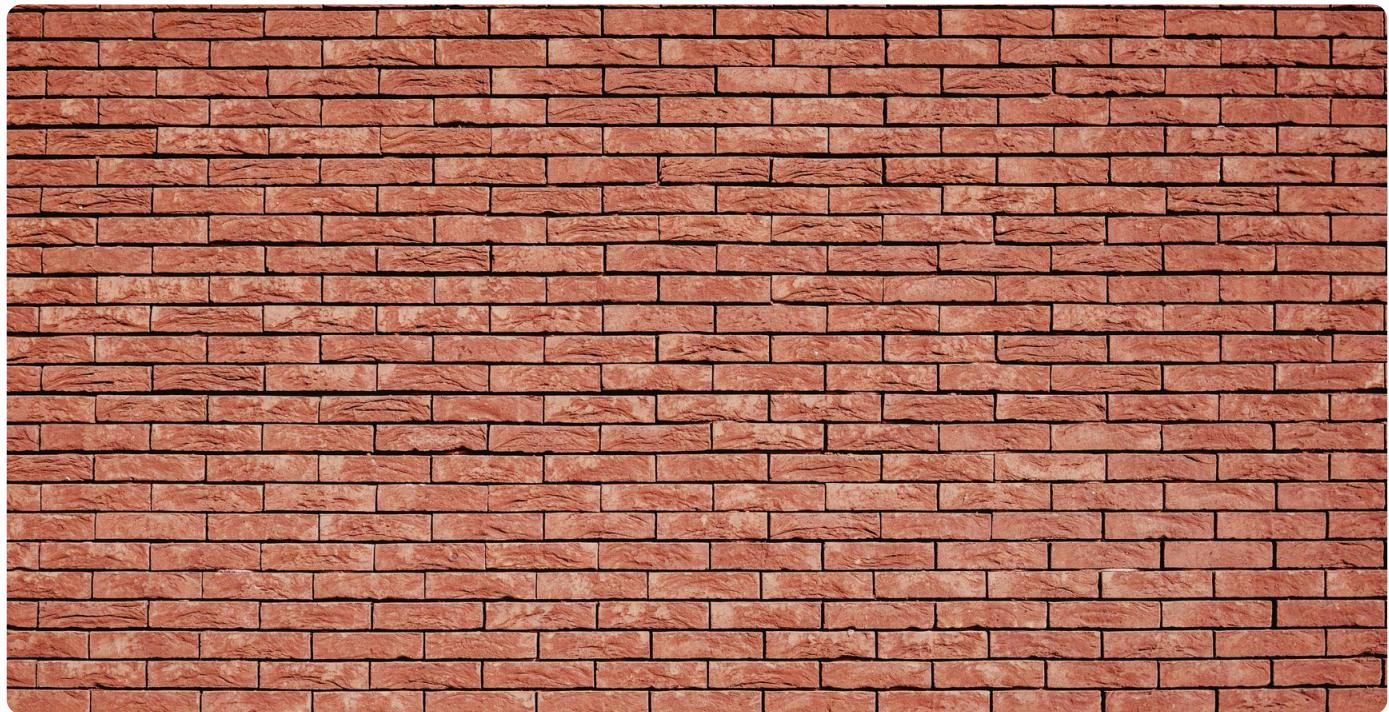
[Additional Feedback](#)





Alerts

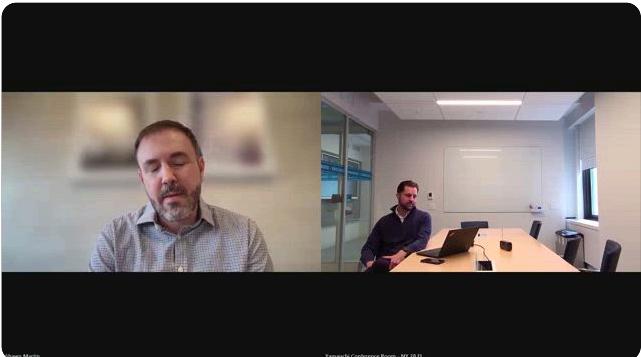
9 views Like Comment



Blockers

In many cases, the same groups of people across teams work collectively on things like fund launches, so users were either **reaching out to their colleagues or filtering by a prior task owner** in a workflow to get eyes on potential blockers or items at risk.

In some cases, it was hard for users to identify dependencies or issues affecting their work downstream. In other cases, the problem was that the workflow is a lot more detailed and includes more people than are fully captured on the Workflow Dashboard.



SC-4-24-2024

I think it would be helpful to know going back a couple steps of tasks that are going to become due soon that aren't in my court yet. So if I need to, I need to reach out to people and like make sure they're actually doing their jobs.

Workflow Dashboard 126



CW - 4-18-2024

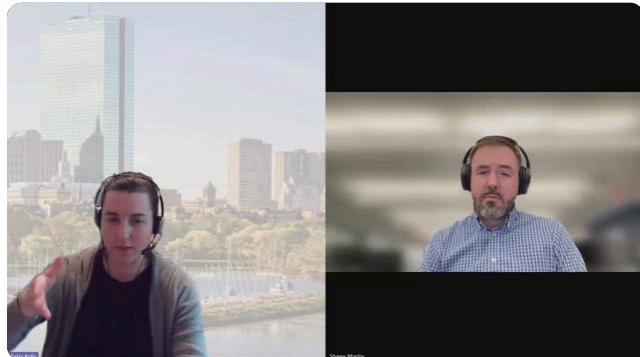
That's just reaching out because usually I'll know who's this, who's like working on the fund, right? And if I don't, then I have like my main person on the team that will be like, hey, he is working on this one. Who can I talk to? Who can I annoy about this? Right? So it's very analog in comparison to a tool. It's just reaching out. So, whoever on the fund finance or legal team and there's nothing automated now.

Blockers 5 Workflow Dashboard 126

Communication 58

Efficiency 370

EIG 203



KK - 4-18-2024

The biggest deliverable and the biggest hand off there are a few handoffs, but the biggest one is a subscription document. So on top of the resource allocation where the pipeline, OK, we get the pipeline and here's what's coming, here's who assigned then in order to track the timing, the most important handoff, which is a subscription document is tracked whether that is received from legal or if it's a direct fund through the manager as that is the gating item. And the item that causes is cause it requires the most amount of work to be done on the platform. So that that item is tracked as far as from a handshake. Is that getting item delivered? If so, then it can enter the queue of our clock of what it takes to execute like a fund launch feed or fund 3 to 5 days direct fund, you know, 5 to 7 type situation. But a lot of times it will be a launch date or a pipeline. But unless you have that subscription document, that date is almost moot because you can't actually deliver without that piece of information that's contingent upon a third party, right?

Blockers 5

Workflow Dashboard 126

Operations 18

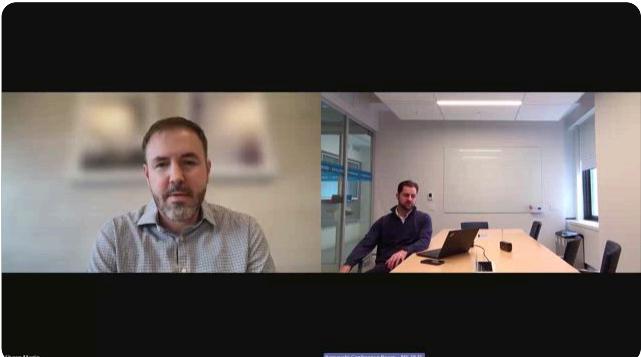
EIG 203





SC-4-24-2024

And I use the alert, the blocker feature pretty heavily to get people to move things forward. One thing that is tough, at least in fund launch workflow is that we have dates defined for like when things are due, but they're fairly loose because launching a fund, the timing for launching a fund is



SC-4-24-2024

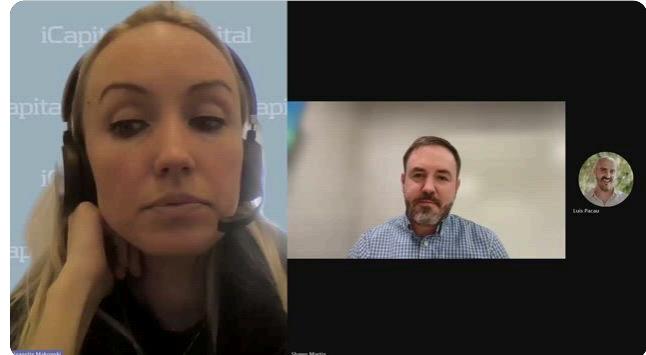
we do have a lot of work flows where the timing requirements are pretty tight and there are handoffs between teams.

Blockers 5

Fund Origination 84

Workflow Dashboard 126

Pain 757



JM - 4-29-2024

Maybe for me, I've been a little bit lucky because it's consistently coming from the same parties. Either usually I'm working with (one employee) or (another). So if I have to, I just search my box for them, but if they, if we had a lot more people, I don't know, somehow I kind of just remember who I worked with through which fund launch. So I, I understand that if we were, you know, a way larger organization that's not really the best way. Somebody who has to know if something came in for a fund not launched by (the colleague I usually work with). I won't necessarily have all those details. I have to start searching frantically for service tickets. So that's kind of what we have going on today. It's a little tricky if that's the case.

Notifications 64

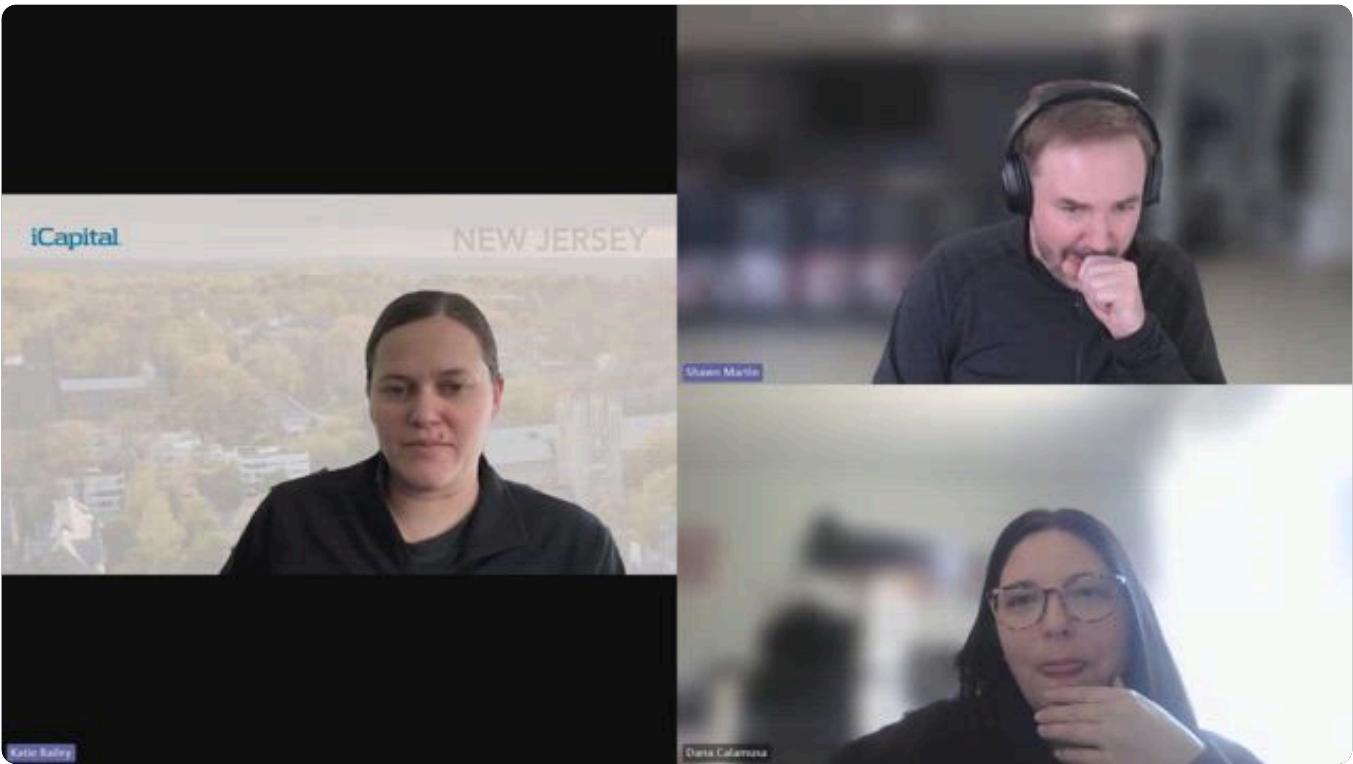
Alerts 16

Workflow Dashboard 126

Collaboration 10

EIG 203

^



KB & DC - 4-26-2024

the issue is that the way that they create the tasks, the owner of it is just whoever the fun finance rep is in fun master. So it's one person. So like what I've had Dana do in the past and like other people who are responsible for their tasks is go in whenever the workflows are created, pick the tasks you know, are going to be yours and like, assign them to yourself. But then to Dana's point, like, I don't, I don't know why, like some funds are created, like the workflow is created after and like, you'd have to go in and check every day and be like, OK, was anything assigned to someone else that I need to assign to me?

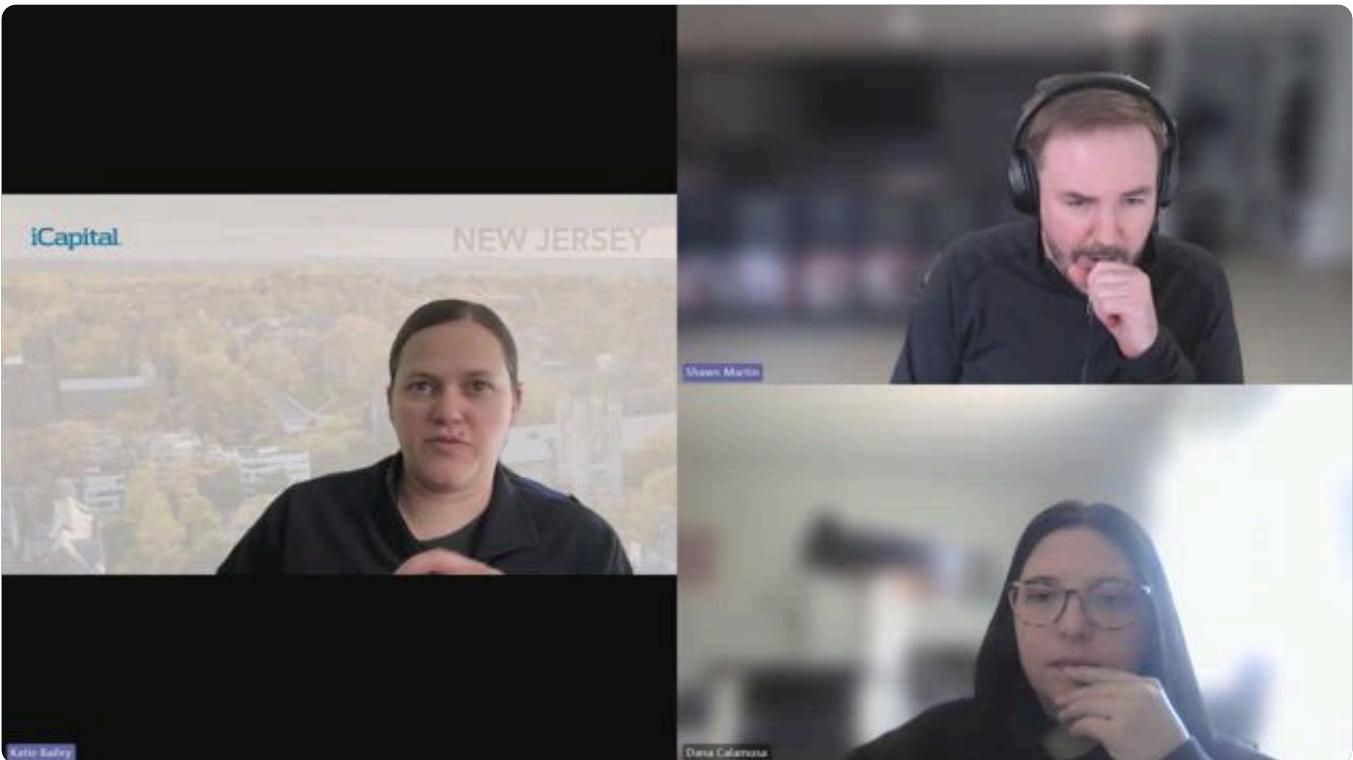
Workflow Dashboard 126

❗ Pain 757

Task Discovery 17

Fund Finance 129





KB & DC - 4-26-2024

So we filter by like admin by like whatever we have to do to narrow down and then she's responsible for, you know, like three or four tasks or whatever. So she filters on that and then she's got a bulk, assign them to her. And then, like I said, like if she said, if any new fund gets like a workflow gets added for some reason, like after all of the other ones are added, it'll just sit out there and be assigned to the fund finance rep until Dana realizes like, oh, shoot, that's really supposed to be mine.

Workflow Dashboard 126

Pain 757

Transparency 268

Reduce Risk 115

Task Discovery 17

The screenshot shows the iCapital software interface. On the left, there's a large table titled "Workflow Dashboard" with columns for Status, Form No., T, Date Task..., Workflow, Workflow Template, Attention Regs..., Due By, Task Name, Task Owner, and a "Select" column. The table lists various tasks such as "Approve PCAPs" and "Receive statement from LP". To the right of the table is a sidebar with a tree view of tasks under "Task Types". On the far right, there are two video feeds: one for "Christopher Walker" and one for "Shawn Martin".

Shawn Martin

CW - 4-18-2024

is this the order that they need to get done in and like, what are the dependencies have we drawn out the dependencies?

Workflow Dashboard 126

Opportunity 999+

EIG 203

Flexibility 51

More insights in this project

[View insights](#)



Other Workflow Tools



Additional Feedback



Alerts

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Taking and Logging Action

Depending on the participant's team, there was a range in the amount of tasks within a workflow that were done in iCapital's systems, versus outside of them.

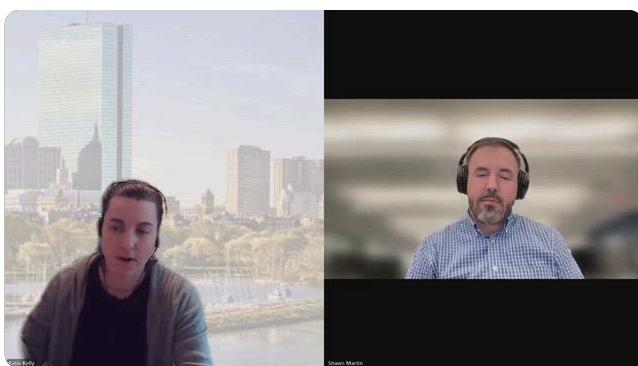
What was frustrating for some, was the added step of tracking progress. Status updates are another thing to do, among many things already on their plate. The updates themselves, for the most part, are not automated.

As a consequence of the state of updating things now, sometimes people will get caught up in other work, meetings and client fire drills or may **forget to update the statuses of the items they've already completed.** In some cases, it's something they might **wait to update until the end of the week.**

It may be common that something may be ready for the next doer in a workflow, but they have **no idea it is ready.** As a workaround, doers would regularly reach out to other teams to inquire about a task's status.

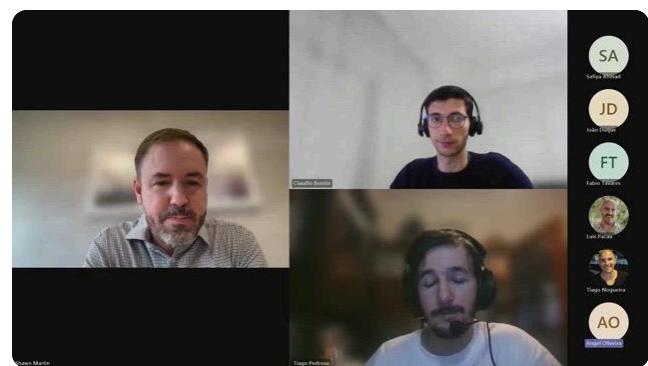
There was a desire among several participants for **tasks to self-update** once they've done their work in Global Data Master, Rails Admin, or whatever other part of the platform they've done work.

- One participant did raise the concern that self-updating workflows would not be too valuable in respect to things like fund launches, where the **workflows and tasks themselves are a bit too high level**. For each task visible in the workflow, there might be a dozen other things the team is doing that isn't explicitly spelled out.



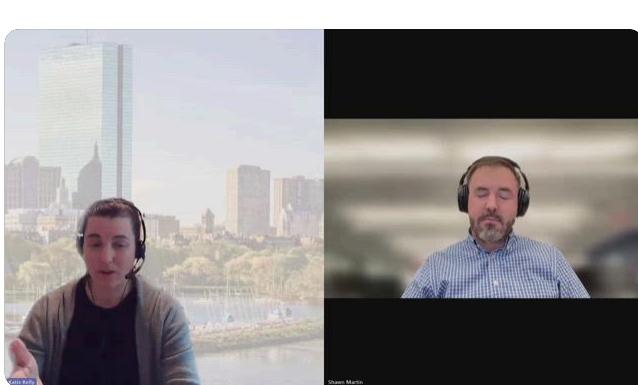
KK - 4-18-2024

you're asking people to do something that the check box actually takes more than the actual thing that they're doing. And because you're asking them to go back and forth, you're actually creating more risk and a sense of like micro management or making something a little bit more arduous. And



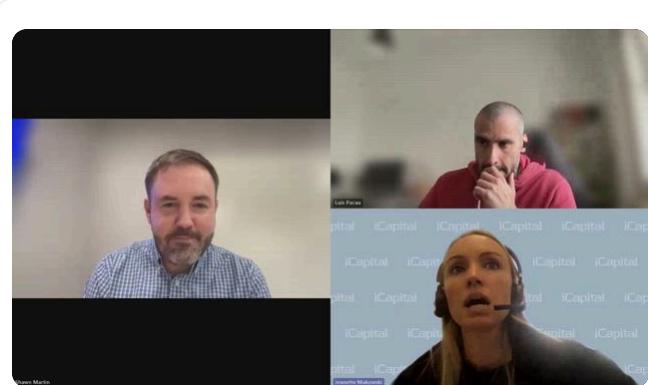
MC, SA, TP, CB, JMS - 4-24-2024

at least on the offshore side, we, we have this we, we have this tool as a honestly like it, it looks like an extra step, right? Because we have to finish our tasks and then we have to come here to update the status. It will be better if we can integrate this more. For example, when I click on email approval to



KK - 4-18-2024

what people need to action on like the checklist? The how to all of that? It's not



JM - 4-29-2024

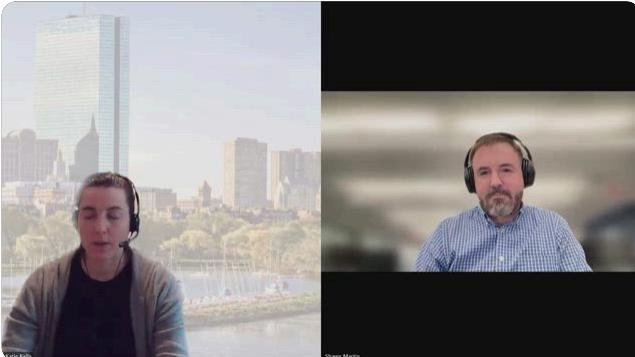
But for the things that are currently listed in workflow manager, I just don't think that

really on the platform. So everybody has to go off of it anyway.

Efficiency 350

Workflow Dashboard 29

EIG 189



KK - 4-18-2024

It would be, they want to know if the major checkpoint was delivered, right? Like, and like I said, it was a subscription document.

EIG 189

Simplicity 3

Alerts 1

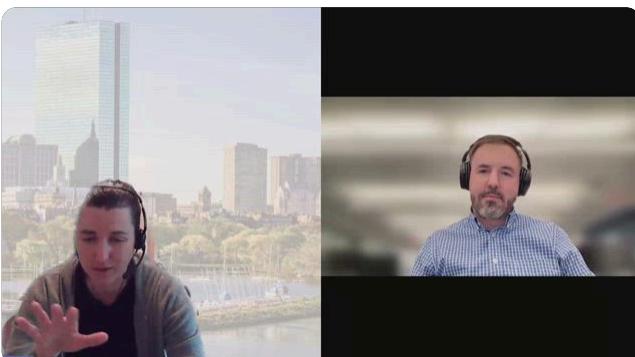
Workflow Dashboard 29

would add too much value (to automatically update high level steps when actions are taken in the system). It's in fact, these things that were listed here to add the white list jurisdictions and curious about how some of



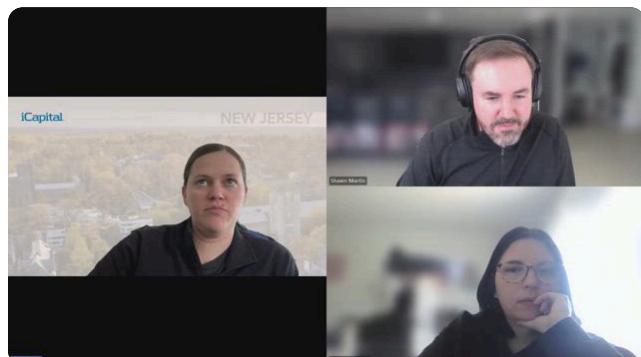
SC-4-24-2024

Is it difficult for you to have purview, in terms of what's at risk of not meeting a deadline, you know, if, if people are doing it that way (tracking tasks on paper). Yeah, it is. So when I think of the types of things that are really at risk when we have in the ticketing system, you know, we have some metrics



KK - 4-18-2024

When you're training someone and then, and they need to like practice or do the checklist is great when people are doing to quality control or just doing the quality control. But when they're running through, it's good to have a checklist. So they don't go off the top of their head and then miss like five out of



KB & DC - 4-26-2024

I know like I do look at the fund launch and I see things getting held up like, I just don't think people know that it's, their responsibility or, I don't know, like I know an email is supposed to go out. But I mean, I definitely see a lot of, a lot of things being held up. So I don't know, if everyone, if all



Shawn Martin

Farnsworth's Conference Room - NY 2011

SC-4-24-2024

Would you say that other teams or your own team are diligent about updating the status of tasks in the dashboard? It's definitely an issue.

 Pain 757

Fund Origination 84

Workflow Dashboard 126

Accountability 7

Status Updates 3



SC-4-24-2024

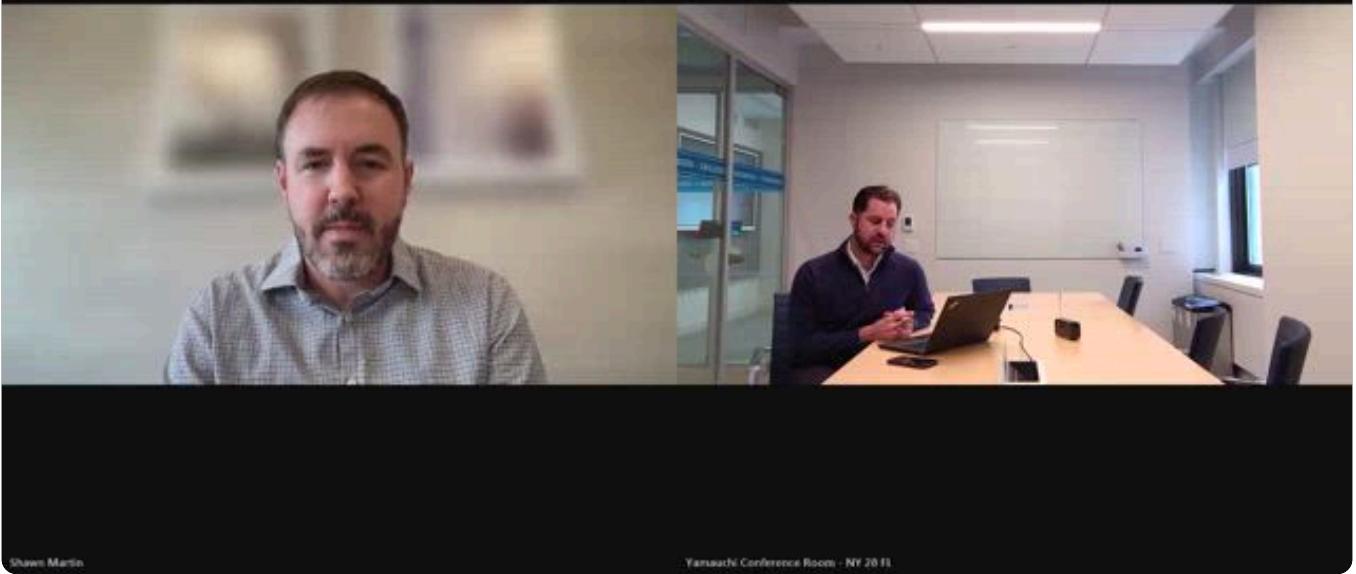
So with events like that (in ICN), once it's posted, would you rather the status update itself if there was some sort of syncing going on? Absolutely. Sure.

Status Updates 3

Opportunity 999+

Fund Origination 84

Workflow Dashboard 126



Shawn Martin

Yamashita Conference Room - NY 20 fl.

SC-4-24-2024

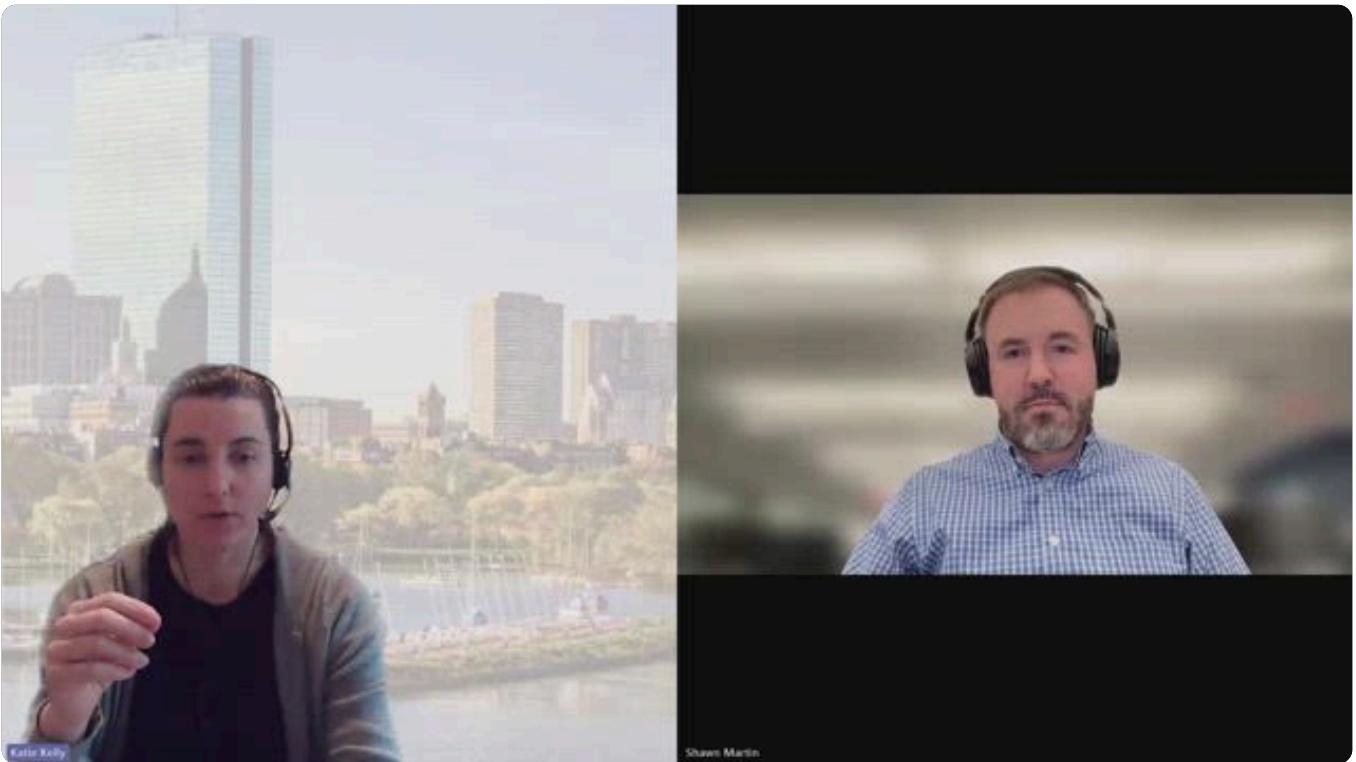
And it's pretty normal for teams to kind of batch their updates. So maybe they get a bunch of things done and kinda on Friday afternoon, they go in and check off everything they've completed pretty normal for people to do things off line and just completely forget to do their work in the dashboard.

Status Updates 3

Workflow Dashboard 126

Fund Origination 84

⌚ Opportunity 999+



KK - 4-18-2024

And then that's a major point. Like knowing, being able to say you had 10 funds in your queue over the next call in like six weeks, you'd want to know, like to be able to see, oh, where's the sub doc at?

[Workflow Dashboard 29](#)

[EIG 189](#)

[Task Priority 1](#)

[Transparency 244](#)

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Alerts

👁 10 views ❤ Like 💬 Comment



Bird's Eye

At a bird's eye view, participants were **more focused on the stuff they needed to get done**, rather than seeing everything across all workflows. The default state of the Workflow Dashboard was perhaps too noisy for participants to quickly glean what they needed to tackle next.

In an ideal state, participants would want that simplified. Examples given were **things that need to get done today, this week, what's overdue**.



CW - 4-18-2024

Here's a step. Here's how long it's gonna take. Is it done? Is it in progress? Has it not even been started? Like those are the things I need to know and like who it's assigned to, right?

Workflow Dashboard 29

Transparency 244

CW - 4-18-2024

And if I can be told from like my perspective, if I have like two days left to do something out of the 10 days allotted that would be helpful because, right, the 10 days isn't, it doesn't take me 10 days to do something. Sure. It just, I have 10 days because I have a million other things going on.

Efficiency 350

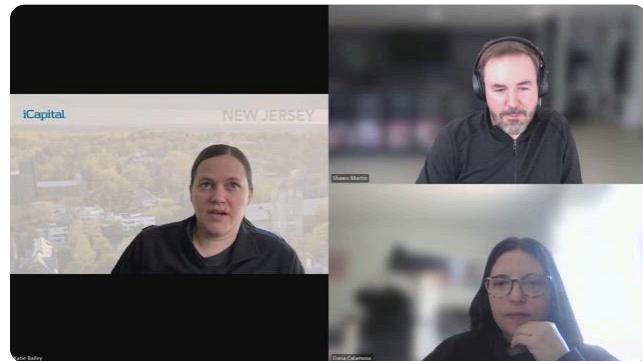
EIG 189

Opportunity 999+

Notifications 55

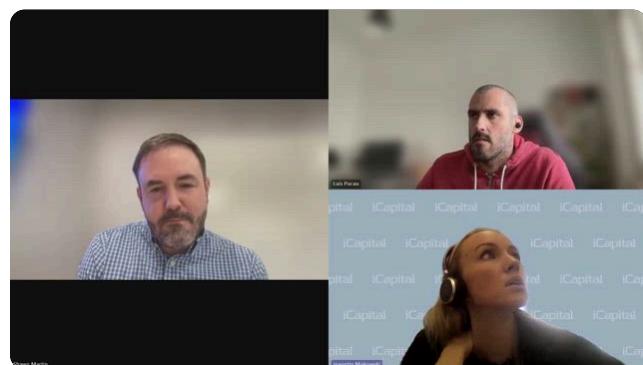
Workflow Dashboard 29

Reduce Risk 104



KB & DC - 4-26-2024

I guess like, like here's what you should work on like today or something. Like here's what's upcoming kind of a thing, like maybe based on dates or whatever. Like here's what's at risk of not being completed on time, something like that where it's very specific to me.



JM - 4-29-2024

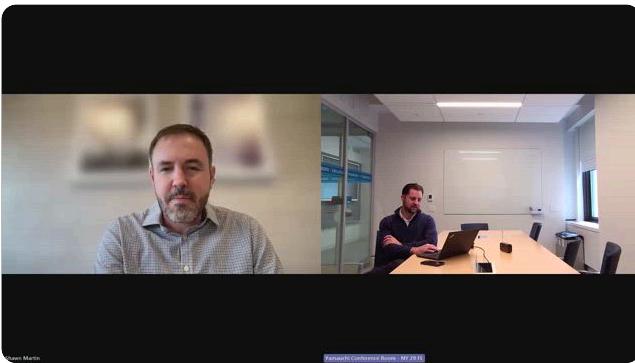
I don't think I would ever have to stay at a high level, something like that. I think it's just fund by fund.

Not Interested 66

Dashboard 1

EIG 203

Workflow Dashboard 94



SC-4-24-2024

I don't need to know if I have completed tasks. I need to know what I need to do in my job.

Metrics 8 Fund Origination 84

Not Interested 69 Workflow Dashboard 126

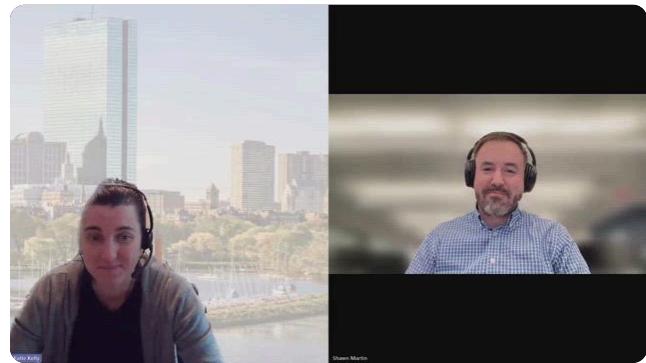
The screenshot shows a software application window with a sidebar on the left containing various menu items like 'My Asset Database', 'Applications', 'Home', 'Analytics', 'Capital Returns', 'Workflow Tool', 'Workflow', 'The Hub', 'Workflow History', 'Tickets', 'Calendar', 'Friends', and 'Help'. The main area displays a list of items under 'Workflow Name' with columns for 'Name', 'Status', and 'Task Owner'. One item is highlighted in blue. A large circular icon with the letters 'SC' is visible at the bottom right of the screen.

SC-4-24-2024

I think additionally, there's a lot of data and functionality that you can, a lot of data you can bring into the, the workflow dashboard, but the average user isn't aware of what that is. So unless you're a power user, it's just like a bunch of jumbled data.

Fund Origination 84 😕 Pain 757

Simplicity 7 Workflow Dashboard 126



KK - 4-18-2024

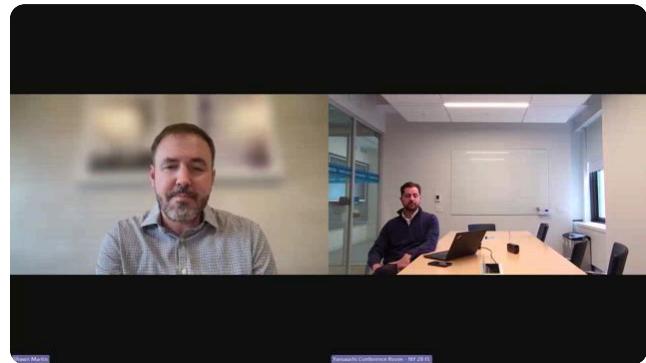
I open it up and my head wants to explode.

Workflow Dashboard 126

EIG 203

Simplicity 7

❗ Pain 757



SC-4-24-2024

Like for myself, I regularly have like 250 tasks ready in workload dashboard. That's like the number of funds that I'm launching, that's how you tackle that pile. Yeah, so like none of the not 250 tasks need to be done today by any means. But like some of them need to and I it'd be helpful if I knew which ones were higher priority systematically.

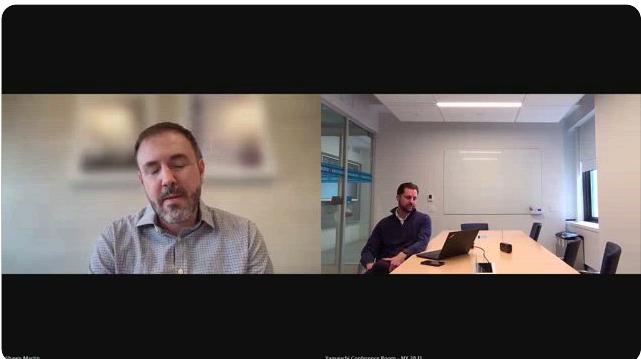
Workflow Dashboard 126

Task Priority 13

💡 Opportunity 999+

Fund Origination 84

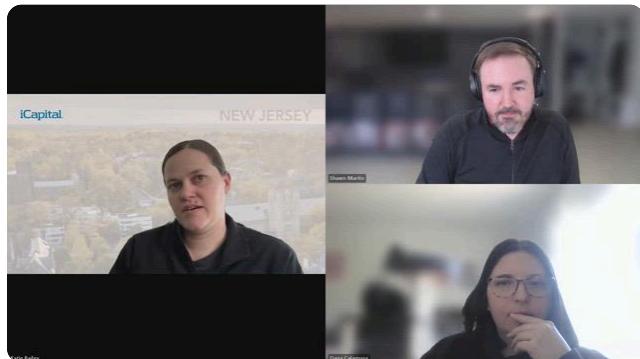




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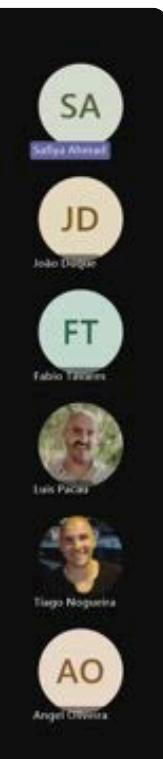
I think it would be helpful to know going back a couple steps of tasks that are going to become due soon that aren't in my court yet. So if I need to, I need to reach out to people and like make sure they're actually doing their jobs.

Workflow Dashboard 126



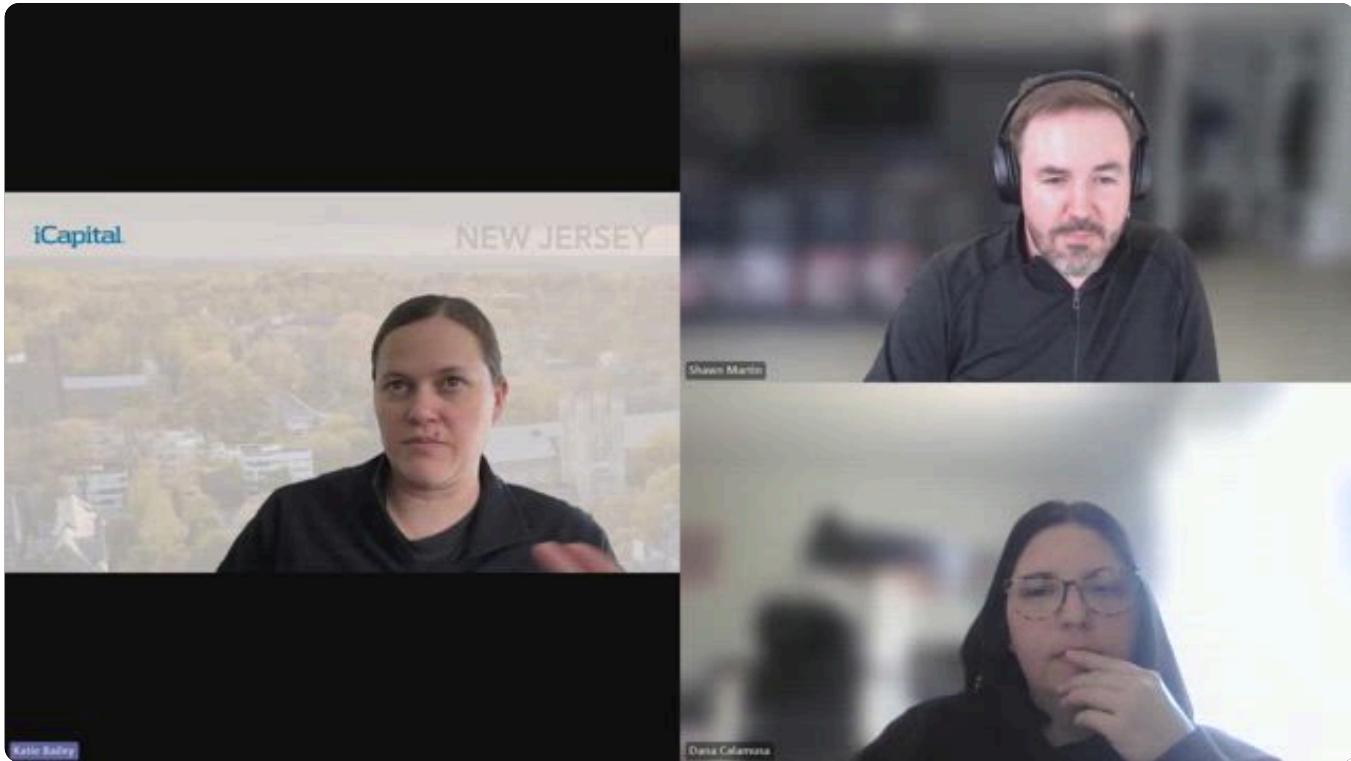
KB & DC - 4-26-2024

something where you could log in and it could just be like, hey, here's what you have going on today, like whether it's a calendar or just the dashboard broken out into, like here's what you should work on, like sooner rather than later. Here's what's like upcoming and things like that would be helpful



MC, SA, TP, CB, JMS - 4-24-2024

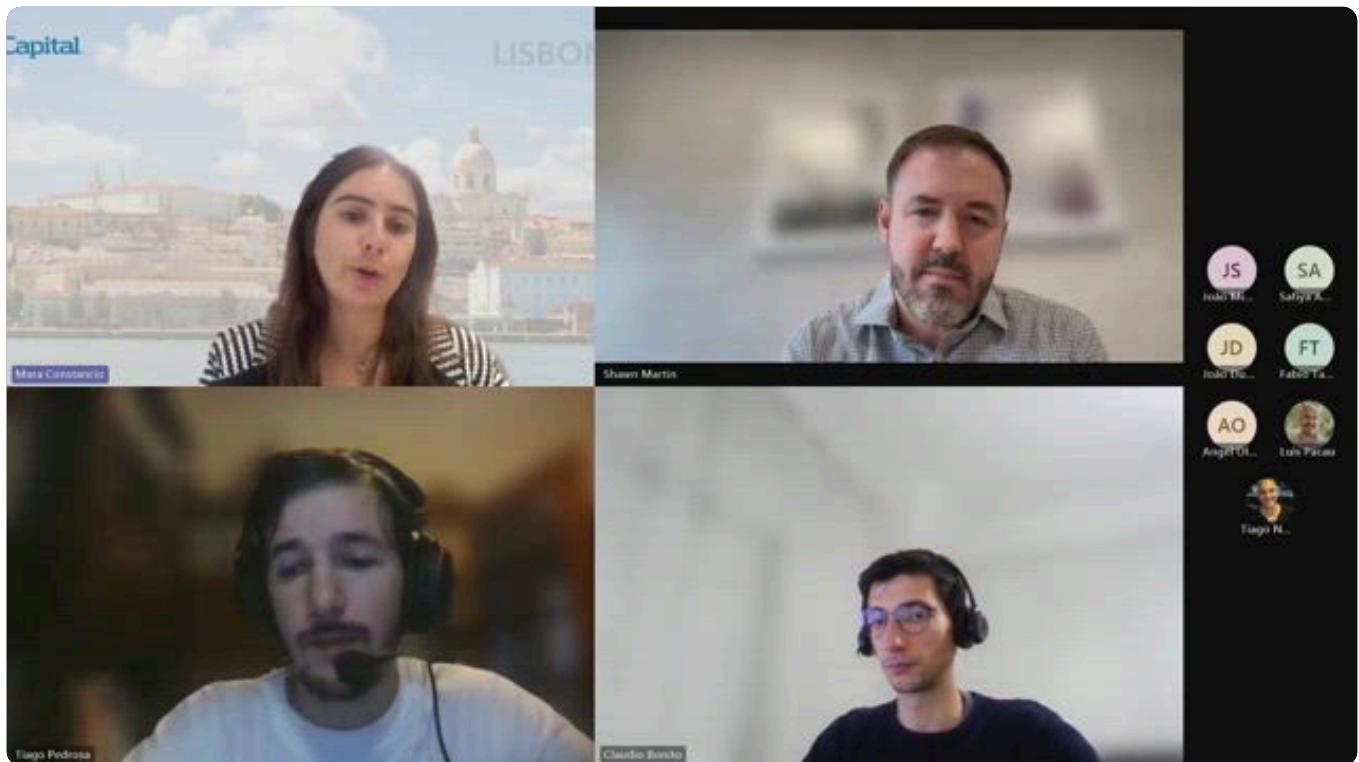
So maybe when we log in, perhaps a better view would be a more simplified one. So mostly with the funds that we work with and probably the stage that we are with the funds. So if we're in the beginning stage, middle or end for that month, we have received enough or we analyzing the NAV or have we completed the NAV because I feel like it's got a lot of information and a lot of tasks and sometimes that can be overwhelming.

[Opportunity 999+](#)[Fund Finance 129](#)[Pain 757](#)[Simplicity 7](#)[Workflow Dashboard 126](#)

KB & DC - 4-26-2024

I think like, they maybe were trying to accomplish that with like our home screen because it's sort of like everything and I guess you could theoretically like filter on your name, but it takes a lot of filtering. I feel like to see what you actually need to work on. Like, that's sort of like my biggest complaint, like all the data is there. It's not, it's not like an issue with the data. It's just, I feel like there's a lot of work to really see like what you need to work on.

[Pain 757](#)[Efficiency 370](#)[Fund Finance 129](#)[Task Discovery 17](#)[Workflow Dashboard 126](#)[Filter 66](#)



MC, SA, TP, CB, JMS - 4-24-2024

Instead of you going play with the filters, we can just go into the home pages. Like that's what's new for you, that's your metrics and that's what other teams completed for you to pick up now.

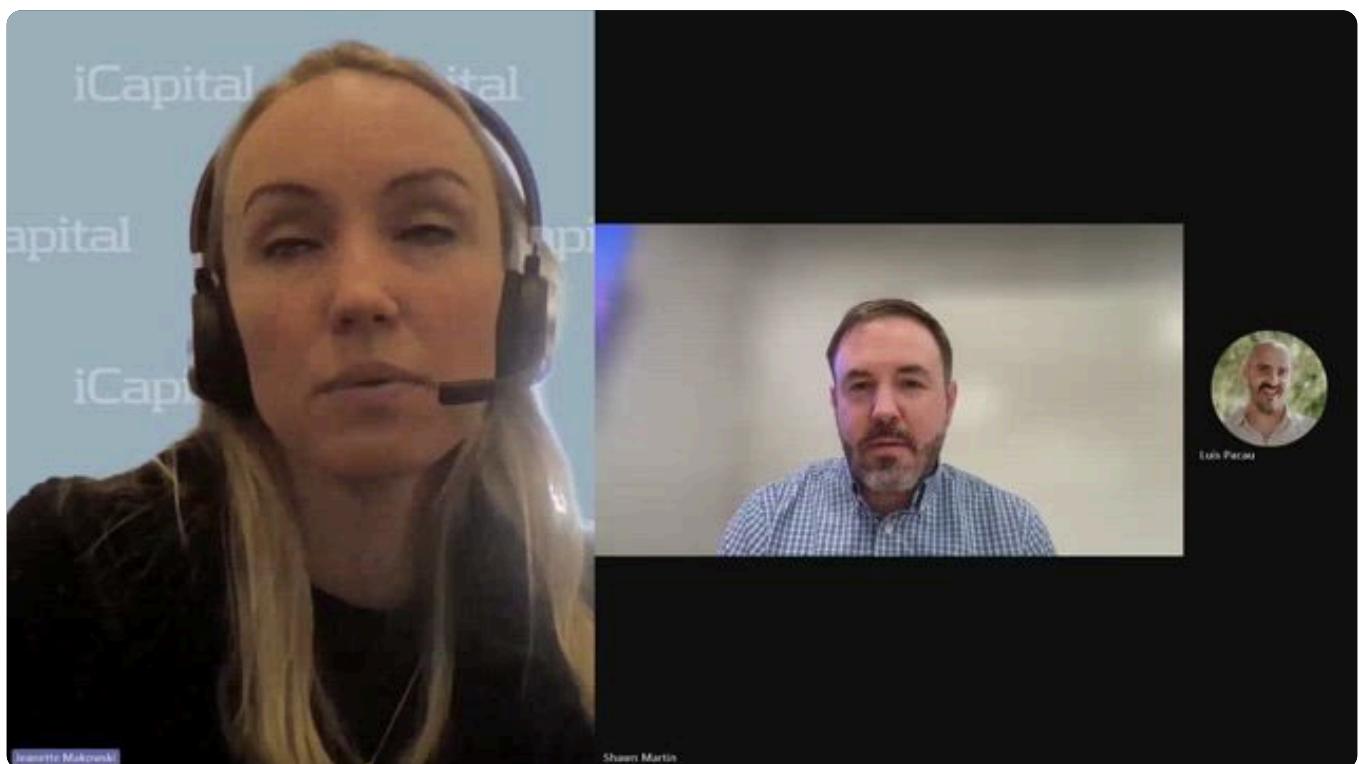
Workflow Dashboard 126

Task Discovery 17

Fund Finance 129

Metrics 8

Opportunity 999+



JM - 4-29-2024

A task is ready. Great. I only want to see it when it's ready. Otherwise... people are gonna treat it like spam. If something's not ready for me, I really don't wanna see it

Task Discovery 17

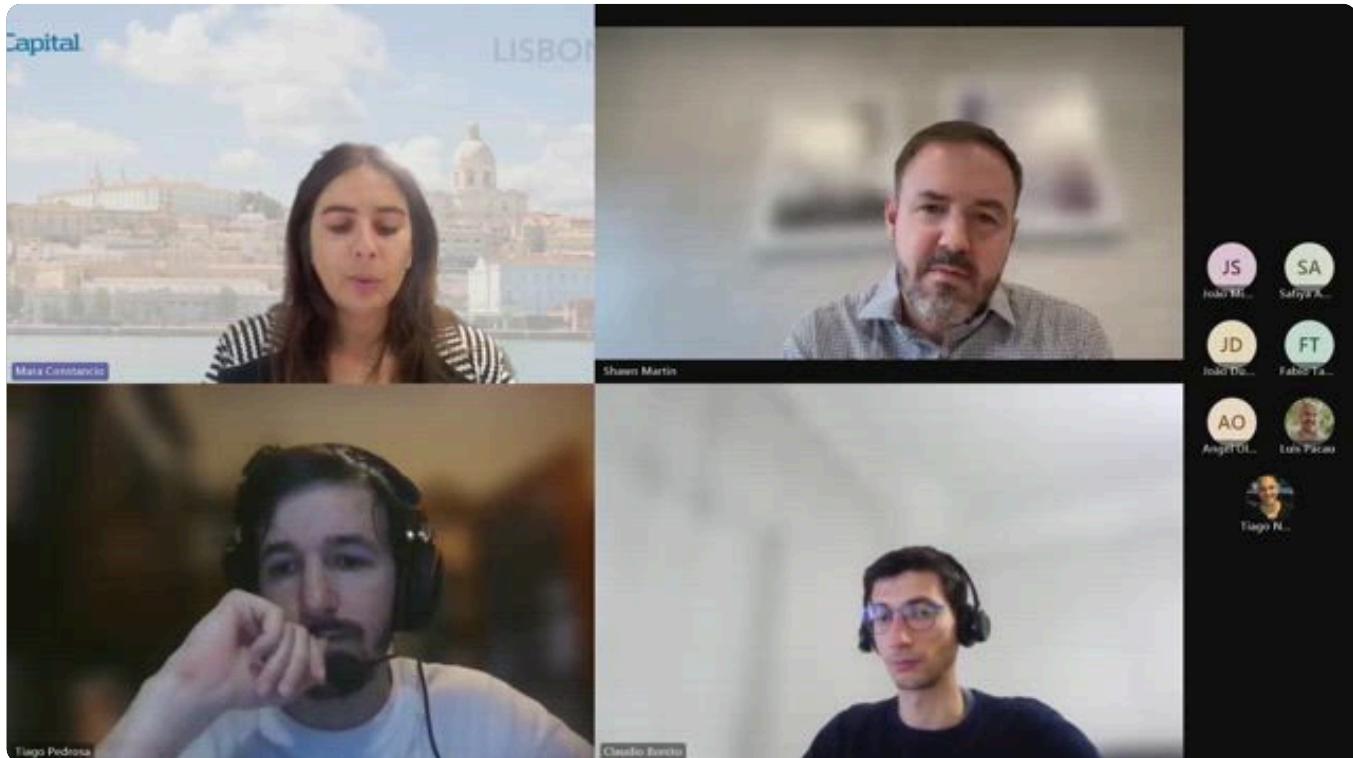
EIG 203

Task Priority 13

Workflow Dashboard 126

Simplicity 7

Minimalist 94



MC, SA, TP, CB, JMS - 4-24-2024

at least having like a home page on the workflow that we can show like either notifications or just this task, just got ready for you.

Task Discovery 17

Fund Finance 129

💎 Opportunity 999+

Workflow Dashboard 126

Alerts 16

More insights in this project

View insights



Other Workflow Tools



Additional Feedback



Alerts

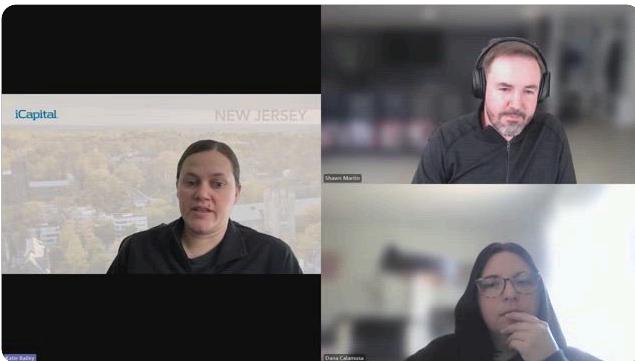
👁️ 10 views ❤️ Like 💬 Comment



Task Metrics & History

For some participants, it would be nice to see metrics on actioned tasks to **get a sense of how things are going** or to get data to **support operational KPI measures** without doing a bunch of extracting and calculating.

What one participant stressed, was that simple breakdowns of tickets addressed or pie charts covering the status of tickets was not really all that helpful. However, having a **time series that might demonstrate positive or negative momentum** on the number of tickets tackled over a period of time, what percentage of tasks were completed on time, or how long a workflow took to complete, would better illustrate how things are going.



KB & DC - 4-26-2024

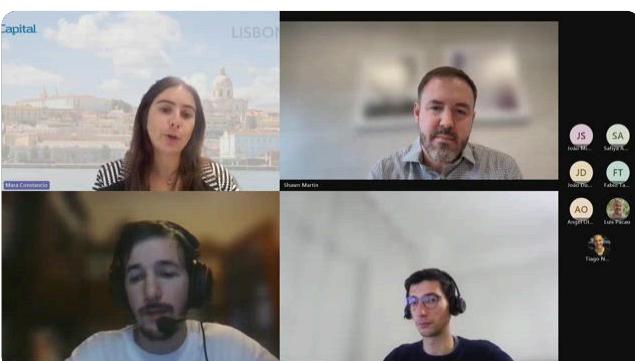
Eileen has a lot of KPI's that she's sort of asked people to come up with numbers on and like it's, you know, how long did it take to get from this task to this task? And so we have to export the data, format the dates in like a certain way, do a formula to figure out like how long it took. So yeah, I think there's like a time to like the whole entire thing be complete, like stored somewhere, but there's not really a lot of like, OK, how long did it take me to get from this task to this task? I don't think.

Opportunity 999+

Insight 115

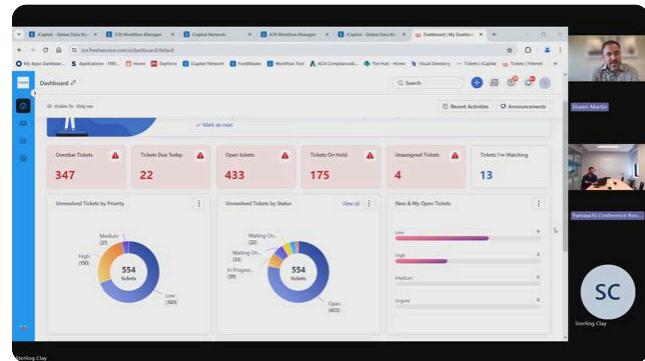
Fund Finance 129

Workflow Dashboard 94



MC, SA, TP, CB, JMS - 4-24-2024

Instead of you going play with the filters, we can just go into the home pages. Like that's what's new for you, that's your metrics and that's what other teams completed for you to pick up now.



SC-4-24-2024

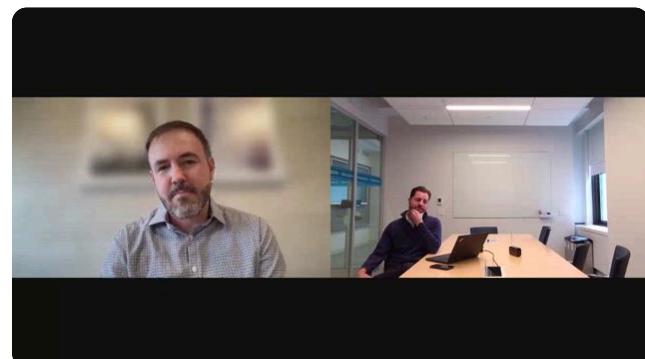
I pretty much always found pie charts like this to be not all that helpful. For a manager reviewing this.

Fund Origination 84

Not Interested 69

Metrics 8

Workflow Dashboard 126



SC-4-24-2024

I always struggle with these sorts of landing pages for systems like this because they are also frequently display like here's the number of tasks you completed in the last week or something. And I've always found it to be a useless metric. Like who cares if I completed your tasks? But I have 300 that are outstanding.

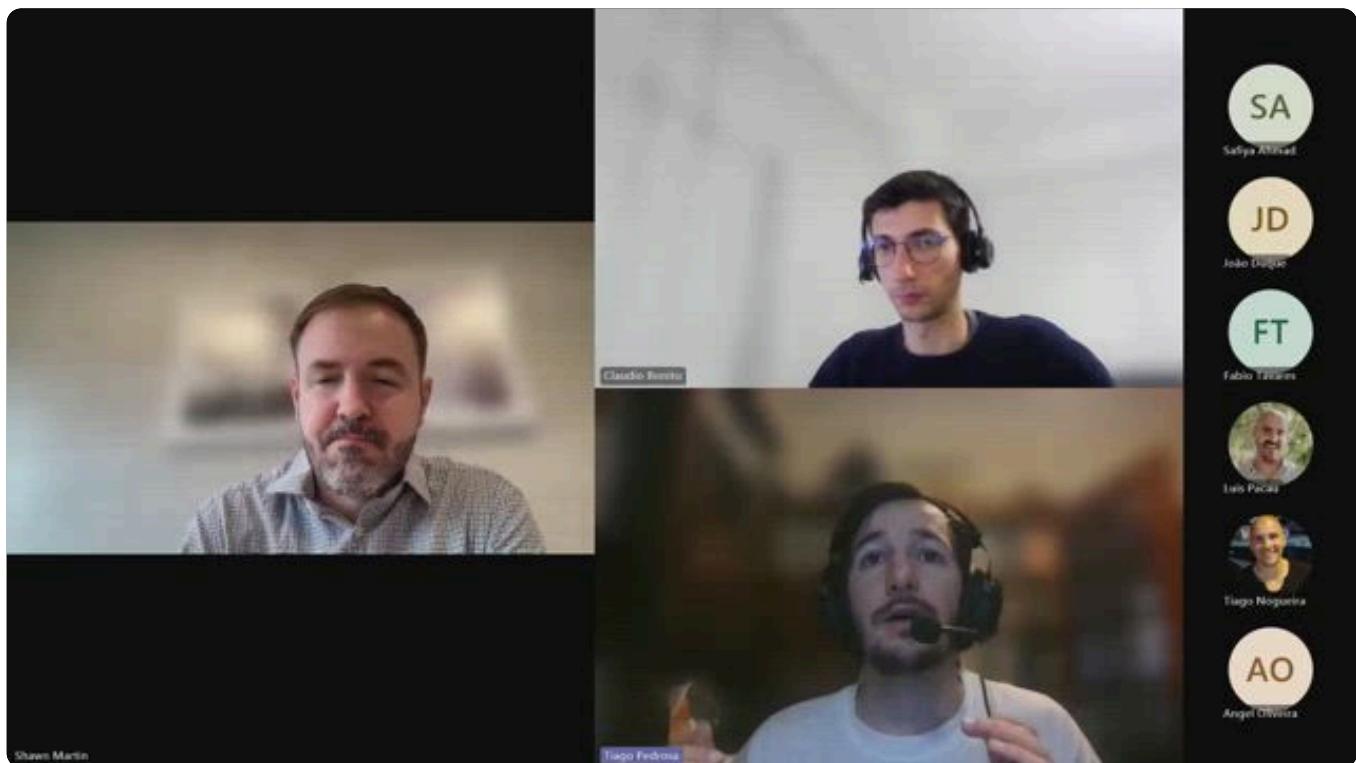
Metrics 8

Not Interested 69

Dashboard 4

Workflow Dashboard 126



[Workflow Dashboard 56](#)[Metrics 4](#)[Opportunity 999+](#)[Task Discovery 9](#)[Fund Finance 105](#)

MC, SA, TP, CB, JMS - 4-24-2024

it will be like interesting to have some visibility on tasks completed on time as well already on our side. So we can as well have a view of how it's going and as well as we are doing some clean up on on due dates too because well, at least on our side, we have a, a very, ah, big number of funds to, to cover on all the due dates. So, currently it's being done on those metrics in Tableau, but for example, I, I don't have access to Tableau, so I'm still dependent on someone running the Tableau report and then sending it to me and usually it's already like late when I receive it and, and doesn't have me, doesn't give me a chance to, to use that information to actually, ah m make anything different on my side.

[Workflow Dashboard 126](#)[Metrics 8](#)[Accountability 7](#)[Transparency 268](#)[Fund Finance 129](#)

The screenshot shows a Freshservice dashboard with the following key metrics:

- Overdue Tickets: 347
- Tickets Due Today: 22
- Open Tickets: 433
- Tickets On Hold: 175
- Unassigned Tickets: 4
- Tickets I'm Watching: 13

Below these metrics are two donut charts:

- Unresolved Tickets by Priority:** Total 554 tickets.
 - High (150)
 - Medium (20)
 - Low (313)
- Unresolved Tickets by Status:** Total 554 tickets.
 - Waiting On... (32)
 - In Progress... (33)
 - Pending... (19)

On the right side of the dashboard, there are two user profiles:

- Shawn Martin:** A video call interface showing a man in a grey shirt.
- Sterling Clay:** A profile card with a large blue circle containing "SC".

SC-4-24-2024

The Time Series is definitely more helpful if we can say, oh, you know, over the last four months, we have actioned, you know, 50 tickets a month and we're on time completion rate is 90% and going to 95. Like that's a much better metric for me as a manager than saying, there are 554 outstanding tickets where you could see an upward trajectory across the Time Series, you know, to, to speak to performance or things like that.

Workflow Dashboard 126

Opportunity 999+

Metrics 8

Fund Origination 84



MC, SA, TP, CB, JMS - 4-24-2024

It depends really on the type of tasks. So like for, for our team, one of like the most important task is make the first review of, of the NAV that's like so you can like have a lot of tasks that aren't as critical as that one. And like for example, for the task that will be like the most like important for me to know if I get in the due date correctly. For example, how much time between the task was ready and the task was completed. How mu how much time did it did it took that will be like something ah useful but not for like all the tasks or counting all the tasks.

Fund Finance 129

Flexibility 51

Metrics 8

Workflow Dashboard 126

Transparency 268



More insights in this project

[View insights](#)



[Other Workflow Tools](#)

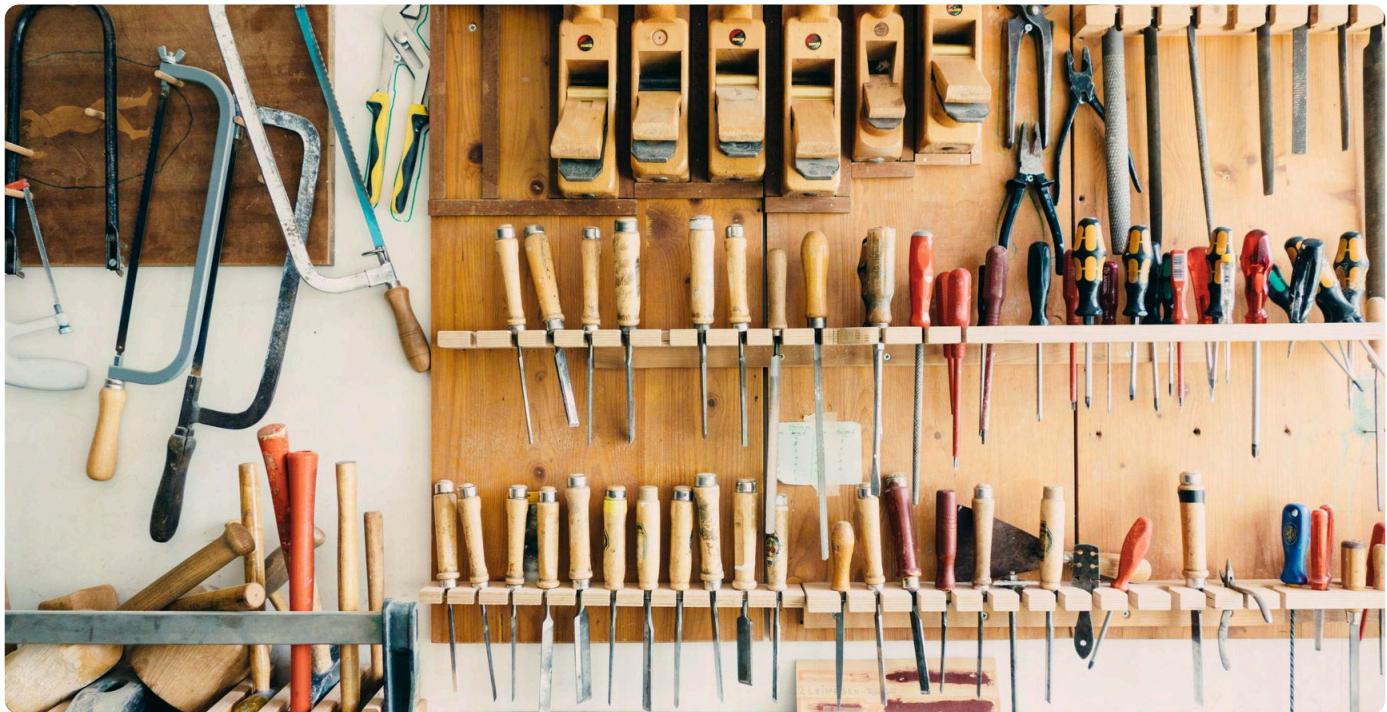


[Additional Feedback](#)



Alerts

16 views Like Comment



Other Workflow Tools

The following products aim to manage workflows, often offering flexibility in how data is presented to suit a variety of user preferences on getting things done and tracking work. Both Monday and Asana are and were used previously at iCapital to support project management in various departments.

Monday

General Use - Project Management

Rating - 4.7/5 (10,674 reviews)

Views - Table, Timeline, Gantt, Charts

The screenshot shows the Monday.com interface with several project management views. On the left, a sidebar lists projects like 'ICN Product S...', 'Core Team Roadmap', and 'Developer Hub Enhancements for Internal Users'. The main area displays two Gantt charts. The top chart, titled 'Core Team Roadmap', shows tasks like 'Complete POC in q1' and 'Production Rollout' with timelines and T-shirt sizes. The bottom chart, titled 'Developer Hub Enhancements for Internal Users', shows tasks like 'Provide link to Spurk logs' and 'Provide line to all the nodes for a service that have error codes...'.

Automations - Yes

Maker/Checker - Yes

Dashboards - Yes

Time Tracking - Yes

Users often praise Monday.com for its intuitive interface, customizable features, and effective centralization of project management tasks which enhance overall team collaboration and productivity.

([TrustRadius](#)) ([The Tech Report](#))

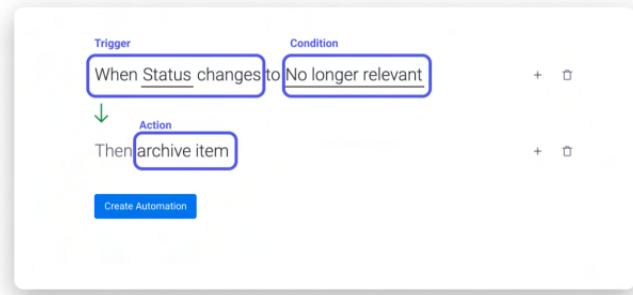
Pros (GPT Summary)

Common complaints include the platform's relatively high cost, particularly as the number of users increases, and some users find the automation features limiting unless they subscribe to higher-tier plans.

([GetApp](#)) ([The Tech Report](#))

The screenshot shows a detailed timeline dashboard for 'Project Bluebird'. The left sidebar lists project components like 'Operations Product Roadmap' and 'Project Bluebird'. The main area features a large Gantt chart titled 'Actual Completion Timeline' spanning from Q4 2022 to Q3 2024. The chart is filled with numerous tasks represented by colored bars, each with a brief description below it. A legend on the right side identifies some of these tasks.

The screenshot shows a chart-based dashboard for 'Project Bluebird'. The left sidebar lists project components. The main area features a pie chart titled 'Dev Stage (% of all Engineering Effort)' with segments for 'In Develop.' (60.8%), 'Analysis' (23%), 'Complete' (13.9%), and 'SME - Fine' (2.2%). To the right of the chart is a card displaying 'Total HC Savings of Comp...' with the value '70.4'.



General Use - Project Management

Rating - 4.7/5 (9,466 reviews)

Views - Checklist, Kanban, Gantt, Calendar, Workload, Mind Map, etc...

Automations - Yes

Maker/Checker - Yes

Dashboards - Yes

Time Tracking - Yes

Pros (GPT Summary)

Users appreciate ClickUp for its extensive customization options and its wide range of features that accommodate various workflow styles, enhancing productivity and project management capabilities.

([The Digital Project Manager](#))

([TechRepublic](#))

Cons (GPT Summary)

Some users find ClickUp's interface to be overly complex and overwhelming due to the plethora of features, which can lead to a steep learning curve and

The ClickUp interface shows a 'Workload' section for three team members: Brendan, Amy, and Maria. Each member has a bar chart showing tasks not done, tasks done, and total time estimated. Below each bar chart is a list of tasks categorized by status: Ready, In Progress, and Review. The overall interface is clean with a light blue and white color scheme.

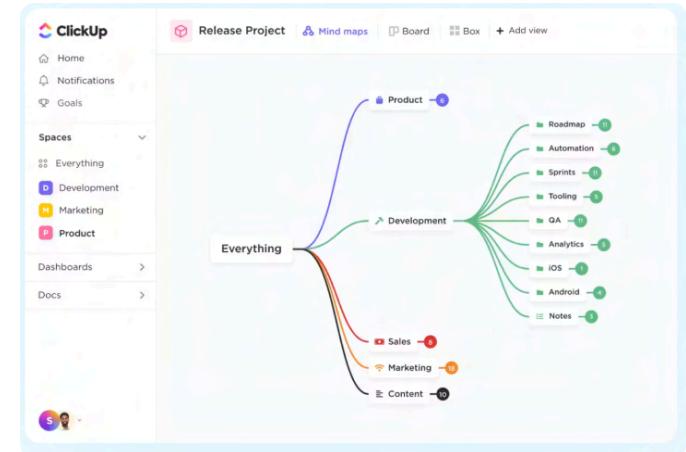
The ClickUp interface shows a Gantt chart for a project timeline from April 20 to May 10. Tasks are represented by colored bars, and each bar includes a small icon and a brief description. The interface includes a sidebar with navigation links like Home, Notifications, Goals, Spaces, Dashboards, and Docs.

The ClickUp interface shows a weekly workload heatmap from February 28 to March 5. The heatmap grid shows assigned tasks for four team members: William, Amy, Maria, and Ivan. Each cell indicates the duration of a task, with some cells showing 'OVER CAPACITY'. The interface includes a sidebar and a top navigation bar with project, workload, board, timeline, doc, and whiteboard tabs.

The ClickUp interface shows a 'Release Project' board with three columns: Ready, In Progress, and Review. Each column contains several tasks related to Stage 1 of the release. A modal window is open over the board, showing a detailed view of a task titled 'Gather key resources' with sub-tasks and a progress bar. The interface includes a sidebar and a top navigation bar.

potential underutilization of its capabilities.

([The Digital Project Manager](#))
([TechRepublic](#))



Airtable

General Use - Projects, Operations, Process Tracking

A screenshot of the Airtable interface for 'Commercial Real Estate Management'. It shows a table with four columns: 'Building', 'Under renovation', 'Planned status', and 'Under construction'. The 'Building' column lists addresses like '300 Peel Street', '540 Mercer Street', etc. The 'Under renovation' column shows '208 Hayden Street' with a status of 'Under renovation'. The 'Planned status' column shows 'Entertainment District' and 'Catskillown' with a status of 'Proposed'. The 'Under construction' column shows '82 Huron Street' and '29 Cheng Lane' with a status of 'Not started'. To the right of the table is a map of Toronto with several location markers.

Views - Table, Kanban, Calendar, Gantt, Timeline

A screenshot of the Airtable interface showing two views. On the left is the 'Employee Directory' view, which is a table with columns for 'Name', 'Title', 'Department', and 'Reporting to'. It lists various employees across different departments like Executive, Sales, Marketing, and SDR. On the right is the 'Corporate Org Chart' view, which is a hierarchical organizational chart showing reporting relationships between employees like Brianne, Kathleen, and Lorraine.

Automations - Yes (up to 50, 25 actions per)

Maker/Checker - Yes (must be created)

Dashboards - Yes

Time Tracking - Plugin

A screenshot of the Airtable interface showing a timeline for 'Launch timelines' from Q1 2021. The timeline includes tasks such as 'Live streaming for mobile' (status: 'Live streaming...'), 'Mobile app crashes' (status: 'Mobile app...'), 'Status updates automation' (status: 'Status updates automation'), 'iOS app design' (status: 'iOS app design'), 'Admin usage rights' (status: 'Admin usage rights'), 'Facebook automations' (status: 'Facebook automations'), and 'Mobile signup form' (status: 'Mobile signup form'). A color legend at the bottom allows users to 'Record color' by specific color, by view, or by selected field.

Pros (GPT Summary)

Airtable is highly valued for its flexibility and the unique combination of database and spreadsheet functionalities, which support a diverse range of use cases from project management to CRM.

([The Digital Project Manager](#))

([TechRepublic](#))

Cons (GPT Summary)

Critics of Airtable often point to its higher cost, especially at scale, and some limitations in terms of deeper data manipulation and reporting that can be essential for more complex database needs.

([The Digital Project Manager](#))

([TechRepublic](#))

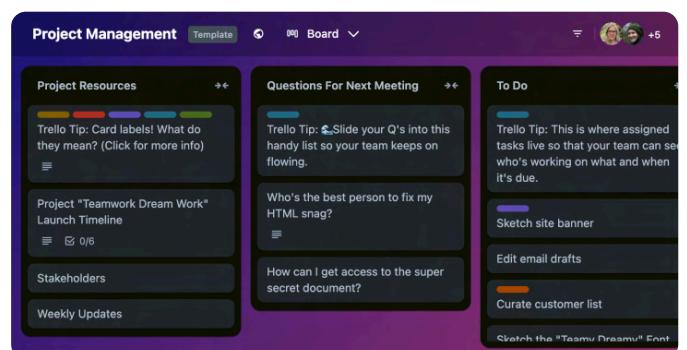
Trello

General Use - Project Management

Rating - 4.4/5 (13,518 reviews)

Views - Kanban, Calendar, Timeline

Automations - Yes



Maker/Checker - Plugin

Dashboards - Yes

Time Tracking - Yes

Pros (GPT Summary)

Trello is lauded for its simple, intuitive kanban board approach that makes task management and project tracking accessible to all levels of users.

([The Digital Project Manager](#))
([TechRepublic](#))

Cons (GPT Summary)

On the downside, Trello's simplicity can be a drawback for teams needing more complex project management tools and deeper integration capabilities without resorting to numerous add-ons.

([The Digital Project Manager](#))
([TechRepublic](#))

A screenshot of a Trello calendar view titled "Event planning". The calendar spans from January to June 2021. It shows various tasks assigned to different team members, such as "Develop master plan", "Cost estimates", "Event date", "Event budget", "Speakers", "Close sponsorships", "Brand and publicity", "Launch web and ticket sales", "Recruit speakers", "Coordinate with suppliers", "Event day execution plan", "Find event streaming solution", "Swap selection and design", "Speaker liaison", "Financial / Administration", "Ramp-up publicity plan", and "Close early bird tickets". The tasks are color-coded by category and some have checkmarks indicating completion.

Create a Rule

Trigger

when a card is added to list "Done" by me

Actions

mark the due date as complete

check all the items in all the checklists on the card

remove all the members from the card

Save

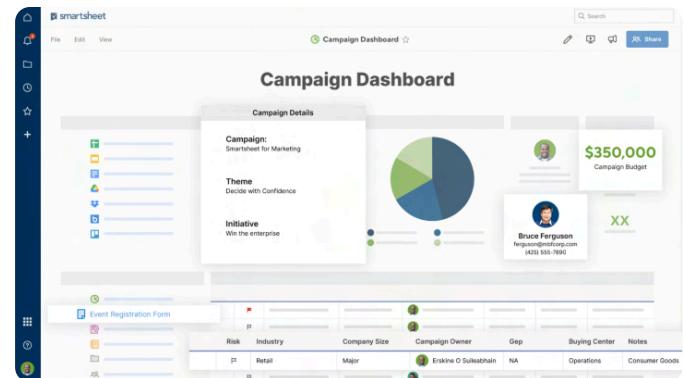
Cancel

Smartsheet

General Use - Project Management

Rating - 4.4/5 (15,036 reviews)

Views - Kanban, Gantt, Table, Calendar



Automations - Yes

Maker/Checker - Yes

Dashboard - Yes

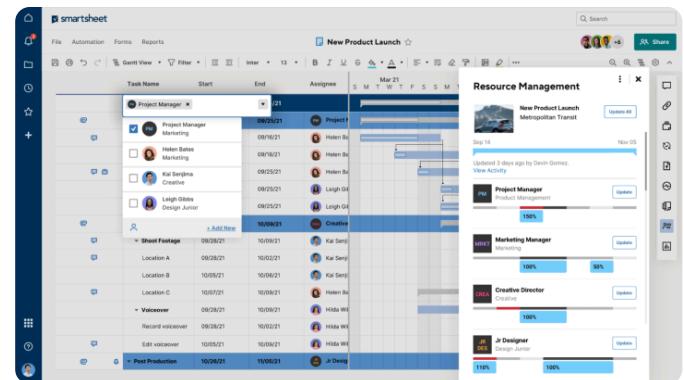
Time Tracking - Yes

Pros (GPT Summary)

Smartsheet receives praise for its powerful capabilities that blend traditional spreadsheet functionality with advanced project management features, making it ideal for complex data tracking and reporting.

([The Digital Project Manager](#))

([TechRepublic](#))



Cons (GPT Summary)

The primary criticisms of Smartsheet include its relatively high cost and a learning curve that might deter less tech-savvy users from making full use of its extensive features.

([The Digital Project Manager](#))

([TechRepublic](#))

Teamwork.com

General Use - Project Management

Rating - 4.4/5 (1,111 reviews)

Views - Kanban, Gantt, Table, Workload

Automations - Yes

Maker/Checker - Yes

Dashboard - Yes

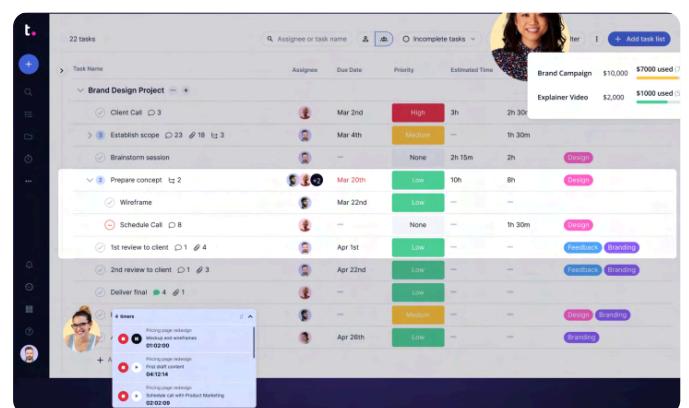
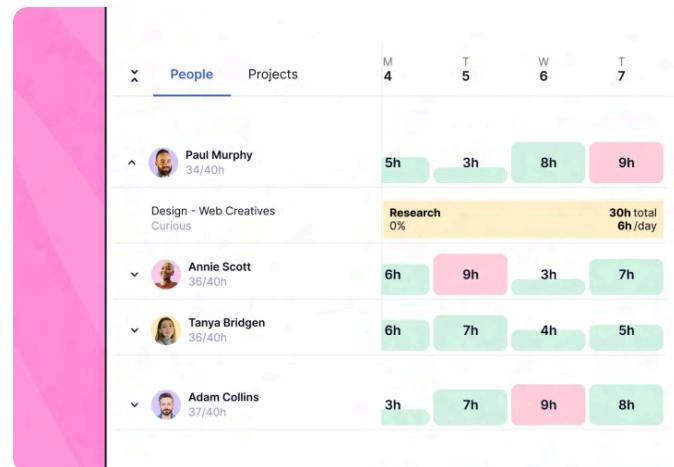
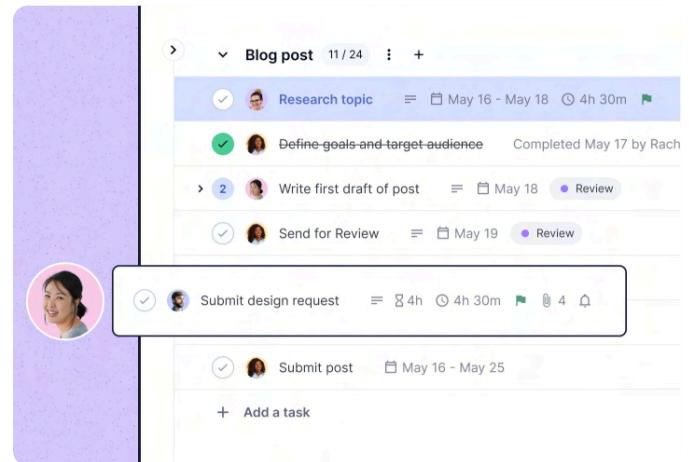
Time Tracking - Yes

Pros (GPT Summary)

Teamwork.com is favored for its comprehensive project management features that enhance team collaboration and organizational efficiency.

([The Digital Project Manager](#))

([TechRepublic](#))



Cons (GPT Summary)

Users often mention that while Teamwork.com is feature-rich, its interface can be cluttered and sometimes unintuitive, complicating the user experience especially for new adopters.

([The Digital Project Manager](#))
([TechRepublic](#))

Asana

General Use - Project Management

Rating - 4.3/5 (9,915 reviews)

Views - Checklist, Kanban, Timeline, Gantt, Calendar

Automations - Yes

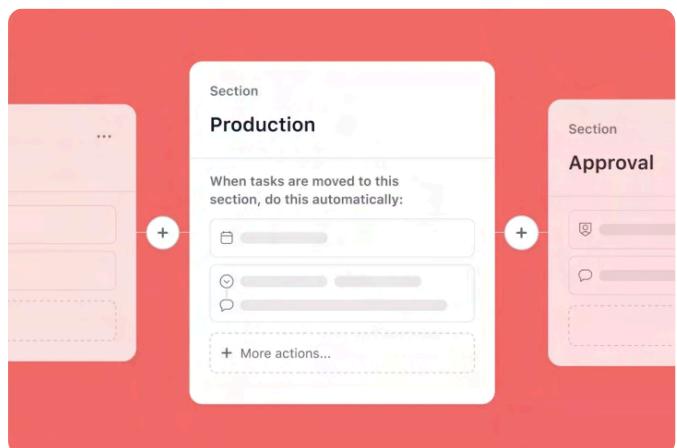
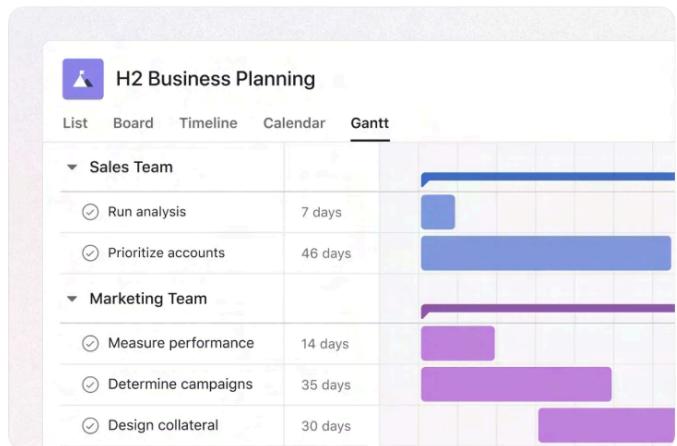
Maker/Checker - Plugin

Dashboard - Yes

Time Tracking - Yes

Pros (GPT Summary)

Asana is appreciated for its well-organized interface and robust task management tools that help teams



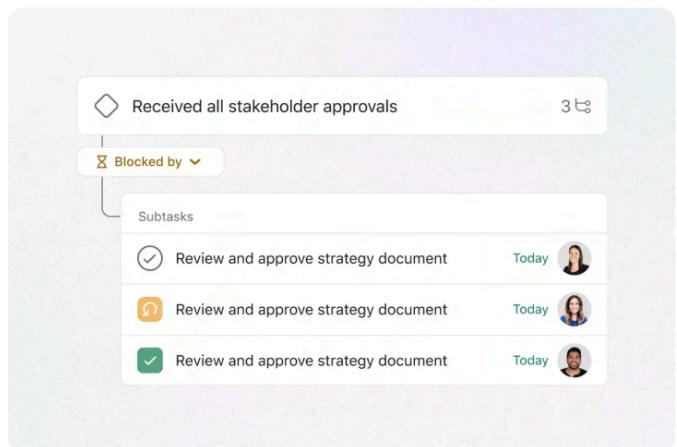
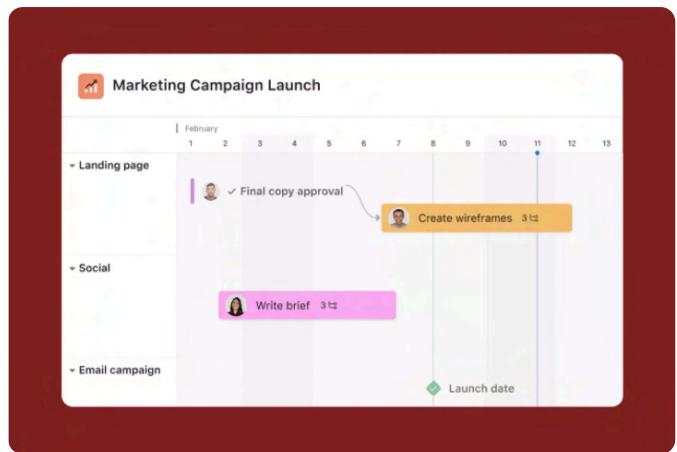
stay on track and communicate effectively.

([The Digital Project Manager](#))
([TechRepublic](#))

Cons (GPT Summary)

Asana's pricing can be prohibitive for smaller teams, and some users feel that its best features are locked behind higher pricing tiers, limiting accessibility.

([The Digital Project Manager](#))
([TechRepublic](#))



Wrike

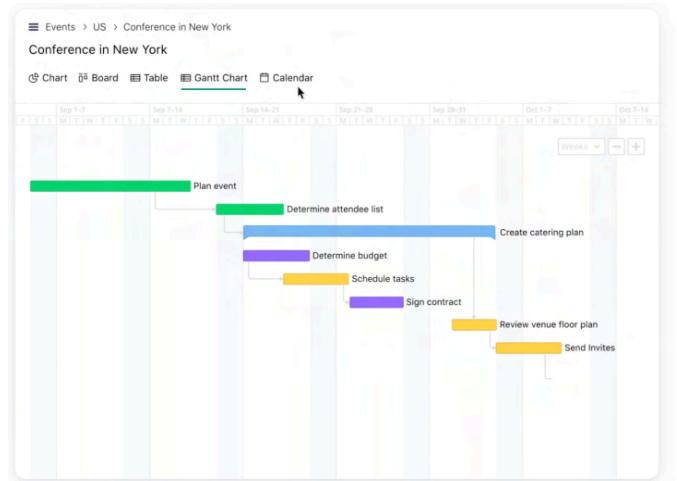
General Use - Project Management

Rating - 4.2/5 (3,666 reviews)

Views - Table, Kanban, Calendar, Gantt, Charts

Automations - Yes

Maker/Checker - Yes



Dashboard - Yes

Time Tracking - Yes

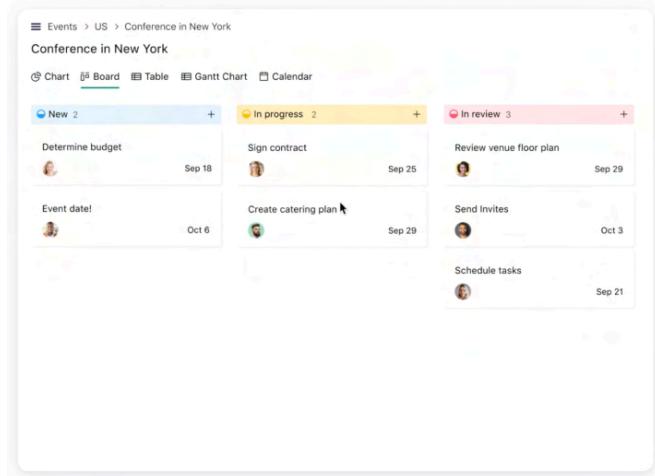
Pros (GPT Summary)

Wrike is recognized for its detailed project management tools and the ability to customize workflows extensively to suit varied business needs.

([The Digital Project Manager](#))

([TechRepublic](#))

#	Title	Status	Assignee	Spent Time	Capacity
1	Conference in New York	In progress	Freja Mcfarland	273h	450h
2	Plan event	Done	Saffa Hamilton	16h	50h
3	Determine attendee list	Done	Shelby Sweet	30h	50h
4	Create catering plan	In progress	Renzo Findlay	60h	50h
5	Determine budget	New	Kobi Amos	70h	50h
6	Schedule tasks	In review	Macaulay Burgess	15h	50h
7	Sign contract	In progress	Jessica Brown	14h	50h
8	Review venue floor plan	In review	Amina Parks	30h 30m	50h
9	Send invites	In review	Monty Harmon	10h	50h
10	Event date!	New	Kenzo Clark	27h 30m	50h

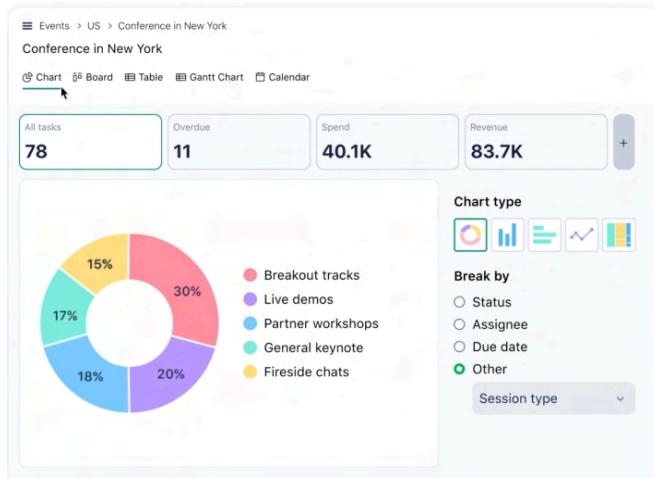


Cons (GPT Summary)

Conversely, Wrike's interface can be complex and may overwhelm new users, while the pricing structure can escalate quickly as additional features are utilized.

([The Digital Project Manager](#))

([TechRepublic](#))



Events > US > Conference in New York

Conference in New York

Chart Board Table Gantt Chart Calendar

Mon	Tue	Wed	Thu	Fri	Sat
1 Create illustration	2	3	4 New Navigation	5	6
8 Announce...	9 Write a Script for a video	10	11 Banners design	12 Draw a storyboard	13
15 Case study	16 Send invites	17	18 Two illustrations for A/B tests	19	20
16 Create a promo LP					

When this happens → then do that

- Apply to Task
- When status changes to Review required
- Add comment or mention
Hi! @AccountingTeam please review this task!

Create

More insights in this project

[View insights](#)



Additional Feedback



Alerts



Task Metrics & History

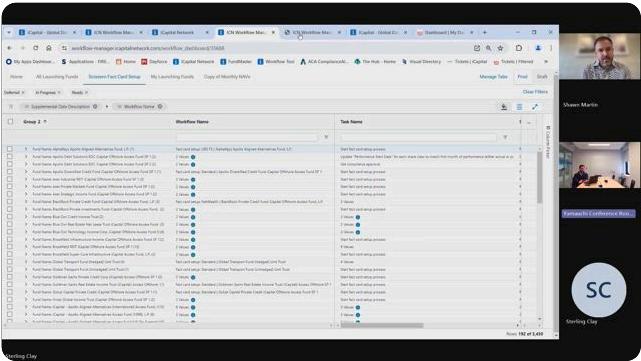
👁 5 views ❤ Like 💬 Comment



Additional Feedback

Participants raised some of the following pain points and ideas for how to improve the dashboard:

- **Performance** was an issue, especially when batching status updates.
- There's a desire for **more workflows to move on-platform**, so it's easier to centralize how workflows are managed, actioned and tracked. In some cases, those might be really small in scope compared to larger streams of work like a fund launch.
- If keyword filtering a column by a string, a participant regularly ran into the default behavior would be to filter by all items in the column but that string - making the number of items in the filter row up top really difficult to work with if they **wanted to clear one out of very many filters**.



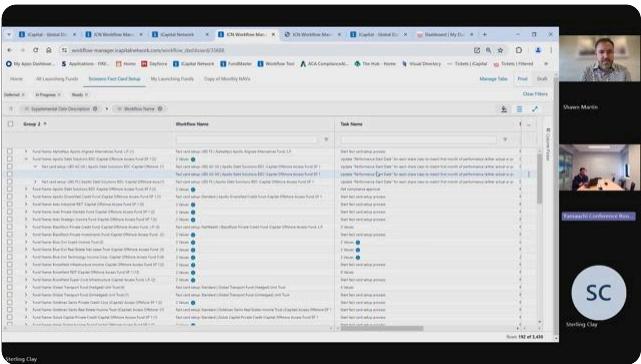
SC-4-24-2024

the functionality and just like the speed for Workflow Dashboard is very, very slow.

Fund Origination 84

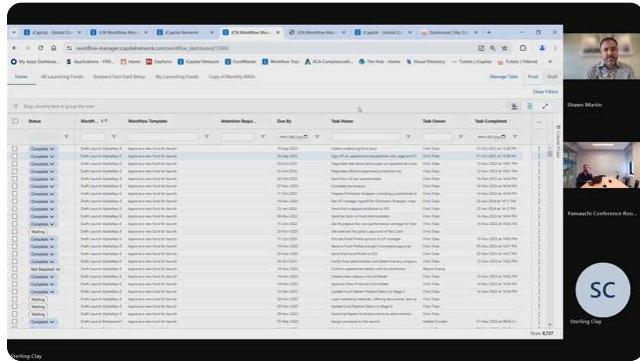
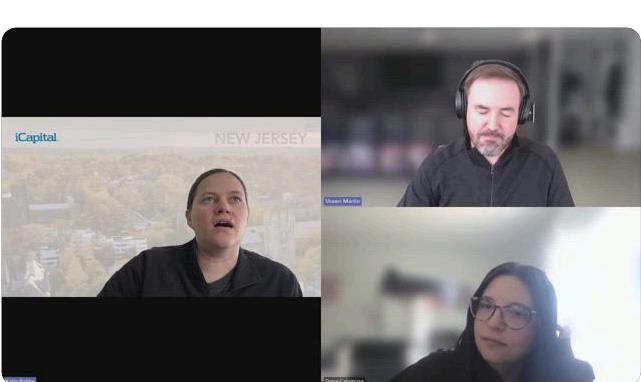
Workflow Dashboard 126

❗ Pain 757



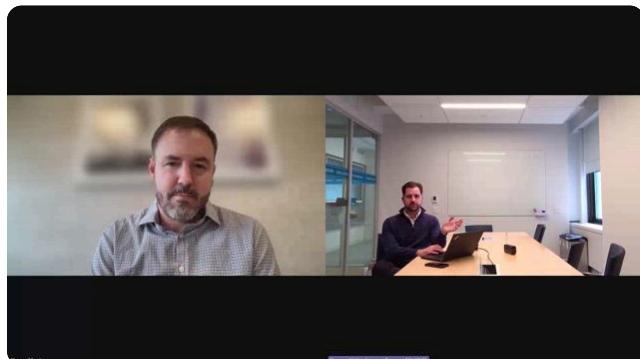
SC-4-24-2024

I'll go ahead and like check off a task for you. Alright. It looks like for you know, so like I'll I'll check this off as complete. It's gonna like sit there and yeah, it took like almost five seconds for that to go to like cycle through the system. But for these, especially for a workload like this where I am checking off



SC-4-24-2024

And then I think lastly, I've often wanted to create small workflows. Ok? I just like have a project and I know there are like 15 things I need to get done. Be great for me to track it. I can't do that in here. That's not really the fault of the system, but I would be able to do that.



SC-4-24-2024

especially with project Bluebird is looking to move some of that work onto the platform. And so there will be more opportunity to build work flows and to automate that. But even though a decent portion (of work) happens off the platform, there definitely are enough interaction points on the platform that I think it would be better to have a workflow for, for a lot of the things I've mentioned.

Fund Origination 84

Opportunity 999+

Workflow Dashboard 126

KB & DC - 4-26-2024

Is there a way to work on like the filtering? I'll show you, I mentioned this before. I talked to somebody before and it drives me nuts. And I think they said like it has to be this way.

Workflow Dashboard 126

Fund Finance 129

Filter 66

Pain 757



JM - 4-29-2024

So the way I look at it is the EIG tasks are broken down into just a couple here (the workflow dashboard). But then within something that maybe you don't see in the workflow manager is all the God knows how many steps that go into launching a fund.

And so I actually keep track of that in an

Excel spreadsheet that I have.

KB & DC - 4-26-2024

So like, let's say I see ACP here but like, let's say it was at the bottom and I didn't see it right? And I start typing in ACP and I'm like, oh, you know what I want this one. OK. This drives me nuts.

Workflow Dashboard 126

Filter 66

Conventions 70

Fund Finance 129

Pain 757

Katie Kelley

Katie Kelley

Shawn Martin

Dana Calenzese

KB & DC - 4-26-2024

But like if I wanted to filter on other things, like I like having these up here so I could easily not these. But like if I filtered on like this, you know, I would want that up here and like, if I wanted to clear this filter now, I can't hit X because it's somewhere in the 848.

Fund Finance 129

Filter 66

�� Pain 757

Workflow Dashboard 126

Recognition 86

More insights in this project

[View insights](#)



Other Workflow Tools

Alerts



Task Metrics & History

👁 4 views ❤ Like 💬 Comment



Final Thoughts

The insights and details provided by participants provided a wealth of information on how teams are or aren't leveraging the Workflow Dashboard in concert with other tools to get their jobs done. Additionally, participants had great ideas on how to simplify the means of picking up, prioritizing and measuring work.

This feedback is instrumental in understanding which enhancements to the Workflow Dashboard might provide the most value, and the details on how our teams would expect and hope they function.

More insights in this project

[View insights](#)





Other Workflow Tools



Additional Feedback



Alerts