Detailed Viability Analysis and Recommendation Excerpt

Background

The CRISP™ Method is optimized to reduce noise inherent in M&A initiatives. One of the ways this happens is by removing the false notion that teams can have actionable responsibilities assigned at that level. With CRISP™, individuals are responsible for producing and consuming deliverables, regardless of their "team" (or Work-stream) affiliation.

The excerpt below answers the question: When adopting CRISP™ what would the Adobe Workfront structure look like where Consumers can tag or subscribe to a deliverable such that the producer (and administrator) had visibility to who needed their deliverable? It is one part of the total recommendation

DVAR Recommendation – Consumer tagging

To implement the CRISP™ requirement in Adobe Workfront where **Consumers can tag or subscribe to a deliverable**—allowing the Producer and Administrator visibility into who needs that deliverable—you can use a combination of **custom fields**, **subscriptions**, and **collaborative tagging**. Here's a step-by-step outline of how this could be structured:

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1. Create Deliverables as Workfront Tasks

- Each **deliverable** should be represented as a Workfront task.

- Assign an **Owner (Producer)** who is responsible for delivering the item.

- Include relevant metadata such as deliverable definition and promised due date.

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2. Enable Consumer Tagging/Subscribing

To allow Consumers to identify themselves as requiring the deliverable, use one of these approaches:

Option A: Custom Fields for Consumer Tags

- Add a **Custom Field** to the deliverable object (task) called "Consumers."

  - **Field Type**: Multi-select dropdown or text field.

  - **Values**: Pre-populate the dropdown with a list of individual names from the Colleague Roster artifact.

  - **Process**: Consumers add themselves to the "Consumers" field when they require the deliverable. NOTE: this happens prior to the CRISP™ Producer/Consumer Review sessions.

  - **Visibility**: This custom field is visible to both the Producer and Administrator, showing a real-time list of who needs the deliverable.

Option B: Task Subscriptions (recommended)

- Consumers can use the built-in **subscription feature** in Workfront to follow a task (the deliverable).

  - This automatically notifies the subscriber of updates, making them actively engaged.

  - Producers and Administrators can view the list of subscribers to know who has an interest in the deliverable.

Option C: Assign as "Reviewers"

- Consumers can be added as **Reviewers** (a Workfront role) on the deliverable task.

  - Reviewers are not responsible for completing the deliverable but are notified of changes and can provide feedback.

  - The Producer and Administrator can view the list of assigned Reviewers.

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3. Visibility for Producers and Administrators

- Use **dashboards** or **reports** to give Producers and Administrators clear visibility into who needs a deliverable:

  - **Custom Report**: Create a report showing:

    - Deliverable Name (Task)

- ▪ Owner (Producer)

- ▪ Consumers (from the custom field or Reviewer/Subscriber lists)

- ▪ Due Date

- ▪ Note: the Workfront conventions of "Status" and "Priority" are expressly not needed and should not be used.

- o **Filters**: Add filters to highlight deliverables with high Consumer demand or nearing deadlines. NOTE: CRISP™ deliverable Impact Scores based on demand and used for sequencing and allocation can be calculated as Workfront custom fields.

- o **Dashboards**: Display this report in dashboards accessible to Producers and Administrators.

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4. Automating Consumer Notifications

- **Custom Notifications**: Workfront's automation tools can trigger notifications for Consumers when:

  - o The deliverable is updated.

  - o The deliverable is marked as complete.

  - o A due date changes.

- **Conditional Alerts**: For example, notify the Producer if more than 5 Consumers are tagged to the same deliverable, signaling higher visibility requirements. NOTE: adding conditional alerts should be carefully considered as it increases maintenance expense and potentially unnecessary messaging traffic.

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5. Collaborative Discussions (Optional)

- Use the **Updates** section of a deliverable task for collaborative discussions. Consumers can comment directly, and the Producer can respond, ensuring alignment without unnecessary meetings.

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6. Scaling for Larger Teams

- For large projects, you can group Consumers into teams or roles (e.g., Marketing, Legal, Finance) using Workfront's **Teams feature**. "Teams" map to the CRISP™ concept pf Work-streams.

- Important: the Workfront ability for Consumers to tag **teams** instead of tagging individuals is strongly discouraged as it de-optimizes communication flow and disconnects the relationship between Consumer and Producer.

Example: Abbreviated Workfront Workflow

1. **Deliverable Creation**: Consumer creates a task titled "Marketing Strategy" and adds their name to the "Consumers" custom field or subscribes to the task.

2. **Producer Assignment**: Deliverables (tasks) are assigned (or selected) by the Producer who is responsible for delivery.

3. **Visibility**: The Producer views the Consumers in the task details or a report.

4. **Completion**: When the task is completed, Workfront optionally sends automated notifications to all tagged Consumers.

This structure aligns with CRISP's™ principles of ensuring clear communication and alignment between Producers (Owners) and Consumers, while leveraging Workfront's robust capabilities to provide visibility and reduce unnecessary noise. Care should be taken when considering whether to use the subscription feature as the potential for added noise in the form of unnecessary messaging traffic is high.

Detailed Viability Analysis and Recommendation can be produced for any technology eco-system and is included when licensing the complete CRISP™ Method. The excerpt above is only one part of the DVAR.