COLLABOSPHERE

TAKE FLIGHT

ENTERPRISE TRACK

THE QUEST FOR LAZINESS

ALEXANDRA BURTON + KEVIN LEWIS | CENTRAL DESKTOP

JASON DIEHL | CBS

Agenda

- How to identify areas of automation

- Explorations (big and small)
  - For the user
  - For the team
  - For the admin

- Q+A

Class
First class

Departure
Santa Monica
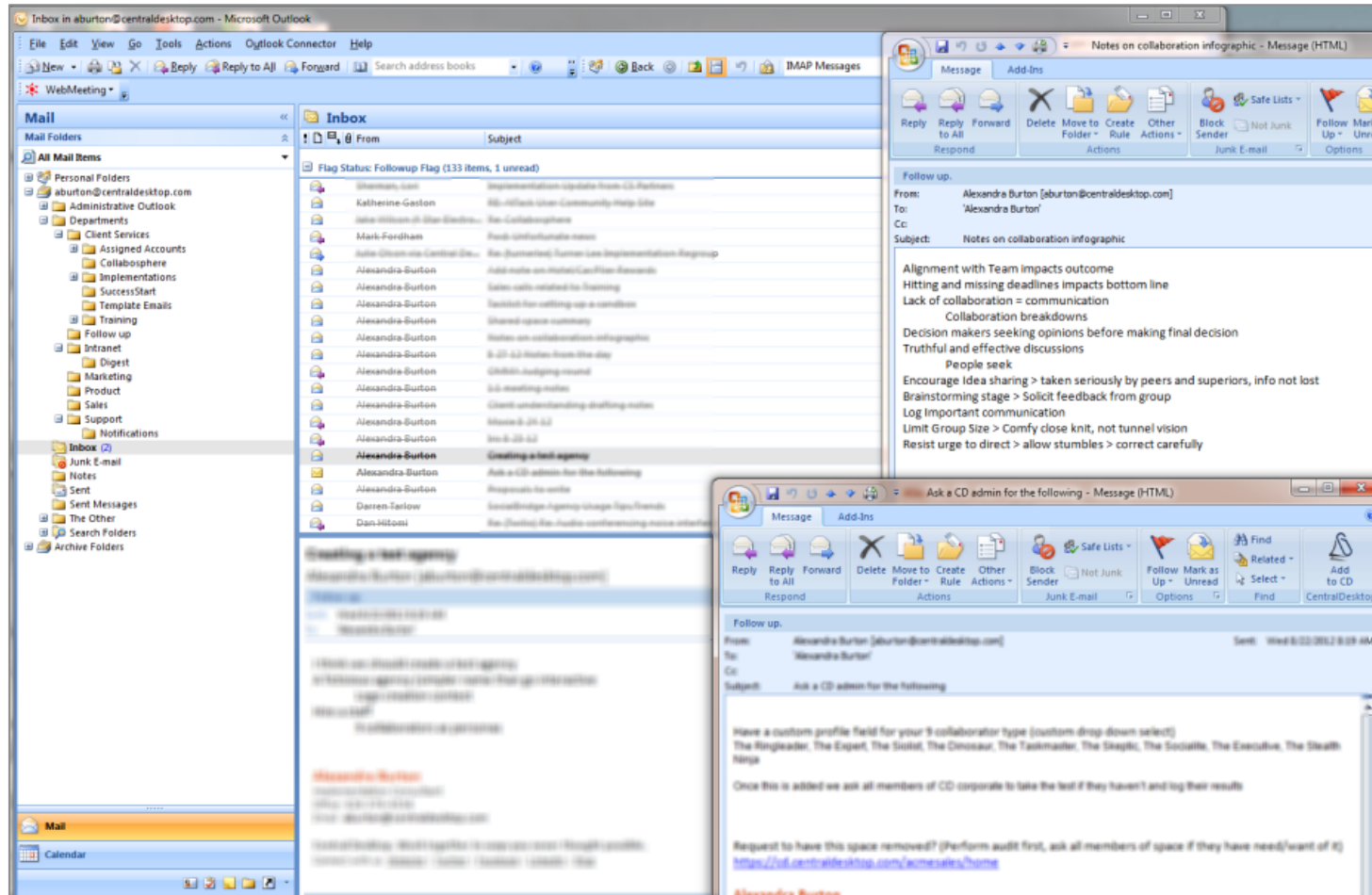
Arrival
Cloud 9

TRIMMING THE FAT

Trimming the fat

- Places to look
  - Your email inbox/sent folder
  - Company setup
    - General tab for feature usage
    - Reports
    - Trending searches
  - Project Management tab

Trimming the fat:
Your email inbox/sent folder

Trimming the fat: Company setup

- General tab for feature usage
- Reports
- Trending searches

Trimming the fat: Project management

Trimming the fat: Questions to ask

- Do I see patterns in the people I work with…in the actions I take…in the information I am getting?
- Are people always asking for clarification?
- Am I always looking for the same thing?
- Do I always send in the same format?
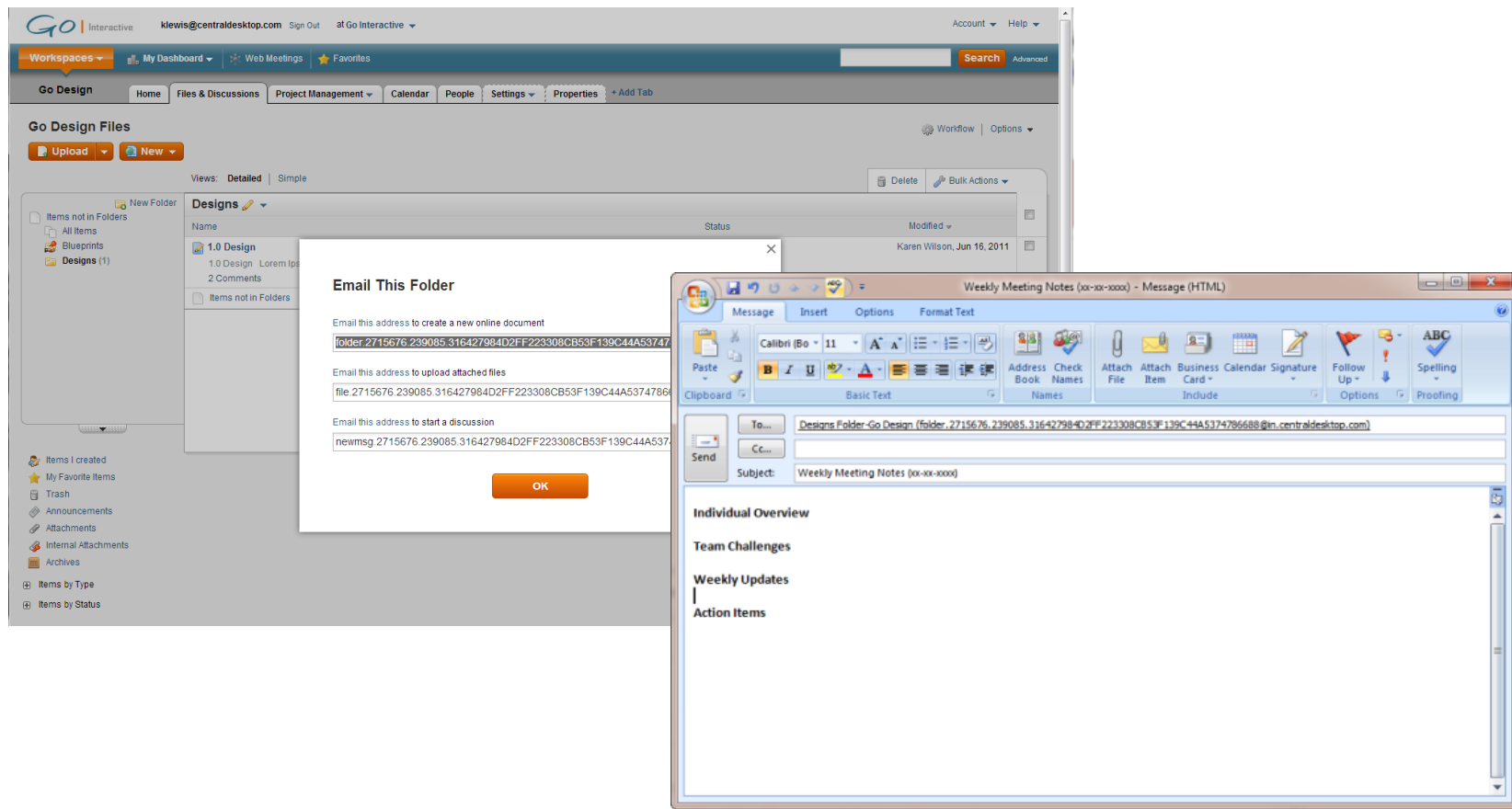- Are my projects structured in the same way?

FLYING SOLO

Flying solo: For the user

- Flex your email muscles (email in content)
  - Email templates
  - Custom contacts for folders
- Make your own mark
  - Using favorites
  - Identifying where you land
- Report on the things that matter
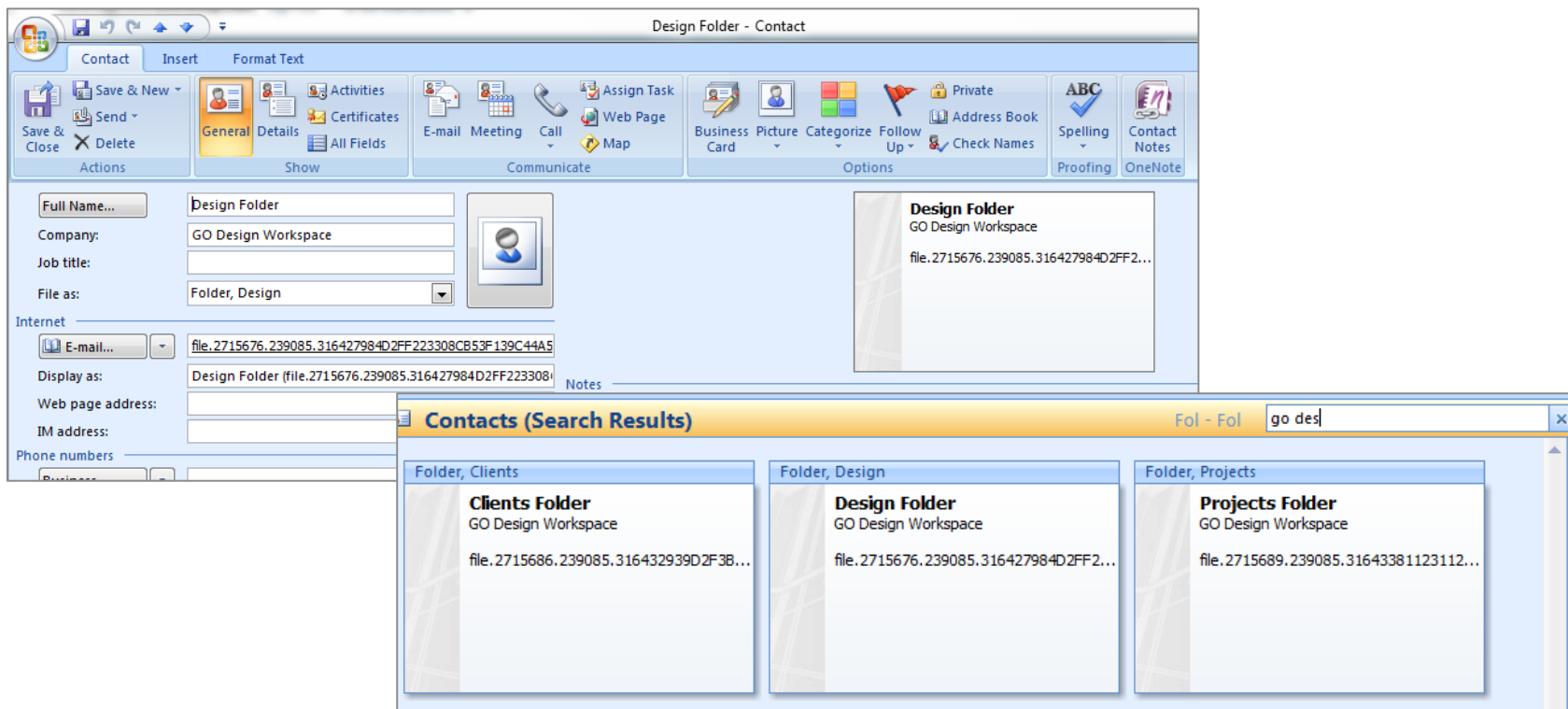 - Custom reports
  - Saved for future use

Flying solo: Flex your email muscles

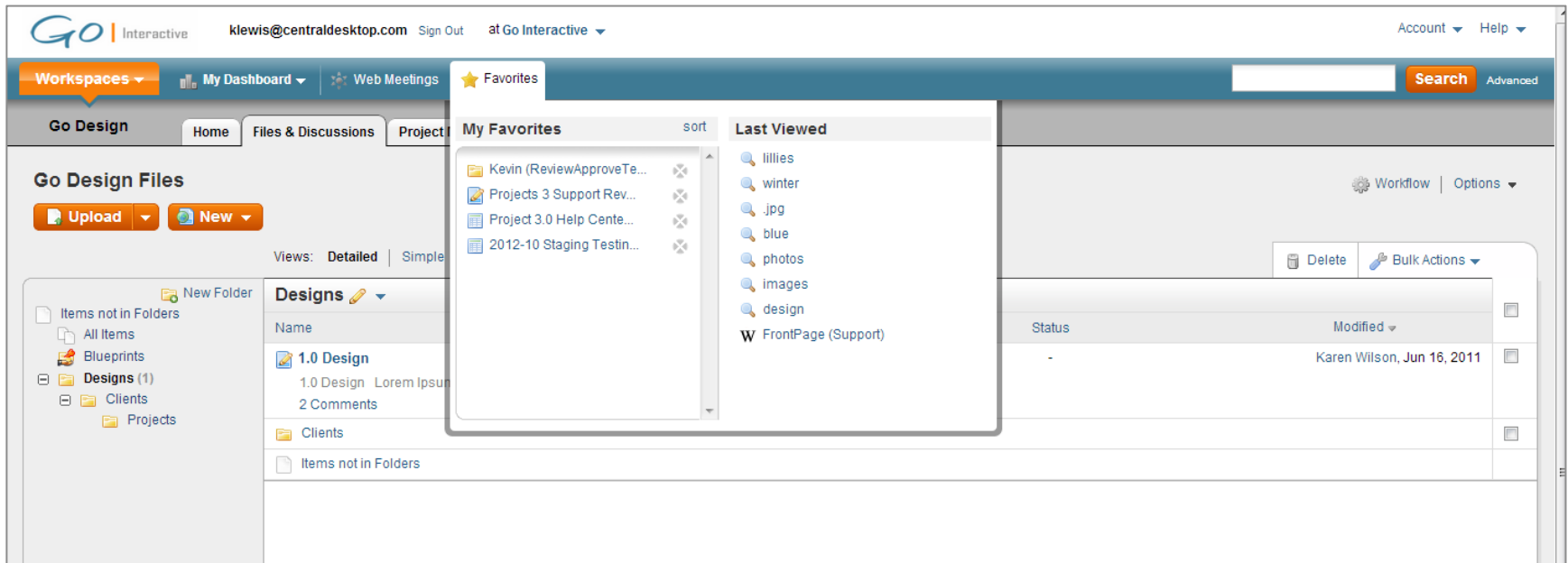## Email templates for email-in

Flying solo: Flex your email muscles

Custom contacts for folders

Flying solo: Make your own mark

- Using favorites
- Identifying where you land

Flying solo: Report on things that matter

- Custom reports
- Saved for future use

THE FLIGHT CREW CAN NOW PREPARE FOR TAKE OFF

The flight crew can now prepare for takeoff: Least common denominator

Workspace templates

The flight crew can now prepare for takeoff: Use Workflow to:

- Send an email notification
- Create a task
- Perform an action

The flight crew can now prepare for takeoff: Workflow automation

- Creating templates that work for you
- Database process notifications
- "File room" maintenance
- File and document approval

Notification

Insert Variable

Select a Database Field ▾   [Insert into Template]

Task Title

New Project Request:###$TITLE### has been ###$ACTIONED### --[###$WORKSPACE_NAME###]

Task Description

This notification has been sent to you because the request for: ###$TITLE### has been ###$ACTIONED###.

Title: ###$TITLE###
Category: ###$CATEGORY_Q6523QM0317264152P###
If Other, list: ###$IF_OTHER_LIST_BP8SL7MB317264153G###
Comments/ More Info: ###$COMMENTS__MORE_INFO_MJ88L27J317264154C###
Elements: ###$ELEMENTS_CA4ZWRCH317264156P###

Please triage this request and assign the appropriate team to begin work.
(Go) Notes: ###$GO_NOTES_K8PH8QDP317264157X###
Creative Director: ###$CREATIVE_DIRECTOR_RBPXX577317264160N###
Team: ###$TEAM_L51EKT1N317264161S###

To view this record click here:
###$URL###

WF Rule: New project Request-Please Follow up

Hearing from Jason Diehl, CBS: Workflow automation

- Identifying the need
- Designing the Solution
- Winning back valuable time

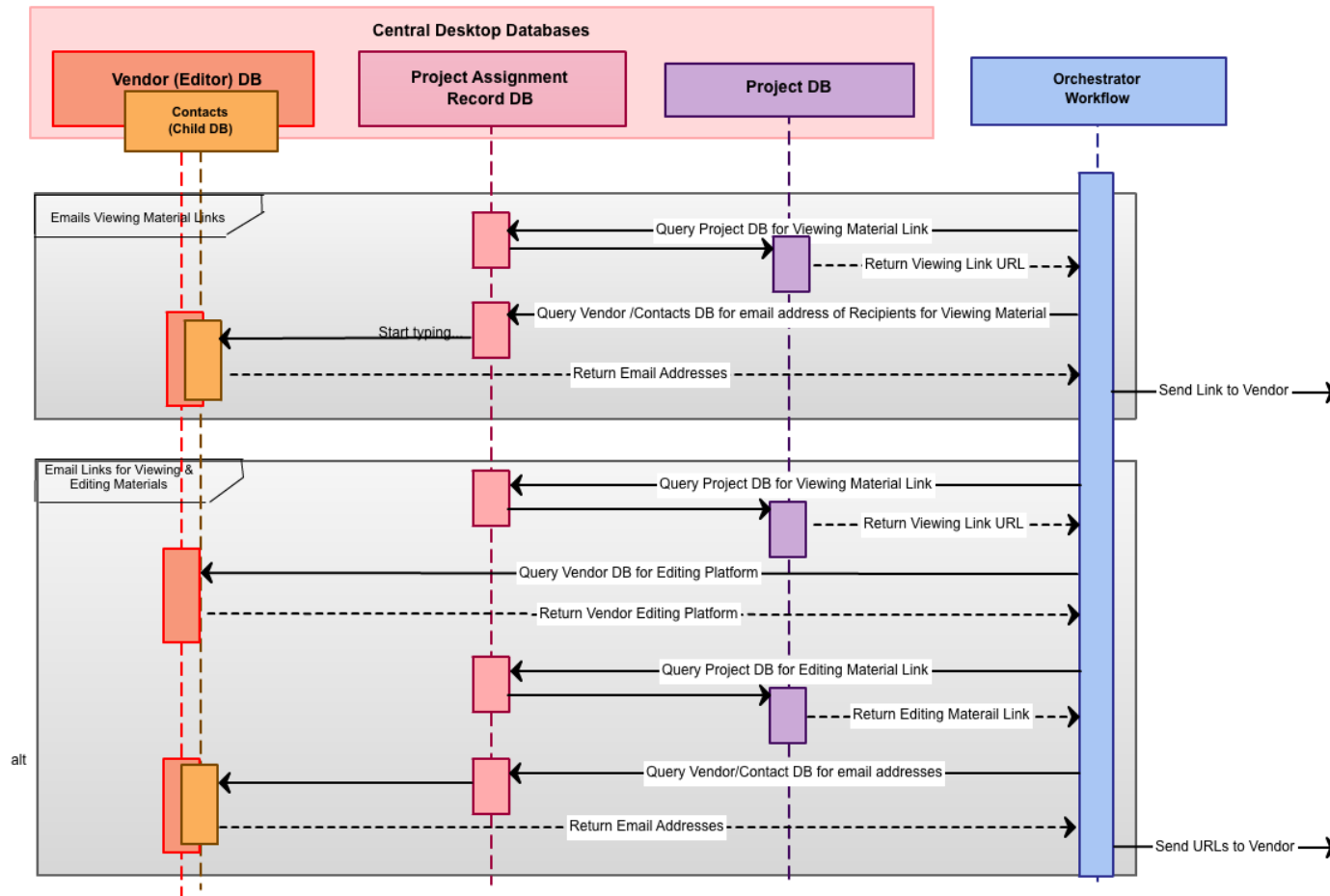#CENTRALDESKTOP

Hearing from Jason Diehl, CBS: Workflow automation

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Hearing from Jason Diehl, CBS: Workflow automation
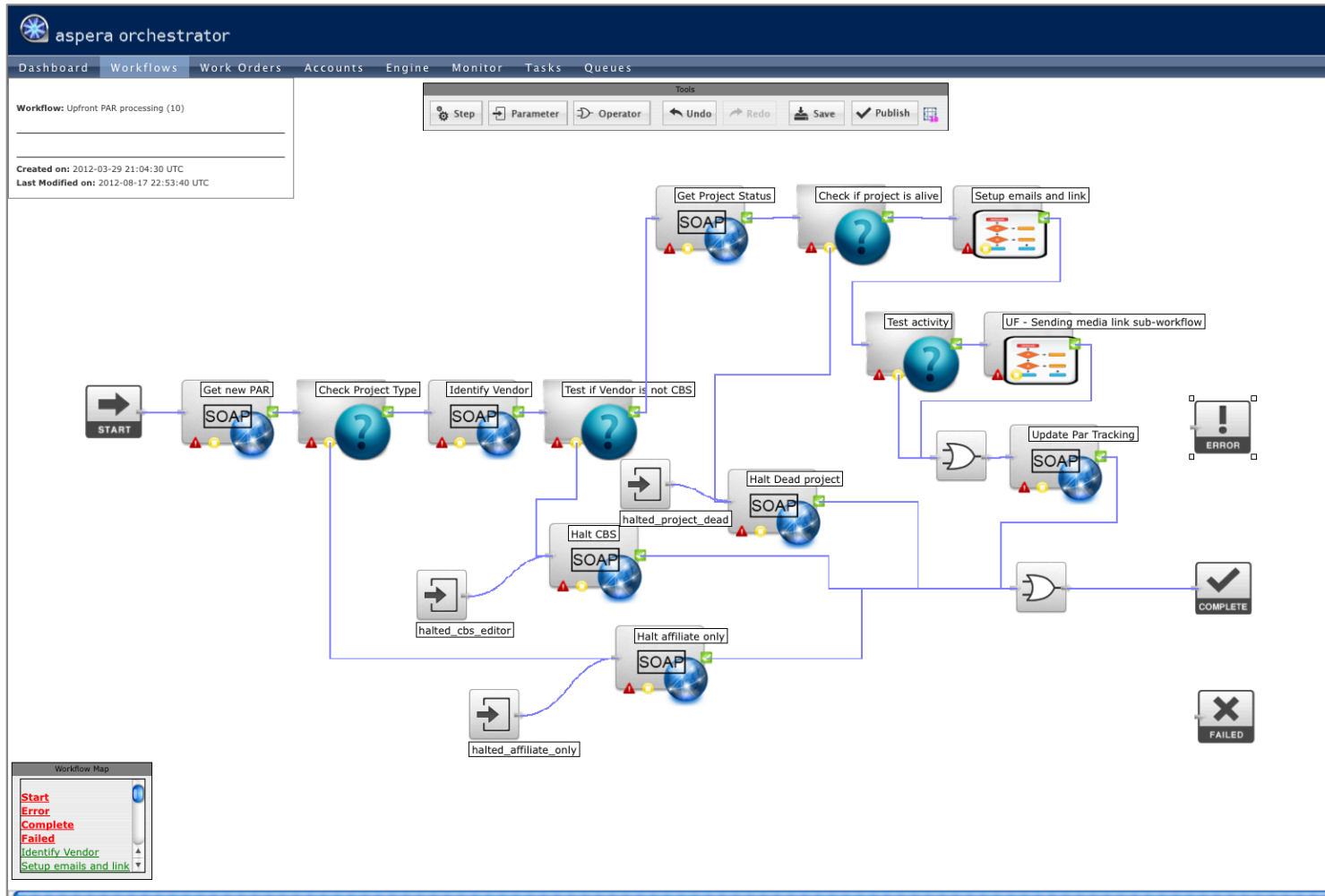
THIS IS YOUR CAPTAIN
SPEAKING

This is your captain speaking...

- Lather, rinse, repeat
  - Task list templates
- Know your audience
  - Custom fields
  - Workspace properties
  - Time tracking
- Less is always more
  - Member groups

This is your captain speaking…
Lather, rinse, repeat

Task list templates

This is your captain speaking...
Lather, rinse, repeat

Task list templates

- Book Review Process
- Design Stages
- Onboarding Process
- Reporting Steps

This is your captain speaking...
Know your audience

- Custom fields
- Workspace properties
- Time tracking

This is your captain speaking…
Less is always more

Member groups
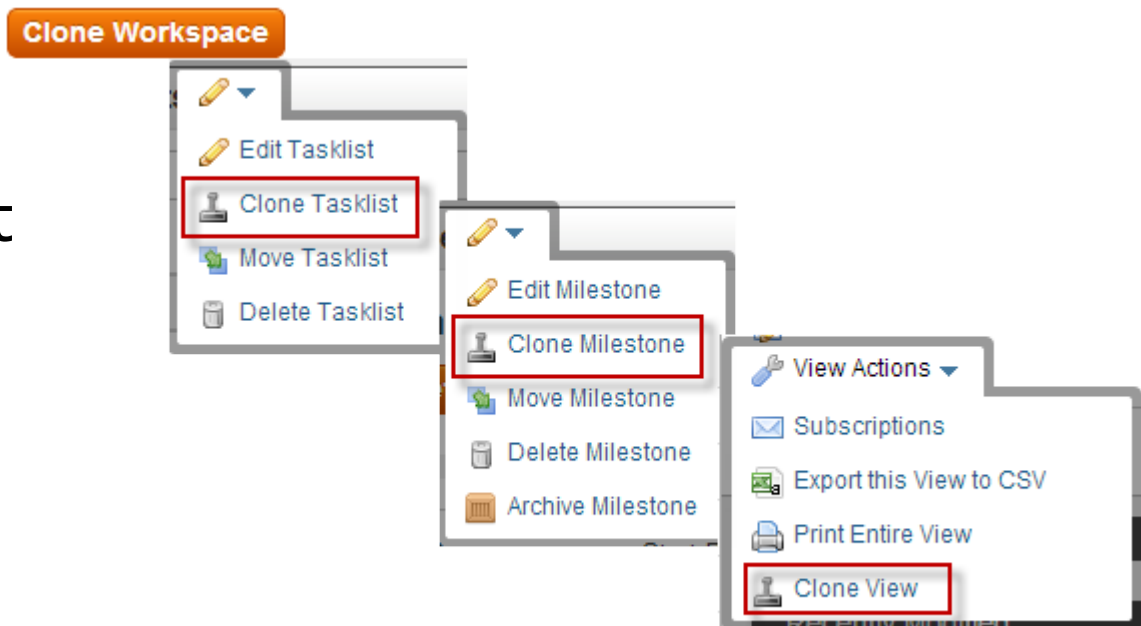
IT'S THE LITTLE
THINGS…

It's the little things…

- Cloning
- Drag and drop
- Email in content

THANK YOU FOR
FLYING WITH US.

GET READY FOR
YOUR NEXT
ADVENTURE

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