Workfront's Power Trio: Connecting Planning, Workflow and Canvas Dashboards

Adobe Workfront Customer Success – March 12, 2026

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This session is being recorded.

Keep an eye out for a follow-up email after the event (from csatscale@adobe.com) with a summary and links to the recording, slide deck, and more.

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Today's Agenda

Successful organizations don’t treat planning, execution and reporting as separate activities—
they connect them.

In this session, join Workfront Expert, **Madalyn Destafney**, as she shares how to leverage Workfront Planning alongside Workfront Workflow to create a connected operating model that moves seamlessly from planning into execution, with real-time visibility through Canvas Dashboards.

This won't just be a high-level demo; we'll get into the how!

Start Time	8:30 a.m. PT/11:30 a.m. ET
5 minutes	Welcome & Introductions
20 minutes	Presentation Slides
20 minutes	Demos
15 minutes	Q&A
5 minutes	Wrapping Up
End Time	9:30 a.m. PT/12:30 p.m. ET

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Available to all customers, you can find or contact us:

- During our free virtual events. View the calendar of Events on Experience League. Register now!
- On Experience League. Tag us on the Community
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Special Guest Star

Madalyn Destafney

Workfront Rockstar

Before we get started

- SO MUCH MORE functionality than shown today
- You'll have more use cases – I know you'll get creative!
- Showing fake data but I use these in real life – Planning, Planning + Workflow, Canvas
- Canvas is in Beta
- Q&A at end

Think of all the things outside of Workfront that reference things in Workfront

Lack of visibility
with no clear view of overall plans and progress, information in multiple tools

Lack of strategic alignment
and inability to trace initiatives back to goals

Poor
decision-making
resulting from fragmented data that lacks context

Hindered collaboration
resulting from siloed workflows

Siloed & Fragmented Work

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Then Workfront Planning joined the chat

Adobe Workfront | System of Record for Work

Planning & Governance

Work & Resource Management

Platform & Features

Workfront Planning

Workfront Planning lets you centralize plans, align those plans to execution, and govern metadata using a flexible operational framework.

Workfront Workflow

Workfront empowers individuals and teams to eliminate work chaos by prioritizing, resourcing, executing, and reporting on work holistically.

Workfront Fusion

Workfront Fusion enables custom workflows and integrations that automatically sync data across any API-based system.

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Example Planning use cases

Use case	Description
Centralized Plan Management & Taxonomy	Centralize plan management with all planning activities and decision-making processes coordinated from a single, central point – ensuring consistency, alignment, and efficiency. Planning lets you go outside of just portfolios, programs, etc.
Initiatives, Goals, etc.	Goals, OKRs, internal initiatives, etc. that you've kept outside of Workfront and can't easily connect to supporting projects.
Lists, 'Non-Project Stuff'	Every org has this – lists/repositories/ongoing things that aren't really projects and may never be. Agendas, reference info, ad hoc metric-tracking, a place for brainstorming, etc. Get up and running without a custom form.

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High-level demos only go so far

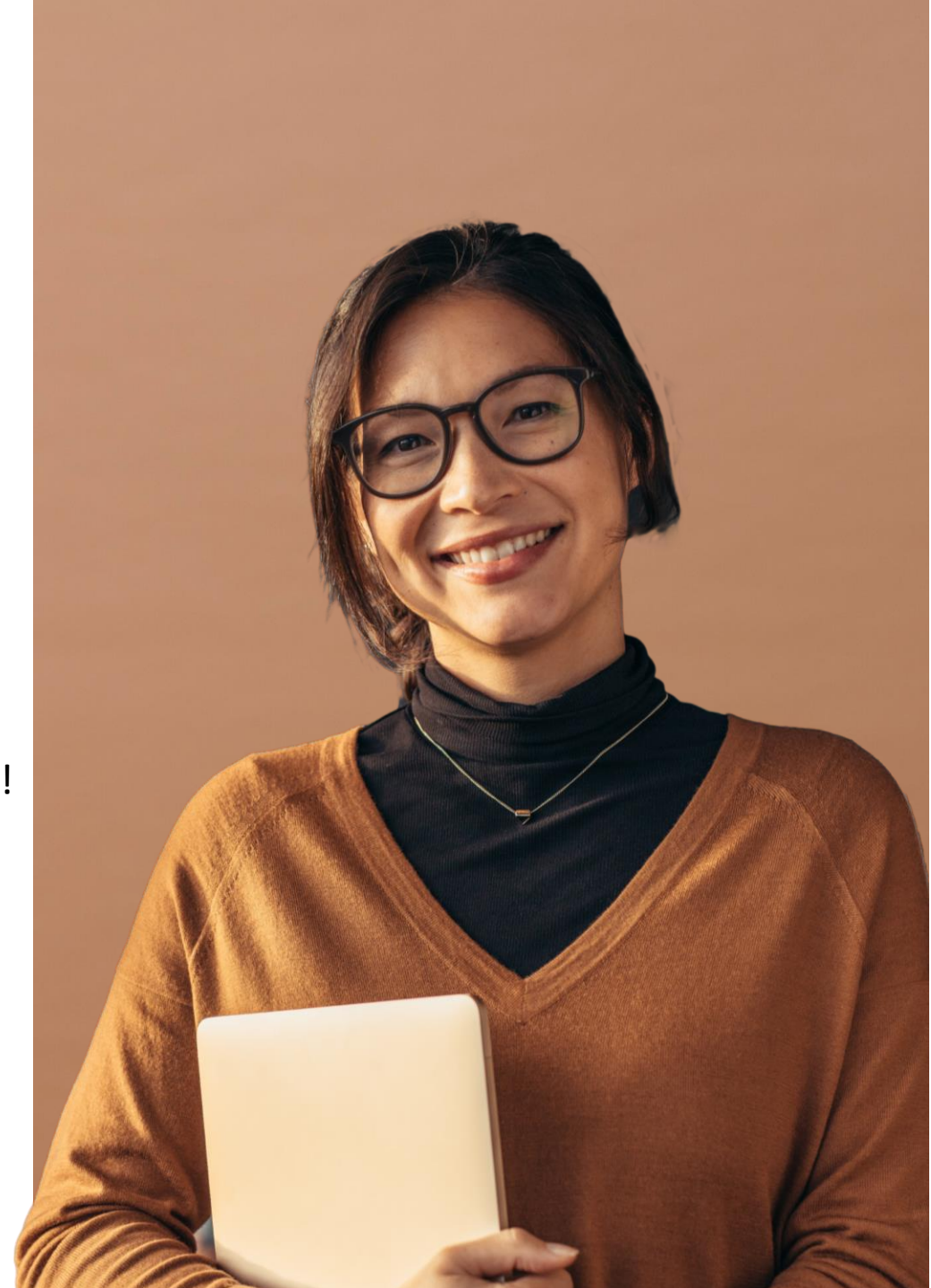
Let’s get into HOW to connect Planning to Workflow and how you can use Canvas to visualize data.

We’ll go over how to:

- Connect a Workflow project* to a Planning record
- See them connected from within Workflow & Planning
- See hierarchy & record data pulling into connected projects
- Use Canvas for visualizations on Planning or Workflow data – or both!

Planning > Workflow > Canvas

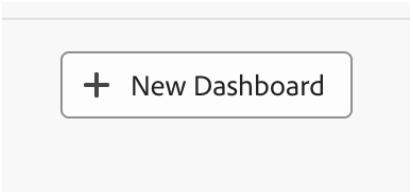
*You can connect to more than just projects.



Additional Resources

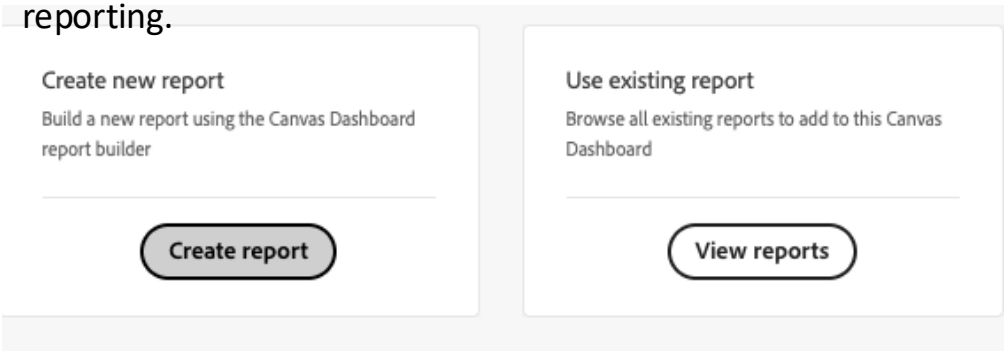
How to start a report in Canvas (enroll in beta first)

1. Dashboards > Canvas Dashboards > New Dashboard in upper right

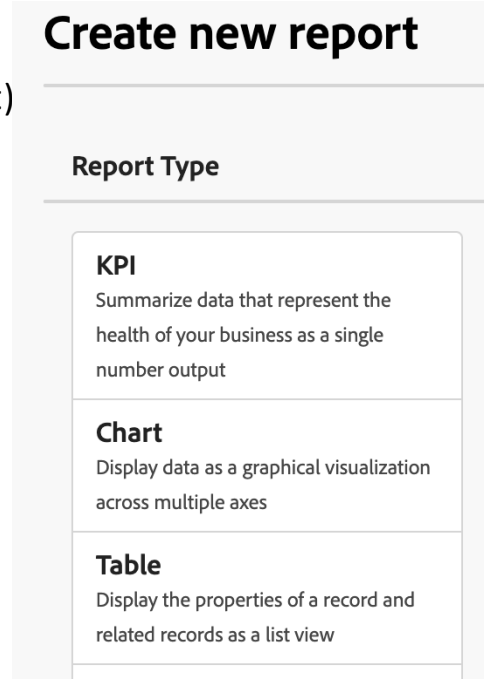


2. Name dashboard > Create

3. Click Create report option for Canvas report. Use existing report option means you can bring in an existing 'Classic' report into your dashboard as is. You're able to have a Canvas dashboard with some reports built in Canvas, some pulled in from Classic reporting.



4. Select report type > Create (upper right)



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Resources

Planning

- Planning Article Index
- Planning Video Tutorials
- Create WF Objects from Planning as you Connect them to Records
- Manage Record Connections from Workfront Objects
- Configure Adobe Workfront Planning Automations
- Get Started with Adobe Workfront Planning
- Workfront Planning API Basics
- Create & Manage a Request Form in Planning
- Planning Object Limits
- Create Workspace Hierarchies
- Cross-Workspace Record Type Overview
- Create Records by Important CSV/XLS File

Canvas

- Canvas Dashboards Overview
- Canvas Dashboards Beta Information
- Canvas Dashboards Video Tutorials

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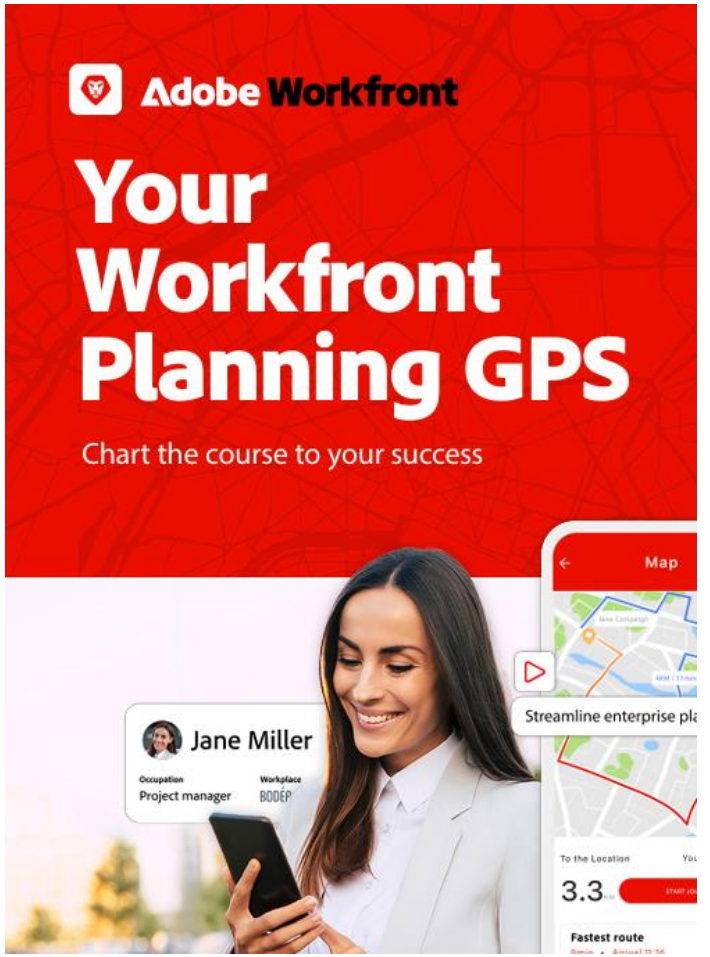
Open Q&A

Workfront Planning Resources

Looking for more info on Workfront Planning? Check out these resources:

- Upcoming Event: March 12, 2026
  - Workfront's Power Trio: Connecting Planning, Workflow and Canvas Dashboards
- On-demand Event Recordings
  - The Relationship Builder: How Syracuse University leverages Workfront Planning to Connect Work - December 9, 2025
  - From Vision to Value: Workfront Planning Release & Roadmap November 10, 2025
  - Workfront Planning, Reimagined: SNHU's Creative Use Cases August 28, 2025
  - Workfront Planning: The Smart Start – Building Your Base Implementation July 31, 2025
  - Summoning Success: Unlocking the Latest in Workfront Planning June 26, 2025
  - Start Fast, Scale Smart: Activating Team-Level Success with Workfront Planning May 28, 2025
  - Chart Your Course to Success with Adobe Workfront Planning March 14, 2025
- Documentation: Workfront Planning Best Practices
- Guidebook: Your Workfront Planning GPS
- Release info: Workfront Planning release activity



Training Videos

- Adding Planning to your instance (License plans and such)
- Creating a Workspace (Getting started with the foundation for Planning)
- Create and Manage a Record Type
- Create and Manage Table Views

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FREE Events for Workfront System Administrators

All events are published to the Events page on Experience League. Check back often for updates and to register.

- March 12 at 8:00 a.m. PT – Workfront's Power Trio: Connecting Planning, Workflow and Canvas Dashboards
- March 17 at 8:00 a.m. PT – Admin 101: Getting Workfront Data
- March 19 at 8:00 a.m. PT – Rethinking Resource Management the Agile Way at Advisors Excel
- March 24 at 9:00 a.m. PT – Admin 101: Bring Your Workfront Questions
- March 25 at 9 a.m. PT – Fusion Decoded: Part 2 – Let's Start Building
- March 26 at 9:00 a.m. PT – Understanding Unified Approvals: Direction, Reporting, and What's Next
- April 9 at 8:30 a.m. PT– Adobe Workfront Second Quarter 2026 Release Webinar

Have a topic you'd like to see added to the list? Send us an email at csatscale@adobe.com and we can make arrangements to get it in the lineup for Q2+!

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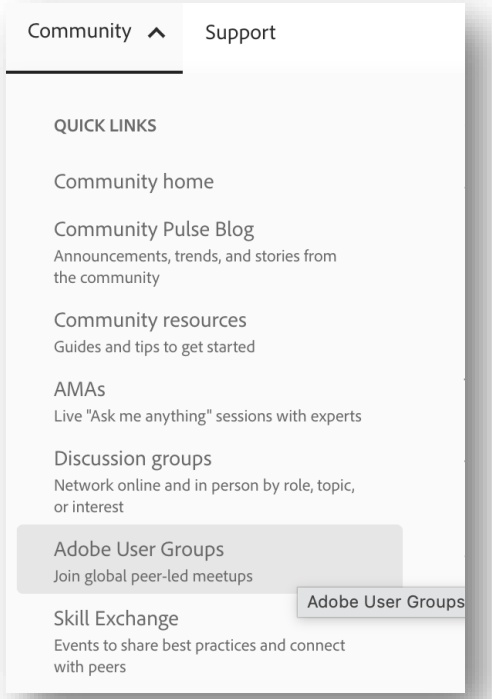
Workfront User Groups (WUGs)

Workfront User Groups (WUGs) are your chance to connect in-person and virtual with other Workfront customers!

Now accessible via the Community dropdown on Experience League, WUGs are customer-led meetups intended to help individuals succeed with using Adobe Workfront. Join your local chapter today!

Don't see your city or region listed? Apply to start a new chapter by emailing Julie Wilson at juwilson@adobe.com.



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Adobe Summit

Adobe Summit is taking place at The Venetian Resort Las Vegas, April 19-22, 2026.

The 2026 Session Scheduler is live! Sessions and labs fill up VERY fast and are available on a first-come, first-served basis, so register early and snag your top session picks before spots run out.

IMMERSE YOURSELF WITH ALL THINGS WORKFRONT @ SUMMIT

- Sign up for the preconference trainings ($)
- Take FREE certification exams with a full-conference pass
- Attend the customer and partner-led Skill Exchange sessions (filter for Session Type = Skill Exchange)
- Check out the latest product demos at the Workfront booth and maybe connect with a Product Manager!
- Network with other Workfronters at Summit via the GroupMe app – more info coming soon!
- Stay in the know via the bi-weekly Summit blog on the Experience League Community

Still making the case to attend Adobe Summit? Download the convince your boss letter to support your request.

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