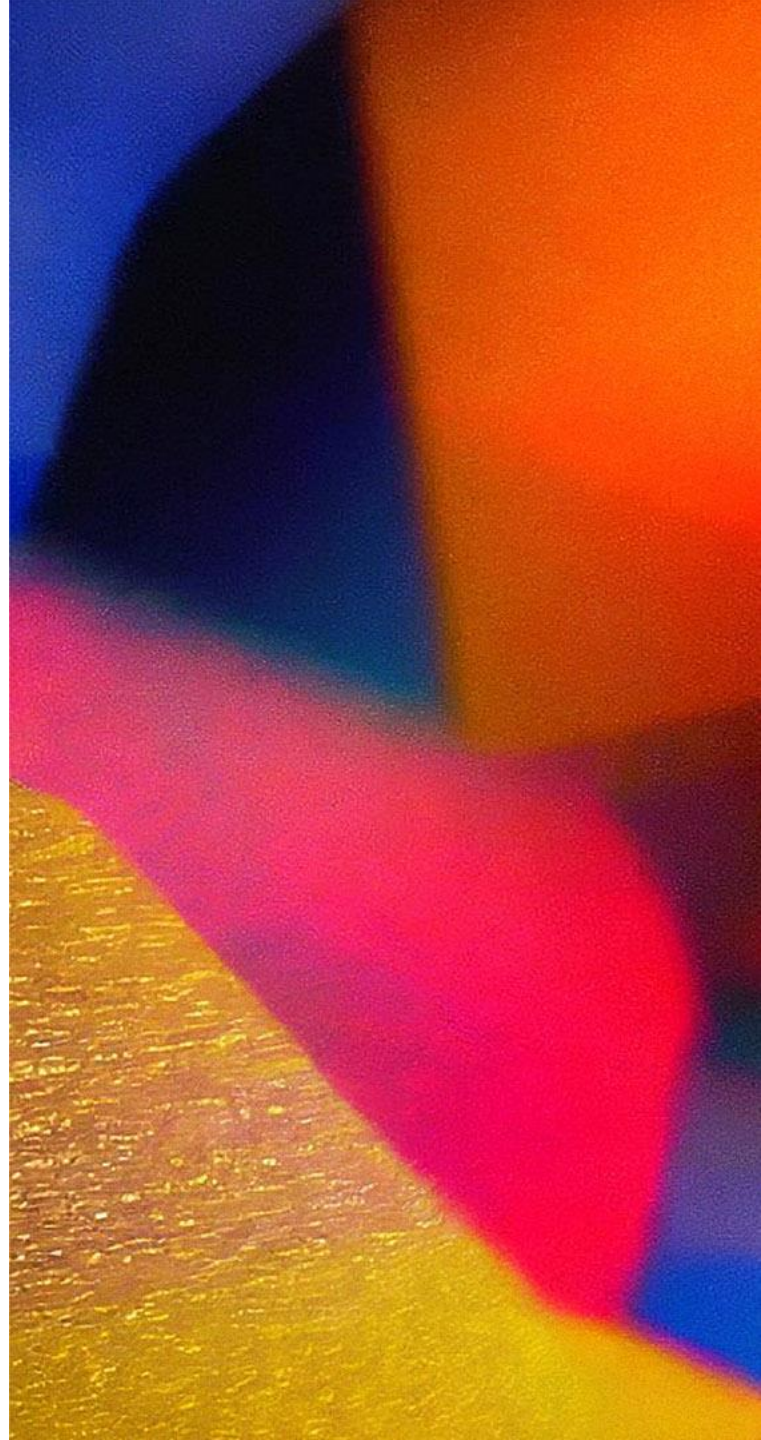
Workfront Planning: From First Build to Team Collaboration

November 3, 2026

Adobe

Customer Success | Digital Experiences



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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Agenda

Turn your planning ideas into actionable, shared views. In this hands-on workshop, explore the Solution Architect skill, AI and Designer tools, and Planning MCP tools. Learn to create timeline views from tables, use Timeline View enhancements, organize work with swimlanes, and share views with your team. Whether you're getting started or building on an existing setup, bring your use case and questions for guidance on your next steps.

Start Time	8:00 a.m. PT/11:00 p.m. ET
2 minutes	Welcome & Introductions
60 minutes	Workfront Planning Presentation + Demo
25 minutes	Q&A
3 minutes	Survey, Upcoming Events
End Time	9:30 a.m. PT/12:30 p.m. ET

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Introductions



Elizabet Chichyan

Product Manager, Adobe



Nichole Vargas

Sr. Customer Success Manager

Experience League: @NicholeVargas



Leslie Spier

Customer Success Manager

Experience League: @LeslieSpier

Serving all customers, you can find or contact us:

- During our free virtual events. View upcoming events on Experience League.
- In the Experience League community.
- By emailing us at csatscale@adobe.com.
- By connecting with us on LinkedIn.

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Setup & Configuration

Solution Architect skill · Planning MCP tools · Document ingestion

Set up and configure Planning using Workfront Planning Solution Architect Skill

Available in the **Adobe Skills Marketplace** | Works in ● Claude ● GitHub Copilot ● CX-Coworker

github.com/adobe/skills/tree/main/plugins/workfront/skills/wf-planning-solution-architect

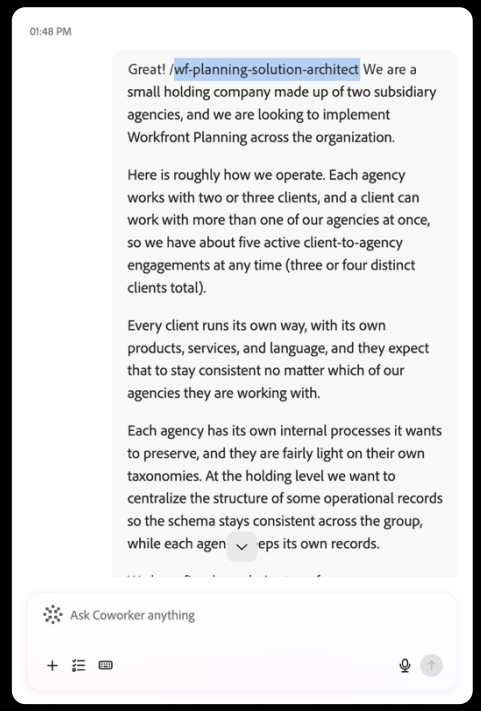
1 Ask

Auto-loads the skill and explains Planning best practices



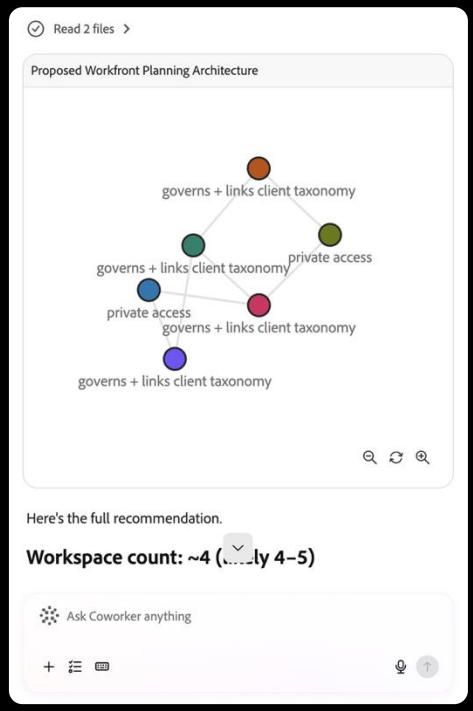
2 Describe

Share how your business operates, in plain language



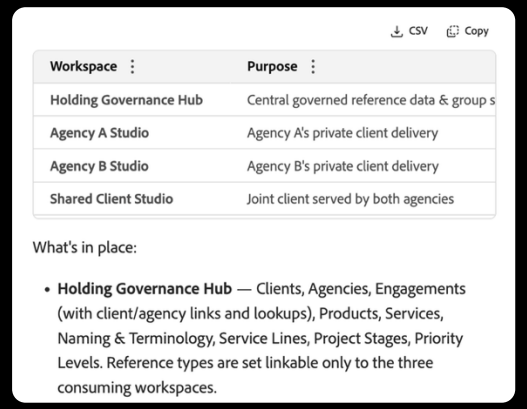
3 Design

Proposes the architecture: workspaces, links and access

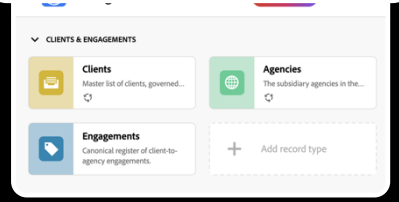


4 Build

Creates the workspaces, record types, links and views



Built in Workfront Planning



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How it unlocks Admins to do their “Jobs to be Done” Agentically

01

Set up, design and configure Planning to fit their business

A customer who just bought Workfront Planning can stand up a workspace shaped around how they actually operate.

02

Analyze the impact and cost of change

Read the system to understand how a change affects the whole organization.

03

Analyze an existing configuration

Review it for best practices, antipatterns, and more.

04

Understand usage against limits

Customers can ask how their workspace usage compares to our recommendations and limit caps.

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Analyze an existing configuration for best practices, antipatterns, and more

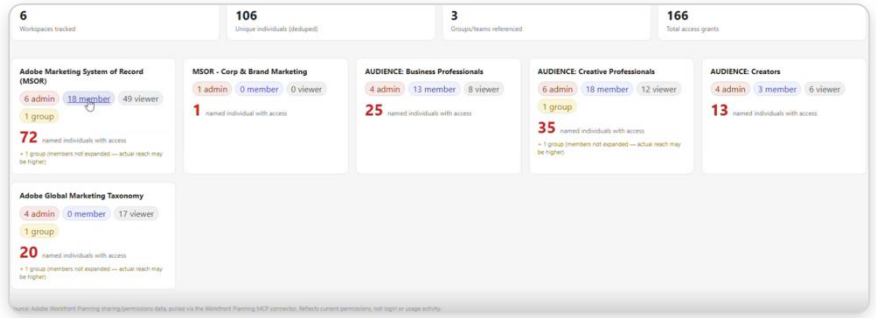
Admin clean-up: Find access and configuration clean-up opportunities

The same scan shows who can access each workspace and which connections are outdated or conflicting, so admins get a clean-up list instead of auditing workspace by workspace.

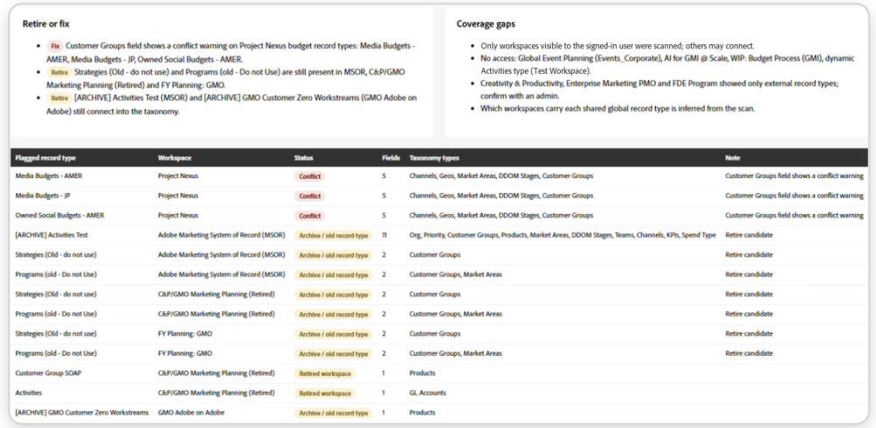
What the skill can surface

- Who has access to each workspace
- Access grants to review
- Conflict warnings to fix
- Old connections to retire

1 Who has access to each workspace



2 Connections to retire or fix



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Planning MCP tools

Tools your AI platform uses to find, create, update, and delete Planning items for you

What's available

- Workspaces
- Record types
- Records
- Fields
- Views
- Templates
- Search & utilities

Read and write

Read tools are on by default

Write tools stay off until your Workfront admin turns them on in System Preferences

The agent always acts with your Workfront account, access level, and permissions.

How to install

1. **Enable**
   Your Workfront admin turns on MCP tools in System Preferences.
2. **Connect**
   Add Adobe Workfront as a connector in Claude, ChatGPT, Copilot, or any MCP-compatible platform.
3. **Sign in**
   Use your Adobe ID and choose your Workfront instance.

MCP server URL

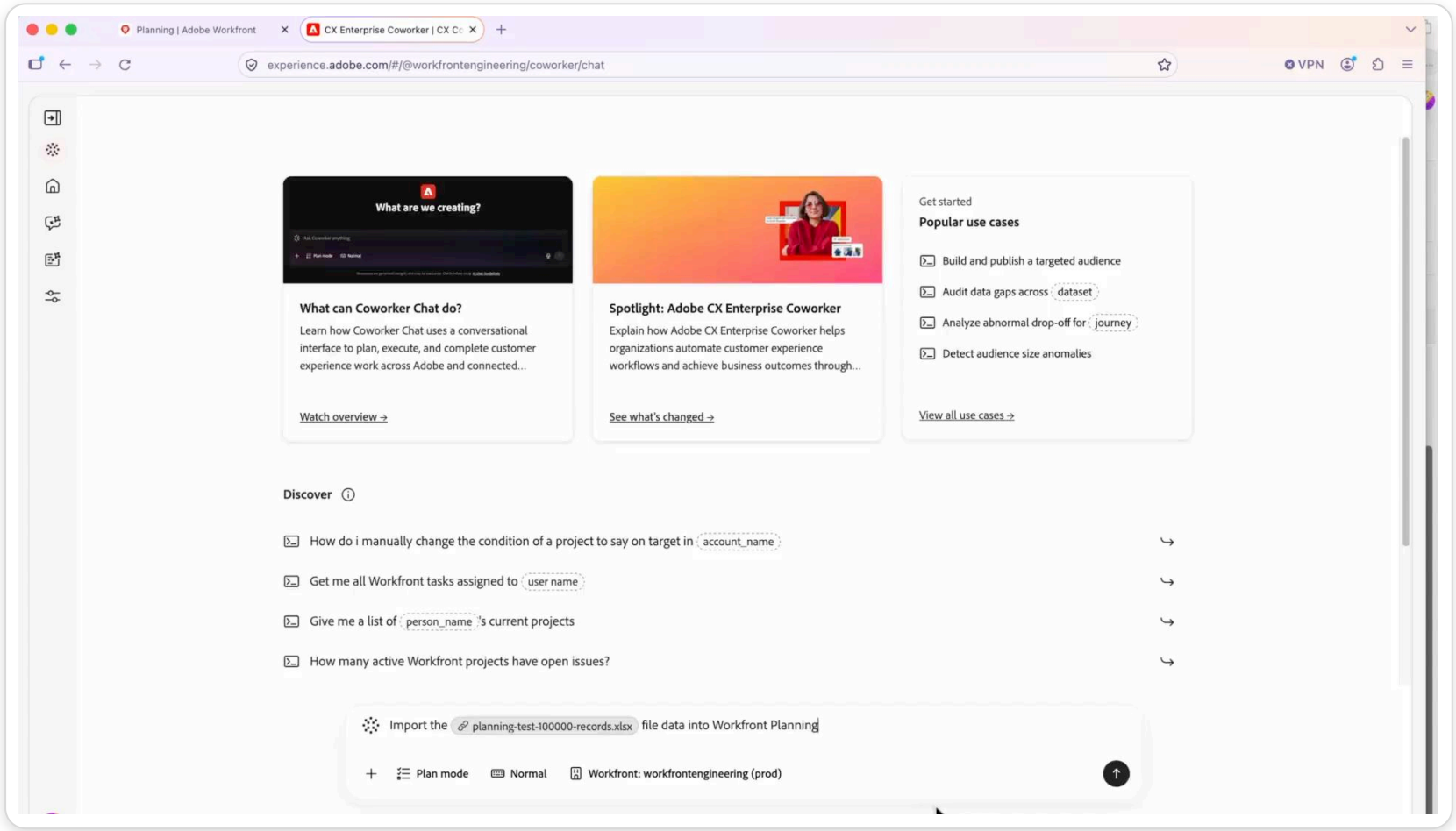
https://mcp.workfront.adobe.com/mcp/v1/workfront

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Ingest your current documents and files for easy setup and migration to Planning

From file to workspace: Bring your spreadsheets into Planning without mapping every field



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Build your view

Swimlanes · Fiscal calendar · Sorting · Sharing

Build your own views: How to create a Swimlanes view to track your roadmaps

Swimlane layout

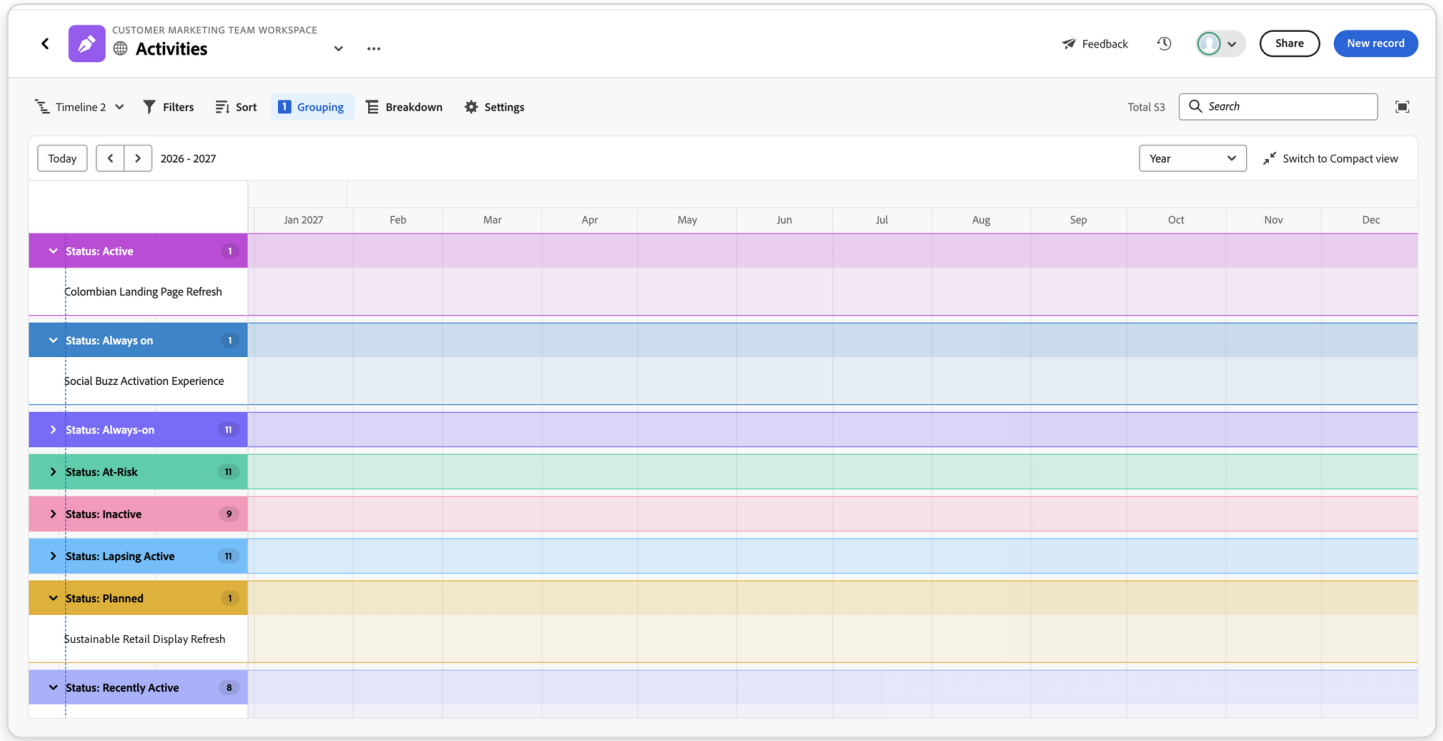
Dedicated horizontal rows with sticky labels, so you can track overlapping campaigns and initiatives.

Groupings & filters

Up to 3 hierarchical groupings in a stacked or swimlane layout, plus custom filters and color-coding.

Drag-and-drop updates

Drag records between lanes to instantly update dates, assignments, or classifications.



Set it up

1. Open a Timeline view of your records
2. Click Grouping and pick up to 3 fields
3. Under Layout, select Swimlane
4. Color-code lanes in Settings

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Set up your organization calendar using fiscal weeks and labels

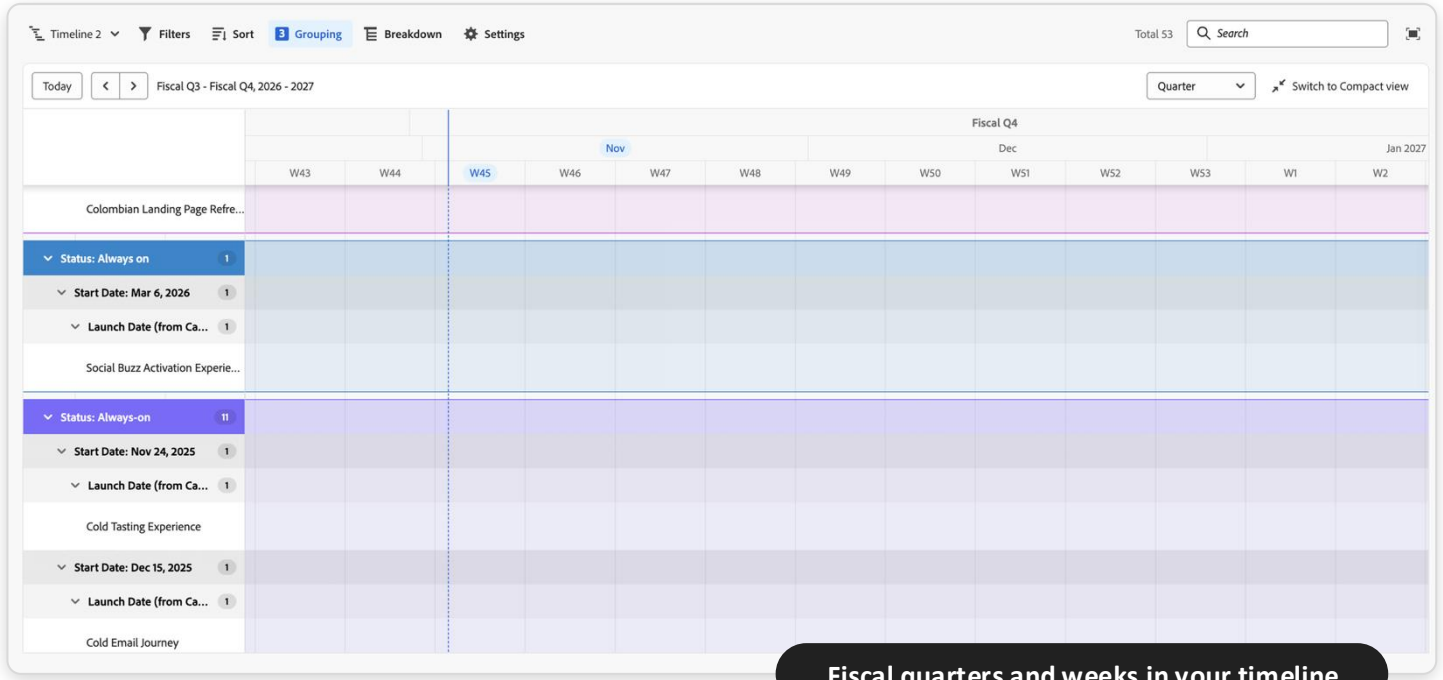
The challenge

> *"Our company has a non-standard fiscal year, so reporting by calendar year or quarter doesn't work for us. We also track campaigns by week, so the week is our working unit."*

The solution

Set up custom quarters and fiscal weeks once, and they automatically appear in your Planning timeline views.

A Workfront admin sets this up in Setup. Without it, timelines show classic quarters.



Fiscal quarters and weeks in your timeline

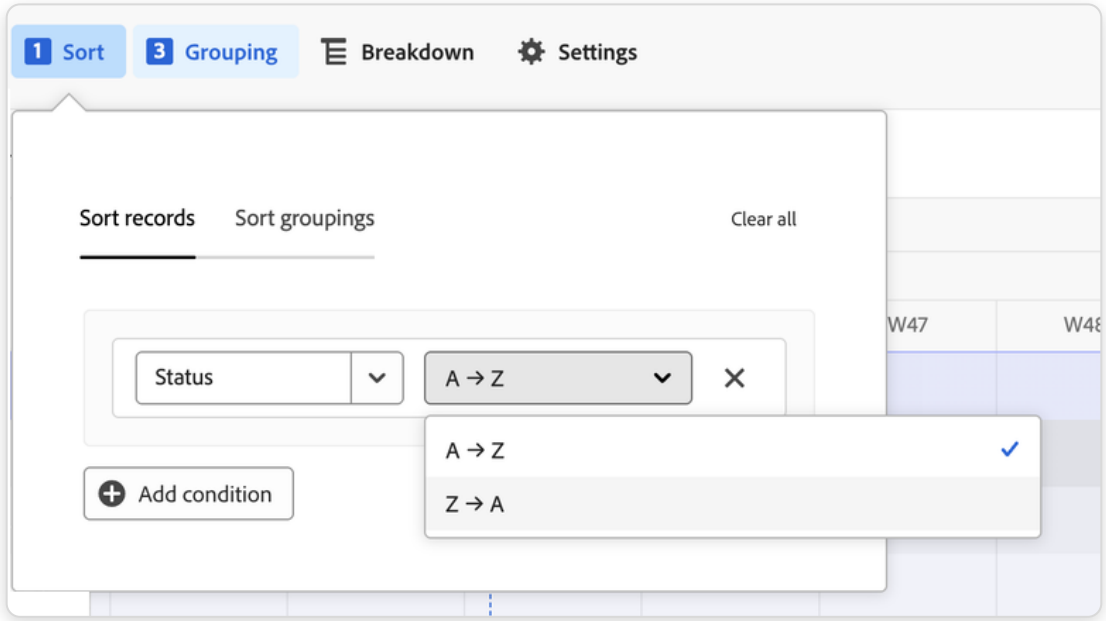
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Build your view: Sort your campaigns and activities based on your priorities

Sort records and groupings: Click Sort in the timeline toolbar to put your top priorities first

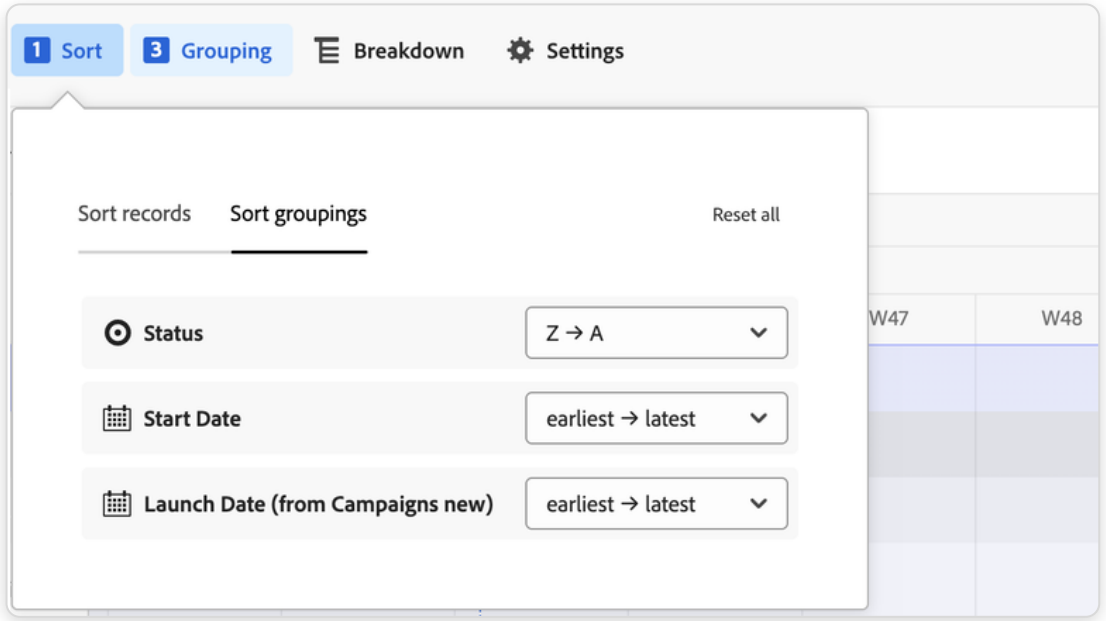
Sort records

Order records by any field, such as Status A → Z or Start Date earliest → latest. Add conditions to refine the order.



Sort groupings

Choose the order of your groupings, such as Status Z → A, so the lanes that matter most come first.



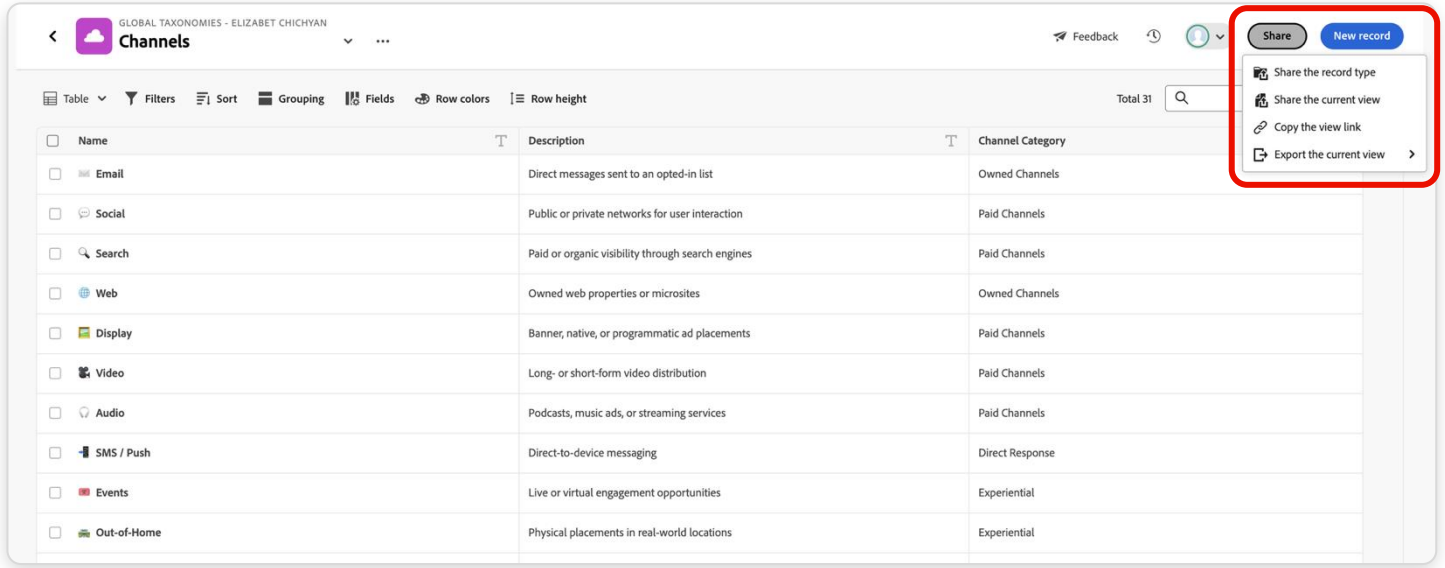
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Share your views with your teams

Real collaboration starts when teams work together

Invite more teams to see the work you've created in Planning, and let them build their own views as well.



View sharing

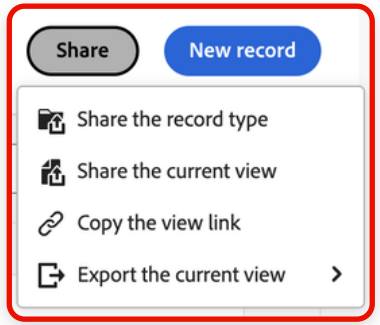
Give people, teams, or groups View or Manage access, or share publicly with an expiring link.

Record type sharing

Share a record type with people, teams, or groups in Workfront, up to their workspace access.

How to share

1. **Click Share** in the top-right corner.
2. **Choose** Share the current view or Share the record type.
3. **Add** people, teams, or groups and set their access.



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Q&A

Bring your use case and questions for guidance on your next steps

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Agenda

Setup & Configuration

01 Workfront Planning Solution Architect skill

02 Planning MCP tools

03 Ingest your documents and files

Build your view

04 Swimlanes in Timeline view

05 Fiscal quarters and weeks

06 Sort records and groupings

07 Share your views with your teams

Wrap-up Q&A, bring your use case, and guidance on your next steps

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Event Feedback

Before you go, please take less than a minute to share your (anonymous) feedback on today's event via this short survey.

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Resources & Updates

Upcoming Events, Latest News, and More

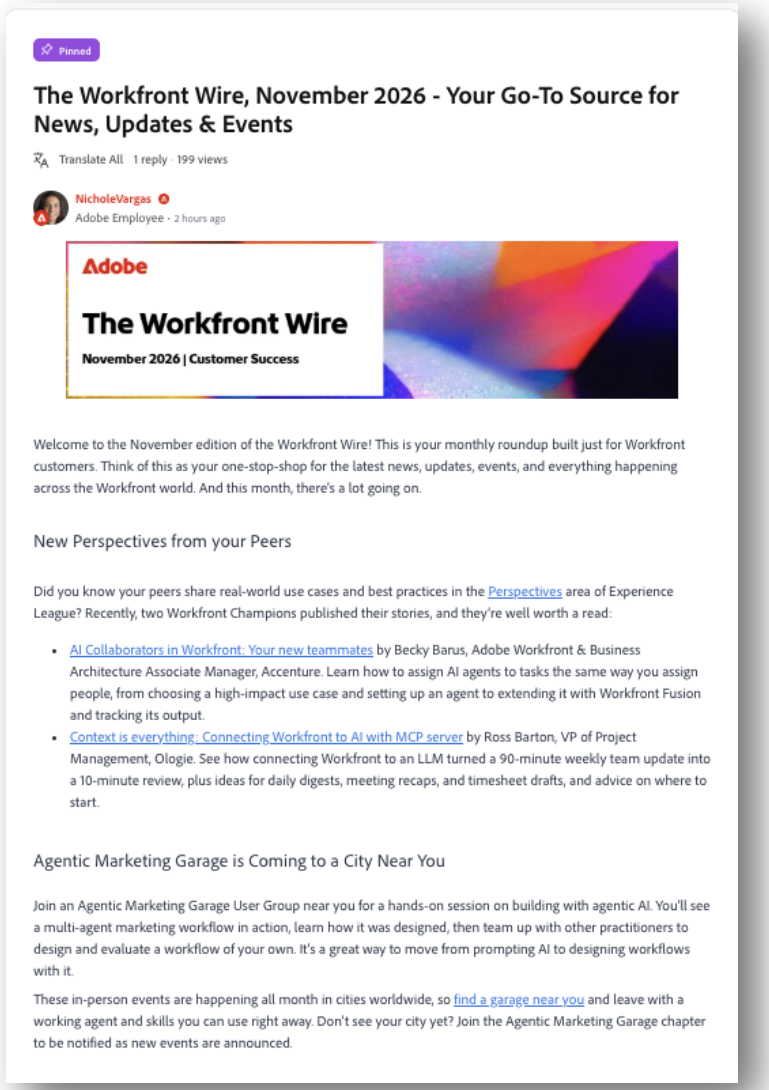
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The Workfront Wire: November Edition

The November edition of The Workfront Wire is now live on the Experience League Community! There's a lot being shared this month, so be sure to check it out. Highlights include:

- New Perspectives from your peers
- A guide to help you understand and navigate the API Explorer
- Top features from the Q4 Release
- In-Person Agentic Marketing Garage events
- And more!

Read the November edition here.



Pinned

The Workfront Wire, November 2026 - Your Go-To Source for News, Updates & Events

Translate All · 1 reply · 199 views

NicholeVargas
Adobe Employee · 2 hours ago

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The Workfront Wire

November 2026 | Customer Success

Welcome to the November edition of the Workfront Wire! This is your monthly roundup built just for Workfront customers. Think of this as your one-stop-shop for the latest news, updates, events, and everything happening across the Workfront world. And this month, there's a lot going on.

New Perspectives from your Peers

Did you know your peers share real-world use cases and best practices in the Perspectives area of Experience League? Recently, two Workfront Champions published their stories, and they're well worth a read:

- AI Collaborators in Workfront: Your new teammates by Becky Barus, Adobe Workfront & Business Architecture Associate Manager, Accenture. Learn how to assign AI agents to tasks the same way you assign people, from choosing a high-impact use case and setting up an agent to extending it with Workfront Fusion and tracking its output.
- Context is everything: Connecting Workfront to AI with MCP server by Ross Barton, VP of Project Management, Ologie. See how connecting Workfront to an LLM turned a 90-minute weekly team update into a 10-minute review, plus ideas for daily digests, meeting recaps, and timesheet drafts, and advice on where to start.

Agentic Marketing Garage is Coming to a City Near You

Join an Agentic Marketing Garage User Group near you for a hands-on session on building with agentic AI. You'll see a multi-agent marketing workflow in action, learn how it was designed, then team up with other practitioners to design and evaluate a workflow of your own. It's a great way to move from prompting AI to designing workflows with it.

These in-person events are happening all month in cities worldwide, so find a garage near you and leave with a working agent and skills you can use right away. Don't see your city yet? Join the Agentic Marketing Garage chapter to be notified as new events are announced.

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Experience Maker Awards

Submission for the 2027 Experience Makers Awards are open through November 20. Apply here.

For Workfront customers, THE CONDUCTOR recognizes companies that are orchestrating AI-powered content creation and scaling production, management, and delivery with Adobe products and AI capabilities.

Submissions must include Adobe Workfront, Adobe Experience Manager Assets, Adobe Creative Cloud, and one (1) or more of the following: Adobe Firefly, Adobe Firefly Creative Production, Adobe Express, Adobe GenStudio for Performance Marketing.



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FREE Events for Workfront Customers

Virtual Events

- November 18 – Workfront Fusion Wednesday Forum
- November 18 – Ideation Space in Workfront Planning: New Capabilities & Use Cases
- December 10 – Unified Review and Approvals: Your Questions Answered by the Product Team

In Person Events

- Find an Agentic Marketing Garage event near you!

Connect



Register for our events and find previous recordings on the Experience League events page.



Join the Workfront community for discussions and peer support.



Look for the Workfront Wire, our monthly newsletter, pinned at the top of the community!



Join a Workfront User Group and register for events.



Share and find Workfront-related jobs on the Job Board.

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Workfront Planning Resources

Documentation & Training

- Get started with Adobe Workfront Planning
- Workfront Planning terminology
- [Tutorial] Create a workspace
- [Tutorial] Create and manage a record type
- [Tutorial] Create and manage table views
- [Tutorial] Create a timeline view
- [Tutorial] Connect record types
- [Tutorial] Create a record type request form

On-Demand Workfront Planning events:

- Workfront Planning, Reimagined: SNHU's Creative Use Cases
- The Relationship Builder - How Syracuse University leverages Workfront Planning to Connect Work

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