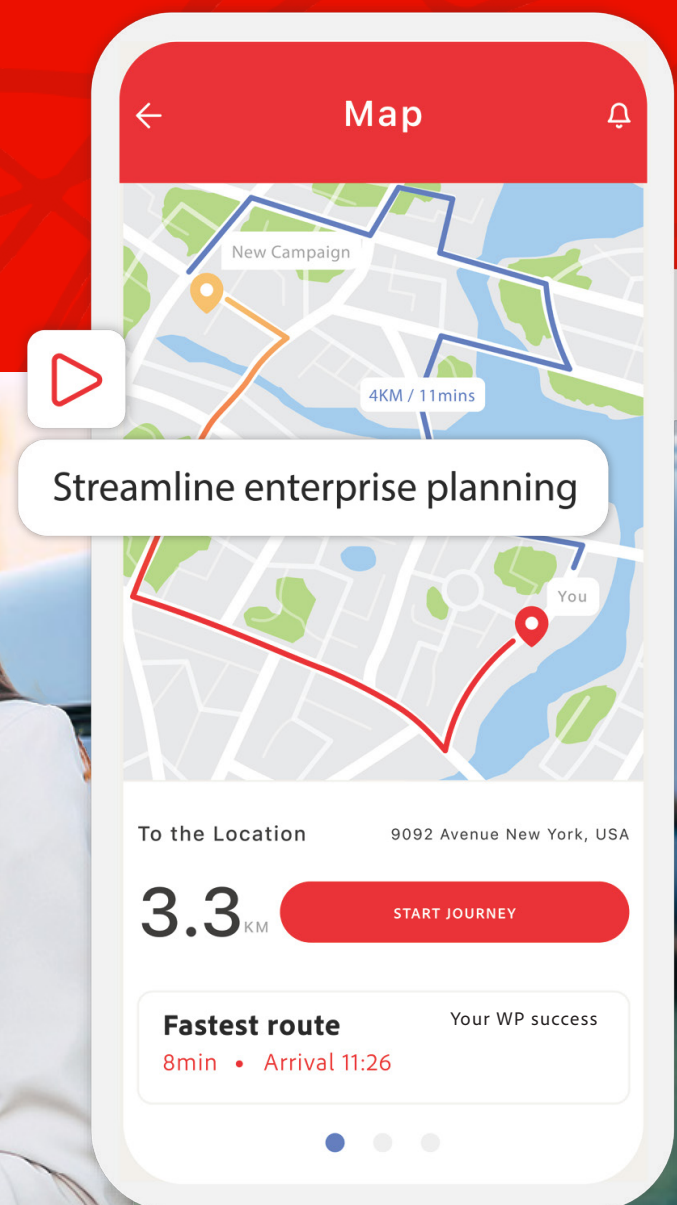
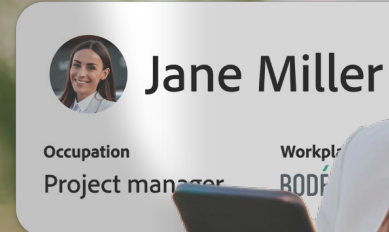


# Chart Your Course to Success with Adobe Workfront Planning

March 13, 2025

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Start your journey

# Today's Agenda

1

What is Workfront Planning?

2

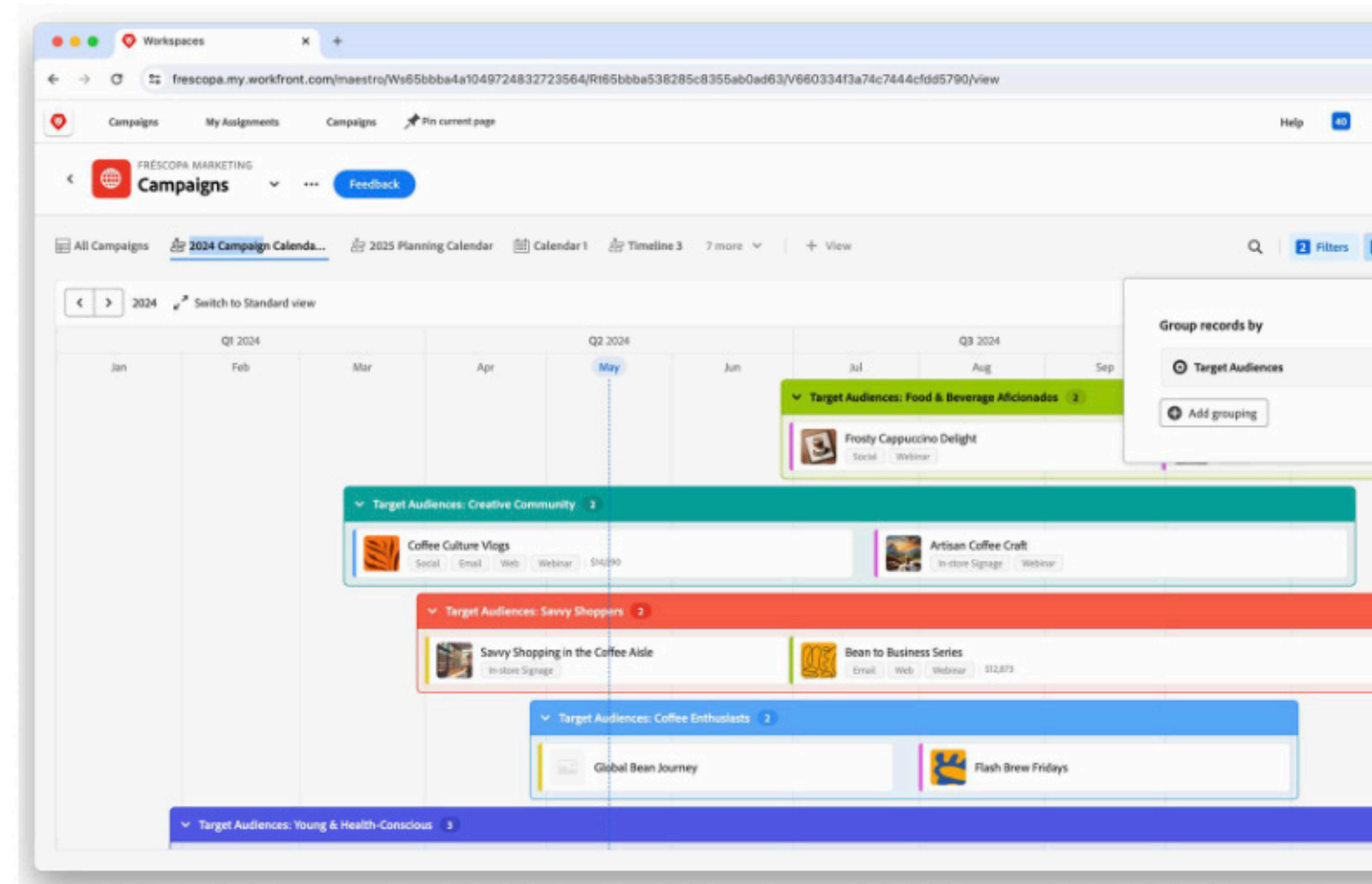
How to get started

3

How to scale

4

What's next for Workfront Planning

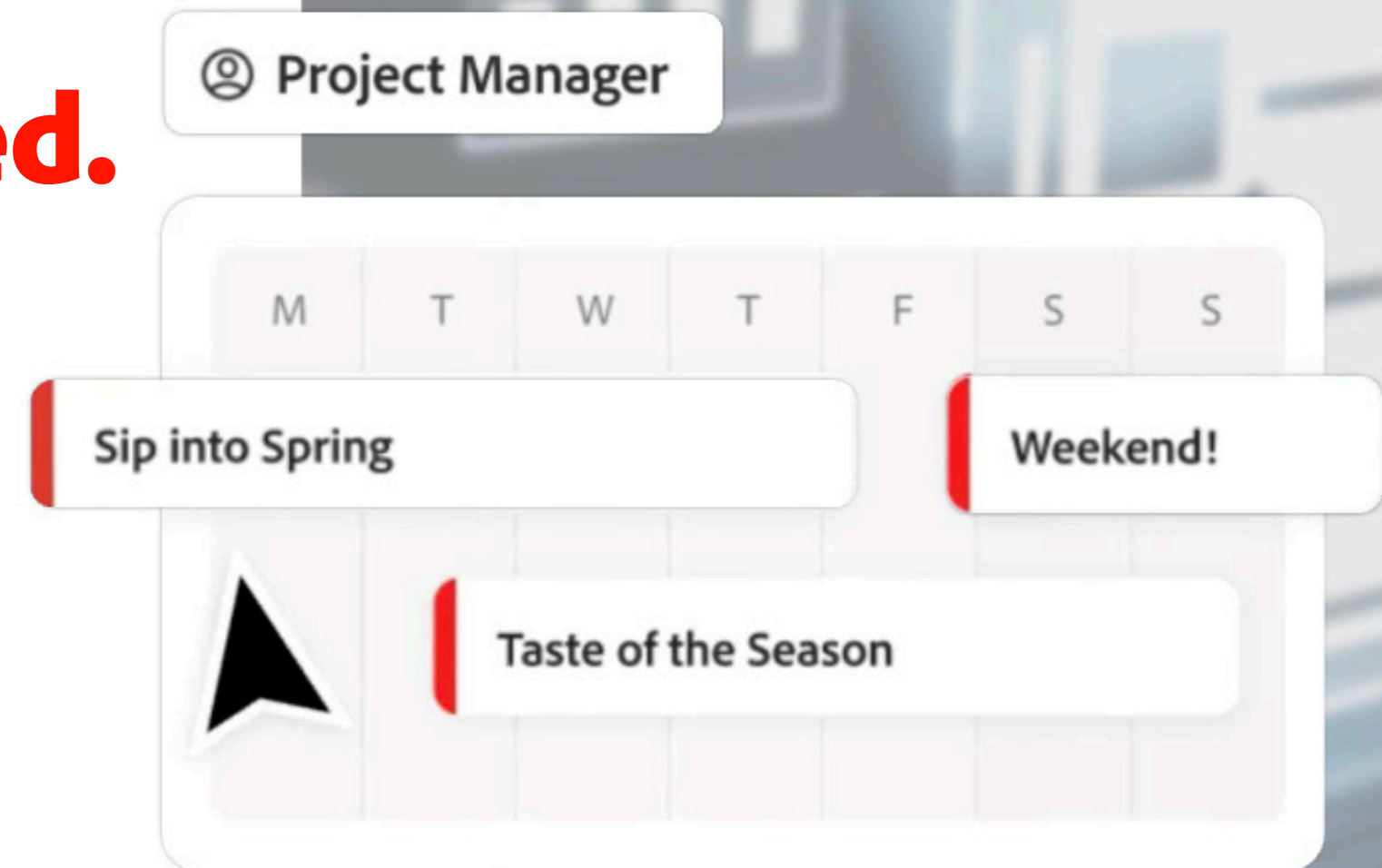




# What is Workfront Planning?

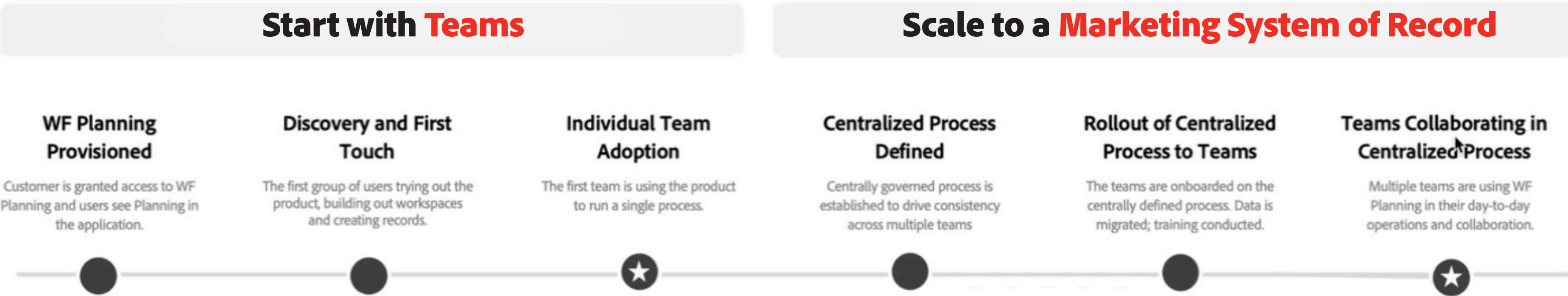
**Workfront Planning is a new offering** that connects fragmented workflows and data across marketing teams, delivering actionable insights that allow brands to **execute with greater speed.**

- 1** Move planning activities out of siloes and into the Workfront Planning for enterprise-wide alignment, collaboration, and execution.
- 2** Unify your marketing strategy and activities by linking planning and execution records across the marketing ecosystem.
- 3** Create, save, and share interactive views, such as calendars or timelines, to provide role-specific visibility and intelligence across teams.



# Path to Adoption

Unlocking visibility and efficiency across the marketing lifecycle is the goal.





**Let's get started!**

# What's next for Workfront Planning

**Our Roadmap for Q2** includes exciting new features and enhancements.

**1**

Enhancing seamless experience between Planning and Execution with trigger-based automation for field value changes, automated creation of multiple objects/records from a single record, reportable Planning Lookup Fields in Workflow, and in-line editing in Connection View.

**2**

Enhanced Centralized Planning Requests with Filtering for submitted requests and improved Planning intake by allowing form sharing with specific Users, Teams, Groups, Roles, and Company.

**3**

Extend record-level permissions and strengthen enterprise controls with centralized management of key record types (e.g., Campaigns, Deliverables), enabling operations teams to standardize core structures for teams to capture their work.

**4**

Enhance field and record management with conditional rules on planning fields, enabling operations teams to enforce structured, organization-wide processes.

**5**

Unlock core calendaring and timeline features with real-time updates and field visibility control for breakdown records and full record name display in Timeline View. Guide users to breakdown creation and support custom fiscal year/quarter displays.

**6**

Enhance collaboration by enabling Table view exports to Excel and CSV formats, providing Workspace Managers with a flexible, unified export function for seamless data integration and manipulation in external tools.



# Best practices

- Start with 1 team and 1 use case
- Think about how you are solving that use case today, and then how you can do it in Planning
- Publish global record types when scaling beyond a single team
- Leverage reporting in Planning through Canvas Dashboards

Linked resources:

- [Best practices article](#)
- [Training videos in Experience League](#)
- [Learn more about Canvas Dashboards](#)
- [Guidebook](#)

The image shows a screenshot of the Adobe Experience League interface. The top navigation bar includes 'Experience League', 'Learn', 'Documentation', 'Events', 'Community', and 'Support'. A search bar is present on the right. A banner at the top encourages signing in for personalized recommendations. The main content area displays the 'Adobe Workfront Planning best practices' article, dated November 6, 2024. A sidebar on the left lists various Workfront Planning topics. Overlaid on the right side of the article is a large red graphic with the text 'Your Workfront Planning GPS' and 'Chart the course to your success'. The graphic features a woman, Jane Miller, a Project manager, looking at a smartphone. The phone screen displays a map with a route and the text 'Streamline enterprise planning'.



**Questions?**