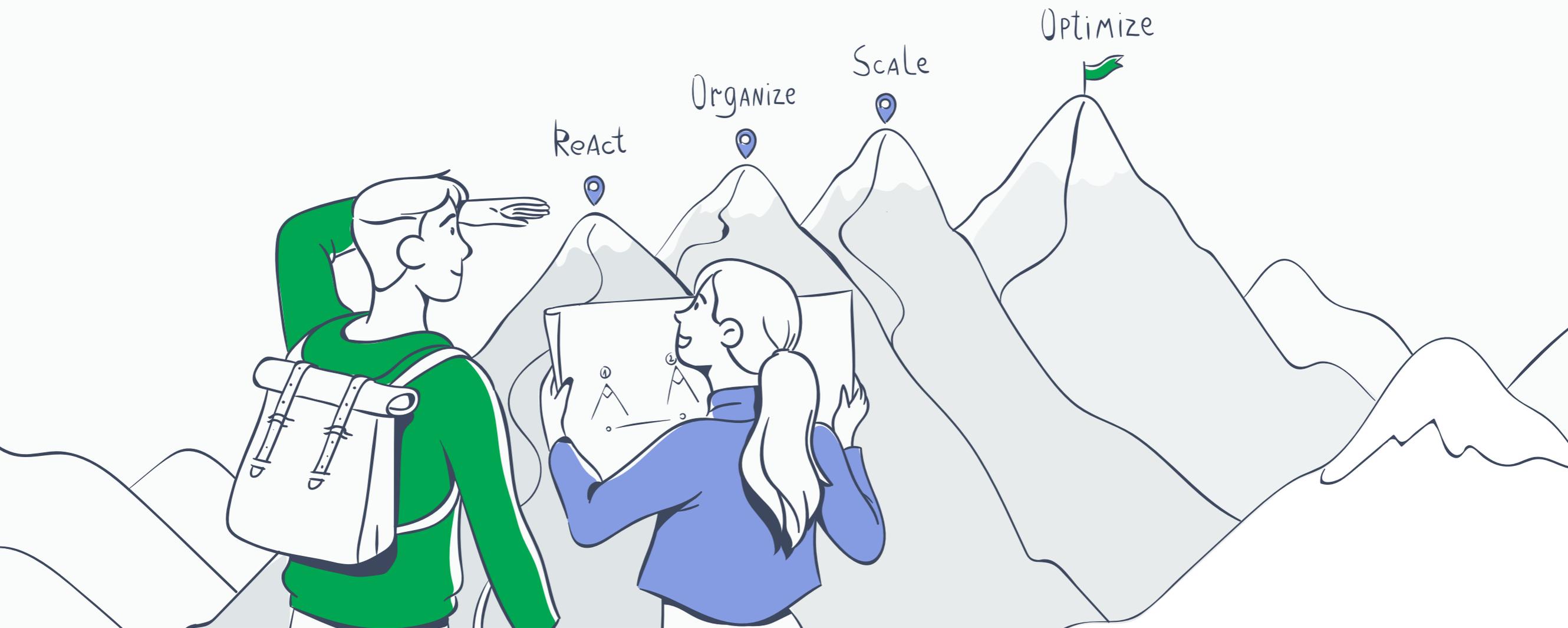# The Route to Excellence:

THE WRIKE WAY

The world's top tier companies don't do things the way other companies do. They're different, and we've been obsessed with figuring out exactly what those differences are. Working with over 15,000 of the world's leading companies over the last decade has given us an incredible amount of data and insights to comb through. One of the first things we've learned is that operationally intensive teams tend to share three common goals:

| 1	2	3
They're looking to increase their productivity while boosting quality.	They want to increase visibility and control to manage their work more effectively.	They're focused on building a high performance culture.

Wrike

As we dug deeper, clear patterns emerged separating those who succeed from those who fail. We've spent the last year collecting and distilling these findings into what we're calling the Wrike Way, a step-by-step model to achieve Operational Excellence.

Companies that successfully build Operational Excellence follow a clear path of four stages that usually happen in a linear sequence: React, Organize, Scale, and Optimize.

Optimize

Scale

Organize

React
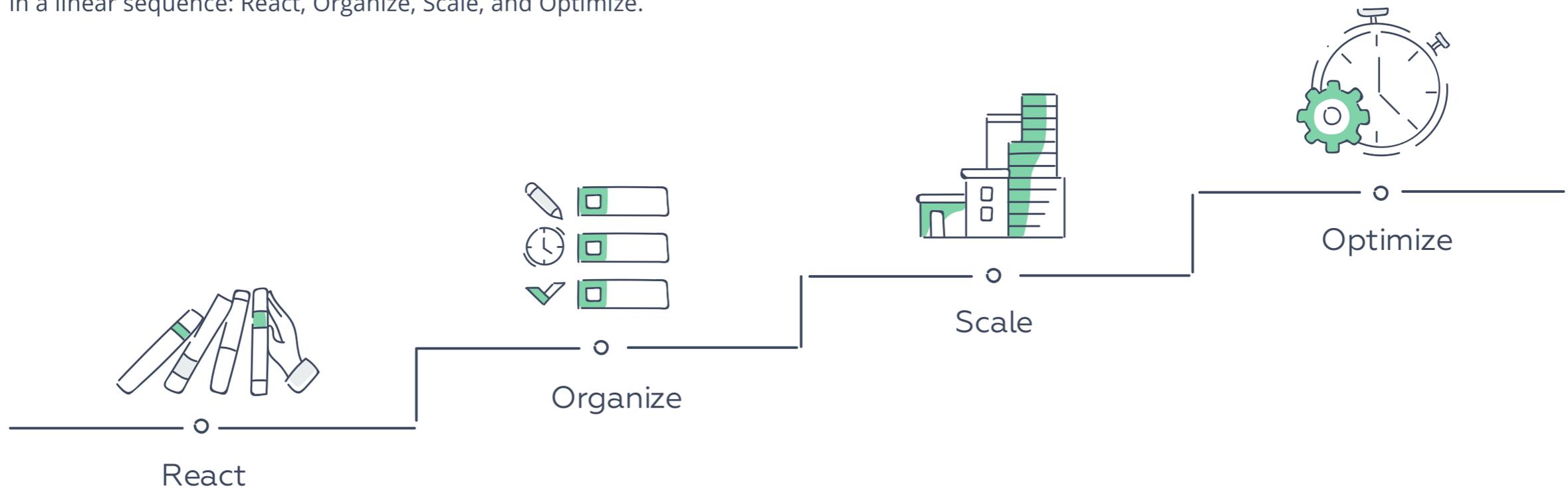
Each stage is a measure of the capabilities of the organization and has key milestones that must be met before advancement to the next stage is possible. Successful companies are in constant motion, progressing through each stage and then working to continuously improve.

Wrike

The Fuel That Propels Teams Forward

Advancing from one stage to the next is the direct result of a deliberate investment in four key disciplines: Planning, Process, Collaboration, and Visibility.

Planning

Align people with the most important work

In today's on-demand economy, customers' needs and requirements are changing in real-time, as are business needs and competitive dynamics. Teams must be able to alter plans mid-stride by having planning cycles that are shorter and more nimble. Any changes must be communicated quickly and clearly to all team members so that the changes are integrated into day-to-day work.

Process

Move faster with defined and streamlined workflows

Processes are no longer linear or sequential, but conditional. Rapidly changing conditions can call for abrupt changes to a process and it's up to teams to adapt in time. The best teams actively manage, tune, and refine them to achieve the best results. Managers at leading companies are also quickly learning how to leverage automation to optimize their team's output. Used effectively, it complements knowledge workers and can help define what work gets done and how it gets done.

Collaboration

Reduce interruptions and noise through focused communication

Everyone knows good collaboration is essential to staying competitive. But the state of the art in this discipline is being able to quickly communicate change of direction and to coordinate your team, so that the right person is working on the right task at the right time.
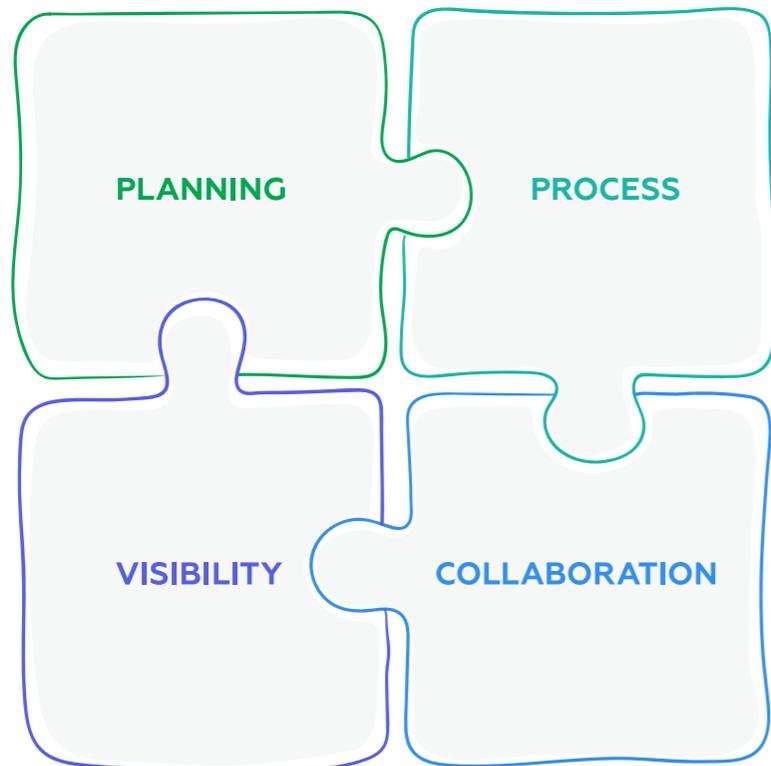
Visibility

Make better decisions through greater access to data and analytics

In a world of significant change and fluidity, it's critical to develop an approach that shortens awareness, reaction, and communication to the team. Having accurate and timely data enables quick course correction. Effectively leveraging data helps drive predictability in planning and enables you to engage in continuous process improvement. It also empowers everyone in the organization to independently identify and act on highest ROI activities.

Investing in these four disciplines levels up the entire organization and helps it advance through each stage in the journey to excellence.

PLANNING

PROCESS

VISIBILITY

COLLABORATION

Wrike

The Four Stages of the Wrike Way

	REACT	ORGANIZE	SCALE	OPTIMIZE
Planning	Work activities, requests, plans, and assignments are unstructured and managed in an ad hoc, siloed fashion.	Core requests and projects are consolidated into a single, shared system to be prioritized, assigned, and planned.	All work is tracked in the system and workload is balanced across the team during planning and assignment.	Strategic priorities align teams and focus work. Shared best practices optimize planning. Planning accuracy improves.
Process	Ad hoc intake, planning, and execution methods and undefined roles lead to rework and excessive firefighting.	Roles and workflows are clearly defined and transparent, leading to better accountability for core projects and tasks.	Streamlined processes, templates, and approval workflow enable greater agility and increased throughput.	Analytics and metrics spur continuous improvement, intervention, and innovation.
Collaboration	Siloed teams, crucial project/task information and agreements are lost in a sea of emails, with wasteful meetings spent just trying to catch up.	Project and task communication is in a central workspace. Meetings are more focused, with ideas, action items and agreements captured.	Collaboration focuses on setting goals and facilitating decision-making among executives and across teams.	Collaboration is extended to include key stakeholders, clients, and partners. The team/org captures best practices and is able to tap into collective intelligence seamlessly.
Visibility	It's hard to tell who's doing what, where the delays and bottlenecks are, and what the workflow is.	Basic reports and dashboards give insight into progress and expose bottlenecks.	Tailored and scheduled reports keep the broader team, upper management, key stakeholders, and clients aligned.	Shared macro- and micro-level views of work are connected. Proactive alerts trigger action.

REACT

This is where most organizations start. Ad hoc and on defense, there's little visibility and few, if any, established processes. Work is not structured and typically conducted in email, spreadsheets, or other lightweight project management systems.

The checklist for success:

- ☑ **Planning** - Identify and standardize core processes for intake, execution, and delivery.

- ☑ **Process** - Use a work management system instead of email and spreadsheets to collaborate and communicate status real-time.

- ☑ **Collaboration** - Create a common "how to guide" to capture "rules of the road" for multiple teams to collaborate efficiently inside the work management system.

- ☑ **Visibility** - Establish success criteria and create dashboards and reports early on to give you visibility into the most important aspects of your work.

Case Study

How Stitch Fix moved from React to Organize

Eve Maidenberg
Creative Services Director

Stitch Fix is a fast-growing personal style service for men and women that evolves with your tastes, needs, and lifestyle. As the team grew, so did the number of tools and apps being used.

"

There was a lack of consistency and transparency into what was happening on a particular project....
We were not in the position to scale in any way that we could actually manage the work, the people, and the workflow.

— *Eve Maidenberg, Creative Services Director*

Wrike

PLANNING:

The team at Stitch Fix used Wrike to create a unified, single system to accelerate project delivery and manage rapidly increasing workload with moderate staffing growth.

" *We have been able to manage more because we have an easier system. We've seen increases in productivity and fewer questions about when projects are due. There is so much more transparency across the board,"* says Maidenberg.

PROCESS:

By using Wrike, the team was able to turn to a single, shared view of project and task details, timelines, change history and collaboration.

" *It's really changed how we manage the work. Individual spreadsheets have essentially gone away because people can use a Dashboard to see everything their team is working on,"* says Maidenberg.

COLLABORATION:

By making its goals and instructions clear, the entire team was able to work together more efficiently.

" *We created a really detailed onboarding guide…. In 30-60 minutes I can walk someone through how we use the system, how we track our projects and what the team expects. New team members can be in Wrike up to speed and working fairly easily,"* says Maidenberg. *"It's a fairly intuitive tool and people get it pretty quickly."*

VISIBILITY:

By putting everything into the work management system, everyone on the team was able to gauge incoming work and set better priorities.

" *There was no way to look at utilization, capacity, or to anticipate future capacity needs for workload coming in,"* says Maidenberg.

Team members also use custom Dashboards for an instant view of their priorities, and the custom workflow status of each item.

" *For each of them to see what's on their plate and what's due that week with clarity is hugely helpful,"* says Maidenberg.

Read more of the Stitch Fix story

ORGANIZE

At this stage, companies adopt a Single Source of Truth to ensure nothing slips between the cracks and to provide visibility to everyone involved. Basic workflows are established and rolled out to teams, helping make sure roles and responsibilities are clearly defined.

The checklist for success:

☑ **Planning** – Improve individual productivity by having team members prioritize and manage their individual tasks in the work management system.

☑ **Process** – Address bottlenecks, then automate and streamline processes to improve throughput and quality.

☑ **Collaboration** – Prioritize and balance work efforts with an understanding of resource utilization and availability.

☑ **Visibility** – Enhance and extend reports and dashboards to provide visibility to upper management, key stakeholders, and the full team.

Case Study

Case Study: How Sotheby's moved from Organize to Scale

Christina Anstett

Direct Marketing Specialist at Premier Sotheby's International Realty

The marketing department at Premier Sotheby's International Realty was originally using spreadsheets to assign work to their creative team. While they had moved beyond the React stage by having formalized processes, their system of multiple spreadsheets caused a lot of confusion and misunderstandings. There was also no way to track accountability and manage workloads.

Christina Anstett, Direct Marketing Specialist at Premier Sotheby's International Realty, says one of her biggest concerns was that they had no way to find statuses of open jobs or provide proof of effort when mistakes were made.

PLANNING:

One of the first things the team did was practice prioritizing their own work so everyone on the team was in sync about what needed to be done.

" *Wrike makes it possible to come in each morning and know exactly what our day looks like and plan our week accordingly,"* says Antstett.

PROCESS:

Because their marketing team receives between 20 and 50 agent requests a day, they set up Wrike to automate processes as much as possible. For example, associate requests are sent through Wufoo forms, which integrate with Zapier. Once a request is received, Zapier sends an automated request to Wrike, creating a job and assigning it to the proper people.

COLLABORATION:

By funneling all of their communication into Wrike (using it as the Single Source of Truth), the marketing team was able to get full visibility into each project and see how work was being distributed. This dramatically reduced miscommunications and mistakes as well as wasted time.

" *The number one change in our organization is that we no longer have to look for where a project is located — which saves us a ton of time,"* says Anstett.

VISIBILITY:

The marketing team at Sotheby's uses Wrike to demonstrate their department's hard work and justify results to upper management.

" *The biggest benefit of Wrike is that when you're working with 900 individual personalities and independent contractors, being able to prove your value is crucial," says Anstett. "Pulling a report and showing them how many jobs were completed on their behalf during a certain time frame is very, very powerful for us."*

Read more of Sotheby's story

SCALE

The scale stage is about taking initial wins developed at the Organize stage and scaling them to achieve greater business results. There are three dimensions of scaling.

1. Scaling the process itself to capture more work.

2. Scaling collaboration across the team and possibly the organization.

3. Scaling the integrations of the work into other systems.

At this stage, automation rises in prominence as an important way to increase velocity and quality in the form of templates, custom workflows, and intelligent routing. Individuals and teams increase their throughput by breaking down internal silos, routing all work through the central system, and identifying "low hanging fruit" opportunities to increase efficiency.

The checklist for success:

✓ **Planning** – Prioritize and plan projects further ahead by coordinating resources, timelines, and budget for maximum impact.

✓ **Process** – Continuously measure performance against goals and improve your work processes in order to drive productivity, quality, innovation, client satisfaction, and other defined performance outcomes.

✓ **Collaboration** – Build collective intelligence by capturing and sharing insights, best practices, and post-mortems inside your work management system.

✓ **Visibility** – Proactively connect your work management system between top level objectives and the work needed to achieve them.

Case Study

How Gwynnie Bee moved from Scale to Optimize

Phillip Hoffman
Senior Program Manager

Betty Kang
Program Manager

Gwynnie Bee is a personalized clothing rental service offering the largest collection of plus-size clothing on the internet.

With rapid expansion and the acquisition of a new distribution center, Philip Hoffman was brought on to help manage the project program and processes for the new distribution center, as well as cross-functional projects for the company.

PLANNING:

Moving away from Excel spreadsheets, which the company had previously been using, Hoffman adopted Wrike and quickly made use of the Timeline to carefully manage dependencies and monitor project health.

66 *That was really key for us. We wanted to have consistency in terms of how we were all looking at the project plan and how we were all thinking about it,"* says Hoffman.

PROCESS:

Dependencies and Alerts were put in place to help the team deliver on time and on schedule.

Betty Kang, a program manager, was quick to find value.

66 *The dependency view is extremely important for us to launch our project, so we know which item has become a blocker, which items must happen before another one, and for the task owner to understand how important their task [is]...,"* says Kang.

COLLABORATION:

Use of email was virtually eliminated and all insights were put into Wrike for maximum visibility.

66 *We use Wrike instead of email to reach an agreement and also to record all of the history," says Kang. "I think it's helpful for this team to be able to see the magnitude and the impact of their work."*

VISIBILITY:

Wrike made it easy for everyone at Gwynnie Bee to measure progress and ensure progress was being made.

66 *It gave us a reliable step-by-step play to follow and keep everybody on the same page,"* says Hoffman. In addition, Wrike's ability to provide transparency to stakeholders and prioritize tasks helps management report on productivity levels.

Read more of Gwynnie Bee's story

OPTIMIZE

At full maturation, execution becomes a competitive advantage. The organization is running like a well-oiled machine with aligned priorities, defined strategic objectives, proactive reports & alerts, and continuous improvement cycles. Teams further their success by connecting external systems into the Single Source of Truth.

The checklist for success:

- ☑ **Planning** – Strategic priorities align teams and focus work across the organization.

- ☑ **Process** – End-to-end processes and workflows are well defined, measured, and continuously improved.

- ☑ **Collaboration** – Collaboration is extended to include related teams, key stakeholders, clients, and partners.

- ☑ **Visibility** – Shared macro- and micro-level views of work are connected. Proactive alerts trigger action.

Case Study

How Airbnb builds and sustains Operational Excellence in the Optimize stage

Hoon Kim
Creative Production Manager

Airbnb is one of the world's most innovative companies. They're creators of a revolutionary platform that allows guests to live and stay like a local, hosted by passionate experts who want to share their culture and community.

Recently Airbnb was about to launch their groundbreaking new Experiences service, an extension of Airbnb's revolutionary travel platform. After the initial launch of Experiences, CEO Brian Chesky wanted to quadruple production from the initial 12 cities.

Creative Production Manager Hoon Kim was tasked with streamlining a process to be able to create thousands of assets, including photography, videography, and digital and print posters.

PLANNING:

The Airbnb management team uses Wrike to monitor the production process to identify slow-downs and inconsistencies across regions.

" *By having that kind of visibility and transparency from the bottom up, we can make better decisions. We can say this is taking too long, or we have too many reviews in process and we need to be more efficient, and see the quality across the board,"* says Kim.

PROCESS:

Wrike's flexibility allowed Kim to tailor his team's workspace to focus only on relevant, high-priority tasks, instead of an entire massive project.

" *It really helps when you're looking for information to streamline where to look, and then who to communicate with," says Kim. "It makes that 800-item task list a lot more manageable when you're focusing on smaller chunks."*

COLLABORATION:

Teams all use Dashboards and Reports to track status and notify team members of handoffs.

" *Dashboards and Reporting have eliminated a lot of the constant 'what's the status' emails and meetings. People are now able to just check their Dashboard and know what the health is, and then utilize their time more efficiently. The main advantage of Wrike has been less frivolous communication,"* says Kim.

" *Whereas before a lot of time was spent trying to find information, with Wrike, people are more self-sufficient in finding that information on their own. That saves us a lot of time."*

VISIBILITY:

Airbnb's cross-functional Experiences teams collaborate faster by keeping as much communication and thought evolution as possible inside Wrike.

" *These teams were in their own worlds, trying to figure it out by themselves. Whereas now with Wrike, they can lean on other teammates. They can @mention teammates and get questions answered really quickly."*

Read more about Airbnb's story

Wrike

Operational Excellence Is Not the Destination, It's the Journey

Excellence is not an achievement you unlock once and then hold forever. It's a mindset that must be sustained. The world's most innovative companies know that building a culture of excellence — getting every employee to see the value in their work and how it affects the customer— is the last differentiator and can set them miles ahead of the competition. It's a continuous process and requires the commitment of the entire organization.

The Wrike Way breaks down the specific actions organizations must take to build this culture of excellence. As demonstrated in these examples, it can begin with a single team or even individual, but must be adopted by the organization as a whole. This can't be achieved purely through executive sponsorship. The personal and organizational benefits of excellence, both qualitative and quantitative, must be understood and appreciated by all to get buy-in. Those embarking on the journey of excellence must go willingly.

We encourage you to follow the Wrike Way and begin your journey to Operational Excellence with Wrike. We are here to be your partners on this journey, trusted by over 15,000 companies and team leaders. Ready to start? Try your free trial of Wrike today.

Get started *for free*

Wrike