

Monday.com Adoption Report

Purpose

Adopt Monday.com as a department-wide project management tool. Right now, documents are being stored and shared in the following locations:

- SharePoint - Multiple locations
- Teams - Learning & Development Systems, DPEP Documentation, Multimedia – Attractions, and individual LOB channels,
- Smartsheet,
- Planner, and
- Personal computers.

Using Monday.com will help streamline the documents into one project management tool, increasing efficiency for the Documentation team, and making it easier for our LOB contacts to access information.

General Benefits and Disadvantages

• Benefits

- User interface is easy to navigate and learn.
- Boards can be downloaded into Excel files, making weekly reports and data collection easier to gather and distribute.
- Boards can be viewed via main tables, cards, charts, Gantt chart, dashboards, etc.
- Individual licenses allow users to edit and create documents; currently we do not have that ability with Smartsheet.
- Automations allow for fewer miscommunications, as items can be programmed to move to specific board/locations.
- We can create dashboards that automatically populate data into charts.
- LOB partners will be able to see documents, but not have editing rights. This allows the communication lines to stay open but protects documents from accidental edits.
- Licenses are assigned to our group; however, if someone were to leave, we would not need to purchase another license. They are interchangeable.

• Disadvantages

- Licenses are purchased annually. I've included recommendations at the end of this document regarding how many licenses would be beneficial.

Product information, costs, and specific [benefits/usages](#), [disadvantages](#), and [recommendations](#) are listed below.

Product Information

- Product has been vetted by Disney legal teams.
- Currently being used by 37 Disney departments, such as:
 - Studio Promotions, Studio Mastering, DPEP Learning, Corporate Alliance, DMED Tech, ESPN, Hulu, FX, ABC, Lucasfilm, and more.
- We have an established contact that works with these existing groups, and therefore knows Disney parameters, needs, etc.

Cost

- Licenses are purchased by "buckets" – our options are 5, 10, 15, 25, 50, 75, 100...
- Licenses are purchased annually.
- Note: These prices were created using the Disney Enterprise discount.

50 licenses <ul style="list-style-type: none"> • This would cover the entire Doc & Training team with a few additional seats. 	\$13,800
25 licenses <ul style="list-style-type: none"> • This would cover the Doc Admins/Corey/Rachael/Des with a several additional seats. 	\$6,900
15 licenses <ul style="list-style-type: none"> • This would cover the Doc Admins/Corey/Rachael/Des with a few additional seats. 	\$4,140
10 licenses <ul style="list-style-type: none"> • This would cover the Multimedia team with a few additional seats. 	\$2,760

Benefits/Usage

1. [Documentation Location](#)
2. [Forms](#)
3. [Priorities Spreadsheet](#)
4. [Data/Dashboard/Reports](#)
5. [Train Me Conversion](#)

Documentation Location	
Use	<ul style="list-style-type: none"> • SharePoint <ul style="list-style-type: none"> ◦ Multiple locations • Teams <ul style="list-style-type: none"> ◦ Learning & Development Systems ◦ DPEP Documentation ◦ Multimedia – Attractions, and individual LOB channels • Smartsheet • Planner • Personal computers
Concerns	Documents are in several different locations, which can cause confusion as to where the team and LOB partners can find forms, information, weekly reports, and priorities sheets.
Monday.com Solution	You can create multiple workspaces that allow users to access based on permissions settings. Sample workspaces created for this pilot include: <ul style="list-style-type: none"> • Main workspace (personal to each user, where I host my direct report dashboards) • LOB Priorities • Multimedia • Train Me System

Document Workspaces

The collage consists of six screenshots from the Monday.com interface, each with a callout box explaining a feature:

- Top Left:** Shows the 'Main workspace' dropdown menu with a search bar and a list of workspaces: Main workspace, LOB Priorities, Multimedia, and Train Me System. A red box highlights the '+ Add workspace' button. **Callout:** 'This allows users to create multiple workspaces, which can host information currently stored in SharePoint, Smartsheet, etc.'
- Top Middle:** Shows the 'Main workspace' board with a red box around the 'Direct Reports' section, which lists 'Rachel Hunt' and 'Brad Hoffarth'. **Callout:** 'This allows users to see what is in each workspace and click on the board they would like to view/edit.'
- Top Right:** Shows the 'LOB Priorities' board with various request forms listed.
- Bottom Left:** Shows the 'Members' tab of a workspace board, listing 'Lauren Tidmore' as a member. A red box highlights the 'Members' and 'Permissions' tabs. **Callout:** 'This allows users to add specific members to the board, and edit permissions (such as viewer, editor, owner, etc).'
- Bottom Middle:** Shows the 'Multimedia' workspace board with a red box around the '+ Add' and 'Search' buttons. **Callout:** 'This allows users to add boards and/or search for specific content.'
- Bottom Right:** Shows the 'Train Me System' workspace board with a 'Train Me Request Form' listed.

Bottom Right Callout: 'The above images are examples of boards created for this pilot.'

Forms	
Use	<ul style="list-style-type: none"> • Multimedia Request Form • WDPR Training Tracker • Train Me Item Request Form
Concerns	<p>Currently these are hosted on</p> <ul style="list-style-type: none"> • Smartsheet (Multimedia Request Form) • SharePoint (WDPR Training Tracker) • Teams (Train Me Item Request Form) <p>The information must then be copied over to priorities sheets or shared individually with specialists to build and track products.</p> <p>Additionally, the multimedia form cannot be edited by any media specialist; they must submit changes through the Smartsheet admin and wait for changes to be made.</p>
Monday.com Solution	<p>Forms are created in Monday.com, and automatically populate in the corresponding boards.</p> <p>Calendar views are created in form dashboards, allowing users to see when items are due for delivery and publish.</p> <p>Items are populated to move to completed boards when projects are finished, thus allowing Leaders and LOB contacts to keep tabs on ongoing projects.</p> <p>Forms are automated to show only relevant sections. For example, if requesting an update in Train Me, the user will only see the fields for updates (and will not see new request questions).</p> <p>Another example is through the WDPR Training Tracker. Users will select the profit center, and depending on the selection, the form will automate with relevant drop-down menus.</p>

Train Me Item Request Form

The screenshot shows the 'Train Me' Training Request Form. It includes fields for 'Product name' and 'Requestor's Email'. A 'Type of Request' dropdown menu is highlighted with a red box, showing options for 'New Product' and 'Update'. Below it, two conditional logic rules are shown: 'If answer is one of New Product, then' followed by a question 'What is the estimated training length?', and 'If answer is one of Update, then' followed by a question 'Version Notes/Update Summary'. A callout box explains: 'When a user selects the type of request, only the relevant questions will appear.'

WDPR Training Tracker

The screenshot shows the 'WDW Item Request Form' under the 'TRAINING & DOCUMENTATION' header. It includes a 'Please Select the Profit Center' dropdown menu with options: Site-Wide, WDW Parks, WDW Resorts, HH - Hilton Head Island, VB - Vero Beach, and Water Parks. Below it, a conditional logic rule is shown: 'If answer is one of WDW Resorts, then' followed by a 'WDW Resorts - Select One' dropdown menu with options: AKL - Disney's Animal Kingdom Lodge, ART - Art of Animation Resort, ASR - Disney's All Star Resort, BLT - Bay Lake Tower Resort, BWR - Boardwalk Resort, and CBR - Caribbean Beach Resort. A callout box explains: 'When a user selects WDW Resorts, the items listed below will appear. Similar automations are set up for each profit center.'

Priorities Spreadsheet	
Use	LOBs without content in Train Me are using priorities sheets to track projects/item requests.
Concerns	<p>Currently these are hosted on SharePoint, or on the Doc Admin's personal computer.</p> <p>These are updated by the Doc Admin and shared prior to the respective LOB/Admin priorities meeting.</p> <p>There are no automation features that notify Doc Admins or LOB partners when new requests are added.</p> <p>A lot of manual work to fill in information copied from the item request or training request form.</p>
Monday.com Solution	<p>Created an Item Request form for Operations Training, and a separate Item Request form for Train Me.</p> <p>Users complete these forms, and they are automatically distributed to the corresponding Priorities board. This allows information to be accurately and efficiently uploaded to the LOB document. Additionally, features have been created to automatically go to document type (e.g., project, TEMP Procedure, redline, etc.).</p> <p>Once a Doc Admin marks the status as complete, the item will automatically move to the completed board. This will then update the LOB data dashboard.</p> <p>Doc Admins and Specialists will get email notifications when items are added to their board.</p>

Current Priorities sheet; standard Excel format for all LOB without content in Train Me.

A	B	C	D	E	F	G	H
Property	Location/Project	Specific Work/Version Notes	Status	Update/Delivery Date	Version/Publish Date	Item Request	Training Time
Yacht & Beach (YB)	YB Coordinator Lifeguard Deep Water - Pool Operations	Update the lifeguard manual (which already exists in Wilderness Lodge, Grand Floridian, All Star Movies, and All Star Music)	In progress				
Mickey's Retreat (MR)	MR Wildlife	Safety will update to determine pest control procedures. Update to come.	On hold	TBD	TBD		
Fort Wilderness (FW)	FW Wildlife	Safety will update to determine pest control procedures. Update to come.	On hold	TBD	TBD		
Property	TEMP Procedure	Specific Work/Version Notes	Status	Update/Delivery Date	Version/Publish Date	End Date	Training Time
Contemporary (CT)	CT Marina - Specialty Cruise	Temp for the duration of the 50th.	Running	12/1/2021	12/1/2022		
Grand Floridian (GF)	GF Spa - Spa	Temp for the HEPA filter (to be baked in with after-opening edits). Will need to be baked into the next publish.	Running	1/26/2022	1/31/2022		
Yacht & Beach (YB)	YB Lifeguard	Reactivating a Temp for Y&B Pool bridge closures. Run through labor day.	Running	6/28/2021	6/28/2021	9/5/2022	
Caribbean (CB)	CB Region Lifeguard	Temp for Shallow Lifeguard - Original dates of 8/22/21 - 11/21/2021. Request to extend Temp until OG updates can be worked on. Want to eventually make this permanent; will stay temp until further notice (at least through end of the fiscal year).	Running	6/24/2021	8/22/2021	9/30/2022	
Coronado (CO)	CO Lifeguard	Temp for the aquatic fitness class	Running	6/24/2021	7/1/2022		

Items are requested through forms; Doc Admin manually puts the information into the Excel sheet.

Sample Monday.com Priorities board.

Items are requested through forms and automatically populate into the board. You can also add an item manually if needed.

Items identified as a TEMP procedure automatically load into that group.

Allows user to change view.

Allows user to filter, sort, and hide information as needed.

Allows user to invite people to access the board (as owner, editor, and/or viewer).

Allows user to see who has recently accessed board.

Allows Doc Admin to assign work to a specific specialist; can automate to show up on Direct Report 1:1 board.

Data/Dashboards/Reports	
Use	<ul style="list-style-type: none"> Weekly emails Weekly excel reports
Concerns	<p>Each report is published on Wednesdays and hosted in SharePoint.</p> <p>Doc Admins must type out their weekly report in an email, and then manually fill out the excel sheet, creating two separate spaces where information is hosted.</p>
Monday.com Solution	<p>Users can create a dashboard that incorporates widgets such as charts, project totals, timelines, and graphs.</p> <p>This information is automatically updated based on the linked boards. Therefore, Doc Admins would not have to manually update information in an email and excel sheet.</p> <p>Additionally, the dashboard can be exported to an excel sheet.</p>

Current Weekly Reports. Each report is published on Wednesdays and hosted in SharePoint.

Doc Admins must type out their weekly report in an email, and then manually fill out the excel sheet.



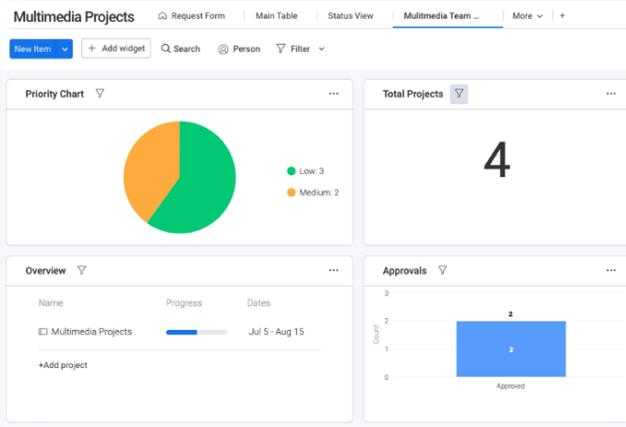
Shared Documents > Weekly Publishing Data

Name
Archive
DPEP_Publishes_07.06.22.xlsx
DPEP_Publishes_07.13.22.xlsx
DPEP_Publishes_07.20.22.xlsx
DPEP_Publishes_07.27.22.xlsx
DPEP_Publishes_08.03.22.xlsx

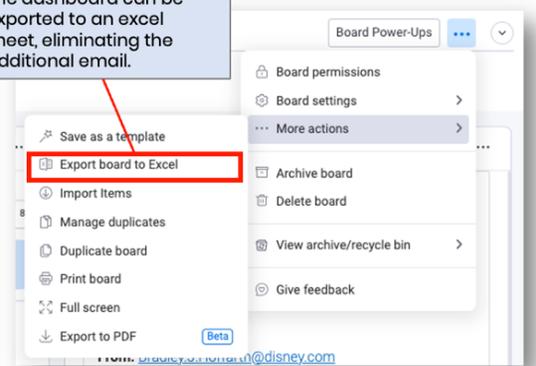
Weekly Publishes 07/07/22 - 07/13/22							
Category	Substatement Desc	Service NOW Cnt	TEMP	UP-FT	Placeholder Products		
DLA	Attractions	35					
	Entertainment	4					
	Security						
	Lodging/Lodging Control						
	Merchandise	3					
	Custodial						
	Maintenance/PM						
	Hotel	3					
	Food & Beverage	23			2		
	Other						
	Site Total	69	0	2	2	0	0
WDW	Attractions						
	Entertainment	42					
	Security						
	Lodging/Lodging Control	22			1		
	Merchandise	69					
	Custodial						
	Maintenance						
	Hotel	112			7		
	Food & Beverage						
	Transportation						
	AMC						
	Water Parks						
	Other						
	Site Total	245	0	0	8	11	11
DCL/DVC	Single Total						
DPEP Total		114	0	2	3	11	11
Grand Total DLA		73					
Grand Total WDW		257					

This is a sample dashboard showing how users can incorporate widgets such as charts, project totals, timelines, and graphs.

This information is automatically updated based on the linked boards. Therefore, Doc Admins would not have to manually update information in an email and excel sheet.



The dashboard can be exported to an excel sheet, eliminating the additional email.



Train Me Conversion	
Use	Individual LOBs
Concerns	Each LOB converting to Train Me will have their own process and timeline. One recurring concern is the inability to see the start date of multiple LOB items in a singular calendar view.
Monday.com Solution	<p>By creating a folder specifically for a singular LOB, users can share permissions with those who need the information.</p> <p>From there, users can create a dashboard that pulls in information from multiple boards and displays all start and end dates on a calendar.</p> <p>Users can also create subitems that allow the task to be broken into multiple smaller tasks, which helps keep track of the overall project progress.</p>

This is an example of the current conversion timeline a DLR Doc Admin uses for a singular LOB. This is hosted on a SharePoint site.

This is an example of how the board could be viewed in Monday.com.

Other Doc Admins and specialists could be added to the board as viewers or editors.

The dashboard allows the user to set up a calendar that automatically updates according to the start/end dates on the board.

Disadvantages

Cost

As mentioned above, each license must be purchased annually. Below is a breakdown of the cost based on the number of licenses we would get. These prices do include the Disney Enterprise discount.

50 licenses	\$13,800
<ul style="list-style-type: none"> This would cover the entire Doc & Training team with a few additional seats. 	
25 licenses	\$6,900
<ul style="list-style-type: none"> This would cover the Doc Admins/Corey/Rachael/Des with a several additional seats. 	
15 licenses	\$4,140
<ul style="list-style-type: none"> This would cover the Doc Admins/Corey/Rachael/Des with a few additional seats. 	
10 licenses	\$2,760
<ul style="list-style-type: none"> This would cover the Multimedia team with a few additional seats. 	

Access

Users who do not have a license will not be able to comment or edit on anything in Monday.com; however, they will still be able to view content.

Should we go with the 10/15/25 license options, we would not have enough licenses to cover all Doc Managers, Doc Admins, **and** Doc Specialists. There are some instances where it would be beneficial for Specialists to be able to edit the documents; additionally, there are times where it would be good to have the ability for commenting on specific items/tasks/etc.

Please note: We would not want LOB contacts to have access. It would be beneficial for Sean Marshall to have access for multimedia purposes.

Recommendations

Purchase 50 licenses

This will cover

- All Documentation Managers (3)
- All Documentation Admins (7)
- All Documentation Specialists (including new positions) (34)
- All Multimedia Specialists (4)
- Danielle
- Sean Marshall

Purchase 15 licenses

This will cover

- All Documentation Managers (3)
- All Documentation Admins (7)
- All Multimedia Specialists (4)
- Sean Marshall

Purchase 25 licenses

This will cover

- All Documentation Managers (3)
- All Documentation Admins (7)
- All Multimedia Specialists (4)
- Danielle
- Sean Marshall
- Additional Spots (9)

Purchase 10 licenses

This will cover

- All Documentation Managers (3)
- All Multimedia Specialists (including Lauren (as multimedia leader)) (4)
- Danielle
- Sean Marshall
- Additional Spot (1)