



workzone

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AUGUST EDITION



Workzone August Update

In a few weeks the fall campaigns, the Q4 planning, and every "let's circle back after summer" thread come due in the same week.

July cleared a few things off your plate: the Microsoft integration went native, and the Reports and Settings nav got a full rebuild. And this week, Forecasting went live: it reads how your projects are actually trending and shows you where they land before the deadline moves.

We also have our next session in the [AI Skills for Marketers series](#) coming up, and it's about the work you never chose to do: the weekly reports, the research pulls, the file cleanup that quietly eats your week. We'll show you how to hand it off to Claude, no technical background needed.

In this issue:

- Live webinar, Aug 19: [Claude Cowork 101 for Marketers](#). Hand off the busywork that eats your week, no code required.
- FEATURE Product update: [Forecasting is live](#).
- Product update: [Microsoft Drive](#) is now native in Workzone
- Product update: [Reports and Settings navigation](#) got a rework
- Plus: four smaller upgrades, from hidden request forms to clearer activity logs

WEBINAR

Claude Cowork 101 for Marketers: Delegate the Work That Eats Your Week

LIVE WEBINAR - A HANDS-ON SESSION

DELEGATE THE WORK THAT EATS YOUR WEEK

CLAUDE COWORK 101

REGISTER NOW

A LIVE BUILD - JULY 30 - 12 PM EST

Claude Cowork is an AI teammate you hand repetitive work to. Connect a folder, describe the task in plain English, and it runs, once or on a schedule you set. No code, no setup headache.

On **Wednesday, August 19, 12 PM EST (11 AM CST)**, we'll build it live and show you how to put it to work. No technical background needed.

You'll learn how to:

- Set up your first task.** Connect a folder, write the prompt, set it to repeat.
- Choose what to delegate.** Weekly reports, competitive research, deck assembly, file cleanup.
- Brief it for quality.** How to prompt Cowork so the output comes back ready to use.

You'll leave with the **Handoff Playbook**: the exact task setups and prompts we use. Part 2 of our **AI Skills for Marketers series** (Vibe Coding was Part 1).

Register →

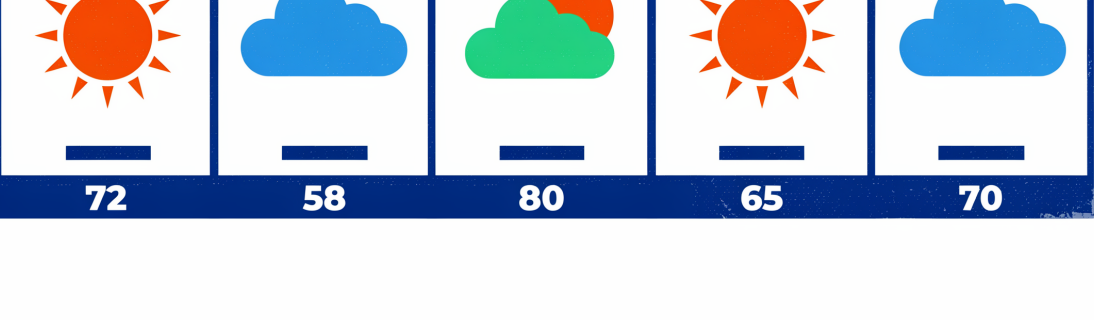
P.S. Busy that day? Register, and you'll get the recording, the playbook, and the setup checklist.

FEATURE HIGHLIGHT

NEW in Workzone Enterprise: Forecasting

FORECAST ANALYTICS

PREDICT WORKLOAD, TIME, EXPENSES



Forecasting is now live in Workzone. Baselines showed you the slip. Forecasting reads where it's headed, studying how your completed tasks have drifted and projecting that same drift onto the work that's still open.

→ Gray is your baseline, blue is where you are now, orange is where you're headed

→ Built from your own completed tasks, not a guess

→ Covers schedule, time, and expenses

→ Shows up once your first task is marked complete

Available on Workzone Enterprise. It lives right in the Baselines tab.

See Forecasting →

PRODUCT ROADMAP

Missed the Roadmap Webinar? Watch the Recording

THE WORKZONE ROADMAP.

What's shipping. What's next. What it saves you.



Our CEO and CTO walked the full Workzone roadmap in 45 minutes. It already happened, but the recording covers all of it:

→ A clear view of what's shipping in the next few months, and what's further out

→ The thinking behind each priority, and why we built it that way

→ A first look at where AI fits in, grounded in saving time and catching risk early

→ The full Q&A with the team

Watch the Recording →

RECENT RELEASES

Other Recent Releases

A few more updates worth a look:

- Microsoft Drive, now native.** Connect Microsoft Drive files straight to projects and tasks, so the file you need is the latest version, not last week's draft.
- A reworked Reports and Settings nav.** Everything's back in the left nav with an auto-collapsing accordion, plus pinned reports and in-module reporting menus.
- Hide a request form from the public list.** Share its direct link with just the people who should have it.
- Edit time and expense entries mid-entry.** Edit an existing entry while a new row is already open in the tray.
- Clearer activity logs.** Task update logs now show the project name, plus a new log for who created a user and when.

✨ BEFORE YOU GO ✨

Know someone juggling multiple accounts or drowning in email approvals?

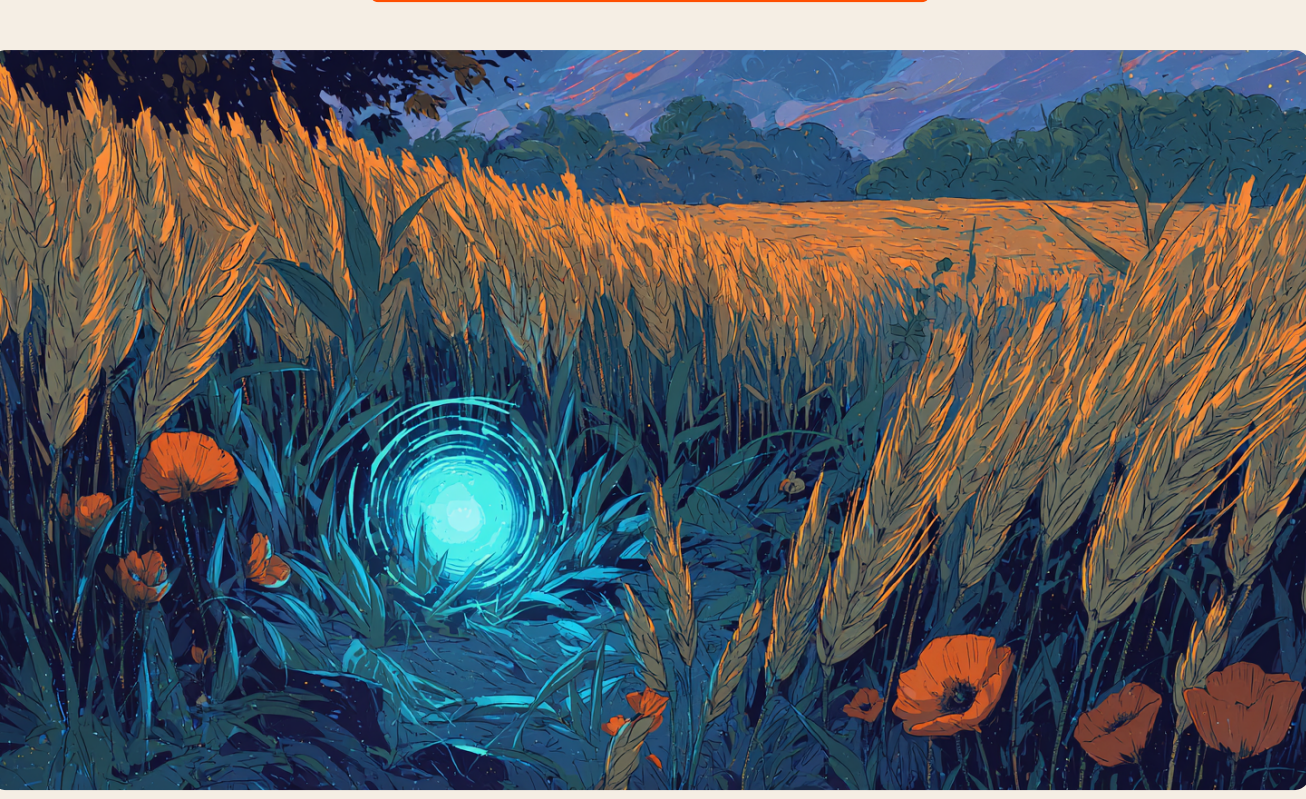
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Workzone Free Trial →



Worth reading this month

FROM THE WORKZONE BLOG



21 AI Prompts for Credit Union Marketing Teams Who've Been Told "Don't Use ChatGPT"

16 Min Read →



Everything Is Urgent, So Nothing Gets Finished

When the loudest request always wins, the campaign that would actually drive pipeline sits at seventy percent forever. Here's how the best teams make "what's next" a decision everyone can see.

6 Min Read →



Cowboy vs. Hero Culture Stops Working as You Scale

Early on, the person who just knows how everything works feels like a superpower. Then they take a week off and the whole team stalls. Here's why hero culture quietly caps your growth.

7 Min Read →



Time Management Techniques for Project Teams

Personal habits only get a team so far. Pair them with shared visibility into everyone's workload and the plan holds even when the week gets loud.

8 Min Read →



That's it. That's the whole email. You made it. Proud of you.

Have thoughts? Questions? Just want to vent about your project? Reply any time. Humans over here. Not a bot, not a form, just us.

Talk soon,
The Workzone Team

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