REVENUE OPPORTUNITIES WITH ADPOINT: **WORKFLOW CASE STUDY**

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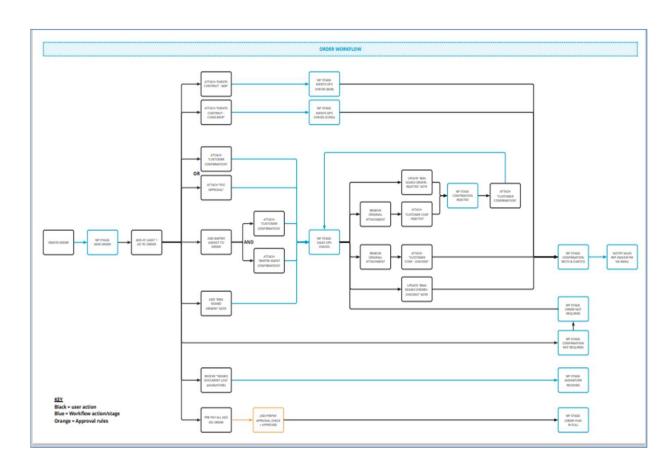# The World of Workflow – Introduction

Why do we need workflow?

Workflow should be used to enhance current business processes.

This is a structured way of organising and managing work processes to ensure visibility, efficiency and consistency across the sales orders.

The first step is to map out the business process offline, so you have a clear understanding of where workflow is required.

The World of Workflow – System Configuration
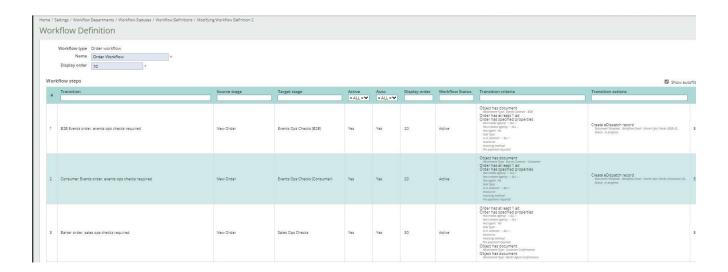
What defines a workflow?

There are some pre-configured workflows in Adpoint, we use to create the workflow definitions.

They consist of:

- **Workflow Streams** – Ad, Cases, Creative Detail, Material, Opportunities, Order, Order Revision & Project
- **Workflow Criteria** – The data the workflow is looking for.
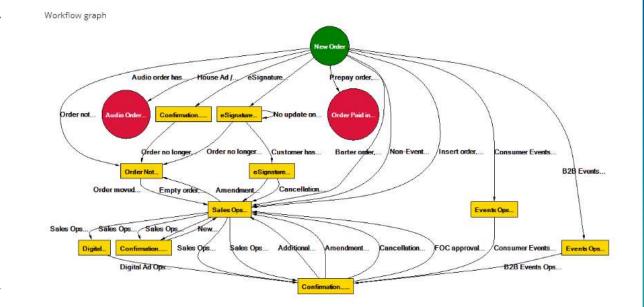- **Workflow Actions** - The changes workflow can make.

The World of Workflow – System Configuration

Creating a Workflow

- **Workflow Departments** –
  For information only – to identify
  which department has responsibility
  for the order/ad at that time

- **Workflow Statuses** –
  Already configured in the system.
  We use 'Active' and 'Completed' –
  Completed is to only be used if the
  whole process is finished.

- **Workflow Definitions** –
  Where the workflow is configured.

- **Workflow Creation Rules** –
  To determine which workflow is
  automatically attached when an order /
  ad is first created.

- **Workflow Widgets** –
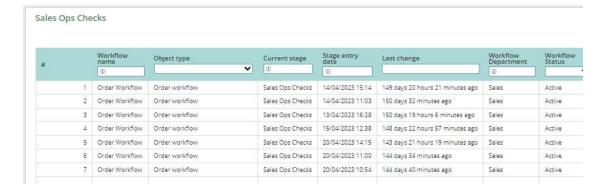 To create dashboard views.

The World of Workflow – System Configuration

Creating a Workflow Widget

One of the key benefits of workflow, is allowing users to see the stages of an ad, and see anything assigned to their teams in their worklists.

Worklists are generated using workflow widgets and selecting the 'dashboard' widget type.
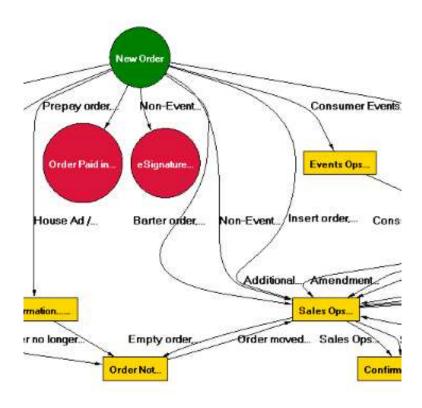
The World of Workflow – Operations

What does Workflow mean to us?

Our Order Workflows –

- Determines the destination of the order

- Creates our worklists

- Allows us to see where an order is in its journey

Our Ad Workflows –

- Enable delivery of ads

- Creates worklists for delivery & enablement teams

- Prevents fulfilment until all approval checks are complete

The World of Workflow – Operations

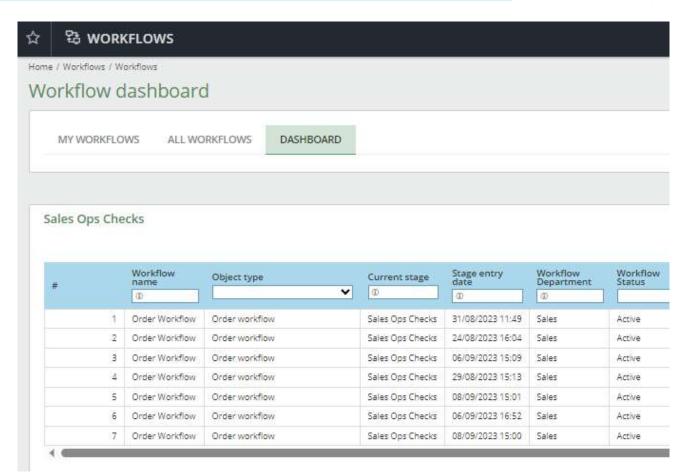## How does Workflow shape your work?

The Order Workflow is applied upon creation of an order

The Order Workflow creates our worklist

Each Workflow stage can be reported and managed

Certain actions drive the transitions to move the Workflow on

Each Order and Ad Workflow stage tells us what action is required

The World of Workflow – Operations

How does Workflow shape your work?

Workflows join up the operational teams

Digital delivery can be tracked through Workflow

Social ad lines are managed through Ad Workflow

Month end digital reconciliations are structured around the Ad Workflow

Helps to ensure all ads are in a billable status, ready for month end billing

Sales Ops Checks (Delivery Met / Not Met)

Workflow name	Object type	Current stage	Stage entry date	Last change
Online Ad Pattern Workflow	Ad workflow	Delivery Not Met	03/01/2023 13:01	249 days 4 hours 28 minute
Online Ad Pattern Workflow	Ad workflow	Delivery Met	01/06/2023 09:15	100 days 8 hours 15 minute
Online Ad Pattern Workflow	Ad workflow	Delivery Met	03/01/2023 08:38	249 days 8 hours 52 minute
Online Ad Pattern Workflow	Ad workflow	Delivery Met	01/02/2023 11:10	220 days 6 hours 19 minute
Online Ad Pattern Workflow	Ad workflow	Delivery Met	01/02/2023 11:11	220 days 6 hours 18 minute
Online Ad Pattern Workflow	Ad workflow	Delivery Met	01/03/2023 11:48	192 days 5 hours 41 minute
Online Ad Pattern Workflow	Ad workflow	Delivery Met	03/07/2023 07:13	68 days 10 hours 17 minute
Online Ad Pattern Workflow	Ad workflow	Delivery Met	01/08/2023 07:50	39 days 9 hours 39 minutes
Online Ad Pattern Workflow	Ad workflow	Delivery Met	03/07/2023 07:13	68 days 10 hours 16 minute
Online Ad Pattern Workflow	Ad workflow	Delivery Met	03/04/2023 09:10	159 days 8 hours 19 minute

lineup