

# workflow

Say 'goodbye' to business by Excel with Adpoint's powerful workflow customization and optimization tool.

Adpoint Workflow **simplifies** complex advertising workflows for media companies selling multi-media advertising.

It systemizes and maps entire order-to-billing business processes to keep orders moving, **increase operational efficiencies**, and **enhance collaboration** amongst your teams for better, faster service delivery.

The solution **automates** redundant, manual tasks based on pre-defined standard operating procedures (SOPs), saving you hundreds of hours of administrative work. It also automatically applies rules and transitions to orders that do not require manual intervention, allowing your advertising sales teams to focus on managing the kinds of complex or bespoke orders that typically generate **more revenue**.

Our workflows are **easy to build** and can be adjusted to meet the needs of standard or complex business processes and rules. You can utilise a comprehensive bank of existing transition actions and criteria, and you can assign workflows to the entire application or per groups and roles.

- › Process orders **faster** and more **cost effectively** with **automated** transitions
- › Achieve more **consistent outcomes** on repetitive tasks
- › **Improve** customer service and response times
- › Increase team collaboration by **automating** your SOPs
- › Deliver better **order accuracy** through error elimination
- › Fully auditable for **SOC compliance**

## Workflow can help you:

### Create workflows specific to each sales journey

Adpoint Workflow will automatically evaluate the information on the opportunity or customer profile, then provide the journey that's most appropriate to the sell you're trying to make.

### Automate copy chasing

Make sure orders never fall through the cracks, without clogging up your calendar with chase notifications. Workflow will send out notifications to remind the correct person of your deadlines for approved copy.

### Track material statuses in real-time

Simply set up notifications for when ads are pushed to the ad server and once campaigns start delivering, and trust these statuses are accurate.

### Automate production & inventory approvals

Workflow can automatically approve orders based on your pre-defined rules. It eliminates the need for human approvals and ensures that policies are followed consistently and uniformly throughout your organization.

### Monitor over-sells

Use Workflow to make smarter sales decisions! If your teams have a habit of overselling a particular ad section, the tool will automatically send offending orders back to your planners or sales coordinators.

### Automatically adjust order formats

Workflow enables each single multi-channel, multi-ad order to be distributed to different delivery systems, and for the correct data to be collected simultaneously.

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## Recall the correct creative collection forms

There's no need to remember which fields need to be filled in, or to gather unnecessary data points for your order. Workflow will bring up the correct creative collection form options, based on the type of advertising you're selling.

## Lock ads from unauthorized revisions

Sidestep complicated policies and make sure your entire record is auditable by 'smart locking' your ads according to rules that define who can edit an order and when.

## Quickly escalate case disputes

Instead of manually monitoring all comments, let Workflow send cases to the correct person directly, cutting your customer wait times and reducing frustration amongst your teams.

## Perform QA & compliance checks

Whether set up as a replacement for your human QA team or to enhance it, Workflow is a great tool for catching small mistakes that are easily missed.

## Additional Functionality:

- › Workflow evaluates the **total value of any opportunity** and its probability of closing, then automates revenue splits across publications, brands, and orders
- › The **Opportunities feature** manages whether sales activities are present – and flags orders that are assigned to each prospect
- › Workflow **evaluates** against phrases and words that, if used, can progress, or stop the workflow accordingly, per the case types and their statuses. It also **checks** on order owner office positions for approval or follow-ups
- › Enhanced **document management** enables checks for specific file types and multiple custom statuses

Workflow is available with **Adpoint Plus**.

## What is Adpoint?

Adpoint is a multichannel advertising sales management solution. Encapsulating four key modules – CRM, OMS, Finance and Analytics – Adpoint allows your teams to manage the entire ad sales process, from placing the initial order through to booking, invoicing, and measuring success.

## What is Adpoint Plus?

Our Adpoint Plus program enables you to enhance your system's functionality even further. This suite of paid-for tools includes Adpoint for Salesforce, Digital Signatures and Workflow.