

Automation Workflows

Streamlining Processes for Efficiency

Presented by:

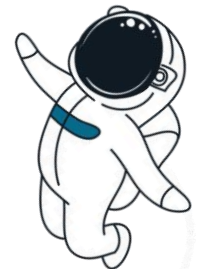
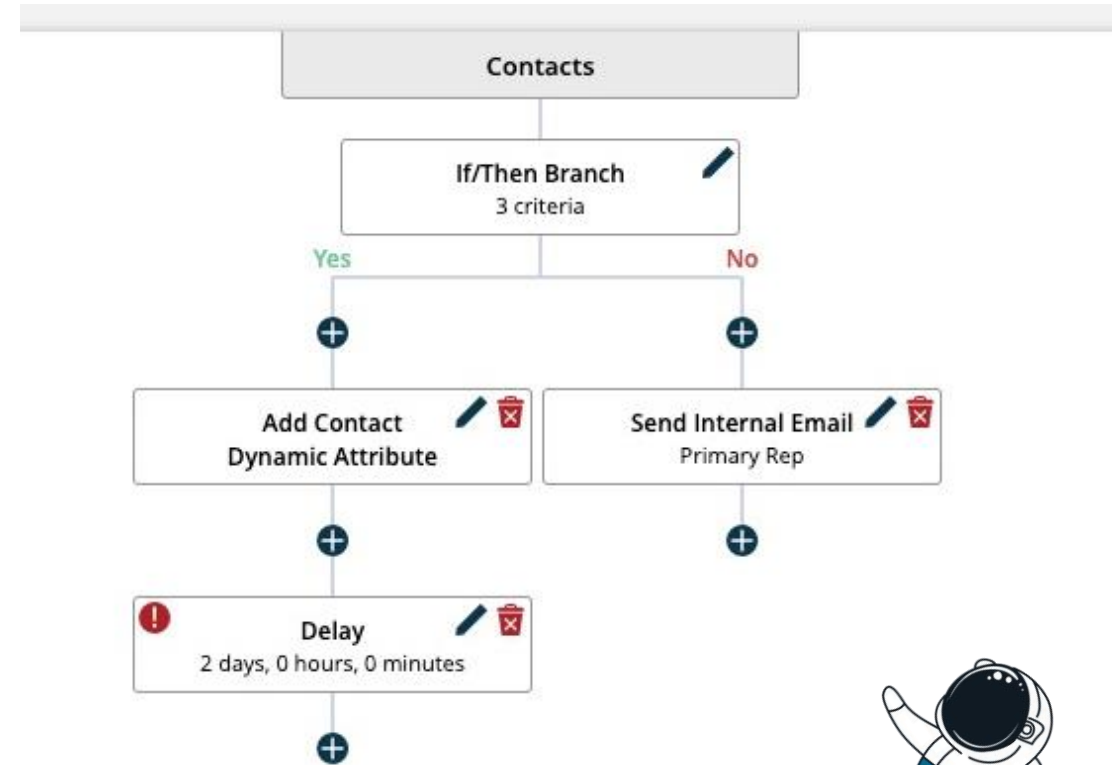
Brook Williams, Dan Thurston, & Shalyn Ormsby

ORBITAL24
Fall Forum

Ad  Orbit

What are Automation Workflows?

Workflow automation is a digital strategy that uses software to automatically complete tasks and processes, reducing the need for manual intervention. It's a tool that helps businesses operate more efficiently and consistently.



Types of Automated Workflow

Ad Orbit Supports Multiple Types of Automation Workflows

Contact/Sales

- Contact Created
- Contact Dynamic Attribute Modified
- Contact Modified
- Current Contact Dynamic Attribute Value

Ticket

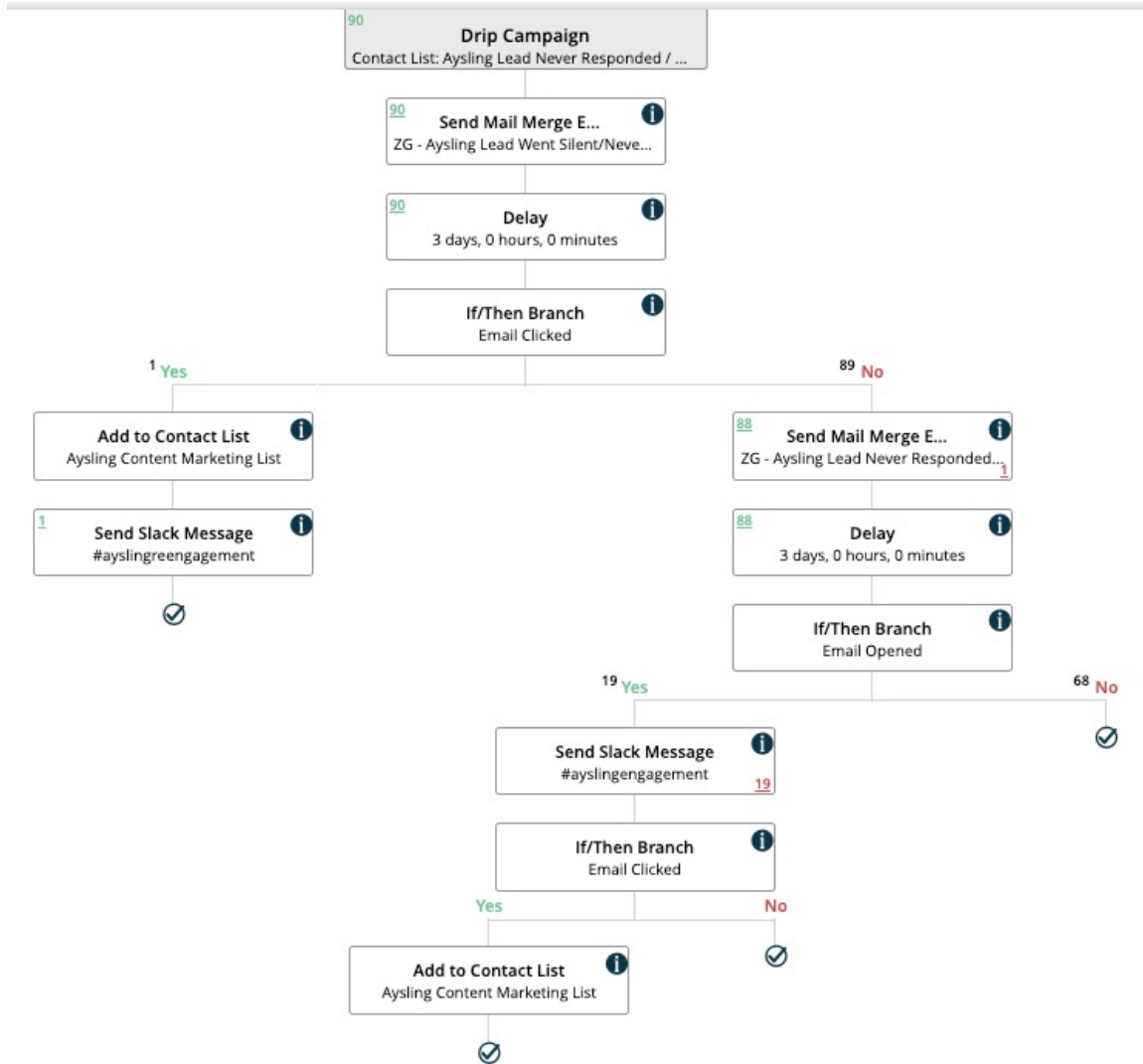
- By Ticket Type: Ad, Digital Media, Event, Service Item, Service Ticket
- This can be narrowed down by publication, ad size, product category, or product.
- There are a lot of options!

Marketing

- Geared toward drip campaigns
- In a combined list with contact automated workflows
- Excellent for follow-up!

Understanding Automation Workflows

- A workflow is a series of tasks or steps that, once triggered, are completed automatically.
- Workflows can range from simple (like auto-email replies) to complex (integrating multiple departments or platforms).



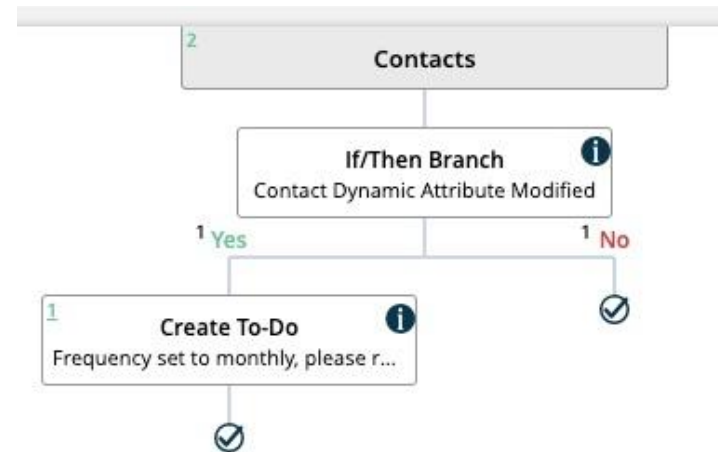
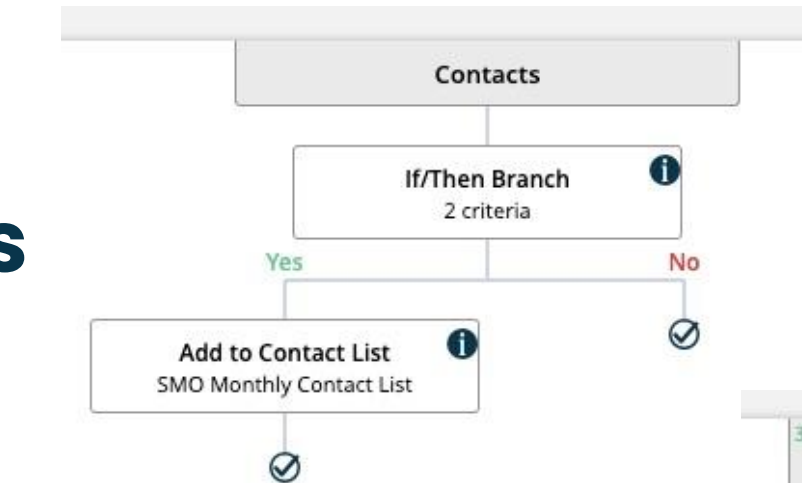
Key Benefits of Automation

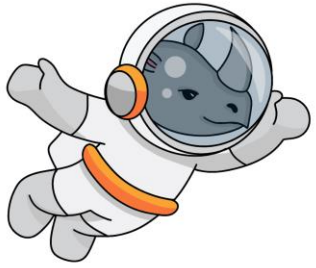
- Increase Productivity
- Reduced errors
- Cost savings
- Efficiency
- Scalability
- Accuracy and precision
- Enhance customer engagement
- Enhanced collaboration
- Faster Processing
- Boost employee morale
- Choose the right automation tools
- Complete accountability
- Compliance
- Data insights
- Facilitating business scaling
- Increases transparency

Contact/Sales Automation Workflows

Let the system do some work for you...

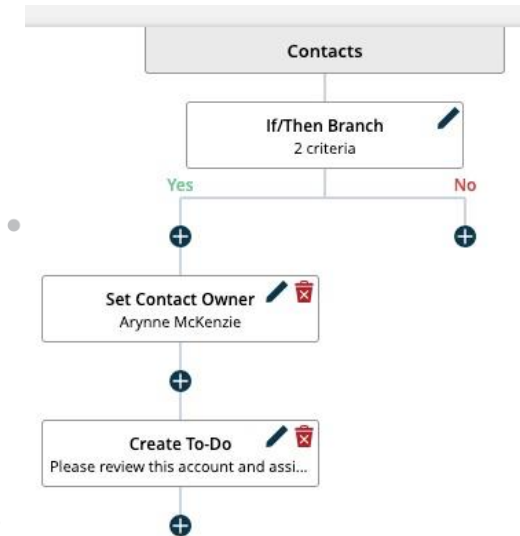
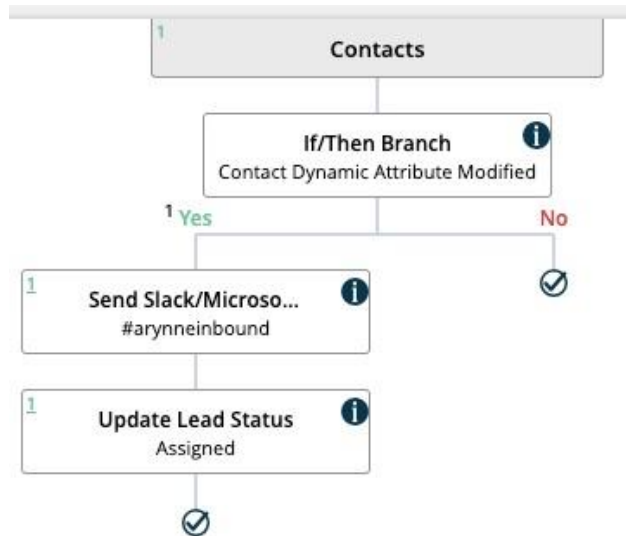
- Use automation workflows with dynamic attributes to add contacts to
 - Contact and auto draft lists
 - Add to-dos to calendars
 - Send messages to Slack/Teams
- Get an email, Slack, or Teams message about inactive accounts.
- Update lead statuses
- So much more!!





Contact/Sales Automation Workflows

Here are a few more examples



Add Automation Workflow

Name *

Execution Time *

Every Day

Timezone

America/Detroit

Type *

- Ad Tickets
- Digital Media Tickets
- Event Tickets
- Service Item Reminders
- Service Tickets

Save Cancel

Ticket Automation Workflows

Whether you need simple or complex ticket management, let automation help!

- Customized by ticket type
 - Ad Tickets (Print & Digital)
 - Digital Media Tickets
 - Event Tickets
 - Service Item Reminders
 - Service Tickets
- Individualized by publication(s)
- Ad tickets (print and digital ads) can be narrowed down by ad size(s).

Edit Automation Workflow Settings

Name *

Type *

Ad Tickets

Execution Time *

Every Day

Start Time

End Time

Timezone

America/Detroit

Publication Type *

Print

Publications *

Ad Orbit University

Ad Sizes

—

Save Cancel

Add Automation Workflow

Name *

Execution Time *

Every Day

Timezone

America/Detroit

Type *

- ✓ -
- Ad Tickets
- Digital Media Tickets**
- Event Tickets
- Service Item Reminders
- Service Tickets

Save Cancel

Type *

Digital Media Tickets

Execution Time *

Every Day

Start Time

End Time

Timezone

America/Detroit

Inactivity Workflow

Inventory Type *

Impressions

Product Category *

AO - Impressions

Products *

Geofencing

Publications

Ad Orbit University Digital

Save Cancel

Ticket Automation Workflows cont.

Digital Media Ticket Automation

- Digital Media is set up by
 - Inventory type
 - Impression
 - Slot
 - Targeted Display
 - Reserved
 - Product category
 - Product(s)

Add Automation Workflow

Name * Type * **Event Tickets**

Execution Time * **Every Day** Start Time End Time

Timezone **America/Detroit**

Inactivity Workflow

Event *
Ad Orbit University 2024

Booth/Sponsorship *
All included package for two guest

Save **Cancel**

Add Automation Workflow

Name * Type * **Service Item Reminders**

Execution Time * **Every Day** Start Time End Time

Timezone **America/Detroit**

Product Category *
— Select Category —

Services *
—

Reminder Date * **Expiry Days ***
— Select Reminc

Save **Cancel**

Add Automation Workflow

Name * Type * **Service Tickets**

Execution Time * **Every Day** Start Time End Time

Timezone **America/Detroit**

Inactivity Workflow

Product Category *
— Select Category —

Services *
—

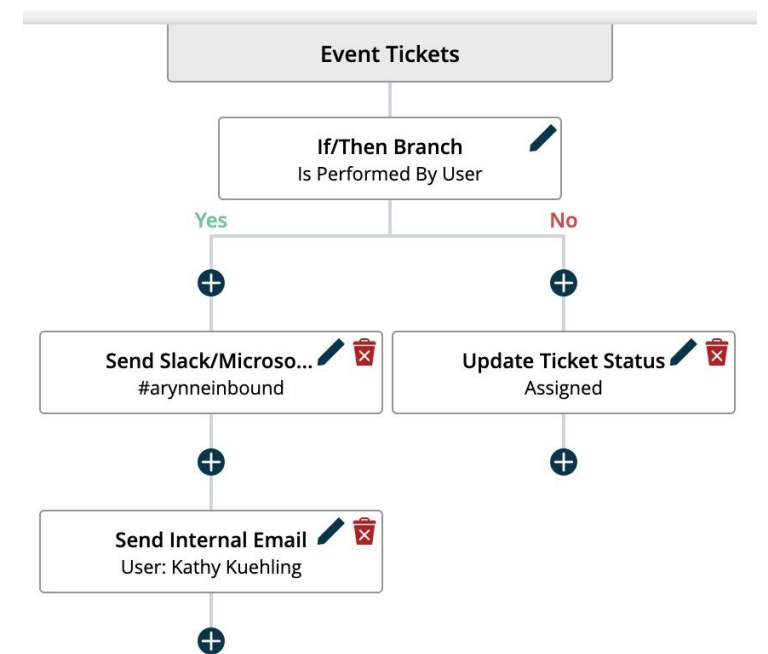
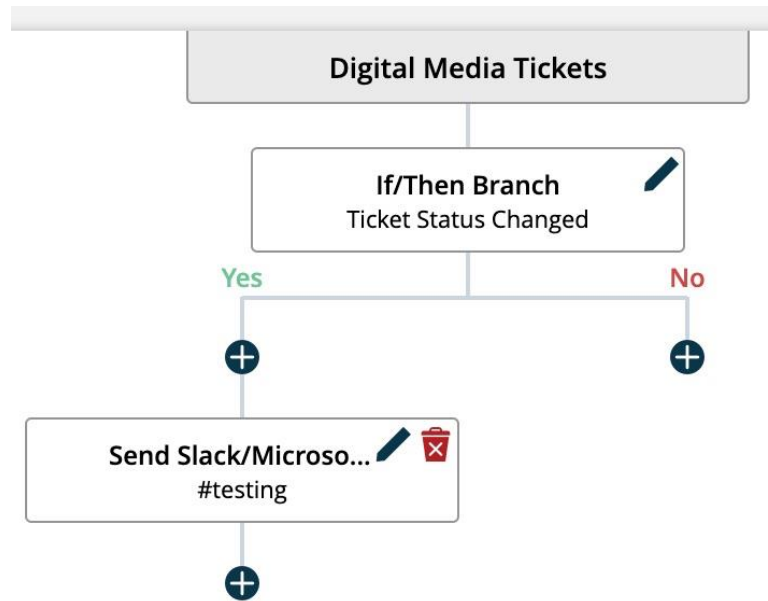
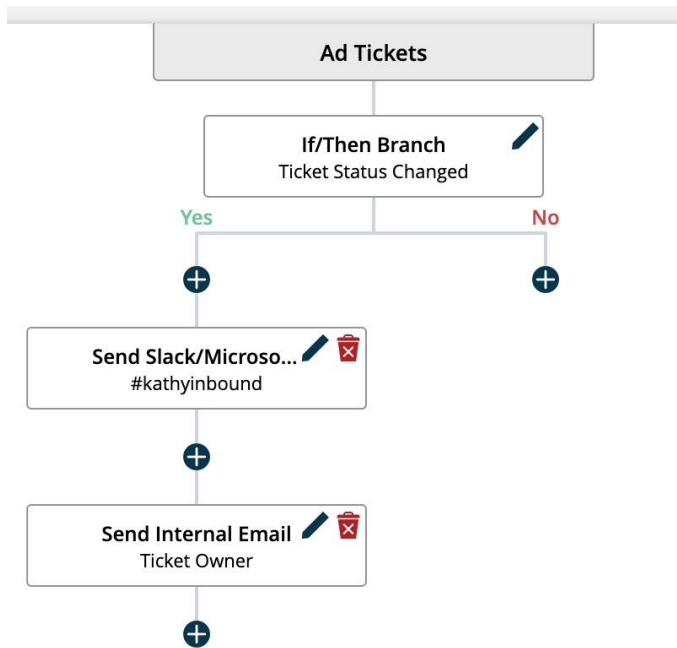
Save **Cancel**

More Ticket Automation Workflows

Event Tickets, Service Item Reminders, Service Tickets

- Customized by ticket type
 - Ad Tickets (Print & Digital)
 - Digital Media Tickets
 - Event Tickets
 - Service Item Reminders
 - Service Tickets
- Individualized by publication(s)
- Ad tickets (print and digital ads) can be narrowed down by ad size.

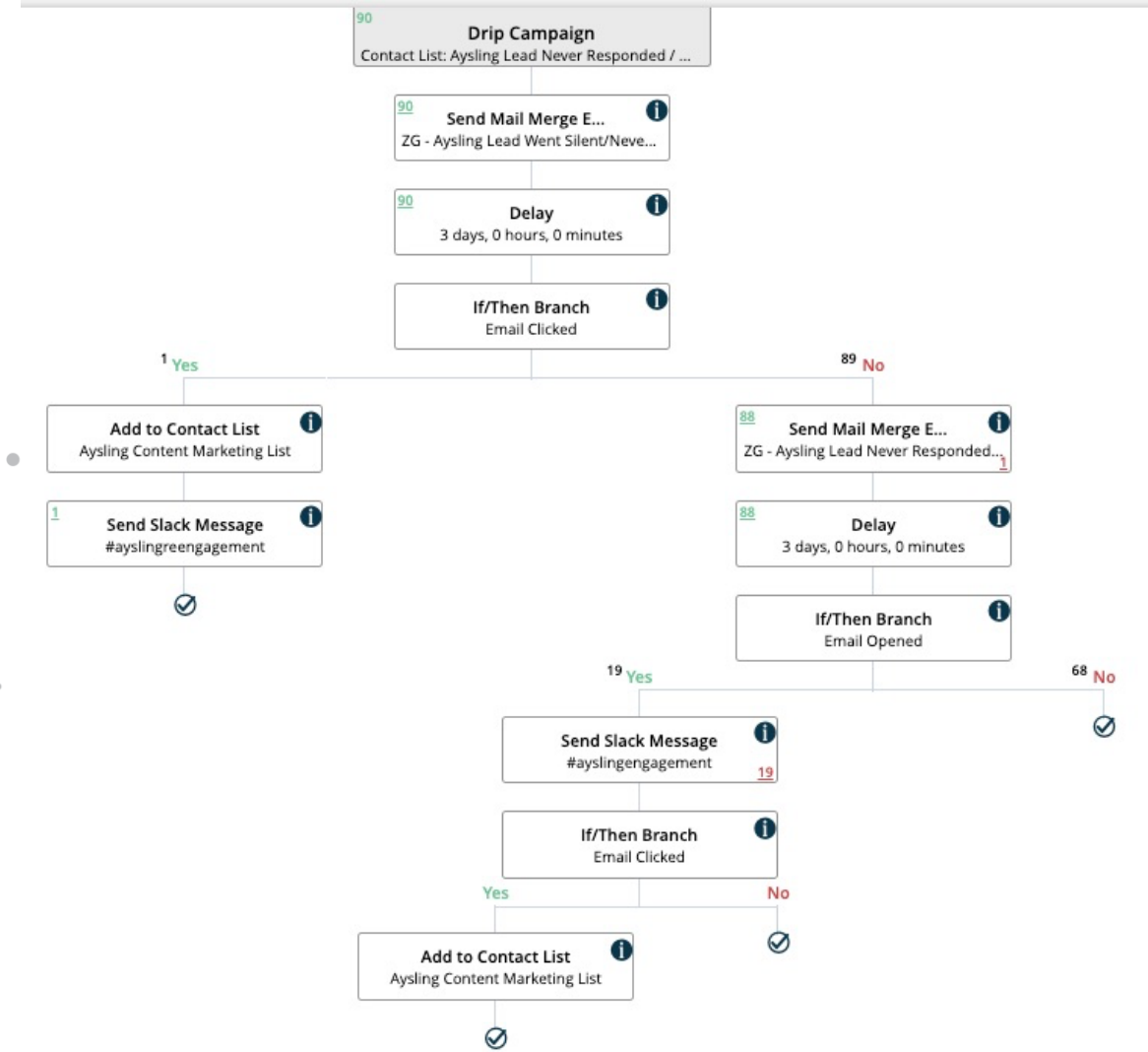
Ticket Automated Workflow Examples



Marketing Automation Workflows

Utilize automation workflows to meet your marketing requirements.

- Design personalized drip campaigns for prospects and customers, increase engagement, nurture leads, and improve customer retention.
- Integrate sales and marketing.



Questions?

THIS SPACE IS FOR YOUR HEADER

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The body text of your slide can go here. Now we'll fill this space with lorem ipsum so you can see how many words you can fit.

Lorem ipsum odor amet, consectetuer adipiscing elit. Himenaeos erat habitant ac condimentum ex laoreet ligula ullamcorper. Fusce donec platea facilisi mi nunc convallis.

Viverra phasellus urna auctor nulla nisl justo sociosqu litora.



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- It's the same as the other one we just flipped it for some variety.

Lorem ipsum odor amet, consectetur adipiscing elit. Himenaeos erat habitant ac condimentum ex laoreet ligula ullamcorper. Fusce donec platea facilisi mi nunc convallis.

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IMAGE

Maybe you just want to put a big picture with a few words. This is the slide for you.

THIS SPACE IS FOR YOUR HEADER

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Sometimes you might need to put three images in a row. Maybe it's a process or multiple screenshots. Have fun, go nuts.



IMAGE



IMAGE



IMAGE

IMAGE

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consectetur adipiscing elit.
Himenaeros erat habitant ac
condimentum ex laoreet ligula.

IMAGE

Lorem ipsum odor amet,
consectetur adipiscing elit.
Himenaeros erat habitant ac.
there are no "jokes" on this slide.

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consectetur adipiscing elit.
Bibendum id nam; dignissim litora
nibh orci mollis. Facilisi justo.



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subheader



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