



10 Things you should automate today for a better marketing workflow

If you follow the Ziflow blog, you're probably familiar with a theme we discuss often with regards to marketing and creative production—the difference between being “busy” and being “productive.”

All too often, that distinction comes down to how well you organize your marketing workflow—optimizing the way you accomplish the work assigned, so that you're maximizing the time spent on high-value, impactful activities.

The rate at which new marketing projects and campaigns are being produced today doesn't allow for any wasted time, especially time spent on “busy work” (busy work being defined as anything you'd rather give to a robot to accomplish).

Having an effective creative marketing workflow is more important than ever, for both marketing departments within large companies, as well as the agencies that serve them. Deadlines and margins are shrinking, expectations and costs are growing. This is where technology must finally help create balance in the marketing organization.

Simplifying lives of marketers everywhere—that is our *raison d'être*—we know there are hours that can be saved every day simply by automating the repetitive, mundane, yet important tasks that go into creative marketing production.

We've chosen a few tangible areas where Ziflow can add immediate value to your marketing workflow. Whether you're a graphic designer looking to spend more time on actual creative (and not converting PSDs to JPGs, again), or you're a production or project manager sticking to timelines, Ziflow can help you and your team, acting as your marketing robot.

Getting (and staying) organized

One of the quickest “wins” with Ziflow is the immediate gains our customers get from automating the tasks that go into keeping their Work in Progress (WIP) files organized. One agency client of Ziflow shared with us:

“ ... my team works with multiple creatives on many different campaigns all at once, so organization sometimes falls short. This of course leads to miscommunication and having to extend deadlines with the clients in order to get everyone aligned.

Here’s some examples of what Ziflow can automate to help you organize WIP files, as well as examples of storing work when a project has been completed:

Copying and/or moving files

Say you want to create an emergency back up of all project files in case something gets over-written or just deleted altogether. Ziflow can create copies of all files, or certain file types you identify. You can also selectively move types of files to different folders. In this case, you could drop all of a project’s files in a single folder and Ziflow can selectively identify all source files (like AIs or INDDs), image files (PNGs, JPEGs, GIFs, etc.) or even PDFs, and move them to proper folders, depending on how you like your files organized.

Renaming files

This is one of the more common “a ha” moments when we start to discuss automating parts of the creative workflow as files get ready for review and production. Ziflow can automate the renaming of folders and files, saving you the time and effort. This comes in handy if project guidelines required a certain naming convention, such as inserting a specific product, client or project name in the filename. This can be done on one or hundreds of files simultaneously.



☒ Customize file name

ProjectName_ **Filename** \${seq.number}

^ Tokens

Use these to add dynamic information to the folder name.

<code>\${current.date}</code>	Date at the moment of renaming the file ?
<code>\${current.datetime}</code>	Date and time at the moment of creating the folder
<code>\${user.name}</code>	User who triggered the flow
<code>\${seq.number}</code>	Sequential numbers in executed flow - 01, 02, 03 ...

Preview

ProjectName_ExampleFileName1.txt

Creating folders or folder hierarchies

If you and your team likes to keep things consistent across projects, that means you probably have a standard file-tree as part of your marketing workflow. Once a new project is kicked off, simply creating a new folder can trigger a Ziflow rule to create an entire hierarchy beneath it. You can also use this function to create a single folder.

Structure

Drag and drop folders to modify hierarchy. ⓘ

WIP	×
Design Files	×
Video files	×
Audio files	×
For Review	×
Final	×
To Production	×
New folder	?

Offloading folders or files for storage

In addition copying and move files, many of our customers have created **workflows in Ziflow which allow them to move entire folders, or single files, via FTP**. This comes in really handy when it's time to ship files off to their final production destination, or at the end of a project when it comes time to clean up your workspace in digital terms and move folders to an FTP site for long-term storage and retrieval if need be.

Getting organized can pay dividends

There was a great article recently by Jeffery LePine, management professor at the W. P. Carey School of Business at Arizona State University, where he shared research conducted with NASA on how the transitions between tasks affects our productivity ([you can find the article here](#)). His findings at a high level? The secret to productivity isn't working faster—it's doing things in the right order. We couldn't agree more! By automating tasks that don't require a lot of value-added thinking, but are time-intensive, you can ensure things get done properly, in the right order, the first time, cutting down on rework.

File preparation and transformation

Given the wide range of marketing channels being used to engage with customers these days, marketers are being asked to deliver more and more file types for each new project. Whether it's static design, video, audio or mixed media, this can create hours upon hours of extra non-creative production work to to accommodate all of the types needed.

Ziflow can help streamline your marketing workflow by automating these types of conversions. Here's a few examples of how we can help.

File conversions

How many times have you been a party to this situation: a designer (maybe that's you) sends out a new design via email. A few minutes later, a few replies start to roll in..."what's an AI file?" or "I can't open INDD files on my phone" (maybe you've said this yourself). It's a simple task to convert a file within your favorite design product, but what about the 15 variations (and sizes) you just created for a review session today? Now you're talking actual real time on something that a robot should do for you.

A common workflow often implemented on day one of using Ziflow is converting native design files, like AI, INDD or SKETCH to easily shareable file formats like PDF, PNG, JPG, etc.

It's not just design files that can be converted; if you work in Office formats like PowerPoint or Word and prefer to limit the editing of those docs before you share them, you can also convert these files to PDFs by simply dropping them into a Ziflow-enabled folder.



Video transcoding

The use of video has exploded and so have the formats used to convey those videos. If you or your team is creating video for multiple use cases and destinations, Ziflow can automate a wide range of format conversions (mobile optimized, web, various HD outputs, etc.). Another added benefit is that you can set notifications to let you know when the files have been completed and automatically deliver them to distribution networks, or simply share them out with team members.



Audio transcoding

Similar to video transcoding, Ziflow can also transcode audio files into the file formats you use every day. Simply dropping your source file into a Ziflow-enabled folder will kick off the workflow.

Ziflow supports dozens of video and audio codecs for input for industry-leading format compatibility.



Automating file sharing and notifications

When it comes to criticisms of team performance, there probably isn't a more cringe-inducing description than "not being on the same page." Clearly there isn't a shortage of communication methods available (email, Slack, status update in project management apps, etc.), but we still sometimes fall short on keeping everyone updated on what's being asked of them or what their next steps are.

Given the pace at which marketing teams work today, it's not always feasible to stop what you're doing to email the various teams you're working on (or remembering which of your teammates is working on which project). Ziflow makes it easy to automate file sharing and notifications to keep projects moving on time.

How many projects are you working on currently? For each of those projects, are your team members the same? If not, you probably have to keep track of who to share new working files with.

- **Need to convert an AI file to a PNG?**
No problem, and once it's been converted, Ziflow can share the new PNG with your team members.
- **A new version of a file has been created—want to let everyone know it's ready for review?** No problem, and once the new version's been uploaded, Ziflow can notify everyone that there's a new proof ready for their feedback.
- **Do you want to share only newly transcoded audio files with your audio specialist?** No problem, you can share files as narrowly or broadly as you need to, by easily picking which team members get notified about certain file types.

In each of these instances, you've actually accomplished two things in improving your marketing workflow:

- **You saved yourself the time required to send countless emails, Slack messages, texts or status updates, by having Ziflow do it for you.**
- **You ensure that the right people have the right info, at the right time.**

Notifications can also be simple emails, Slack or Microsoft Teams messages, enriched with tokens: metadata about the file itself, the folder it's in, who created it, etc.

File sharing doesn't just apply to humans. As mentioned earlier, Ziflow can also automate the delivery of finished files to FTP sites and distribution networks. This comes in super handy if you're currently managing multiple logins via sticky notes on your monitor. Those can all be managed by Ziflow for repetitive use.

Email address

Mike Puterbaugh ✕

Type name or email

☒ Custom message

Subject

\$(file.name) has been added to your WIP folder

Message

Hey \$(user.name),
A new file (\$(file.name)) has been added to \$(folder.name) in the
\$(folder.folder) tree.

You can check it out here: \$(file.link)

Thanks. You're awesome.

▼ Tokens

Conclusion

If you or your team work on projects or campaigns that leverage a wide range of marketing channels (web, print, video, audio, mixed media, etc.), being able to automate the mundane, repetitive, or monotonous work will save you hours every day—kicking your marketing workflow into a higher gear.





Ziflow is the leading creative collaboration platform. It empowers agencies and brands to deliver exceptional creative work by streamlining feedback on any creative asset from concept to completion. Customers include Showtime, McCann Worldgroup, AWS, Weber, Specialized and Dupont. Ziflow was founded in 2016 and serves thousands of customers across the world. Ziflow has team members in the US, UK, Poland and South Africa.

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