LEO BURNETT RELIES ON PROCESS DIRECTOR TO RUN KEY BUSINESS PROCESSES

Leo Burnett

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Leo Burnett Worldwide is one of the world's largest agency networks and the parent company of Leo Burnett and its marketing services arm, Arc Worldwide. Leo Burnett, a HumanKind communications company, has a simple and singular approach: put a brand's purpose at the center of communications to truly connect with people. Leo Burnett, one of the most awarded creative communications companies in the world, creates "Acts, not just Ads" for some of the world's most valuable brands including Allstate, The Coca-Cola Company, Hallmark, Kellogg's, McDonald's, P&G, Samsung and Walgreen's.

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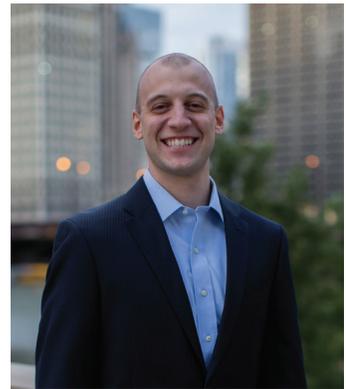
GREG ROSZCZYBIUK
Chief Architect

THE NEED TO AUTOMATE

Steve Hudgin is the Director of Agency Technology Solutions Group and liaison to the IT Solutions Shared Services Group. His team supports and delivers technology solutions to agency staff and

departments. Working with and reporting to Hudgin is Greg Roszczybiuk, the chief architect and resident expert on the agency's implementation team. The two work hand-in-hand to define, identify and then deploy the technologies that address the requirements of Leo Burnett's business.

Prior to Hudgin and Roszczybiuk's involvement with workflow and BPM technology, the leadership team at Leo Burnett had identified the need for a more formal, technology-based solution to route client estimates for approval. Recognizing that automating the Agency's project estimating procedure was a priority, that team had agreed to replace a tool which had outgrown its original scope. (That tool was a hybrid solution consisting of a document management and file sharing system with basic routing.) As users had attempted to add more complex rules to the system, it became more and more challenging to use and maintain. As a result, Agency management decided to look for a tool with a business process foundation, one

that could handle both simple and complex workflows — and do so without coding.

The support team looked at the evaluation process from an additional perspective. They needed to route estimates for the work that every client requests from the Agency, as all estimates created for clients goes through a process that involves periodic updates along the way. A business process management approach fit 95% of Leo Burnett's requirements and would enable the staff to set up rules based on brand and dollar amount – and have better control over the approval process.

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Preliminary field market research including Google searches was the first step, followed by a discussion with Gartner analysts. As the original team looked at the different tools available, they determined criteria including they wanted a product that was dynamic, could handle complex rules, yet was simple to administer. Their selection criterion was 10 pages long and reflected both what the staff knew what it wanted, knew it needed — and also what would be nice to have.

IDENTIFYING THE BEST VALUE PROPOSITION

In terms of core criteria, Leo Burnett needed a flexible, reliable and auditable workflow tool that was secure and would provide a way to move documents within

Leo Burnett and to its clients. The Agency created a requirements list for the product they wanted to acquire. The product needed to: 1) Be flexible, 2) Easy to use, 3) Include dynamic workflows and detailed reporting, 4) Provide administrators with sufficient control, 5) Be compatible with the current environment (SQL server/Windows), 6) Be extensible and scalable and 7) Ensure that hundreds of concurrent users could be supported.

After gathering the requirements, the technical team viewed vendor demos and reviewed information. They developed a score card and ranked/weighted the alternatives. The team then made its recommendation to five committees, who approved the purchase.

In selecting BP Logix Process Director, the team concluded that it was the strongest product to meet both short and long term needs. Process Director would also save the Agency about 35 support hours a week (or one full time employee) in addition to eliminating the backlog.

ENSURING ACCOUNTABILITY TO CLIENTS

Soon after Leo Burnett decided to license Process Director they identified a 'short list' of 12-15 projects. The Automated Estimating System (AES) was the first one that needed to be addressed and completed as the Agency needed a uniform way to route, manage, review and approve all client estimates.

In the Leo Burnett environment there are designated users who create estimates for all new work entertained by the agency. Depending upon specific project criteria, each estimate is required to have specific levels of approvals prior to the commencement of work. These criteria are predefined and have been built into Process Director, allowing each estimate to run through a corresponding workflow that routes it to the correct agency and client approvers. The approvers receive email notifications and are able to open, review and approve the estimates entirely within the system. Automating the estimating process drives efficiency, while allowing the agency to maintain strict internal controls and ensure that approvals are received in the correct sequence and from the appropriate parties.

"We now do a lot of 'Where is that document?' look ups and reports. Managers can review and examine the work being done, study what is in whose queue and analyze the levels of work to make sure the load is balanced," Hudgin stated. In addition he reports, "We have made it known that if people are not following the process, their managers will be following up. And they have."

Every day people come to Roszczybiuk with requests. "The first thing we ask ourselves is "Can Process Director do that?" The product enables us to write rules in a way that looks at all fields on the forms — and identifies who and how many approvers are required. This is done to ensure that we are in compliance with internal controls," Roszczybiuk declared. In addition,

Process Director ensures that everyone is completing the required steps. And any lag time between steps or approvers can be readily identified as well.

A CORNERSTONE FOR THE AGENCY

The Agency Technology Solutions Group finds that Process Director's graphical workflows have helped users to better understand how work is moving through specific processes. "With 8,000 jobs and 16,000 POs, that's really important. I request a job, fill out a form in Process Director, which is then routed to the individual who enters the job into SAP. That individual subsequently enters the job number that was assigned back to Process Director to complete the workflow. Within the form users can create an estimate, purchase order etc. — and basically launch it from within the form. That makes us more efficient from the start," Hudgin declared.

Hudgin is excited about the progress they have made. The old system did not provide the flexibility or reporting that the agency needed and was not integrated into its other systems. "Flexibility is important, as we are supporting a high end system. As important, the BP Logix team supporting the tool has been excellent. We have really good interactions, quick and reliable responses. The tool itself is also reliable—and the company is really good at pushing out new releases with meaningful enhancements. We have experienced Process Director evolving nicely," he added.

From his perspective at the 15,000 foot level, things are positive for Hudgin and his team. With previous rollouts and solutions the team was able to see fairly quickly whether a tool would sink or swim based on its stability. "The feedback we receive indicates that our employees are confident using Process Director. Everything Greg has done with the tool has exceeded what was done before. We import data, filter lists, and more. Our process has also evolved, becoming bigger and more complex than when we started. What we are doing in Process Director far exceeds what we bought it to do. Process Director is now a critical part of how we run the business," concluded Hudgin.

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