

CUSTOMER PROFILE

LEO BURNETT RELIES ON PROCESS DIRECTOR AS IT AUTOMATES 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 The Coca-Cola Company, Kellogg's, McDonald's, Hallmark, P&G, Allstate, Walgreen's and Nintendo.



MADHU KOLAVENNU
Associate Director of Client Solutions

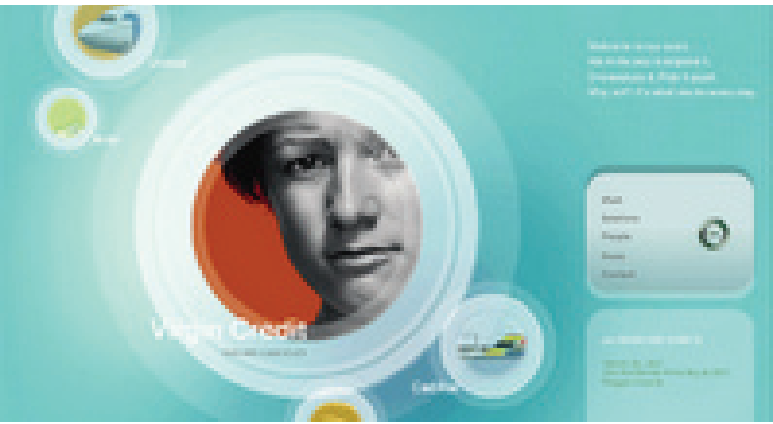


BILL HAYES
Client Solutions Analyst



THE NEED TO AUTOMATE

Madhu Kolavennu is the Associate Director of Client Solutions within the Agency Technology Solutions Group; his team supports the technology needs of the Agency's client-supporting professionals.



Working with Kolavennu is Bill Hayes, a Client Solutions Analyst. The two work hand-in-hand to define, identify and then deploy the technologies that address the requirements of Leo Burnett's business.

One requirement that Kolavennu and Hayes identified was the need for a more formal technology-based solution to routing client estimates for approval, both internally and externally. While automating key processes was at the top of their list, Leo Burnett's project estimating procedure was one of the most visible and necessary of those initial processes. According to Kolavennu, the agency had been routing estimates for approval with a tool not really designed for that purpose. The existing tool was a document management and file sharing system with basic routing. "It was like putting a square peg in a round hole. As we tried to add more complex rules to the system, it became more and more difficult to keep it working. We decided to look for a tool that had a business process foundation and could handle both

complex and simple workflows easily and without coding," he recalled.

Hayes looked at the process from an additional perspective. "We needed to route estimates for the work that every client requests from us. All estimates we create for our clients must go through a process that also involves updates along the way. A BPM approach fit 95% of our requirements and would enable us to set up rules based on brand and dollar amount – and would also enable us to have better control over the process."

Kolavennu and Hayes started with preliminary field market research including Google searches – then spoke to Gartner, Inc., the IT research and advisory company. "As we looked at different tools we knew we wanted something that was dynamic, could handle complex rules yet be simple to administer," remarked Kolavennu. "Our selection criterion was about 10 pages long," Hayes added. "We knew what we wanted, what we needed at an absolute minimum and what would be really nice to have."

IDENTIFYING THE BEST VALUE PROPOSITION

The list Kolavennu and Hayes created required a product 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, Hayes involved Kolavennu in reviewing vendor demos and information. They then developed a score card and ranked/weighted the alternatives. The team then made its recommendation to five committees, who approved the purchase.

“We had a business issue that we needed to solve. There was no IT pain point.

Once we spoke with BP Logix regarding Process Director’s functionality and cost, we quickly determined that it was the strongest product to meet

both our short and long term needs. While we haven’t quantified the ROI we expect Process Director to save us about 35 support hours a week (or one full time employee) in addition to eliminating the backlog,” Kolavennu stated.

ENSURING ACCOUNTABILITY TO CLIENTS

Soon after Kolavennu and Hayes decided to license Process Director they identified a ‘short list’ of 12-15 projects. The Automated Estimating System (AES) was the first one completed; when rolled out to the entire agency it will seamlessly automate a system that provides uniform routing, management and notification of client estimates – and its workflow ensures that the limitations of the previous system have been overcome.

In Leo Burnett’s environment there are designated users whose job it is to create estimates for all new work entertained by the agency. Depending upon specific project criteria, each estimate is required to have certain approvals prior to the commencement of work. These criteria are predefined and built into the solution utilizing Process Director, allowing the 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. This automation of the estimating process



drives efficiency, while allowing the agency to maintain strict internal controls, ensuring that approvals are received in the correct sequence and from the appropriate parties.

“Every day people come to us with requests. Now the

first thing we ask ourselves is “Can Process Director do that?” The product already enables us to write rules in a way that looks at all metadata fields on the forms – and identifies who and how many approvers are required to be in compliance with internal controls. In the old system we had no way of proving what had been done. In addition, Process Director gives us the control to know, not guess, that everyone is completing the required steps. And lag time between steps, or approvers, can be readily identified now!” Hayes declared.

Kolavennu added, “AES is simple for employees to use. Our ability to customize and format email notifications is a great help. In addition, Management is embracing

Process Director. We have made it known that if people are not following the process, their managers will be following up. And they have," he remarked.

A CORNERSTONE FOR THE AGENCY

While the Agency Technology Solutions Group expects to soon begin using Process Director to address other Agency processes, they believe that

Process Director's graphical workflows are already helping users to better understand how work is moving through a specific process. Hayes is also very pleased with the support he received from BP Logix. "I would recommend the

support staff to anyone. They worked consistently, delivered what they said and helped with any problem that arose. It is difficult to find that – and I can't say enough good things about the support team," responded Hayes.

Kolavennu is excited about the progress they have made already. "Bill dove in – and got his feet wet. Because the system is so flexible you can define and set up workflows in many ways. He designed and architected workflows then converted them to integrate into our system. While the old system didn't give us flexibility or reporting, it also wasn't overly difficult to support. The flexibility we now have to use on different processes is worth that," Kolavennu commented.

From his perspective at the 15,000 foot level, things are positive for Kolavennu. "With many of our rollouts and solutions we can see fairly quickly when a tool will sink or swim based on its stability. A lot of the feedback we are getting indicates that our employees are confident that this will work as we roll out new processes and to new teams. Process Director still meets the needs we came in with – that's extremely positive. It goes a long way to validate our research and proves to be a cornerstone of what we hope to do moving forward," concluded Kolavennu.

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