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Objectives of this article

- Define Workflow management.
- Explain some of the unique features of workflow management applications.

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Definition

When we talk of workflow management, we are talking about the process of organizing [how work is done in an organization](#). It is part and parcel of marketing automation. Here we are going to look at some of the roles that workflow is meant to perform in an organization.

One of the roles of workflow management is to streamline marketing and sales campaigns by automating the work. It ensures that there was no duplication of work between the sales and marketing departments.

At times, if there is no coordination, there may arise a situation whereby the two departments continue to repeat the same effort and find it difficult to draw the line.



Workflow management also monitors and document all calls, emails and meeting being made by the organization in their effort to turn a lead to a customer.

It will prevent a situation whereby two salespeople are working on a lead, or a situation whereby contradicting information is given out to a lead, in the process of turning him into a customer.

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Workflow management also helps in assigning leads to the target group. At times, this is done with the location of the group to handle it in mind. These may be based on certain criteria that the lead(s) and the assigned groups have in common.

Workflow management also adds decision points and conditional requirements before events are triggered.

As was said in the previous chapters, as an organisation, you need to know what you want in your customers, once these conditions are present in a lead; it will trigger an action.

All these conditions are incorporated in the marketing automation and once these conditions are found in a lead, it will trigger an action.

On the other hand workflow automation reduces the time and effort required for doing a routine task.

This is based on the fact that once these tasks are programmed and you have been able to set some pre-conditions, you will be able to save time as you will not have to deal with prospects that do not qualify as a lead.

Workflow management also helps in propagating well-defined business processes across the organization. it will ensure that things are done in the right manner.

It can be used to set protocols and ensure that there is coordination in all the activities of the marketing department.

This will help the organization to deliver a consistently positive customer experience across multiple channels.

Successful CRM initiatives integrate applications across the enterprise in order to get a 360⁰ view of the customer.

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It ensures that the various departments in an organization are linked together in a web of applications that allows the various departments in an organization to have a singular view of their customers.

Workflow management is one of the essential applications that makes this to be possible.

Summary

From this chapter, we have been able to discover:

- Workflow management organizes how work is been done in an organisation.
- It streamlines marketing and sales campaigns through automation.
- It visually configures campaign workflow such as calls, mail or meetings.
- It assigns leads to target groups.

- It adds decision points and conditional requirements before events are triggered.

Brainstorming Session

1. What is Workflow Management?
2. What are some of its benefits?
3. The organisation that you are working for has observed that there is a drastic reduction in the number of their product consumers. What are the practical customer-centric ways of ensuring that consumers return to your products?

Action Point

PS: If you would like to have an online course on any of the courses that you found on this blog, I will be glad to do that on an individual and corporate level, I will be very glad to do that because I have trained several individuals and groups and they are doing well in their various fields of endeavour. Some of those that I have trained include the staff of Dangote Refinery, FCMB, Zenith Bank, and New Horizons Nigeria among others. Please come on Whatsapp and let's talk about your training. [**You can reach me on Whatsapp HERE.**](#) Please note that I will be using Microsoft Team to facilitate the training.

I know you might agree with some of the points that I have raised in this article. You might not agree with some of the issues raised. Let me know your views about the topic discussed. We will appreciate it if you can drop your comment. Thanks in anticipation.

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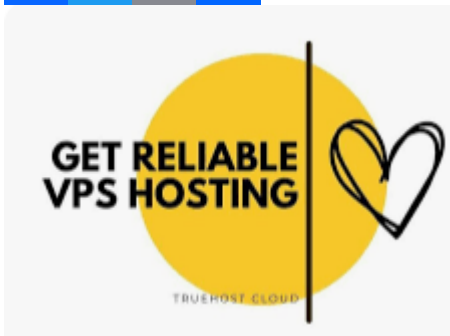
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