Moving to Simplicity and High Value:
A Call to Action for Workflow Automation and People Augmentation

614
GROUP

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Acknowledgments

Workflow Automation Working Group

Co-Chairs

Yvonne Abt - **Sony**
Doug Chavez - **Geometry**

Workflow Automation Working Group Contributors

Josh Abneri - **MatterKind**
Greg Johns - **Canvas Worldwide**
Lauren Smith Ekstrand - **Horizon Media**
Mike Margolin - **RPA**
John Stachulski - **Laughlin Constable**
Allen Stern - **AKQA**
Brittney Whisenant - **MatterKind**

Identity Management Working Group

Co-Chairs

Tom Swierczewski - **Cramer-Krasselt**
Grace Yeung - **Horizon Media**

Identity Management Working Group Contributors

Cliff Atkinson - **RPA**
Josh Bock - **UM Worldwide**
Daniel Bueckman - **Hearts & Science**
Patrick Giblin - **451 Degrees**
Meghan O'Keefe - **Starcom**
Claire Russell - **Fitzco**
Prerna Talreja - **Crossmedia**
Kevin Villatoro - **Amplifi USA**

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Sponsor Participants

Basis
BY CENTRO

Tyler Kelly
Ryan Manchee

FACEBOOK

Erik Geisler

IBM **Watson Advertising**

Brendan Cleary
Jeremy Hlavacek

media.net

Larry Gelfand
Pranay Gupta
Peter Liao

Background: The 4A's Future of Programmatic and Automation Initiative

On March 5, 2020, The 4A's in partnership with The 614 Group launched The Future of Programmatic and Automation Think Tank. The formation of the Think Tank and creation of its intellectual property mark the second stage of a large-scale 4A's initiative that seeks to understand and influence the current and future state of programmatic and marketing automation.

Ultimately, the purpose of the initiative is to foster a better future for marketing automation. Marketing automation must have a foundation of respect for both consumers and practitioners. In the future, it should be easy to optimize the use of data and access interoperable technology in order to be smarter, work faster, and be efficient. Better technology, methodologies and tools will accelerate the process of identifying the right audiences for a campaign, delivering them and measuring the campaign's return. Practitioners will have accurate (where precision is determined through generally accepted standards), real-time inputs and be able to further optimize campaigns or readily course correct. In the envisioned future, data and creativity will come together to make compelling, effective marketing campaigns at scale.

The concept of The Future of Programmatic and Automation Think Tank originated as a real-world action step based on findings and recommendations of a qualitative and quantitative research program. The 4A's partnered with The 614 Group to investigate and understand how best to meet marketplace needs for the future of programmatic and automation. The comprehensive research program included one-on-one interviews with marketing, advertising, publishing and ad tech leaders as well as a quantitative survey. The research identified a number of issues that require cross ecosystem attention to ensure an optimized and efficient future of programmatic and marketing automation. The report, published in November, 2019, can be accessed here.

The specific objectives of the Think Tank are:

- Review the research findings and recommendations to determine which key issues should receive immediate focus
- Put forth actionable POVs and recommendations within a relatively short timeline of six to eight months, once the topics are selected. (Note: this is a different goal and process than standards-setting and technical specification development undertaken by various industry groups)
- Develop ecosystem-wide guidance and POVs around the future optimization of programmatic and automation
  - Core elements of the POVs and guidance should express the agency perspective, while also fully recognizing a cross-ecosystem perspective.
  - Where possible, real world case studies exploring the selected topics should be used to describe successes that illustrate what to do and/or failures to exemplify what not to do.

The Think Tank determined that the two topics requiring immediate focus are: 1) identity management and 2) digital advertising workflow automation. To develop POVs and recommendations for each topic, members of the Think Tank convened

separate working groups for each subject. These groups consisted of members of the Think Tank who volunteered their expertise and time to the work product and are listed in the acknowledgment section above.

The pages that follow detail The 4A's Future of Programmatic and Automation Think Tank POV regarding Digital Advertising Workflow Automation and People Augmentation as developed by the working group that is a subset of the Think Tank.

Introduction to Digital Advertising Workflow Automation and People Augmentation

As stated, the work of the Think Tank emanated from research findings and recommended action items. Three critical areas of the research helped inform the direction of the Workflow Automation and People Augmentation Working Group's efforts:
- Programmatic advertising is still a long way from being automated
- Lack of interoperability
- Strong desire to automate TV (both digital and linear)

Based on these findings, the Think Tank determined that one of its priorities is the development of guidance on how best to achieve workflow automation. Lack of automation hinders speed and efficiency on the part of marketers, agencies and publishers. Automating workflow will permit simplicity, speed and efficiency in how digital media and audiences are planned, activated, measured, analyzed, optimized, post-analyzed and billed. As the extent of the complexity of each step in a campaign's journey is considered, benefits of workflow automation for people augmentation become clear.

Workflow automation opens a direct path to people augmentation because it reduces redundant manual and error prone tasks that tie up talent. Peoples' time and job satisfaction can be enhanced by focus on higher value tasks. When human capital is better invested, an organization can generate greater value both internally and externally with client and vendor partners.

Business Requirements

The ecosystem has to start with baseline requirements for what the businesses need in order to move forward. This POV is neither a standards setting nor a technical specification development paper: It is a precursor to that all-important and necessary work. Standardization of terms and definitions is best accomplished by broader industry standards groups rather than an individual think tank or working group. This paper sets forth a real-world framework for understanding the marketplace's workflow automation needs.

A Call to Action

Why Now?

In late March, the era of COVID-19 introduced a time of great dislocation and a moment of transformation. Lives and livelihoods have and continue to be upended. The workplace itself may never be the same. Moreover, the digital marketing and advertising ecosystem is transforming faster than ever before. This whitepaper is a call to action at a pivotal moment in society, the global economy and the industry. The cookie is literally crumbling. Privacy regulations are stricter than ever. Simultaneously, the decades-long mainstay of national brand advertising, the TV Upfront, did not happen in 2020 and today's TV market is drastically different.

Messaging, timing of campaigns and movement of media weight must be nimble, if not instantaneous, as advertisers adapt to massive change. What better moment is there to move digital advertising away from the constraints of legacy technology and cumbersome workflow? Is there a more compelling need for changing the status quo than the current imperative to transform almost immediately?

Defining the Components of Workflow Automation and the Journey of a Campaign

The diagram below shows the components of campaign workflow automation, as well as the journey of a campaign from inception to results:
- Media and audiences planning
- Activation
- Measurement
- Analysis
- Optimization
- Post-analysis
- Billing

Note that there are workflow automation needs within each component/tile below, for example, software within Holistic Analytics necessary to connect the teams and ensure deadlines are met.

This paper proposes that efforts to automate workflow consider both the components above and the following breakout of workflow automation:

- Platform automation - automation that already exists within a given platform or single tech stack, e.g., Google, demand side platforms like DV360 and The Trade Desk
- Process automation – how different tech and systems integrate and operate with one another to accomplish tasks within the workflow
- Reporting automation - the actual connection of where large sets of data from many sources, e.g., media weights, placements, audiences, analytics, and costs come together.

Reporting automation intersects with a larger set of issues, such as misaligned metrics, questionable data quality and matching, and other areas for improvement in measurement and analytics.

Reporting automation that permits connectivity between and among all areas of the workstream is absolutely critical to the future of automated marketing.

DIGITAL ADVERTISING WORKFLOW AUTOMATION

ALL DIGITAL PLATFORMS AND CHANNELS

Display	Mobile	Search	Social	TV	Video

Plan → **Activate** → **Measure, Optimize, Analyze** → **Bill**

Client Relationship Management			Billing Facilitation
Vendor Relationship Management	Messaging & Communication	Business Intelligence	Financial Actualization
Employee Management	Negotiation Software	Audience Management	General Ledger Integration
Controls, Permissions, Firewalls, Security	Contract Management	Holistic Analytics	
	Ad Trafficking		

Adapted from Centro analysis of workflow.

Fundamental Position

We must eliminate the digital media paradox: even with programmatic and other technology to support marketing and advertising, the industry suffers from lack of platform and tool integration, as well as inefficiencies that are no better, or worse, than traditional media. For all the progress that's been made in the last decade with new digital processes, technology support and infusion of machine learning, there's been an equal lack of translation of these improvements to encompass full cross-channel automated capabilities. For instance, there have been industry-wide efforts to combat quality issues and encourage transparency in programmatic display and digital video advertising. But, there is no parallel industry oversight that has resulted in automation solutions.

Now, "new" TV planning and buying may be suffering similar issues around quality and transparency, yet we have not made significant moves as an industry to further develop third-party oversight, cross-channel metrics, or integrated processes to aid progress.

This is the time to change what has been disappointing in digital display and video programmatic trading and fully integrate the "new" TV seamlessly. Let's learn from past mistakes of bolting on technology to already disconnected platforms and tools as the TV marketplace transforms. By using the term "new" TV, we call attention to the lack of standard nomenclature for the variety of ad supported video content viewed on television and other screens.

The media marketplace must think ahead as platforms and technology are developed. We call upon all parties to work together to develop new tools and enhance existing ones so that we finally have open operability. There must be connectivity.

We recognize that there are vested interests at play that may prefer not to have open operability. We, the end customers and users, agencies and marketers, must finally achieve the automation that we need to navigate the complex media market. We are calling upon vendors and partners to work toward the common good.

Consumer privacy must be respected and adhered to in all uses of data throughout workflow automation. We believe there is an opportunity to assess media/technology firms' individual needs, as well as agency and marketer needs to find privacy compliance frameworks that work for all business partners and for the consumer.

For too long the buying community, especially agencies, has accepted inadequate tools from key vendors without seeking other solutions. By communicating the needs clearly, we hope that legacy vendors will work to better serve brand and agency needs. If not, we ask that complacency not prevent us from considering competitive options should they enter the market.

In order to achieve optimal results from automation, there are levels of industry-wide agreement that must be achieved. We call upon agencies to seize the opportunity for collective success in delivering value to all our client partners that they cannot achieve on their own. Standing side-by-side, agencies can work with other organizations in our ecosystem to remove many of the barriers to efficiency, for example, defining, developing and fostering adoption of measurement standards, and data consistency.

The Framework: Pain Points Must Be Eliminated

Specific pain points must be addressed in order to meet the call-to-action. What follows is discussion of core areas for improvement.

Misalignment of Goals and Metrics

Despite attempts by industry governing bodies and major research companies, there is still no widely-accepted common currency across digital, television and other media channels to enable cross-channel planning and measurement, at scale. It is possible

to support proprietary measurement solutions, whilst keeping core methodologies and currency metrics clearly defined and widely accepted. If countries around the world can develop and trade trillions of dollars of goods and services using currency exchange rates, surely we can create and accept consistent media currency definitions and metrics across platforms.

Lack of widely accepted standards at scale adversely impacts budgets and planning, analyses, optimization and the ability to accurately measure KPIs, impact, attribution, etc. Further, the lack of widely accepted standard metrics leads to a misalignment of campaign goals and metrics. More seriously, this obstacle can lead to over- or under-spend relative to an advertiser's campaign goals.

A simple example of non-standardized definitions is the video view, which is defined one way by Facebook, can mean something completely different on a six-second YouTube ad and something else entirely via OTT. We, as an industry, need to dramatically improve the level of consistency in data definitions.

Platform and Technology Silos Accompanied by Inefficient Transfer of Disparate Data Sets

Methodologies, user interfaces (UI), user identification (IDs) and tools that service just one specific company's offerings are now commonplace. Anyone familiar with the term "walled gardens" understands this, and the adverse issues they create for marketers and agencies. The outlook is almost certain that more walled gardens will be established in the future.

Walled garden environments such as Facebook and Google's allow for effective advanced analytics without great pain in transferring data. But once an agency attempts to work across both those environments and beyond, i.e. into the open Web, in-app, OTT, other Social, data consistency, formats and transfer become unwieldy. Agencies large and small are routinely challenged with maintaining native connections (e.g. Google services), varying API specifications and, in some cases, separate .csv files.

As companies like NBCU, Disney, WarnerMedia and ViacomCBS roll out their own data and content platforms, there will be additional complexity, making the job of seeking streamlined approaches across channels even harder, as buyers contend with multiple ways of working from major portfolio partners. Absent interoperability, more time, more labor, and more room for error will continue to be injected into workflow thus, impairing truly creative planning, and adversely affecting the achievement of campaign goals.

Siloes don't only exist in the world of publishers and marketplace offerings, the proliferation of new tools that are created to facilitate agency and client work have also produced new siloes. Partners and vendors have found it equally difficult to accommodate various agency/client technology stack requirements and connection points. Some of the current friction may be related to advertisers building tech stacks, especially as their needs to manage their own first-party data require more technology and analytics. Still, the marketplace needs greater awareness on the part of both technology vendors and customers that siloed solutions are not acceptable.

"New" and Old TV: Labor Intensive and Overly Complex

A large portion of the industry still views TV advertising through a non-digital lens. For many, the world of broadcast and then national cable TV networks was orderly: one third-party measurement system for currency; a limited number of ad units and placements; fully viewable ads; no ad fraud; predictable brand suitable environments; broad reach.

The world has changed. TV advertising has changed and needs to adapt far more rapidly than it has in order to thrive. CTV/OTT emerged as a serious contender in the TV/Video landscape in 2019. Hopefully, 2021 will be the year that examples like the following will no longer occur.

> Today's planners contend with a multitude of disjointed and mismatched metrics to execute a standard build for a "new TV" plan that includes linear TV: Agencies must figure out how to push a single (first-party) audience through to multiple networks, CTV and DSP partners while looking after privacy, security and match-rate concerns. Once on-boarded, buyers look across deliveries that are sometimes in HH GRPs, sometimes in individual user impressions, with ad exposure split across linear TV, FEP, VOD, YouTube, consumed by the viewer on a TV set or a mobile, tablet and laptop device.   Ads are offered in a proliferation of ways, from homescreen takeovers to interactive ad selectors to standard :30s and :15s. None of the information or specs come through in a standard or automated fashion.

There is a lot of manual work being completed by Ad Operations teams, in particular. Additionally, tricky and error-prone tasks such as tagging, taxonomy, naming conventions and invoice reconciliation are falling on the shoulders of non-specialists, spread across teams. This results in issues such as labelling inconsistencies that can exist even within the same team or organization.

Advertising on TV is vital because it is one of the few forms of media where ads are an ingrained part of the experience and it needs to automate to become part of the digital ecosystem. Planning, purchasing, and reporting TV needs to be in real-time. These changes will require alignment from the entire industry. This includes replacing the TV Ad-Ops/Traffic system with a digital infrastructure, which will require replacing TV creative assets with digital tags. By utilizing tags, agencies can receive reporting at the same speed as their digital media.   This will enable optimizations based on performance in real time. Tags will also allow for additional measurement opportunities. These changes will rely on the entire industry agreeing to retire outdated reporting systems in favor of digital reporting.

Bringing TV into the digital ecosystem in a fully automated, interoperable workflow will make advertising more holistic than ever before. While making over linear TV infrastructure, integrating linear TV, CTV/OTT, digital video, VOD and addressable TV in a seamlessly interoperable system is a significant undertaking, it is vital for the future of TV advertising.

Finance, Billing and Reconciliation

Agencies of all sizes experience reconciliation and billing as a significant time and labor drain on media teams for a number of reasons that primarily add up to lack of automation. In some agencies, there is friction between finance and other teams over which tools to use internally. Additionally, systems that house and execute contracts are not interoperable with media billing and vendor payment systems.

The technology offerings for billing automation that are affordable for smaller and mid-sized agencies do not meet many digital and cross platform billing automation needs. The products still carry legacy functionality for analog media and are neither integrated with, nor automated for digital and cross platform media. Thus, some smaller and mid-sized agencies opt to build their own solutions, or deploy essentially manual processes underpinned by MSFT Excel workbooks and Tableau dashboards, the furthest thing from automation.

As a small agency executive summed it up, "All these tools seem to be solving issues we had somewhere between 4 and 10 years ago. Dynamic cost data, shrinking, but ever-present direct buys and complex media packages just present too many variables for any of the current tools to handle elegantly. We also need to handle offline media at the same time and this just cripples some of these tools. OOH and TV are our biggest areas aside from digital currently. The endless work-arounds make an internal solution sound more attractive all the time."

For larger agencies, the dominant vendor has cemented its role in the agency media and finance ecosystem and is widely accepted by finance departments. However, the apparent reluctance of this vendor to make data more portable to other programs, whether via API or a more fluid or automated way causes friction with the media teams. What agencies' media teams abhor is that lack of data portability because it demands low value repetitive tasks of copying and pasting from one program to another. On average, teams waste three hours a day cutting and pasting. That adds up to a significant amount of time when viewed annually. The dominant vendor at large agencies has been innovating in other areas and we call upon them to become interoperable in the area of billing.

Finance and billing systems require consistent, connected reporting automation across and between all components of workflow.

People Augmentation: Enabling Highly Skilled People to Do High Value Work

Automated workflow enables people augmentation. That can mean reducing redundant manual labor to free people to perform more complex tasks. It can mean greater efficiency in how teams, regardless of experience or skill sets, are deployed. It can mean sharper focus and greater prominence for teams that bring value but are not always at the forefront of the agency business. The latter is especially relevant to ad ops teams.

Automated workflow can fundamentally alter the approach to disciplines throughout

an ad agency. As agencies enter a new era of true automation and people augmentation, the skill sets needed to plan campaigns with precision, analyze campaigns and optimize in real-time, as well as perform in-depth analysis of campaign outcomes, require reimagining the current workforce. Areas of our industry are becoming more technical and mathematical but the requisite skills to be effective in this environment are not following quickly enough. The business environment itself is changing and much of the agency's value proposition is transforming.

It is imperative to utilize means that maximize the unique benefits brought by highly-skilled people. This must be done in a way that surpasses the current boundaries of productivity, thus preserving the agency value proposition....*enabling businesses to do things they could never do on their own.* The core of an agency's talent pool will need to see, think, analyze and act more like "programmers". Agency leadership must think first and foremost about the application of people and software to accomplish tasks more efficiently and effectively.

Reimagining the pool of talent will potentially be more costly. Without automation, the new talents of these individuals will go wasted on menial tasks such as copying and pasting in spreadsheets, negatively impacting job satisfaction and retention rates.

Intraorganizational Improvements

Notwithstanding the abundance of issues that call for cross ecosystem action and attention from vendors to enable workflow automation, there are steps that individual companies can undertake. Much, if not all, of the discussion below also applies to marketers who have and are investing in tech stacks. However, the focus is how agencies automate and streamline their organizations from within.

Single Sources of Truth (yes, plural sources)

Starting with the measurement and metrics as well as disparate and inconsistent data sources, and data transfer, one organizing principle is that a company must determine a single source of truth for each of its various measurement and data needs. This is important in respect to conversions from one metric to another and subsequent inputs into workflow. Agencies will benefit from establishing a single measurement conversion standard for each of the regularly used metrics that provides the basis for conversion/translation of other sources. With this standard, data transformation/normalization can be achieved with much-improved efficiency and scale via an external data transformation platform/provider.

Similarly, within agency organizations there is often opportunity to standardize disparate and often inconsistent data from various sources. By first assessing how data is defined across various teams and then working toward standardizing into a universal data dictionary, agencies can take an early step toward automating across teams and divisions.

Task Management

Agencies that have been operating for at least several years are generally using methods and tools for managing distinct tasks that are no longer the most efficient in the marketplace. In some cases, pre-existing software can solve some agencies' task-specific pain points. In others, agencies need to assess, prototype and optimize solutions built for their specific needs.

Regardless of whether automation is developed from within or with an external partner, each agency will benefit from standardization at least across their own organization. Not to say that each individual client-specific team has the same needs, but they almost always have many of the same core needs. Further, there is opportunity for incorporating discrete tasks into common/standardized workflow. Again, each client-specific team will have discrete needs, but many agency leaders might be surprised to know how few of their junior and mid-level associates, in particular, understand the power of the tools and methods that other teams *within the same organization* currently use. Standardized workflow opens up great opportunities for automation, both limiting inconsistencies in workflow and minimizing output hand-offs and meetings.

Adopting Product Management Practices

Agencies should also employ product management practices used by many technology companies to regularly assess and prioritize opportunities for increasing automation. Product management practices can help agencies organize their own internal ongoing automation initiatives. Applicable product management practices for this purpose include feature/enhancement scoring (often using level of effort, expected outcome and risk factors as inputs), feature/enhancement backlogs and roadmaps and, in many cases, agile workflow processes.

Case Studies: Real World Examples and Implementation Phases

Case #1: Greater Efficiency and More Time for Higher Value Work

RPA, a full-service agency in Santa Monica, CA, identified a broad, systemic issue of highly-skilled associates expending considerable effort on repetitive, low skill tasks while setting up and stewarding campaigns. These included ad placement naming, pacing of campaign ad spending, reconciliation of metrics among multiple sources during the measurement and analytics process and others.

The issue was compounded by the fact that task processes were not consistent from one team to another (sometimes not even one person or campaign to another), leading to increased effort downstream in the analysis and optimization process.

The agency embarked on an extensive workflow automation initiative. Thus far, the initiative has included three phases:

- **Assessment**
  The agency interviewed team members to understand pain points and diagnosed which steps of the reporting process (down to the person and task) contributed to inconsistencies. They estimated the number of hours consumed by tasks such as manual report-pulling and reformatting and then implemented interim solutions where possible (such as look-up tables and standardized workflows for all teams to reference). They projected the level of effort for automating tasks and prioritized them based on value to the agency (including individual client timing needs).

- **Proof of concept**
  Selecting one client, one campaign and one team for each initiative, the agency's internal digital development team (with support from external partners) created prototypes for discrete automation solutions to prioritized pain points. They measured the impact of adoption and built organizational confidence in the greater initiative.

- **Optimization**
  The discrete solutions were refined to take advantage of common underlying technology and interconnectedness; the agency advanced to adopt common and standardized data warehousing, visualization, data connection and transformation and more. Recently, when two discrete task pain points were identified as having functional overlap, the two solutions were merged into a single, multi-purpose solution (thus reducing maintenance redundancy and potentially eliminating process steps).

While the larger initiative is still in early stages, the initial results are promising: a projected savings of thousands of person-hours and double-digit percentage improvements in proportion of work time that planners and analysts spend on high value work.

Now that RPA has a common infrastructure in place, additional low skill/high effort tasks are being investigated and placed into a product pipeline. The agency is developing automation to support areas including research/planning, advanced analytics and creative technologies.

Case #2: Workflow Automation Improves Speed and Quality of Collaboration

Canvas Worldwide used workflow software to fulfill the need to deliver quality work in the time its marketplace demands. Communication surrounding complex tasks is critical to quality and speed. Crucial to effective communication is the adherence to process and standards that ensures that the correct information reaches all necessary points when it's needed most.

Using workflow software, Canvas has replicated many of its critical processes across teams and into partner agencies. The automated workflows improve accountability by assigning specific team members their tasks and providing visibility across the entire team as to the status of any given assignment. Documents and templates are delivered as a process is carried out, reducing the risk that incomplete information results in rework or poor quality downstream.

Case #3: Robotic Process Automation Reduces Time Spent on Repetitive Work and Errors

It is often the agency work that clients don't see that can become a significant resource strain. Areas like digital ad trafficking and digital billing are not sexy but nothing can happen for the client without these processes running smoothly. Canvas looked to the emerging field of Robotic Process Automation, partnering with UIPath to reduce the time and resources necessary to accomplish key portions of billing and trafficking tasks.

Through team members dedicated to business and advertising operations, Canvas created new "robotic" team members to automate thousands of lines of data entry and transfer across systems. The Robotic Process Automation initiative also is used to QA data prior to trafficking, reducing errors that often result in reporting inconsistencies later.

The initiative also reduced time spent by the team on repetitive, mundane work often responsible for hidden costs like reduced morale and retention. By applying automation, Canvas is succeeding for their teams-- replacing lower value work with higher value work that is better positioned to help clients reach their objectives.

Conclusion: Why Automated Workflow?

Automated workflow and attendant interoperability will enable agencies and their clients to:

- Master the complexities of today's fragmented media markets, that is, a plethora of channels, platforms, content, multitude of discrete data and data flows, and an abundance of metrics
- Augment the people and talent to meet the goals of marketing and advertising.

In conclusion, much of what we discussed throughout this whitepaper can be prioritized into the following two distinct sets of items. The first consists of efforts that span the entire ecosystem. The second can be accomplished within agencies and with their clients.

Ecosystem Wide:
1. Reconcile the lack of standards in our fast-changing ecosystem that harms agencies and, in turn, our clients
    a. Standards encompass ad measurement definitions (e.g., "video ad view"), ad placement taxonomy, data transfer protocols, invoice reconciliation and more
    b. Cross platform measurement and metrics require standards both across digital media, across digital and TV and standards for "new" TV that work in an automated cross platform world
2. Standards issues need to be addressed from an ecosystem perspective, with trade associations and key platforms (Google, Facebook, Verizon, Mediaocean, etc.) coming to the table to address:
    a. Interoperability across platforms and tools
    b. Technology offerings for billing automation
3. Break down harmful automation siloes across the industry

Agencies along with clients:
1. Deploy task management workflows to reduce unnecessary / error-prone labor
2. Develop their own automation priorities and move beyond legacy processes built for a different time
3. Reimagine the skillsets of the existing workforce to reflect the rapidly changing needs of today's agencies and recruit talent that aligns with those needs

Ultimately workflow automation will achieve desired outcomes, be faster and more efficient with collaborative efforts across the ecosystem, as well as internal innovation and development.