

Integrating Workfront with Core Marketing Solutions, Maintaining Compliance

An Integration Case Study

FMCNA implemented Workfront, integrated each marketing stack component and integrated Veeva Vault PromoMats, an industry regulatory compliance solution. Zee Jay consultants were there to help the leading healthcare provider enable seamless workflow, provide visibility into all stages of asset development and stay compliant.



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ZEE JAY DIGITAL

In 2019, *Fresenius Medical Care North America*, a leading healthcare organization, chose **Workfront** as its work management system of record. The decision led to an extensive streamlining of work intake and the execution of efficient workflows for a team of 90+ marketers supporting multiple business lines, including Marketing and Corporate Communications, Renal Therapies Group and NxStage.

The implementation encompassed not only putting Workfront in place, but integrating each component of the marketing technology stack. A critical component of this MarTech ecosystem connectivity was the integration of Workfront with Veeva Vault PromoMats, FMCNA's platform for medical, legal, and regulatory (MLR) review-and-approval. Together, Workfront and PromoMats address a gap which FMCNA and many other Life Sciences marketing organizations struggle with around the planning and management of all marketing work that happens before and after the MLR review.



I think folks are seeing the power of Workfront right now because we're not in the office. When it comes to communication, collaboration, as well as coordination across functional groups, it's key.

—Derrick Greene, Marketing Services Director of Program Management, FMCNA



A Productive Partnership Enables Implementation, Integration

Derrick Greene, tasked with managing FMCNA's marketing technology solutions, knew that integrating essential systems the teams use every day with Workfront would not only increase efficiency and productivity, but also drive user adoption. Early in the process, Derrick, FMCNA's Marketing Services Director of Program Management tapped Zee Jay Digital to facilitate the process.

Zee Jay, named Workfront Partner of the Year for the past two years, worked closely with Derrick and other marketing leaders throughout the implementation, which included integration with **Outlook, Adobe: Creative Cloud and AEM Assets, Jira, IBM Watson/Acoustic and Veeva**. The integrations allowed FMCNA marketers to continue to work in the systems crucial to the business while leveraging Workfront's best-in-class project management technology to get the job done.

FIGURE 1: FMCNA EMBARKS ON CONSTRUCTION OF MULTIPHASE END-TO-END OPERATIONAL PLATFORM, ENABLING BROAD PLANNING, EXECUTION AND COMPLIANCE CAPABILITIES



Veeva PromoMats is Central to FMCNA's Content Lifecycle Management Process

The Workfront integration with **Veeva PromoMats**, a content management platform critical to FMCNA's Medical Legal Review (MLR) process, has particular significance. As a healthcare organization dedicated to providing comprehensive medical solutions to those living with chronic kidney disease, **FMCNA understands the importance of compliance**. Providing access to appropriate, approved content for a wide range of marketing initiatives was not only a priority from an efficiency standpoint, it was a necessity from a risk mitigation perspective as well.

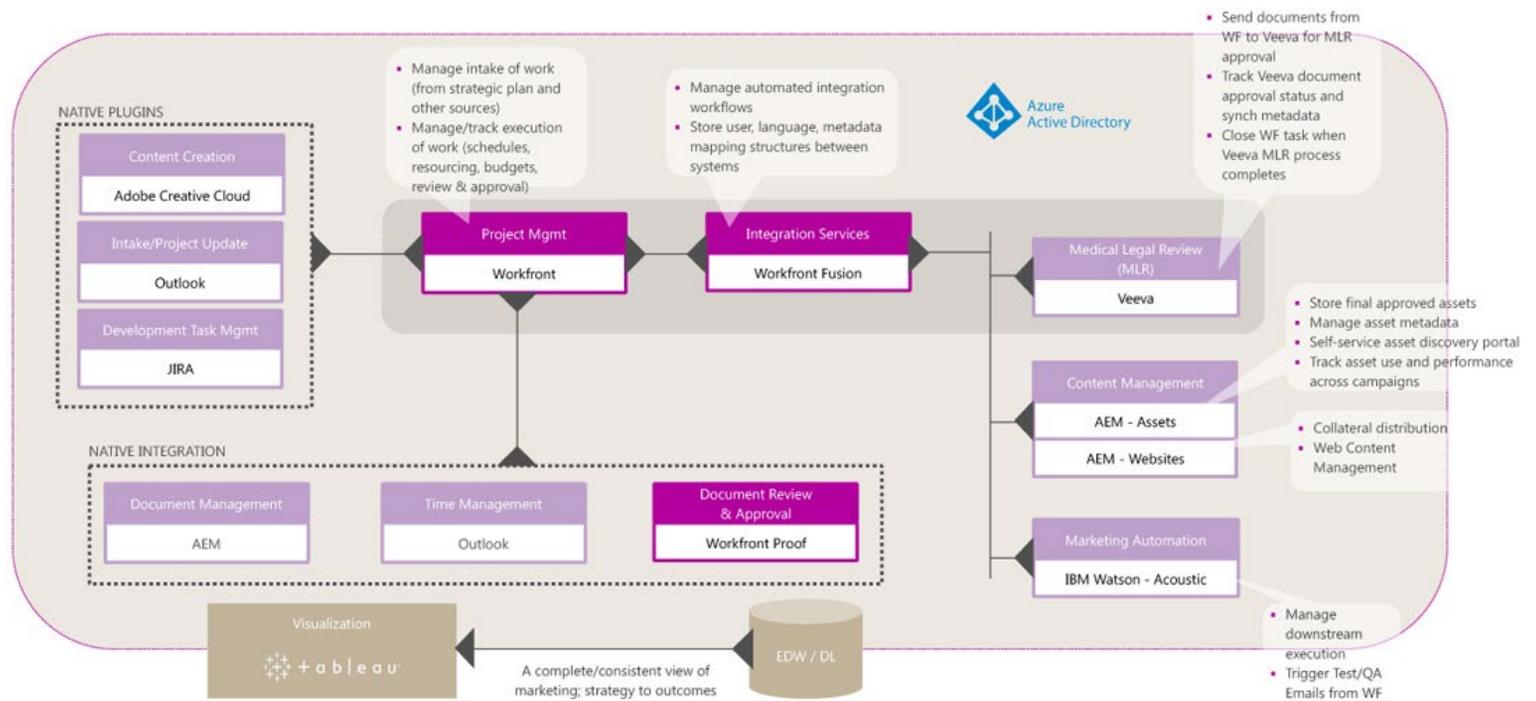
FMCNA needed the ability to track the progress of creative asset development in Workfront, while still maintaining visibility into the MLR process existing in Veeva for all business lines. Working closely with Zee Jay consultants, Derrick and his teams enabled these important abilities:

1. Sync documents between Workfront and Veeva Vault, while capturing custom metadata relevant to the asset
2. Provide marketing champions with real-time status updates of MLR progress
3. Make the final, approved asset easily accessible to content owners and stakeholders

Workfront Fusion Eases Processes

Pairing Workfront with **Workfront Fusion**, a codeless integration platform-as-a-service offering data mapping capabilities, was the answer to ensuring all necessary data was synced between not just the work management system and the marketing solutions—but with Veeva’s MLR solution as well.

FIGURE 2: INTEGRATED DATA FLOW



The Veeva Integration Experience

Integrating Workfront with Veeva PromoMats is an involved process that, if not undertaken properly, can present challenges. FMCNA’s vision to incorporate regulatory compliance tracking as part of the Workfront project was ambitious, requiring significant planning and execution by the organization’s marketing leadership.

Before the integration, assets uploaded to Workfront had to go through creative review rounds in Workfront before being uploaded to Veeva, where pre-set regulatory review roles per business line already existed. The asset advanced through the various stages of the MLR process in Veeva, giving Workfront users no visibility into review progress. Any unique metadata tags applied to the asset remained in Veeva and could not be viewed in Workfront.

By leveraging Workfront Fusion, Zee Jay helped FMCNA build the custom workflows to link metadata applied to a document in Workfront, to Veeva, and have Veeva return necessary reference information needed to track the asset.

Based on fields selected on a custom form attached to a document at the request level, a Placeholder is created within Veeva, returning a Veeva ID added to Workfront. Once the asset is created and reviewed in Workfront, additional inputs on the same custom form trigger the sending of the approved asset to Veeva and the beginning of the MLR process.

FIGURE 3: USE CASE – WORKFRONT-TO-VEEVA DOCUMENT APPROVAL AND MANAGEMENT

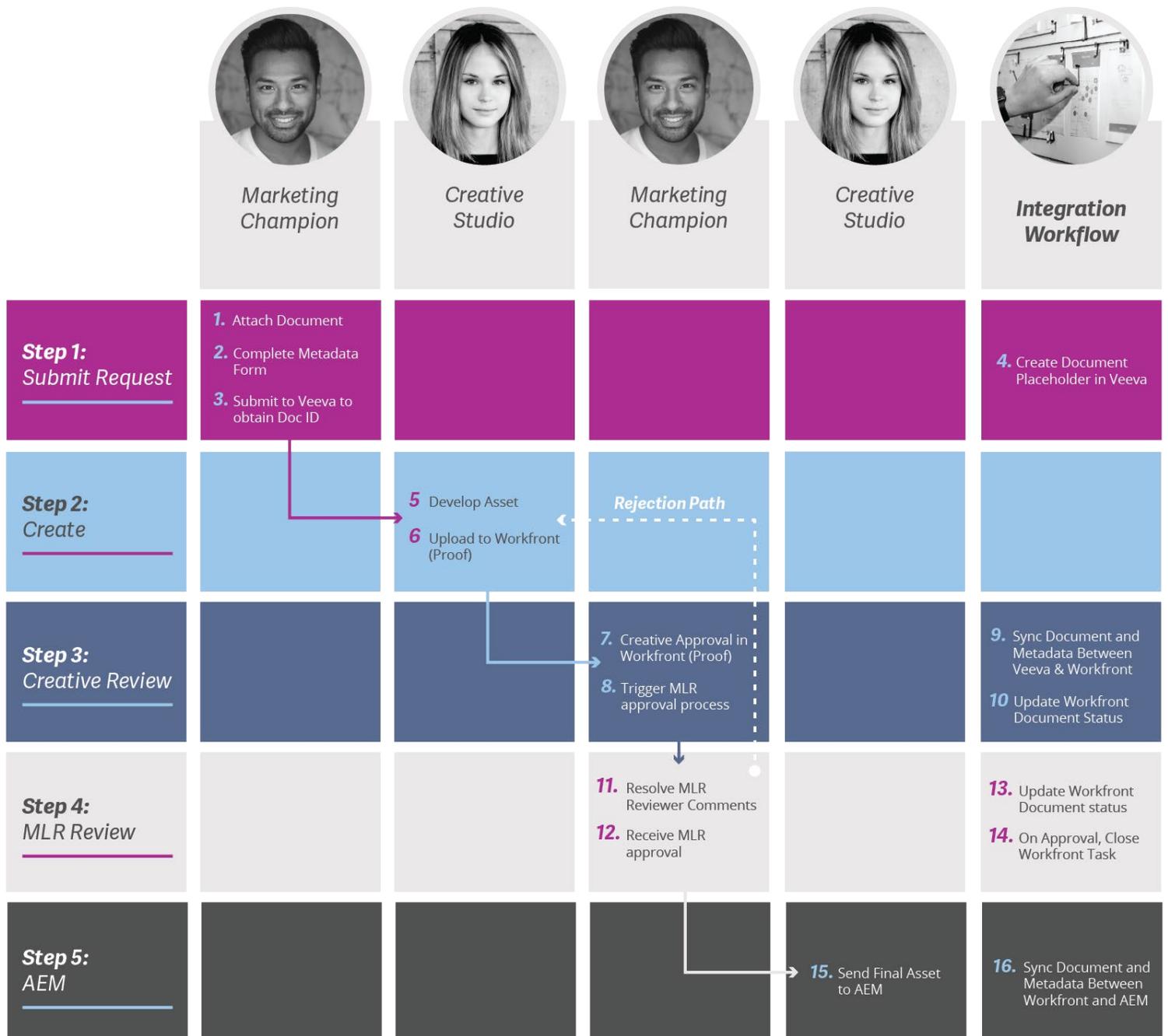
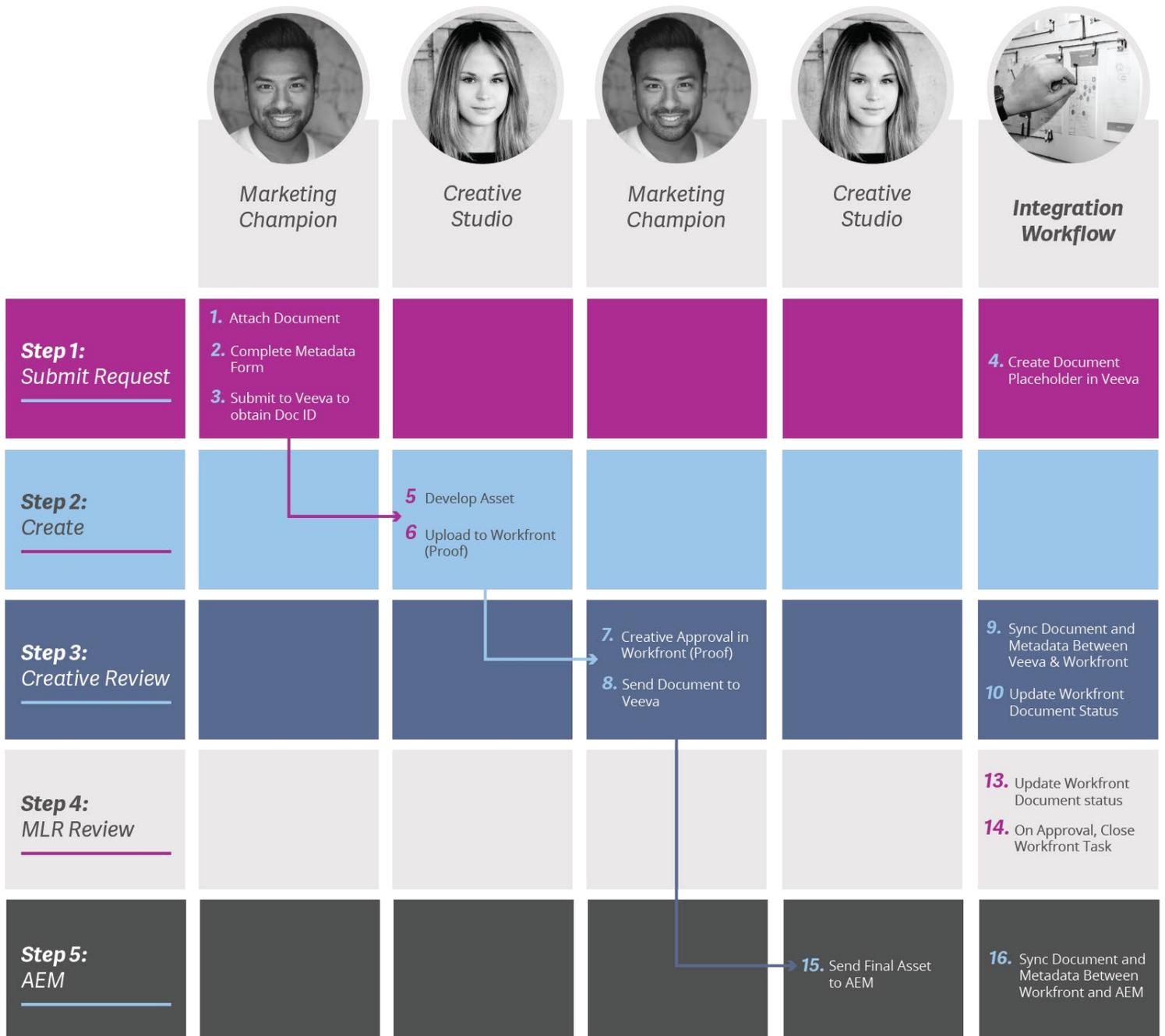


FIGURE 4: USE CASE – DOCUMENTS LOADED DIRECTLY TO VEEVA SYNCED TO WORKFRONT



The Marketing Champion is notified whenever a Placeholder file is created in Veeva, giving marketing teams visibility into MLR progress through Workfront Document Updates indicating the status of the reviews in Veeva.

Once regulatory requirements are met and the asset is approved, it's transferred back to Workfront as a final version. This action triggers the task associated with the MLR Review on the project schedule to automatically close, alerting the Creative Studio to "complete final steps" and upload the asset to AEM to be accessed by stakeholders or distributed across multiple channels.

In addition to regular status meetings ZJD held with FMCNA to align on the integrations, Derrick engaged his team in performing extensive User Acceptance Testing to verify the workflow.

Every Core Team meeting and UAT session had cross-functional representation and Derrick ensured all UAT issues were properly documented and prioritized.

Success Achieved

FMCNA's Workfront/Workfront Fusion/Veeva PromoMats integration resulted in:

- A seamless workflow that accelerated asset approval processes without sacrificing cross-functional collaboration in a remote environment
- Consistency in the content lifecycle and proactive mitigation of compliance risk
- Improved visibility for teams into all stages of asset development

FMCNA's phased approach to launch – from Beta to Production – and Marketing Services' commitment to keeping Workfront top-of-mind with users is no doubt proving to be a highly effective strategy in driving user adoption through the transition.

Helping clients formulate and execute a roadmap for success is just one of the ways Zee Jay Digital adds value to corporate marketing organizations and in-house agencies. The services provided by Zee Jay are helping FMCNA ensure maximum benefit is derived from Workfront, the entire marketing stack—and Veeva. An integrated solution gives FMCNA the tools needed to support the marketing teams—and lay the foundation for the company's future growth.

*This Fusion-based solution was developed in partnership with **ensemble**, a certified Adobe partner and valued partner of Zee Jay Digital.*

You need SMEs that understand the platforms and the workflows.



How has your marketing organization managed the rapid shift to remote working since the advent of COVID-19? The host of Good Morning Marketing, Zee Jay's podcast, wants to know.

Contact ZJM@ZeeJayDigital.com and tell us your story.



A boutique alternative to global consulting firms, Zee Jay Digital transforms marketing's operating model, and the orchestration of work across internal and external teams, to achieve personalized customer experiences at scale. The consultancy was named Workfront Partner of the Year in 2019, and is an Allocadia partner. In addition, Zee Jay is a founding member of the Global Work Management Alliance. Clients include Whole Foods + Amazon, John Hancock, Nike, TJX, Anheuser-Busch, UHS, AAA, Brooks Brothers, Fresenius, Ledvance, Kroger, Big Lots, Perkin Elmer, Bright Horizons, Talbots, Charles River, Giant Eagle, and more. To learn more about how Zee Jay can optimize your marketing organization, visit ZeeJayDigital.com.