

Create workflows for an effective content strategy

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Workflows indicate in which state different content is at the moment, and therefore help you keep track of it. Workflows usually start with the content being drafted and end with its publishing. But that's not the only way to approach it. For different companies as well as different [roles](#), the preferences for your project's workflows will vary.

Besides tracking, workflows also allow you to **set up which roles can work with which workflow steps**. Help your content creators by allowing them to work only with what they should be working with. As many people are often scared of breaking something when they don't work with software regularly, this will provide them the comfort, which eventually speeds up content creation.

🔑 Key points

- Put the workflows together after you [set up your roles](#). Thanks to that, you'll be able to [set up which roles can work with which workflow steps](#).
- Decide what states the workflows should track. Look at the process from the points of view of all participants, and produce the most effective division.
- When coming up with the workflows, draw the options as it's easier for imagination.

When configuring the workflows, it can be helpful to invite your content creation team to the discussion as well. After all, they're going to be the ones using the workflow.


1. Decide what workflows you need

Different types of content may require different steps they need to go through. For instance, marketing content needs to go through marketing and linguistic reviews before it can be published. Legal content, on the other hand, needs to go through a lawyer's review instead of a marketer's one.

To account for this, [create separate workflows](#) for, in this case, marketing content and legal content. It's likely that these two different types of content have different content types in your project. That's why you can set the legal and marketing workflows in a way that content types for marketing content can only use the marketing workflow while the content types for legal content can use only the legal workflow.

📌 Don't have multiple workflows enabled?

Multiple workflows are an extra feature available in higher plans.

Get in touch with us to get multiple workflows or check out our [pricing page](#)  for more details.

2. Choose your steps

Content items in a Kontent.ai project always follow a workflow. Every workflow contains workflow steps representing the state of the content item. What the step symbolizes is up to you, so you can choose the most important way of dividing the content creation flow.

In Kontent.ai, there are three steps that are always part of every project:

- *Scheduled* – for content already planned for publishing
- *Published* – for content that is released
- *Archived* – for content that is withdrawn and obsolete

Create other steps based on your preferences. For example, you can divide your workflows into:

- Process-based steps – *To do, In progress, To review, To translate, Ready for publishing*
- Activity-based steps – *Write, Review, Copy edit, Graphics, Approve, Tag*
- Schedule-based steps – *On hold, Delayed, Planned*

The options are not limited so you can combine different approaches as well.

Keep in mind that you can **select which steps can transition to which steps**. With that, different steps can be skipped if they're not relevant for that content item.

You can also **limit transitioning to different steps to certain roles**. That way, content creators can focus on the part of the workflow that's relevant to them and they don't need to worry about breaking something else. In Kontent.ai, you always set these limitations in the step that the transition is *from*. So, for example, if you want only project managers to be able to publish content from the *Approved* step, you limit the *Approved* step only to the Project manager role.

Automating workflow step activities

Developers can automate some of your team's tasks using [webhooks](#) that can be triggered when a content item's workflow step is changed.

For example, notifying a specific group of people, extracting keywords automatically, or translating texts to different languages. Anything is possible. Kontent.ai is an API-first platform so [connecting your content to other apps](#), platforms like [Zapier](#), or Azure functions, is not a problem.

3. Design your workflow

Designing your workflow should, ideally, **follow up on your permission model and its research** on existing and aspirational content flow. Draw how you'd imagine the workflow should work.

See the diagram on [https://viewer.diagrams.net?](https://viewer.diagrams.net?lightbox=1&nav=1#Uhttps%3A%2F%2Fraw.githubusercontent.com%2FKenticoDocs%2Fkontent-docs-diagrams%2Fmaster%2Fteam%2Fworkflows%2Fworkflow_activity_based.drawio)

https://viewer.diagrams.net?lightbox=1&nav=1#Uhttps%3A%2F%2Fraw.githubusercontent.com%2FKenticoDocs%2Fkontent-docs-diagrams%2Fmaster%2Fteam%2Fworkflows%2Fworkflow_activity_based.drawio

If your workflow is too complicated for a drawing (or you just feel you're bad at drawing), you can use a table instead:

Workflow step	Can transition to	<u>Dedicated roles</u>
To do	In progress, Archived	Project Managers, Content creators
In progress	To do, To review, Archived	Project Managers, Content creators
To review	To do, In progress, To translate, Scheduled/Published, Archived	Project Managers, Editors
To translate	To do, Ready for publishing, Archived	Project Managers, Translators
Ready for publishing	Scheduled/Published, Archived	Project Managers, Editors
Scheduled/Published	<i>(empty as it means creating a new version, which goes automatically to To do)</i>	Project Managers, Editors
Archived	<i>(empty as it means creating a new version, which goes automatically to To do)</i>	Project Managers, Editors

Whether you draw the workflow or create a table for it, note down which roles should work with which steps.

4. Configure workflow in Kontent.ai

When you're finished with the workflow modeling, [create the workflow in Kontent.ai](#).

Remember that changing the workflow is always possible. Just keep in mind that you shouldn't change the workflow in a way that prevents users from reaching the last step.

What's next?

Setting up [roles](#) and the workflow divides the main responsibilities of content creation. Before you get into the actual team collaboration, it's suitable to think also about your multilingual or multiregional needs.

- [Incorporate translated or regional content](#) in your collaboration after you finish configuring the workflow.
- Check how the workflow is set up in a [complete example of team collaboration](#).