workzone

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SEPTEMBER EDITION

Workzone September Update

Fall is the season everything needs a sign-off at once. Campaign proofs, the board deck, the fee-change notice legal has to see before it goes out. Every one of them stalls in the same spot: waiting on the next person to approve.

This month we shipped something for exactly that: Approval Workflows, multi-stage sign-offs that route themselves, so a file moves from one reviewer to the next without you pinging anyone. **We've also made connecting Workzone to other tools a breeze.**

And on October 9, we're hosting a live panel, Fast marketing, inside the compliance wall., two credit union marketing leaders on shipping fast when everything has to clear compliance first.

In this issue:

- **Live panel, Oct 9:** Fast marketing, inside the compliance wall. Two credit union marketing leaders on moving fast when everything needs a sign-off.
- **Product update:** Approval Workflows are live.
- **Product update:** Managed Integrations (Done For You) is here.

WEBINAR

Fast marketing, inside the compliance wall

Credit union marketing moves fast, right up until it hits the compliance review, the business-unit sign-off, and the quick favor that eats Thursday. Bonnie Beard (Lake Michigan Credit Union) and Sarah Johnson (BCU) join Kyndall for a conversation, not a slideshow.

On **Friday, October 9, 12 PM CT (1 PM ET),** sixty minutes, about 45 of conversation and 15 for your questions.

You'll walk away with:

- **A faster path through compliance.** How to ship marketing that clears compliance and the business unit without losing a week.
- **What the "quick favor" actually costs.** What one quick favor actually costs your team, and how to redirect it without saying no.
- **One view of the whole load.** The one view that shows leadership everything in flight, from the flagship campaign to the one-line request.

Everyone who registers gets the **Credit Union Team Health Check**, a quick self-assessment on priorities, ownership, handoffs, visibility, and meetings.

Save my seat →

P.S. Can't make it live? Register anyway and we'll send you the recording.

FEATURE HIGHLIGHT

NEW in Workzone Enterprise: Approval Workflows

You know the sign-off that needs three people in order, and somehow you're the one pinging all three. Approval Workflows fixes that. Build the route once, and Workzone runs it for you: it emails the right approver at each stage, waits for the sign-off, then moves the file to the next stage on its own.

→ Set up unlimited stages. Name each one, pick the approvers, set the days.
→ Use internal users or external parties, and require everyone or just one person per stage.
→ Set one final due date. Workzone back-calculates every stage deadline for you.
→ Track it in the Out for Approval tray and the Approval Dashboard: which stage, who, and when.

Available on Workzone Enterprise. Every plan with document approvals also gets the redesigned Request Approval screen.

See how it works →

FEATURE HIGHLIGHT

NEW: Managed Integrations (Done For You)

Connecting Workzone to other tools just got a lot easier. Tell us the tools you use, and leave the rest to us. We'll help you identify use cases, set up and host the integrations on our infrastructure, and maintain them for you. It's fully "Done For You (DFY)", so you can focus on the work, not the tools.

→ 9000+ tools (CRM, MarTech, ERP, Storage, HRIS, the list goes on)
→ Use case identification: Don't know what to build? We've got you.
→ Setup fully owned by Workzone
→ Integrations hosted on our infrastructure
→ Fully managed and maintained by Workzone

Our secret: An integrations builder that understands your industry and function and lives in a secure, SOC 2-compliant environment.

See what's new →

RECENT RELEASES

Other Recent Releases

A few more updates worth a look:

- **Faster file uploads.** Big files now upload noticeably faster, so attaching that proof or deck no longer pulls your morning.
- **Clearer session timeouts.** When Workzone logs you out for inactivity, a new banner shows when it happened, the page you were on, and what counts as staying active.
- **A smoother Approval Workflows rollout.** We shipped a round of fixes to the new approvals based on early feedback.

✨ BEFORE YOU GO ✨

Know someone juggling multiple accounts or drowning in email approvals?

We offer free trials now. No credit card required.

Workzone Free Trial →

Worth reading this month

FROM THE WORKZONE BLOG

Why Do Projects Fail? 2026 Project Management Statistics

9 Min Read →

Can You Use ChatGPT With Patient Data? A Safe-Use Guide for Healthcare Marketing

HIPAA doesn't have to mean hands-off. A plain guide to what counts as patient data and which AI tools you can safely run it through.

6 Min Read →

Benchmarking Took How the Best Run Higher Ed Teams Execute

Slide to your enrollment size and see how the best-run college and university teams manage project work at your scale, plus what separates the tiers.

Explore the benchmark →

20 AI Prompts for Marketers Who Are the Whole Department

When you are the strategist, the writer, the designer, and the person who hits send, the right prompt is the closest thing to a second set of hands. Twenty of them, sorted by the work you actually do.

35 Min Read →

That's it. That's the whole email. You made it. Proud of you.

Have thoughts? Questions? Just want to vent about your project? Reply any time. Humans over here. Not a bot, not a form, just us.

Talk soon,
The Workzone Team

workzone

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