Project/process management provider Alluvionic speeds its own processes, boosts customer retention, with Smartsheet

Project management provider Alluvionic adopted Smartsheet to manage customer-journey processes such as sales, CRM, and support. But now it uses the platform throughout virtually every department and team in the company. That's because Smartsheet delivers faster, more customer-responsive processes; full visibility into data; and a single, centralized site that puts all the tools that employees need right at their fingertips.

> " What's surprised me about Smartsheet is how it's quickly touched every corner of our business, every department, every team. It's a project management tool, as well as a tool for HR, sales, training, CRM, and more. Smartsheet is the backbone of our business. I don't want to think about what we'd do without it. "

Cherise White, Operations Manager at Alluvionic

Customer:
Alluvionic

Industry:
Professional Services

Organization Size:
Small (1 – 49 employees)

Region:
North America

Website:
alluvionic.com

Alluvionic is a woman-owned small business that provides project management, process improvement, product development, and cybersecurity solutions.

Background

Like many small businesses, Alluvionic has made business growth a strategic priority. And like many businesses of all sizes, it knows that the key to that growth isn't just gaining new customers, but also retaining and growing the customers it already has. That's especially important given that customer retention (when done right) is far more cost-effective than customer acquisition.

To maximize its customer retention capabilities, the company wanted to overhaul customer-journey processes that were mostly manual and expensive. Alluvionic used CRM, but the licensing was expensive enough that few employees outside the business development department had access to it; most relied on a combination of spreadsheets, SharePoint files, and email. What Alluvionic didn't have was fast, full visibility into its customer information, nor a single, central site to access that information and boost collaboration to grow the business.

Alluvionic often delivered reports on workflow and related software to its customers, so it was familiar with packages such as Monday.com and Trello, as well as with document management solutions including OneDrive and SharePoint. But what it wanted was something more: a platform with which to communicate, collaborate, centralize data, and automate workflows, simple enough for everyone to use and affordable enough to roll out to all pertinent employees.

Solution

Lizi Huy, Director of Service Lines at Alluvionic, had worked with the Smartsheet platform for dynamic work at a previous employer. She shared her Smartsheet experience with Cherise White, Operations Manager at Alluvionic. White had recently created a proof of concept around using Smartsheet for issuing invoices—a key pain point for customers when glitches occurred.

The POC was a success, and quickly led Alluvionic to extend its use of Smartsheet throughout the customer journey. It now uses Smartsheet forms to document customer interactions and Smartsheet automation to assign subject matter experts to support customers. Checklists walk Alluvionic staff through the internal administrative processes

Customer:
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Customer Retention

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for managing customer accounts including, for example, reminders to contact the accounting department to schedule billing cycles when projects close.

The company uses Smartsheet to automate updates on customer activity and to manage customer surveys that deliver real time feedback. Alluvionic's Smartsheet use extends to the business-development process in general, including event planning. It uses Smartsheet to build out its event plans, track schedules, and assign individual tasks.

Huy, White and their colleagues also now employ Smartsheet Dashboards as a highly flexible, functional, and extremely cost-effective intranet. The company's Smartsheet homepage provides a central source for quick links, document libraries, reports, and training materials.

"Our Smartsheet intranet is the place to get virtually any business form—again, created in Smartsheet—that employees need, such as expense reports or requests for charge-code changes," says White. *"Many of these are self-managing, with automation telling you where you are in a particular process and what the workflow will do next. As we continue to grow our Smartsheet knowledge, it's easy to change and expand our intranet with new capabilities."*

Boosting customer retention— a key strategic goal

After using Smartsheet for just a year, Alluvionic already sees results in a key business metric: customer retention.

"As a business, we prioritize maintaining our existing customer base, and Smartsheet is helping us to achieve that," says Huy. *"We use Smartsheet to identify and act on repeat business opportunities faster, so we win more of those opportunities. Smartsheet also helps us keep customer relationships strong and to build on them. It has a positive effect on customer retention because it gives us a streamlined, consistent, faster and more effective approach to maintaining customer relationships, identifying new opportunities with existing customers, and building brand awareness."*

In a Nutshell:
Alluvionic also sees a valuable business benefit in the faster, more automated processes that the company has implemented with Smartsheet.

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Saves 100 personnel-hours per year on just one process

Alluvionic also sees a valuable business benefit in the faster, more automated processes that the company has implemented with Smartsheet.

"Because we use Smartsheet to get better and timelier customer feedback, we can act on that feedback more quickly and do a better job for our customers," explains Huy. *"We request feedback automatically via Smartsheet when a project closes so we get the customer's immediate reaction and can act swiftly to address any concerns. We're ISO certified and a key metric is customer feedback, so Smartsheet helps us maintain our ISO certification as well."*

Huy estimates that Alluvionic saves 100 personnel-hours per year implementing and managing those customer surveys via Smartsheet versus its former, manual process. She says automating other processes, such as expense reports, saves employees about two hours per week.

Greater transparency, access to data increases efficiency

Greater transparency and visibility into data is another gain that Alluvionic sees from its use of Smartsheet, according to White. She cites the onboarding process as one that operates smoothly and efficiently thanks to Smartsheet.

"Instead of giving new hires a mixture of documents and spreadsheets that they have to find and track, we now give each hire a personalized Smartsheet with their schedule, training materials, resources and links," says White. *"Beyond making their onboarding more painless, we're giving them more reassurance that we're ready for them when they join the company."*

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