

Global distributor adopts Smartsheet for portfolio project management; gains workflow automation too

ADI Global Distribution has been growing at a significant pace and is focused on delivering a seamless omnichannel shopping experience for customers. ADI needed to simplify management of its increasing range of projects taking place across the business. ADI found the Smartsheet Advance platform easy and cost effective to use, enabling smart project management at the department, regional and enterprise levels.



We use Smartsheet to work together more collaboratively and effectively, which helps reduce the time our teams spend in unnecessary meetings and allows them to operate more efficiently.



Joe Loucks, Global Sales Operations Director,
ADI Global



Customer:

ADI Global

Industry:

Distribution

Organization Size:

Large (2,000-9,999 employees)

Region:

North America

Website:

adiglobaldistribution.us

ADI Global Distribution is a leading global wholesale distributor of security, AV and low-voltage products for licensed contractors. It is committed to helping its customers grow by providing them with access to the products, services and support they need to capitalize on new opportunities. Further, ADI seeks to strengthen its presence in the industry by delivering a seamless and superior omnichannel shopping experience for customers.

Background

What part of this picture reminds you of your company's challenges?

Wholesale distributor ADI Global Distribution sought double-digit revenue growth and rising margins. That was never easy in a highly competitive market, but it became increasingly challenging because of what one executive their calls "the Amazon effect:" the commoditization of products, with price and speed of delivery the only market differentiators. Throw in supply chain disruptions and inflation, and the picture only got worse.

ADI embarked on a journey toward digital transformation to address these issues, and projects began spinning up around the company. But without a squad of on-staff project managers, business leaders now had to double in that role. For example, Joe Loucks, Global Sales Operations Director, was put in charge of Business Excellence and Six Sigma efforts, including establishment of a center of excellence for project management.

Loucks, and ADI, needed a better way to handle the project management challenges that stood between them and their business goals.

Solution

Loucks researched the options for enterprise-wide portfolio project management tools. He didn't have far to look. It turned out that other areas of Resideo, ADI's parent company, had five licenses for Smartsheet and its users were very happy with it. Soon, so was Loucks.

"I loved the no-code, low code aspect of Smartsheet, which meant that it could be readily used by our business managers without needing intervention from IT," says Loucks. "It was also easy and cost-effective to share sheets for collaboration without incurring additional licensing costs just to update a sheet."

Customer:

A product returns process that was formerly managed by three workers is now handled more effectively by one worker using Smartsheet automation.

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We quickly learned we could use Smartsheet to automate workflow and drive productivity back into the business. That was huge to us.

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Joe Loucks, Global Sales Operations
Director, ADI Global

The company purchased Smartsheet Advance, Smartsheet's premium offering, which includes enterprise-grade dynamic work capabilities to empower customers to work at scale. ADI Global has taken particular advantage of Smartsheet Advance components including Control Center, Dynamic View, and Salesforce Data Connection.

"We liked that Smartsheet Advance was an offering at scale for our global organization," says Loucks. "Additionally, we liked that it could continue to support our business as we continue to grow."

With Smartsheet Control Center and dashboards, ADI gained a comprehensive view into project management, from large transformation and capital projects to small improvement projects. Loucks and his colleagues adjust Smartsheet Blueprints, tailoring them for whatever size they need for the scope of their projects.

ADI uses Smartsheet dashboards to track project status and schedules, budget, outstanding items, milestones, and risk, among other factors. For example, Smartsheet gives human-resources personnel an immediate way to track employee progress on certifications in the company's learning management system. Project information throughout the company rolls up from department and regional levels to the global level, feeding the company's global management platform, which also runs on Smartsheet.

Beyond portfolio project management, ADI uses Smartsheet for workflow automation. For example, the company automates and speeds the processes and approvals needed to add a new customer account to the Salesforce CRM system with the Smartsheet Salesforce Data Connection. The technology also enables updates to the sales pipeline and manages the process of customer returns.

With Smartsheet Data Mesh, ADI automates data lookups among sheets, such as employee IDs and addresses, and updates and combines data for periodic reports, such as weekly additions to the employee roster.

In a Nutshell:

ADI has remade collaboration among employees into a far more effective and agile process.

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Now, meetings are... about moving projects forward, not taking a roll call and reviewing what everyone should already know.

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Joe Loucks

While ADI Global uses Smartsheet to get more data to more users, it also uses Smartsheet to provide greater value and more security. For example, the company maintains a quarterly talent review from which it generates plans for talent retention. It uses Smartsheet Dynamic View to ensure that managers only see the data for employees under their supervision, making that data relevant and helping to keep it secure.

Workflow automation saves hundreds of hours per year


To Loucks, the most unexpected aspect of Smartsheet was its utility for workflow automation. *“We were looking for a project management tool and Smartsheet is great for that,”* he says. *“But we quickly learned we could use Smartsheet to automate workflow and drive productivity back into the business. That was huge to us.”*

Loucks estimates that the company saves hundreds of hours per year on “soul crushing work” such as updating reports, that’s now handled by Smartsheet automated workflow. For example, a product returns process that was formerly managed by three workers is now handled more effectively by one worker using Smartsheet automation.

Collaboration tools lead to “fewer, shorter, and more impactful” meetings

By using Smartsheet to proactively push information and action items to employees, ADI Global has remade collaboration among those employees into a far more effective and agile process.

Take meetings, for example. Before using Smartsheet, managers would send weekly inventory reports to relevant employees via email, with instructions to review and address inventory issues. Now, the company puts that information into Smartsheet, which automates notifications, escalations, reminders and dashboard views to the relevant employees. The new process eliminates the need for meetings to review inventory status



Smartsheet frees up time from manual processes, so sales personnel can devote more of their time in customer interaction.

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Smartsheet clearly helps us to achieve our business goals.”

Joe Loucks



and assign tasks. Instead, employees come to inventory meetings chiefly to handle exceptions.

"We use Smartsheet to work together more collaboratively and effectively, which helps reduce the time our teams spend in unnecessary meetings and allows them to operate more efficiently," says Loucks. "Now, meetings are fewer, shorter, and more impactful. They're about moving projects forward, not taking a roll call and reviewing what everyone should already know."

Loucks points to his weekly half-hour team meetings, which use to take 20 minutes on what he calls "bookkeeping" and 10 minutes on "things that matter." Now, those proportions are completely reversed.

Better customer experience boosts customer satisfaction

ADI uses the time it saves with Smartsheet to enhance the customer experience. For example, the Smartsheet-based product returns process provides the ADI team with more accurate and timely information on a customer's requested return, and allows them to quickly respond to a customer inquiry or deliver the information proactively. More broadly, Smartsheet frees up time from manual processes so the sales team can spend more time interacting with customers.

Loucks and his colleagues also share sheets with customers, enabling more successful interactions and collaborations with them, and greater customer satisfaction. *"I talk about Smartsheet all the time," says Loucks. "It helps me and the business to be more successful, inside and outside of the company."*

What ADI Global gains from Smartsheet goes beyond customer experience. *"Smartsheet is critically important to us. By deploying it so ubiquitously, we drive automation, efficiency, the ability to do more with less."*

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