



Alchemy uses Smartsheet Modern Project and Portfolio Management (PPM) to streamline Workday project implementations and respond faster to higher education customers.

Alchemy partners with Higher Education institutions to maximize their investment in Workday technology, delivering a proven approach with a deeply experienced team to unlock the full potential of these transformative solutions.

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Previously, we had to take information from spreadsheets, copy and paste it into Workday twice a week to try to manually keep track of updates. Now, because of Smartsheet Modern PPM and tools including Smartsheet Salesforce Connector, Data Shuttle, and Bridge, we spend less time on required non-value-add project activities, and more time with our customers on what is truly important to their project.

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Joseph Lynch, Project Manager
at Alchemy



Customer:

Alchemy

Industry:

Higher Education

Organization Size:

Medium (50-999 employees)

Region:

North America

Website:

alchemy.us

Alchemy strives to be the premier solutions and implementation partner for Workday products in the higher education community, a growing application platform for unifying student administration, HCM, financials, payroll, budgeting, grants, planning, and analytics. Alchemy partners with higher education institutions across the United States, providing services, tools, expertise, and learning programs to capitalize on the customer investment in their Workday solutions.

Background

For several years, Alchemy has been using Smartsheet Modern Project and Portfolio Management (PPM) to track and manage customer implementation projects and provide updated project data to executives through real-time dashboards. *“Our customers are looking for us to provide full project transparency at all times, and Smartsheet helps us deliver that,”* says Jonathan Zaretsky, Customer Success Director for Alchemy.

Prior to adopting Smartsheet Modern PPM, Alchemy relied on a variety of project management tools and spreadsheet software and struggled to effectively provide rolled-up executive reporting to our internal leadership at Alchemy. *“We had some outdated technology that didn’t have the automation or flexibility we needed,”* says Zaretsky. *“It took a lot of manual work to find updated project status information and share it between teams.”*

Alchemy also lacked an easy method of providing project snapshots to business leaders. *“We mainly used email and Slack messages to give them information, but there was always a disconnect between the data that came out of Workday and our internal interpretation of a project’s status,”* Zaretsky says. *“Overall, our tools weren’t allowing us to provide service to our customers at the level we aspired to provide.”*

Solution

After evaluating and trying several project management software tools, Alchemy adopted Smartsheet Modern PPM. *“We tried out a few solutions, but Smartsheet quickly became our first choice. We’ve used it ever since and have been extremely satisfied,”* says Zaretsky.

Alchemy Project Managers use Smartsheet Modern PPM to track the status of multiple implementation projects through templates created in the Smartsheet Control Center. Each project contains up-to-date details on schedules, assigned managers and tasks, and delivery dates. *“Anyone using Smartsheet can quickly see or update a project at any time,”* says Joseph Lynch, Project Manager at Alchemy. The company uses the Smartsheet Calendar App to connect Smartsheet data and forms to display meetings or other events.

Customer:

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As Alchemy added more Smartsheet users and began utilizing additional Smartsheet features, the company chose to adopt the Smartsheet Advance Gold solution. Smartsheet Advance Gold includes integrations and intelligent workflows that connect Smartsheet to different systems. Alchemy now relies on Bridge by Smartsheet to integrate data from Google spreadsheets and Smartsheet Salesforce Connector to bring in data from the company's Salesforce customer relationship management (CRM) solution. Alchemy also uses Smartsheet Data Shuttle to automatically import project data into Smartsheet.

Bridge by Smartsheet, Data Shuttle, and the Smartsheet Salesforce Connector enables Alchemy to pull together external data in multiple locations into a single source of truth in Smartsheet. *"All of our systems talk to each other now because of Bridge and Data Shuttle,"* says Lynch.

Alchemy uses workflow automation in Smartsheet to automatically notify project managers of important due dates or alert them when a project's status is yellow or red, which indicates a roadblock. *"If a project changes to red, our managers and executives can see that as soon as the status changes, so we can take action,"* says Lynch. In addition, Alchemy uses the Smartsheet Pivot App to create pivot tables containing summaries of resource forecasting, so consultants can see a breakdown of hours worked each month.

Using Smartsheet data, Alchemy also delivers project dashboards to executives, displaying real-time views of projects, resources, budget forecasts, and any project escalations that need to occur.

Better visibility into projects and more transparency for customers

With Smartsheet Modern PPM, Alchemy has a standardized project management solution that gives project owners better visibility into the details of all projects in one location. For example, managers can more easily view hours worked for a project without having to conduct manual research to find the information. *"Using Smartsheet, a manager can see work streams and resources in a given week for a particular customer implementation, without having to read through multiple rows in numerous spreadsheets,"* says Lynch. *"Instead of spending six hours manipulating a data file, a manager can get the most accurate resource utilization data in real time."*

In a Nutshell:

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Because it has centralized its project data in Smartsheet Modern PPM, Alchemy is more transparent about the status of each project. *“Our customers see exactly what’s happening with an implementation project. If we’re seeing red on our end, they are seeing the same thing,”* says Lynch. *“The data is always transparent, so there are no surprises for our customers, our executives, or Workday.”*

Through project dashboards in Smartsheet Modern PPM, Alchemy business leaders and project managers can better anticipate potential roadblocks to a project’s success.

75 percent less time spent forecasting billable hours

Relying on Smartsheet Modern PPM workflow automation, Alchemy no longer needs to spend time manually forecasting billable hours for projects. *“Our entire business model is based on hours that are to be billed to our customers. We do this by forecasting consultants’ time for only what our customers need, and letting leadership know when we have available bandwidth. This allows for resources to be assigned to other customer needs, so forecasting hours correctly is very important.”* says Lynch. *“Previously, we had to take information from spreadsheets, copy and paste it into Workday twice a week, and try to manually keep track of updates. Now, because of Smartsheet Modern PPM and tools including Smartsheet Salesforce Connector, Data Shuttle, and Bridge, we spend much less time on forecasting across the business.”*

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Anticipating roadblocks and responding faster to customers

Through project dashboards in Smartsheet Modern PPM, Alchemy business leaders and project managers can better anticipate potential roadblocks to a project’s success. *“We don’t ever want a project to turn yellow or red without executive awareness and oversight,”* says Zaretsky. *“The Smartsheet dashboards give us a way to see issues right away and be more responsive to our customers. When we get alerts, our customers appreciate us letting them know right away. Eventually, we will be able to anticipate when a project might turn yellow, which will help us be truly proactive rather than reactive. Smartsheet is the only tool that puts everything together for us and brings us into the future.”*