



Hyland™



With the back-and-forth in the email system, it took a week to complete a medium-difficulty request. Now I don't have to send email; Smartsheet does all the communication for me. That saves 20-30 hours per month, and we can turn requests around in a day if needed.

Jacob Huston-Lowery, Web Operations, Hyland

Hyland builds unprecedented efficiency and visibility into website request process with Smartsheet

Hyland's content services solutions help enterprises in health care, higher education, financial services, government, and other industries deliver better experiences to the people they serve. That requires keeping Hyland's own websites and online resources in top form and responding quickly to site issues and new content needs. Smartsheet helps Hyland's web operations team fulfill site requests more quickly and efficiently, while surfacing previously unavailable data to inform strategic decision-making.

"Our team goal is to serve our stakeholders as best we can," says Jacob Huston-Lowery, web operations, Hyland. "That includes any employee at Hyland who stumbles across an issue on our website; they need to be able to come to me and tell me there's an issue. And it's also our customers, because our websites are public-facing. My goal is to give those stakeholders a good and seamless experience."

Situation:

When Huston-Lowery joined Hyland, managing those requests was anything but a seamless experience for his team. People could report issues with an array of web forms or by sending email to various people on the team. The large number of choices made it difficult to know the best way to get a change underway.

"When I came onto the team, there was a Trello board, but I didn't like how it was being used," Huston-Lowery says. "There were five different forms people could use to contact us, but people would still bypass the form and go into email. The more options you give people, the more confusing it is. At a restaurant like the Cheesecake Factory, it's hard to figure out what you

Company

Hyland

Industry

Technology

Company Size

Large (1,000-9,999 employees)

Customer Profile

Hyland is a leading content services provider that enables thousands of organizations to deliver better experiences to the people they serve.

Website

hyland.com

Business Situation

Hyland wanted to replace its email-based web service request process with a more efficient, consolidated and responsive system.

Solution

Hyland uses Smartsheet to eliminate email trails, save 20-30 hours per month, and capture data to drive strategic decision-making and process improvement.

Benefits

- **More than 20 hours saved per month** with automation and centralized communication, leading to 63% improved efficiency
- **Better work scheduling and prioritization** to deliver on-time completion without scrambling
- **Unprecedented visibility into current requests** to enable deeper insights and strategic decision-making
- **A feedback tool for continual improvement** with automated surveys and quantifiable satisfaction data
- **Data and time to enable better training** to help colleagues boost their skills

want because the menu is 30 pages long. It's the same kind of thing for us; if you give people too many options, they're not going to know what to do, and it's a bad experience."

Huston-Lowery's first step was to consolidate request submissions by creating a single central email inbox, which he was responsible for managing and delegating. That made it easier to see how many tasks were waiting to be dealt with, but still required manual effort to prioritize or schedule them. Categorizing and creating reports about the work performed was also time-consuming, limiting the team's ability to identify trends or recurring issues.

Solution:

To streamline the process, Huston-Lowery considered several project management tools. To save money, he was asked to use Smartsheet, which he and his team had already successfully deployed for a Sitecore migration effort that required tracking of detailed review and approval from more than 30 stakeholders. Huston-Lowery was pleased to find that Smartsheet offered an easy-to-use solution for the key challenges his team was facing.

Benefits:

Smartsheet helps Hyland manage requests for website updates and fixes more efficiently, saving 20-30 hours of staff time per month while gaining unprecedented visibility into the work.

Automation to speed service and drive improvement:

Today the web operations team typically has 70 open requests at any time, which Huston-Lowery manages

with Card View in Smartsheet to see status and deadlines at a glance. The solution uses about 30 automations to send status updates to requesters. Huston-Lowery has built a dashboard that colleagues can use to monitor their requests and submit additional files or information. When a request is marked as complete, it's automatically routed into an archive sheet, and feedback surveys are randomly sent to requesters so the web operations team can find ways to improve the process.

"I implemented an approval workflow in the request system," Huston-Lowery says. "It can create a bit of a bottleneck if requesters don't respond quickly, but it's given them a lot more control over the request and I think adds a layer of satisfaction. Before, we would complete and close out requests and people would say oh, no, that wasn't right, and we had to open them back up. Now they can tell me if it's right before we complete it. And that came from the responses on the feedback survey."

Additional dashboards show yearly and year-to-date reporting. Huston-Lowery is building a dashboard for leadership that will surface details such as which requests are project-related or campaign-related along with status and numbers. The visibility created by the Smartsheet system is 100% new; the team simply couldn't capture that information via the email-based process.

Hours saved by stepping out of email:

A single online form directs website requests into a sheet that Huston-Lowery manages, with a special alert for urgent projects. As requests come in, he can gauge how long they'll take to complete, prioritize and schedule them, and assign them to members of his

team or the third-party agency Hyland uses to support website management. Because the form collects key information, there's virtually no email back-and-forth to get a request moving toward completion.

"With automation, I almost don't contact requesters at all — Smartsheet does all the communication for me," Huston-Lowery says. "I'm not typing emails, or if I am it's for clarification. So if I have 20 requests a week and I don't type an email for any of them, that's a lot of time saved. All I have to do is apply the assigner, set some operational categories on the request, and then it goes on its way."

Not only does replacing email with Smartsheet forms capture request information in one place, it saves surprising amounts of time. Huston-Lowery estimates that simply eliminating the need to type new messages about the requests in the system has cut 20-30 hours of work per month, and the overall Smartsheet-based process has improved the team's efficiency by 63%. The time and effort saved can be put to better uses, such as using quantifiable requester feedback to build improvements into the system.

"We can actually track how satisfied our requesters are," Huston-Lowery says. "Having those metrics and goals for requester satisfaction is important, and being able to communicate with leadership on what kind of work we're doing — the visibility just hasn't been there for us. Before, 'Oh, the web team, we do a good job,' but now we can show how many things we're doing and how much we have going on. Leadership can have visibility into all of that now."

More timely completion and strategic scheduling: One of the biggest benefits of using Smartsheet to manage web requests has been the efficiency it brings. By replacing email trails with built-in alerts and update capabilities, the solution saves communication time and eliminates duplicate information-sharing. It also prevents delays caused by inattention or lack of information, issues that weren't easy to flag before.

"Email requests could sit for months with no movement," Huston-Lowery says. "The actual work is one thing, but then with the back and forth it was about a week for us to work on it and get closure. With Smartsheet, we can save weeks at a time with people logging, reviewing and tracking their requests. I have filters that tell me when something is past due, and if it's because I'm waiting for the requester, I can start pinging them for follow-up."

The Smartsheet solution also makes it easier to prioritize and schedule work so hours are distributed more evenly across a workweek. Color-coding and notifications help Huston-Lowery identify truly urgent requests and adjust timelines for less pressing ones, ensuring on-time completion without a last-minute scramble. The ability to strategically manage requests has helped the team implement a 24/5 support program, which wasn't possible before.

Freeing up time for more strategic work: With the time Huston-Lowery and his team save by using Smartsheet, they can develop additional resources for Hyland to work more effectively across multiple teams. Huston-Lowery has been developing a set of Sitecore training videos that supplement the scheduled training programs he conducts. The videos are available on-demand, allowing employees to build the skills they need most on their own

schedule. The value of that training is clear from the data surfaced by Smartsheet — data that wasn't available in an email-based system.

"We went from an email system to a solution that has a lot of data behind it now," Huston-Lowery says. "My Smartsheet reports and dashboards will help us get into the trends. One of the big ones is that right now, 66% of the things we do are content updates, which is actually helping build the case for people to be able to work in Sitecore themselves. That's going to help me drive more efficiency, so instead of doing work on the websites for them, I'll be able to do the job I'm really intended to do, which is supporting them in the system."

About Smartsheet

Smartsheet (NYSE:SMAR) is a leading cloud-based platform for work execution, enabling teams and organizations to plan, capture, manage, automate, and report on work at scale, resulting in more efficient processes and better business outcomes. Today over 95,000 customers, including more than 77,000 domain-based customers and over 70 percent of the companies in the Fortune 500, rely on Smartsheet to implement, manage, and automate processes across a broad array of departments and use cases.

To learn more about Smartsheet, visit www.smartsheet.com.