



## Event design company, Maritz, uses Smartsheet for competitive advantage in serving clients.

To maintain and enhance its reputation for top-notch client service during the pandemic, Maritz chose Smartsheet for collaboration among employees and with clients, replacing email and file shares. The move boosted efficiency, delivered greater competitive advantage, and enabled better planning.

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Aida Campbell, Strategic Account  
Senior Director at Maritz



**Customer:**

Maritz

**Industry:**

Professional services

**Organization Size:**

Large (2,000 – 9,999 employees)

**Region:**

North America

**Website:**

[maritz.com](https://maritz.com)

Maritz has pioneered the incentives industry, revolutionized meeting planning, and now is transforming customer experiences. The company is a leader in meeting and events management, employee experience, incentives and rewards, customer loyalty and automotive-specific solutions.

### Background

When the pandemic hit, the events industry faced its biggest challenges to date.

The team at Maritz needed to operate at greater efficiency than ever before. At that time, their collaboration tools and management systems weren't intended for this increased challenge. Like most companies, Maritz relied heavily on email and shares to exchange and retain information – making that information tough to find, analyze, share with clients and colleagues, and retain for continuity over the client relationship. A variety of third-party tools meant that Maritz project managers and project team specialists often had difficulty navigating from one client project to another.

### Solution

The company wanted a new tool that would boost both internal efficiency and success in client relationships. They chose Smartsheet.

As Devon Stiles, Vice President, Growth Marketing at Maritz – whose team uses Smartsheet for sales and marketing enablement – explains: *“We chose Smartsheet because it is simple to use, has powerful visualizations of our data, and is the connective tissue that allows everyone to view and work with a single source of truth.”*

Maritz started its use of Smartsheet with an intake form for clients to receive support by a Maritz employee via a Shared Support model.

The company went on, during and post-pandemic, to create 40 templates covering virtually every type of event and project. Client-specific workspaces make it easier for Maritz to manage multiple projects for each client, as does a dynamic timeline accessed via a Control Center. The company uses a suite of onboarding templates to make it faster and easier to get all relevant information from a client, including pricing models, ticketed items, demographic information, business rules and more.

### Customer:

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Maritz uses Smartsheet dashboards to share metrics for internal reporting for customer service staff and event registration, for example. Dashboards help to predict staffing needs, track IT status, and share information with clients.

*“With a tremendous amount of client information placed in Smartsheet, rather than hidden away in emails, everyone can access what they need quickly,” says Aida Campbell, Strategic Account Senior Director at Maritz. “This is far more efficient. We had no centralized dashboards before Smartsheet.”*

## Achieves Greater Efficiency

Maritz wanted a collaboration and management solution that would deliver a much-needed, higher level of efficiency. That’s what it gains from its use of Smartsheet. For example, project managers prepare project assets and engage with clients in just half the time it took them before Smartsheet.

By using Smartsheet to replace the former documentation process for client business rules and event specifications, Maritz onboards new clients and new employees more efficiently. Employees, for example, are onboarded three to four months faster.

*“Smartsheet is how we do more with less,” says Renee Lake, Senior Director of Project Management and Registration Services at Maritz. “Our operational teams wanted an optimal way to drive efficiency internally and continue to deliver superb client service. And that’s what Smartsheet delivers.”*

## Gains Competitive Advantage

To Maritz, Smartsheet is more than just a tool for greater efficiency; it’s a competitive advantage that the company promotes to potential clients to win more business.

### In a Nutshell:

**To Maritz, Smartsheet is more than just a tool for greater efficiency; it’s a competitive advantage that the company promotes to potential clients to win more business.**

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*"We use Smartsheet to take better care of our customers than competitors can," says Erin Dunstan, Managing Vice President of Sales at Maritz. "We bring it up in our sales process to show customers how we're easier to do business with, even though we provide such a diverse range of services. With Smartsheet, all the information our clients need is always available."*

One proof point for that argument: Smartsheet-based change logs give both Maritz and its customers an easy, intuitive way to track changes, so clients always have up-to-date information without needing back-and-forth conversations in email.

Clients are convinced. Not only does Maritz use Smartsheet as a successful tool to drive new business but – after working with the company on one or more projects – a growing number of clients adopt Smartsheet as well.

## **Anticipates staffing, budgeting needs**

The better, more comprehensive, reliable, and up-to-date information that Maritz manages through Smartsheet not only makes the company more efficient – it also gives Maritz the foresight to better anticipate issues and needs.

*"We do a better job of anticipating staffing requirements now that we base our analyses on Smartsheet," says Lake. "That means proper staffing levels and better budgeting."*

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