



## Shoppa's Material Handling streamlines project management, boosts collaboration, and gains visibility with Smartsheet for Project & Portfolio Management

Shoppa's Material Handling is a material handling solutions and equipment provider that offers products, services, and integrated systems that customers streamline the storage and movement of goods. The organization uses Smartsheet for Project & Portfolio Management (PPM) to track projects, simplify collaboration, and increase visibility across different teams.

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**As soon as someone hits the submit button on a new project, all the data is pushed automatically into our active projects log, which is the master database for all projects. With Smartsheet, we can more easily get materials onsite and install the equipment our customers need, on time.**

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Scott Hubbell, Senior Project Manager,  
Shoppa's Material Handling

### **SHOPPA'S** MATERIAL HANDLING

**Customer:**

Shoppa's Material Handling

**Industry:**

Manufacturing

**Organization Size:**

Medium (50 - 999 employees)

**Region:**

North America

**Website:**

shoppas.com

Shoppa's Material Handling, founded in 1981, is a growing material handling solutions and equipment provider with nine locations across Texas and Missouri. Shoppa's is an authorized dealer of Toyota Material Handling, the world's best-selling forklift brand. The company offers a comprehensive array of products, services, and integrated systems designed to help customers streamline the storage and movement of goods. Shoppa's solutions include everything from powered industrial trucks to advanced automated warehouse systems.

### Background

Shoppa's is increasingly offering end-to-end services and solutions to customers. *"In addition to material handling systems, we're now a systems integrator and we also provide robotics and other automated solutions,"* says Greg Young, Allied/Storage Solutions Sales Manager for Shoppa's Material Handling. *"As a result, it's more important than ever that the different areas of our business communicate effectively and continuously improve processes."* To address these requirements, Shoppa's uses the Smartsheet for Project & Portfolio Management (PPM) solution for project tracking and management. *"Smartsheet gives us an easy way to manage the full lifecycle of a project, from the lead all the way through ordering and installation and closeout,"* Young says.

Before it adopted Smartsheet, Shoppa's needed to build a unified, standardized system for tracking opportunities from pre-sale to project execution. The organization relied on emails, spreadsheets, and other manual tools that limited project management and visibility for business leaders. *"We used static spreadsheets to submit orders using an order packet, with people updating fields manually. This made project visibility and communication difficult, and it led to inaccurate information and data loss,"* says Scott Hubbell, Senior Project Manager for Shoppa's Material Handling. *"If anyone needed further information on a project, they would have to call someone and get the information verbally or physically go to another office to talk to someone."*

### Solution

Shoppa's adopted the Smartsheet PPM solution to streamline the project tracking process throughout all departments. *"Smartsheet is a very powerful software solution and it's very intuitive,"* says Hubbell. *"It's user-friendly and doesn't require us to write complex code to make things happen."*

Shoppa's turned to Optimum, a software consulting firm and a Platinum Smartsheet Partner, for help implementing Smartsheet. Optimum led a series

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of workshops with Shoppa's stakeholders and then spent six weeks developing the right Smartsheet solution. *"We wouldn't have gotten to where we are today without Optimum,"* Young says. *"Optimum spent time with us to gain a good understanding of our processes and where our bottlenecks were."*

Optimum helped Shoppa's adopt a project management solution based on Smartsheet Control Center, which gives different Shoppa's teams the ability to work together through a centralized system. Team members enter new project requests in Smartsheet, and each project is managed and tracked through interconnected sheets. The solution provides quick links to project details at specific intervals, with key performance indicators (KPIs) visible on several project dashboards.

Shoppa's also uses Smartsheet Dynamic View to enable individualized views for users when updating their specific projects. *"We want to make sure the right resources are allocated for every project, and Dynamic View helps us get information to the right people,"* Hubbell says.

In addition, the company uses Smartsheet automated workflows to notify employees when they have a specific project responsibility. *"Previously, you'd have to proactively reach out to someone or download some reports to keep moving a project along, but now we have trigger points at each stage to notify someone when tasks have been completed,"* says Hubbell.

## End-to-end project tracking and management

Using Smartsheet PPM, Shoppa's has streamlined its order submission process and active projects log to gain end-to-end project lifecycle tracking. Employees in departments including sales, marketing, and project management use Smartsheet to track and manage projects from order to completion. *"As soon as someone hits the submit button on a new project, all the data is pushed automatically into our active projects log, which is the master database for all projects,"* says Hubbell. *"With Smartsheet, we can more easily get materials onsite and install the equipment our customers need, on time."*

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## Easy collaboration between teams

With Smartsheet Dynamic View, Shoppa’s helps different teams communicate and work together more seamlessly than before. Now, employees work together in a centralized project management system that delivers interconnected sheets containing the latest project status, including key deadlines and delivery dates. “Collaboration is much better with Smartsheet,” Young says. “If we have a specialized order, such as a robotics or shuttle system that requires a particular skillset, our sales consultants and equipment salespeople can work together to create a proposal and customer order with the best resources for the project. Dynamic View quickly displays the relevant information for each project.”

## Detailed visibility into each stage

Because Smartsheet PPM integrates data from each project phase, Shoppa’s employees get better visibility into updated project timelines. For instance, when new project requests are entered into Smartsheet, Control Center automatically creates a hyperlink to a project dashboard for that project. “The Smartsheet dashboards provide a good overview of a project, with information such as the project team, customer, project scope, and financials,” says Hubbell. “With this information at their fingertips, anyone can see a project’s stage and find out immediately if we’re still waiting for materials, or if those materials have been ordered, for example. This data all feeds into projected delivery and customer installation dates. Ultimately, Control Center and the dashboards give us more visibility. Our executive team can also use the dashboards to quickly review performance metrics for the entire project or portfolio.”

As Shoppa’s keeps growing, it plans to use Smartsheet for continuous process improvement. “Our goal is to double our revenue by 2025,” says Young. “Smartsheet is the right tool to help our company support that growth by optimizing our processes.”

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