



Sutherland uses Smartsheet for Project & Portfolio Management to save \$1 million annually and give leadership real-time business visibility

Sutherland, an experience-led digital transformation company using human-centered design with analytics, AI, cognitive technology, and automation, helps enterprises across the globe with Smartsheet for Project & Portfolio Management (PPM).

“
With the information we have in Smartsheet, we can pinpoint challenges in the business and can quickly identify root causes. Leveraging that information and lessons learned, gives us a unique perspective as a business allowing us to quickly and proactively transform our process and approach.
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Bill Lafferty, Associate Vice President,
Transition Services for Sutherland



Customer:

Sutherland

Industry:

Technology & Professional Services

Organization Size:

Enterprise (10,000+ employees)

Region:

North America

Website:

sutherlandglobal.com

Sutherland is an experience-led digital transformation company. Our mission is to deliver exceptionally designed and engineered experiences for customers and employees. For over 35 years, we have cared for our clients' customers, delivering measurable results and accelerating growth. Our proprietary, AI-based products and platforms are built using robust IP and automation.

Background

Sutherland uses Smartsheet for Project & Portfolio Management (PPM) solution to manage projects and automate project frameworks across the enterprise. Key business areas where Smartsheet has been successfully integrated include Project Management, Human Resources, Talent Acquisition and Service Excellence. *"Our company has an entrepreneurial spirit. Change is a constant. We needed a tool that allows us to remain nimble,"* says Bill Lafferty, Associate Vice President, Transition Services for. *"We needed a tool that can readily adapt to our needs, and Smartsheet is that tool."*

Sutherland continues to experience rapid business growth, continually adding new customers in new territories globally. *"When I joined the company 12 years ago, we operated in 10+ countries. We've now expanded into over 20+ countries with over 61 delivery centers and ~40K employees,"* says Lafferty. Managing growth of that kind is a challenge. *"We didn't have a formal PPM solution, and used a variety of tools to manage projects,"* Lafferty says. *"As a result, project data was not well integrated making program visibility difficult. Tactically we wanted to move our Program and Project approach to one of transparency – one that provided our internal & client stakeholders a single pane of glass. Thus began our search for a PPM solution. Recognizing our need for flexibility and customization did not mesh well with large PPM tools in the market, we began a search for a PPM Light solution. We adopted Smartsheet as our preferred PPM tool because of speed of adoption, interface familiarity and ability to customize to meet our needs,"* says Lafferty.

Solution

To overcome its challenges, Sutherland adopted the Smartsheet PPM solution, using Smartsheet to

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automate project workflows and centrally manage all internal and client-facing projects. *"We looked at different products, and we chose Smartsheet because it has a user interface that's familiar to a lot of our people, which we knew would help simplify adoption and increase productivity right away,"* says Lafferty.

Sutherland has over 5,000 employees utilizing Smartsheet today. The primary user groups within our organization that utilize the product are our largest PMO's, Transition and Transformation (TNT), our Technology Project Management Office (TPMO), our Human Resources (HR), Talent Acquisition (TA), and Service Excellence teams. Our PMO's utilize templated Workspaces consisting of Smartsheet sheets, reports, and dashboards to track hundreds of projects every day. *"Each project has multiple Smartsheet dashboards for internal and external users, which our leadership teams and client stakeholders use for centralized visibility into the status of each project,"* says Lafferty. The Sutherland HR & TA teams are responsible for managing multiple simultaneous hiring campaigns at any one time. Smartsheet allows them to successfully juggle multiple priorities and smoothly facilitate the new employee onboarding process. Our Sutherland Service Excellence organization relies on Smartsheet to integrate a complex global performance management reporting with Power BI visualization software.

Sutherland uses automation workflows in Smartsheet to automatically manage and update approval processes, with notifications automatically sent through Smartsheet to alert project owners to key schedules and dates. Additionally, Sutherland integrates Smartsheet PPM with its JIRA project tracking software.

Using restricted licensing, Sutherland also allows third-party access to Smartsheet for external clients to manage project reviews and approvals. All project data is managed within a Smartsheet workspace, with an index file pulling in data from multiple sheets within the workspace for reporting.

In a Nutshell:

Because of the automation in Smartsheet PPM, the Sutherland Transition Services organization has eliminated manual processes previously required during new project creation.



Setting up a new project takes about 10 seconds now, compared with 45 minutes before Smartsheet PPM. Overall, this saves us 25 hours each week, which translates to around \$129,000 a year in savings.



Bill Lafferty

Better visibility across the business

Sutherland has increased visibility into projects throughout the organization since adopting Smartsheet PPM. *“At the end of the day, it’s all about visibility,”* confirms Lafferty. *“We now have a single pane of glass so we can look across our entire project portfolio and see everything in real time.”*

Now, Sutherland can communicate with business leaders more simply and efficiently. *“With the better visibility we get in Smartsheet, we can deliver concise project information in a consistent format, so our leadership teams can make timelier and more informed decisions,”* says Lafferty. For example, Sutherland can be more proactive about the business. When a new project kicks off, project managers front-load the project with common risks and issues that could possibly occur. *“With the information we have in Smartsheet, we can pinpoint business challenges and quickly identify root causes,”* says Lafferty. *“That data gives us a unique perspective into the business which enables us to proactively transform the environment creating a win-win for both our clients and ourselves.”*

Project setup reduced from 45 minutes to 10 seconds, \$1 million saved annually

Because of the automation in Smartsheet PPM, the Sutherland Transition and Transformation (TNT) organization has eliminated manual processes previously required during new project creation. *“Setting up a new project takes about 10 seconds now, compared with 45 minutes before Smartsheet PPM,”* Lafferty says. *“Overall, this saves us 25 hours each week, which translates to around \$129,000 a year in savings.”* The organization has also eliminated the need for a third-party vendor to drive API data across multiple spreadsheets.

Other Sutherland teams are seeing cost savings and efficiencies from Smartsheet. The Sutherland Service Excellence team is also taking advantage of Smartsheet to drive improvement projects that have led to an estimated \$1 million in annual

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savings. In a similar way, the Sutherland HR team has realized efficiencies in payroll processing using Smartsheet, capturing 10,000 entries per day, with less than a 10 percent exception rate in payroll accuracy.

Temporary timekeeping solution created in 48 hours

Quick thinking kept Sutherland in the game when one of its timekeeping vendors recently suffered an outage. A tiger team built a temporary timekeeping solution for its North American operations within Smartsheet and rolled it out to the business in 48 hours. Sutherland used the system for timekeeping until its fulltime solution was back up. *“That’s a great example of how we use Smartsheet to quickly go to market to solve big business problems,”* says Lafferty.

The company now plans to increase adoption of Smartsheet across the business. *“There’s a lot of momentum around Smartsheet here, and more people within our company now recognize that Smartsheet can meet their specific business needs,”* says Lafferty. *“So far, from my perspective, there hasn’t been a single problem we couldn’t solve with Smartsheet.”*

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