



Caravel Improves Project Staffing and Management by Optimizing Resource Allocation in Smartsheet

Caravel, BPM Technology Solutions is a full-service NetSuite, Salesforce, technology, and accounting services organization that leads software implementations and provides end-to-end services for prospects and clients.



With Resource Management by Smartsheet, we have a tool for reviewing our team's resource allocation to understand where we might be overstaffed or understaffed, so we can understand if we need to do cross training or make other adjustments. That has helped us reduce our timeline to staff new projects by about four weeks, which ultimately leads to more work and revenue and happier customers.



Evan Jackson, Senior Director of PMO,
Caravel

Customer:

Caravel

Industry:

Professional Services

Organization Size:

Large (1,000 - 9,999 employees)

Region:

North America

Website:

caravel-partners.com

Caravel, BPM Technology Solutions part of the technology services group at accounting firm BPM LLP, helps companies deploy accounting software solutions while providing end-to-end advisory and support services. The company's 1,300-plus employees work in four global delivery centers to help customers implement NetSuite, Salesforce, and other technologies.

Background

Caravel is focused on accelerating business growth, and it needed to find better project management tools to support that goal. *"We want to continue to grow and scale at all levels, whether it's through our service offerings, new products, IT development, or innovation,"* says Tai Valenzuela, senior managing director, delivery and operations at Caravel. Meeting its growth and scalability goals was challenging, though, because the company used a mix of productivity and project management software that made resource management difficult. *"Determining resource allocation on projects was not easy because we didn't have the correct tools to ensure consistent delivery for our customers,"* says Evan Jackson, senior director of PMO at Caravel. *"It was challenging to make sure we had the right people for the job."*

The company also wanted to give senior leaders better visibility into implementation projects. *"We had very limited reporting capabilities, so it wasn't easy to show how projects were progressing,"* Valenzuela says. *"We used basic spreadsheets to report on projects. Overall, we were limited in our ability to scale and grow."*

Solution

To streamline the management of implementation projects, Caravel adopted Smartsheet for both internal and external use. The company uses Smartsheet project dashboards to manage each customer implementation, giving Caravel consultants and Caravel customers a central place to view project status and reports.

When a new customer implementation kicks off, Caravel project managers click a button to access a blueprint containing sheets with information on the project, plan, action items, risks, changes, checklists, and go-live date. *"We use the blueprint and the dashboards internally and externally every day,"* Valenzuela says. *"As we complete each implementation task, the expectation is that we're updating the relevant sheets to show our progress towards a path to go-live and keep everything on track."*

Caravel also uses Resource Management by Smartsheet, a resource and project portfolio planning solution, to identify the resources required for each project and manage capacity to ensure the best allocation. *"For every project, we have a corresponding project in Resource Management, which we break down by task,"* Jackson says. *"Our consultants and project managers use that for entering project hours, and they also use it to look at schedules to avoid conflicts, adjust resources, timelines, or hours if required."*

Customer:

The company can also more effectively anticipate potential project roadblocks by using Resource Management.

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It sometimes becomes apparent in a project that we're going to have a challenge if a date shifts and we know our go-live is at risk. Resource Management helps us plan for those challenges because the resource allocation data is very clean and visible to everyone on the project.

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Evan Jackson, Senior Director of PMO, Caravel

Automated workflows in Smartsheet help Caravel manage action items and send reminders about due dates to project stakeholders, and the company relies on Smartsheet to manage up to 175 implementation projects at any time. *"We're also tracking ongoing support services in Smartsheet, so the number of projects can be even higher,"* Jackson says.

Staffing projects faster by optimizing resource allocation

Using Resource Management, Caravel can ensure its implementation projects are always adequately resourced. *"With Resource Management by Smartsheet, we have a tool for reviewing our team's resource allocation to understand where we might be overstaffed or understaffed, so we can understand if we need to do cross training or make other adjustments,"* says Jackson. *"That has helped us reduce our timeline to staff new projects by about four weeks, which ultimately leads to more work and revenue and happier customers."* Using Resource Management, Caravel has increased project utilization by 25 percent through a better understanding of staffing availability.

The company can also more effectively anticipate potential project roadblocks by using Resource Management. *"It sometimes becomes apparent in a project that we're going to have a challenge if a date shifts and we know our go-live is at risk,"* says Jackson. *"Resource Management helps us plan for those challenges because the resource allocation data is very clean and visible to everyone on the project."*

Additionally, Caravel has improved its hiring capabilities with Resource Management. *"By looking at our forecasts and expected project hours, we can understand what positions we might be short on or if there are specific roles, such as a junior consultant versus a senior consultant or a project manager instead of a developer,"* Jackson says.

More time for project customization and customer service

Caravel has increased its overall efficiency by using Smartsheet, which helps project managers spend less time on manual work and more time on improving projects. *"Smartsheet saves our project managers quite a bit of time on the front end so they can focus on customizing projects rather than starting from scratch,"* says Valenzuela. *"With Smartsheet, we've saved up to 1,400 hours a week total, and that's time we can put into working with customers and getting more people on projects."*

The company can also continue providing high-end customer service while taking on more work because its project managers are more productive with Smartsheet. *"As we've grown with Smartsheet, we're able to take on more and more projects at a resource level without*

In a Nutshell:

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losing our ability to offer white glove service, because of the automation and increased efficiency we have," Jackson says. "Smartsheet allows us to do more with less and make the most of our resources."

Accelerating growth in revenue and headcount

Caravel has rapidly scaled its business since adopting Smartsheet. The company has seen a 500 percent growth in headcount in five years since implementing Smartsheet, along with a 20 percent increase in gross margins. "Smartsheet has definitely given us the opportunity to scale and grow, both in revenue and overall team size," Valenzuela says. "With Smartsheet, we can build out template-based packages to streamline implementations for our customers, and that has also helped us close deals more easily because our salespeople can use demos of dashboards, for example, as part of the project plan they share with new customers."

The organization has set its sights on growing along with Smartsheet. "We're part of the Smartsheet early adopter program, so we have visibility into new features and improvements in the technology," says Jackson. "We're very excited to see what's next."

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