



# Clear Digital Uses Smartsheet to Increase Client Confidence by Seamlessly Tracking Website and Digital Projects

Clear Digital is a B2B digital agency that combines 20+ years of Silicon Valley success with senior hands-on expertise to deliver websites and brand experiences that deliver real-world impact. The company's unified approach brings clarity to a constantly changing B2B landscape. With collaboration at the heart and results at the forefront, Clear Digital confidently takes its clients to the next level.

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Annie Raygoza, Director of Client Services  
at Clear Digital

Customer:  
**Clear Digital**

Industry:  
**Media and Production**

Organization Size:  
**Medium (50 - 999 employees)**

Region:  
**North America**

Website:  
**[cleardigital.com](https://cleardigital.com)**



Clear Digital is a full-service digital creative agency that delivers marketing and advertising services and brand experiences to B2B companies and other customers. Specializing in web design, custom web development, UX/UI design, technology integration, brand strategy, brand messaging, and visual identity services, with a 90 percent client retention rate, Clear Digital delivers impactful and meaningful brand experiences through a methodology that is purpose-built to deliver results.

### Background

Clear Digital was launched 26 years ago, and the company has relied on Smartsheet to track projects for nearly 10 of those years. *"We've grown a lot in 26 years, and with that growth comes the understanding that you need the right tools to be successful,"* says Annie Raygoza, director of client services at Clear Digital. *"Smartsheet makes us more efficient, and it helps us show our clients that we're keeping their projects on track."*

*"Clear Digital previously faced challenges with a fragmented project management approach, relying on a mix of emails and spreadsheets to track progress. Each team had its own system, leading to inconsistencies and inefficiencies,"* says Raygoza. *"When processes aren't consistent, that means our clients aren't having the same experience. We need to give our clients a seamless experience, and part of that is having consistency in tools and processes."*

### Solution

After selecting Smartsheet, Clear Digital began using the tool to track everything from large custom web development projects to small video projects. The company uses Smartsheet Control Center templates to create new projects and manage them from start to finish. Clear Digital also uses Smartsheet to manage budgeting and marketing for conferences and other events, as well as internal meetings and events.

Clear Digital creative teams use Smartsheet to track key project milestones and deadlines. *"Smartsheet helps us understand what we're accountable for, so our creative teams know they can't get started on something until the previous milestone is met,"* says Raygoza. In addition, Smartsheet automated workflows notify creative leaders and project managers about due dates and next steps. *"The last thing we want is to have a client wonder why a project is late,"* says Raygoza. *"We need to stay on top of deadlines, and automated workflows help us do that."*

Raygoza and other employees on the client services team also use Smartsheet dashboards to get snapshot views of projects in progress, quickly determining if key deadlines are in danger of being missed and if corrective action needs to be taken. *"Dashboards give us a quick way to see where every project is during our weekly meetings, and if we need to address red flags in any way,"* says Raygoza.

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## Keeping more than 20 projects on track every day

Smartsheet helps Clear Digital streamline the management of more than 20 projects at a time by providing a consolidated tool for client services, marketing, development, and creative teams. *"Projects have a lot of moving parts, including design, development, discovery, writing, video, and strategy tasks," says Raygoza. "Keeping all teams aligned and aware of deadlines is essential since every task depends on another. Smartsheet brings everything together in one place, giving us real-time visibility into project progress and ensuring nothing falls through the cracks. This transparency not only keeps our team on track but also builds trust with our clients, as they can see exactly where things stand and feel confident that their projects are moving forward smoothly."*

By getting a real-time view into each project, Clear Digital can be more proactive. *"Effective project management is about preventing issues before they escalate. Smartsheet helps us do that by flagging potential risks early, whether it's a delayed response or an incomplete task," says Raygoza. "This allows us to proactively communicate with our clients and outline a clear plan of action if something is at risk of being missed."*

## Making sure clients keep coming back

Using Smartsheet, Clear Digital has full visibility into project milestones, resources, and key contacts. *"We have visibility into every project from end to end with Smartsheet," Raygoza says. "This creates the consistency in tools and processes we need to ensure accountability for our clients."* For example, during weekly client meetings, Clear Digital project managers can share deadlines and updates in Smartsheet to show the latest status or any roadblocks or issues that might prevent a project from being completed on time. Additionally, clients can interact with Smartsheet to view status updates or dashboards. *"With Smartsheet, we know where things are at any moment, and so do our clients," says Raygoza. "Nothing should be a surprise when it comes to a project update, and Smartsheet ensures that we avoid surprises by giving us real-time information."*

In addition, the company has more accurate, updated project data, which increases client confidence. *"More accurate data means more trust from our clients, and that's very important for retention," says Raygoza. "We need to make sure our clients keep coming back to us. We have a 90 percent client retention rate, and that number would probably be much lower without a tool like Smartsheet. In this industry, it can be challenging to keep clients happy. Smartsheet solves that problem."*

Having streamlined project management and client communication processes is also critical because all Clear Digital projects have billable hours and are highly dependent on milestones. *"Saving time and*

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*hitting deadlines is really important with a billable approach, because we don't want to go over budget for our clients and tarnish the strong relationships we have with them," says Raygoza.*

## Helping project managers be up to 50% more efficient

With better visibility and a consolidated tool for managing projects, Clear Digital spends less time manually entering data and more time working directly with clients. *"We are at least 40-50 percent more efficient with Smartsheet, because it helps us automate a lot of the previously manual work of scheduling and movement on a daily basis with our projects," says Raygoza. "As a result, we can be more strategic with our accounts and give clients more attention instead of being so focused on project details."*

With more time available, Clear Digital project managers can take on more projects and work on developing new accounts. *"Smartsheet has scaled with us over the years, so we're now also able to manage larger, more complex projects with bigger budgets," Raygoza says.*

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