



Wolters Kluwer uses Smartsheet to centrally manage thousands of projects and focus on innovation

Wolters Kluwer is a global leader in information, software, and services for professionals in industries including healthcare, tax and accounting, financial services, and corporate compliance, legal and regulatory, and corporate performance and ESG.



We're managing thousands of software projects in Smartsheet. I can monitor deadlines and budgets and make sure our project managers keep everything moving on schedule and on budget.



Lori Cross, Project Manager at Wolters Kluwer Financial Services Solutions

Customer:

Wolters Kluwer

Industry:

Finance

Organization Size:

Enterprise (10,000+ employees)

Region:

North America

Website:

wolterskluwer.com/en/

Wolters Kluwer is a global leader in information, software, and services for professionals in industries including healthcare, tax and accounting, financial services, and corporate compliance. The company's Financial Services Solutions division provides offerings specific to governance, risk, and compliance, with compliance solutions for more than 10,000 U.S. banks and credit unions.

Background

The Financial Services Solutions division uses Smartsheet to track and manage a range of software implementation projects for financial customers every day. *"Smartsheet helps me support all our project managers so they can consistently manage and report on software implementation and testing projects, from end to end,"* says Lori Cross, project manager at Wolters Kluwer Financial Services Solutions. *"With Smartsheet, we can keep things on track and moving across the company."*

Before the company adopted Smartsheet, Cross and her team sometimes struggled to track projects and create updated reports for executives. *"We have nine different software products, and each team had their own way of managing projects,"* says Cross. *"Everyone used different spreadsheets, and information was saved to desktops or on a shared drive. As a result, there was no consistent tracking or reporting. That was a major concern, because tracking dates and financials is very important for our internal and external customers."*

Solution

After initially adopting Smartsheet, Cross began using it as her primary tool for managing and tracking projects for banks, credit unions, and other financial institutions. *"Smartsheet made it easier for me to help our project managers track everything from software implementations to testing software bugs for our customers,"* says Cross.

Several years later, Wolters Kluwer Financial Services Solutions started working with a Smartsheet Technical Account Manager (TAM), a dedicated technical advisor for faster issue resolution, improved employee efficiency, and reduced time spent on solution maintenance and enhancements. *"We rely on our TAM all the time,"* says Cross. *"He really knows our systems and our business inside out, and we have weekly meetings with him to learn as much as possible about our use of Smartsheet."*

More recently, Wolters Kluwer Financial Services Solutions moved from a standard Smartsheet license to Smartsheet Advance Gold, which builds on core Smartsheet functionality and helps customers automate workflows and align global teams. *"We wanted to do more with Smartsheet, and Smartsheet Advance Gold gave us the opportunity to really see the full extent of the solution's capabilities,"* Cross says.

Cross and her team also rely heavily on Smartsheet Control Center, a Smartsheet premium capability that offers blueprints and automated workflows. *"We started with one Control Center, and we have 12 today,"* says Cross. *"Control Center really gives us consistent tracking and*

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capturing of project and financial data by using templates for project management.” Cross also uses Smartsheet Data Shuttle to automatically pull detailed project and billing data from SharePoint into Smartsheet. “I used to spend several hours a day copying and pasting that data into Smartsheet, but Data Shuttle automates that process,” says Cross. “For each project, Data Shuttle provides a unique ID and project number and moves it into Smartsheet.”

Additionally, Cross takes advantage of Smartsheet DataMesh to ensure sheets and reports are in sync and accurate. “We use DataMesh to make sure financial information such as contract start and end dates are correct and updated,” she says.

Wolters Kluwer Financial Services Solutions also uses Smartsheet WorkApps and dashboards to provide project milestones and high-level details to different product team leaders and customers. “We have 20 or more financial dashboards feeding directly into WorkApps, which gives executives a quick view of a project’s status,” says Cross. The organization has also started sharing financial dashboards with customers in view-only mode, which allows customers to closely track project spending and time spent on each project.

Centrally managing thousands of projects and increasing visibility

Using Smartsheet Control Center, Wolters Kluwer Financial Services Solutions can now centrally manage software implementation and testing projects. “We’re managing thousands of software projects in Smartsheet,” says Cross. “I can monitor deadlines and budgets and make sure our project managers keep everything moving on schedule and on budget.”

The company can also give management better visibility into the status of each project through Smartsheet dashboards. “One of our executives recently pulled up a dashboard and discovered six projects were marked yellow and five were marked red,” says Cross. “That meant we knew right away which specific projects needed our attention.” Wolters Kluwer Financial Services Solutions also gives its partners more visibility through Smartsheet dashboards. “Our project managers used to rely on Powerpoint presentations and screenshots during meetings with partners, but now it’s all live data in Smartsheet,” says Cross. “It’s not a snapshot in time – it’s actual live data.”

Creating reports in minutes instead of hours

With automated workflows in Smartsheet, Wolters Kluwer Financial Services Solutions has eliminated manual report creation that previously required cutting and pasting data. “It took me two hours a day to pull

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together data and build a report, and I can do that in a few minutes with Smartsheet Data Shuttle," Cross says. "Moving billing and product data into Smartsheet used to take three hours, from just one data feed. Now, with Smartsheet, I have 11 data feeds and the reporting process only takes 10 minutes a day."

With more time on her hands, Cross can turn her attention to other internal initiatives. "We have an entire wish list of things we want, and Smartsheet has given me the time I need to focus on those things while rolling out more enhancements and innovations that make our business better," says Cross.

Solving technical and business problems more easily

Wolters Kluwer Financial Services Solutions benefits from its relationship with the Smartsheet TAM, who provides technical advice and understands the team's business objectives. "The best thing about working with the Smartsheet TAM is that we can get together frequently, I can tell him [TAM] what we want, and he'll [TAM] always find a way to help us do it," says Cross. "A great example is our financial tracking solution in Control Center. The solution has evolved over time as we have collected different product information, including fixed fee, subscription, and time and materials. Our TAM helped us advance the solution to meet our evolving needs – taking what we had and making it work for something other than its original purpose. That flexibility and understanding of our business is another advantage of our continuing relationship with Smartsheet."

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