California State University Seamlessly Tracks IT Projects and Helps Employees Return to Office Safely with Smartsheet

The California State University (CSU) is the largest four-year public university in the U.S. CSU provides more than 4,000 degree programs across 34 campuses.

"

We got all 240 employees moved back into the office by the date we needed to, because Smartsheet made it easy for us to manage the entire process, from creating floor maps to ordering and delivering equipment.

"

Karen Malone, Operations Analyst for IT at the California State University Office of the Chancellor

Customer:
California State University

Industry:
Education

Organization Size:
Large (1,000-9,999 employees)

Region:
North America

Website:
calstate.edu

smartsheet

The California State University (CSU) is the largest four-year public university in the U.S., educating more than 450,000 students at 23 campuses across the state. CSU offers more than 4,000 degree programs designed to empower students to become leaders in the changing workforce.

Background
Like many public higher education institutions, CSU is striving to consolidate its IT environment due to budget constraints. *"In IT, we communicate via email, video conferencing, chat, and other tools. There isn't much cohesiveness, and we're always looking for a single platform to better provide services across the campuses,"* says Karen Malone, operations analyst for IT at the California State University Office of the Chancellor.

The CSU IT team previously used email and shared files to track everything from IT projects to budgets to travel requests. This made it difficult and time consuming to find the information they needed. *"We relied heavily on sending emails back and forth to get project status updates,"* says Malone. *"I wasted a lot of time searching for files and going from platform to platform to find information."* This unnecessarily complicated work and processes, like salary reviews.

"For a typical salary review, managers and human resources would send documentation back and forth to discuss a salary increase justification. This would go on for a while, and the actual process of submitting information for salary reviews was also complex," says Malone. *"People were sometimes filling out the wrong form because it wasn't clear which form they needed."*

In addition, as CSU employees were being required to move back to university offices after several years of working remotely, the IT team was tasked with managing this campus-wide project. *"We were given two months to help 240 employees move back into an empty office, so we had to quickly plan for furniture and computer delivery, IT infrastructure, and seating arrangements,"* Malone says.

The IT team needed a single tool to help streamline these projects and processes and to improve communication. Malone and her team found that with Smartsheet. *"Smartsheet is our primary project tracker and communication tool,"* Malone says. *"We started using Smartsheet here and in the administrative team, and that progressed to all of IT, human resources, and even our CEO budget office."*
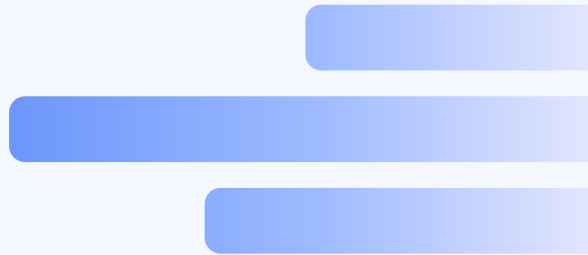
Solution
After using Smartsheet to manage some smaller IT projects, Malone knew she could use the platform to help streamline other processes and bigger initiatives like the RTO. *"I knew that automated workflows in Smartsheet make everything easier and help me save time,"* she says.

Customer:
CSU IT is also making extensive use of Smartsheet dashboards to ease project management and internal communication.

"

I built an IT administration dashboard that acts like a one-stop shop for managing office processes. Now, if I'm in a meeting, I just glance at the dashboard to see the latest information instead of struggling to locate that data.

"

Malone got approval from management and created a project management solution for the RTO initiative in Smartsheet. The team used sheets to track schedules for all workstations, cubicles, laptops, and other equipment to be set up. As many employees were anxious about returning to the office, the team was able to create seating chart overviews and share that to employees using Dynamic View so that they could view their cubicle locations and prepare in advance.

In addition to using Smartsheet to manage the RTO process, The IT team created a standardized salary review solution to simplify the entire process. The solution uses automated workflows to help managers easily answer questions from human resources. *"Previously, when human resources had questions, there was a lot of emailing back and forth with managers to get information about justifications for reviews, and sometimes reviews would get lost,"* says Malone. *"Now, human resources is included in the full process, which makes it easier to get justifications and approve a review."*

The CSU IT team built a dashboard to make it easier to find information, track and report on all of these projects and processes, and improve internal communication. *"I built an IT administration dashboard that acts like a one-stop shop for managing office processes,"* says Malone. *"Now, if I'm in a meeting, I just glance at the dashboard to see the latest information instead of struggling to locate that data."*

Helping 240 employees return to the office and saving administrative time

By using Smartsheet to manage the entire RTO initiative from end to end, the CSU IT team easily met the two-month timeline for the office move. *"We got all 240 employees moved back into the office by the date we needed to, because Smartsheet made it easy for us to manage the entire process, from creating floor maps to ordering and delivering equipment,"* says Malone. *"It saved us at least 30 hours a month, which we would have otherwise spent on mundane tasks such as ordering laptops, tracking parking permits, and assigning office keys to the right people."*

By increasing efficiency with this solution, Malone estimates the CSU IT department has been able to avoid hiring two additional full-time employees to help manage the additional work. *"Our team has seen an increase in our workload, but Smartsheet has freed up enough of our time that it's not an issue to get that work done,"* says Malone.

Higher employee satisfaction and retention

By automating the salary review process with Smartsheet, CSU has helped managers approve nearly all requests for review. *"Previously, only 10 to 15 percent of the employees that submitted requests for*

In a Nutshell:
The CSU IT department has been able to avoid hiring two additional fulltime employees by saving time through increased efficiency.

"

Our team has seen an increase in our workload, but Smartsheet has freed up enough of our time that it's not an issue to get that work done.

"

![smartsheet](smartsheet logo)

salary reviews actually got those reviews. Now, because the process has improved in Smartsheet and everyone knows the steps required, that number has increased to 75 to 80 percent," says Malone. "That represents money going back into employees' pockets."

Increasing Smartsheet usage through easy adoption

Malone has used her Smartsheet experience to become an internal mobilizer, organizing a series of successful Smartsheet Days and quarterly Smartsheet showcases to train new employees. *"Through the Smartsheet Days, we grew our licenses from 550 to more than 800,"* says Malone. Malone has also rolled out a Smartsheet news dashboard that employees can access to fill out a form if they need assistance with Smartsheet features. Employees receive an automated email notification once they fill out the form and are directed to a calendar for appointment booking with Malone and her team. *"It's amazing that our Smartsheet usage started with such a small project and grew so quickly across different university departments,"* says Malone. *"Smartsheet has also transformed my own professional career. Because of Smartsheet, I'm where I'm at today in my position and salary. It has made my job in IT so much easier, and I can now spend my time focusing on the university's strategic goals, like helping train our students in emerging technologies like artificial intelligence and doing more within our budget."*

CSU has also helped managers approve nearly all requests for review because Smartsheet automated the salary review process.

"

Previously, only 10 to 15 percent of the employees that submitted requests for salary reviews actually got those reviews. Now, because the process has improved in Smartsheet and everyone knows the steps required, that number has increased to 75 to 80 percent. That represents money going back into employees' pockets.

"