



# Driving Tool Adoption & Process Visibility at a US-Based Marketing Agency

## Service Area Alignment

- ✓ Improving Change Management & Tool Adoption
  - ✓ Fixing Unstructured or Poorly Documented Processes
  - ✓ Improving Operational Governance & Visibility
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## Client Overview

An award-winning US-based marketing agency was struggling to scale its operations due to **low adoption of Smartsheet**, particularly among long-time team members and external contractors. Despite investing in the tool two years earlier, collaboration remained fragmented—with excessive **Slack DMs, emails, and partially updated task boards**.

The leadership team lacked real-time visibility into client onboarding and project execution. To regain control and enable scaling, the agency engaged PPS Consulting to drive tool adoption and improve operational governance.

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## Challenges

- **Low Tool Adoption** – Smartsheet usage was under 40%, with veterans and contractors reverting to old habits.
  - **Scattered Collaboration** – Excessive reliance on Slack DMs and emails led to miscommunication and abandoned tasks.
  - **Ineffective Dashboards** – Existing Smartsheet dashboards weren't intuitive or actionable.
  - **Lack of Governance** – Leadership couldn't track client workflows or drive accountability through the system.
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## Our Approach & Solution

### Step 1: Ground-Level Process Diagnosis

- Shadowed team members across roles to identify workflow gaps and resistance drivers.
- Evaluated usage patterns, dashboard utility, and integration gaps between Smartsheet and Slack.

### Step 2: Workflow & Dashboard Redesign

- Streamlined client onboarding and management workflows in Smartsheet.
- Designed **intuitive, role-based dashboards** to surface tasks, timelines, and dependencies.
- Introduced **automation features** to reduce manual effort and highlight missed steps.

### Step 3: Change Management Strategy & Execution

- Created a multi-pronged adoption plan including:
  - Live & recorded training sessions tailored to roles
  - Click-through manuals and job aids



- One-on-one onboarding for new contractors
- Recognition and reward mechanisms for early adopters
- Engaged team leads and influential veterans to champion the change internally.

## Step 4: Governance & Culture Shift

- Shifted all team collaboration to **dedicated Slack channels linked to Smartsheet**, minimizing emails.
- Enabled **management reviews through dashboards**, making Smartsheet the single source of truth.
- Trained leadership to **spot usage drop-offs** and reinforce structured practices.

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## Results & Impact

- 📊 **Smartsheet adoption rose from 40% to 85%**, with contractors and core team actively engaged.
- ✅ Email reliance dropped to near zero, with collaboration centralized through Smartsheet + Slack.
- 📊 Real-time visibility into client operations via dashboards improved team meetings and accountability.
- 🚀 Agency scaled client management operations more efficiently with unified governance.
- ★ 5-star client feedback, along with praise: "Nothing but great things to say."

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## Client Feedback

*"Nothing but great things to say. The team helped us turn Smartsheet into the heartbeat of our client delivery. From resistant users to confident adopters—this shift wouldn't have happened without Rahul & Rashmi."*

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## Final Takeaways

- ✓ Change management isn't about tools—it's about people, behavior, and clarity.
- ✓ Adoption accelerates when tools are redesigned to match real workflows.
- ✓ Governance emerges naturally when systems are intuitive, centralized, and reinforced.

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## About PPS Consulting

PPS Consulting enables businesses to scale with structure by combining **behavioral change, operational governance, and process-driven automation**. From startups to global teams, we help transform tools into outcomes.

**Want to unlock true adoption and visibility? Let's talk!**

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