smartsheet

HP uses Smartsheet to automate project tracking and planning and increase HP-led sales and marketing events from 6 to 26 per quarter

HP, founded in 1939, is a leading provider of products, technologies, software, solutions, and services to people and businesses across the globe. Based in Palo Alto, California, HP has 51,000 employees worldwide.

hp

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Roxie Palacios, Senior Events Manager, North America Commercial Marketing, HP

Customer:
HP

Industry:
Technology

Organization Size:
Enterprise (10,000+ employees)

Region:
North America

Website:
hp.com

HP is a leading provider of products, technologies, software, solutions, and services to people and businesses across the globe. Founded in 1939, the company specializes in PCs, printers, and 3D printing solutions.

Background

HP's North America Commercial Marketing group supports the organization's sales and marketing teams worldwide by managing meetings, webinars, conferences, and dozens of other events every year. The Marketing group uses Smartsheet software to manage projects and event scheduling and collaborate with vendors and other agencies. *"Smartsheet is everything that I wanted in a project management system,"* says Roxie Palacios, senior events manager, North America Commercial Marketing for HP. *"It was something I'd always wanted but never knew existed."*

Prior to adopting Smartsheet, the Marketing group relied on different project management and calendar tools to manage events. This resulted in manual processes and inaccurate and duplicate data, with Palacios spending several hours each week manually updating project tracking applications. To manage a typical event, Palacios and her team would send multiple emails to each other and vendors to assign tasks and schedule meetings. *"I used a lot of different tools, and sometimes had to use four or five applications to manage a project,"* she says. *"My biggest challenge was sending emails to someone to kick off a project. Then, they would email me when they finished a task, and I would contact someone else to pick up the project from there. There was a lot of unnecessary emailing and we didn't have a way to assign people tasks and create accountability when tasks were due."*

These manual processes often caused project delays and last-minute corrections of errors. For example, when the wrong event data appeared on a website, 10 staff members had to stop work and join a phone call to resolve the issue. *"Incidents like that caused huge disruptions. Nobody had the correct information because we didn't have a single source of truth for our event data,"* Palacios says. *"We had three separate event calendars and nobody was updating them all at the same time. We needed more automation and an easier way to track and manage events."*

Solution

Palacios was eager to introduce the tool to the North America Commercial Marketing group. *"Smartsheet had the automation and integration*

Customer:

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we were looking for," she says. Her group began using Smartsheet to track and manage all events, and then started using Smartsheet Calendar App to view real-time, updated information on all sales and marketing events, from conferences to marketing campaigns to webinars. Palacios and her team also rely on Smartsheet dashboards to display up to date information on event dates and registration. *"Instead of using multiple calendar forms, we can now see everything in Smartsheet at once. If you can get organized, you can be efficient and innovative," Palacios says. "That is where your true passions play out."*

Now, the Marketing team has a fully automated process for creating, tracking, and updating events. Once Palacios has collaborated with an agency to create a new sales experience event in Smartsheet, a notification is triggered to the agency to confirm the vendor and automatically notify the marketing services team to build a landing page with the information. There are no longer emails back and forth, which eliminates communication bottlenecks. *"Everything is automated now in Smartsheet, from start to finish, so nobody is communicating via email. They're only communicating in Smartsheet, and they are working instead of emailing," says Palacios.*

More efficiency and a reduction in emails and meetings

Because Smartsheet has automated event management planning and tracking processes, the HP North America Commercial Marketing group has increased overall efficiency. *"With Smartsheet, we can work much more efficiently now, and fewer emails need to be sent to communicate about events," says Palacios.* She estimates that email communications has decreased 90 percent for sales targeted events because the Smartsheet dashboard contains updated information on dates, content assets, and registrations. *"Previously, we had no idea who was updating an event, and we weren't notified automatically when someone had requested a new event or changed an event," Palacios says. "Once we put the new process in place, I trusted that everything was being done. I didn't have to check in with people anymore – I could just see it all in Smartsheet. Our Marketing services team even told us they missed talking to us regularly, because they don't need to as frequently with all the information being available in Smartsheet."*

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With the efficiencies gained through using Smartsheet, Palacios has taken on new responsibilities and is now supporting in multiple areas in Marketing on her own. *"If I'm doing more roles, those are positions we don't have to hire and pay for,"* she says. *"This is all possible because of how productive and efficient I am now."*

As a result of efficiency and real-time project and event tracking, the Marketing group needs to conduct fewer planning and status meetings. *"We used to have 6-8 meetings for every event, and that's down to two now,"* says Palacios. *"With one agency specifically, we no longer meet over the things we used to, which now gives us the capacity to discover how we can continue to improve the customer experience."*

Increasing HP-led events from 6 to 26 per quarter

With automated processes and more efficiency, Palacios and her team are more productive. As a result, the team has increased the number of HP-led events per quarter from six to 26. *"Since adopting Smartsheet, we have more than doubled our events, and we have done the equivalent of a year's worth of events in two quarters. In addition, the Marketing team reduced the turnaround time to produce an event from an average of 84 days to 54 days. "We basically knocked an entire month off the event planning process by using Smartsheet,"* says Palacios. *This is impacting our revenue as well. For example, the Marketing group typically invests $15,000 in event creation and sales support, with an ROI average of $300,000 per event, with some Marketing-influenced wins up to $2 million. "So far this year, we have brought in the same amount of money in the first half of the year compared to all of the last fiscal year,"* Palacios says.

The HP North America Commercial Marketing group is continuing to roll out Smartsheet to additional teams, such as global marketing and event teams in Europe and Australia, to automate additional processes. *"Smartsheet helps us be more organized and communicate better, and it's also helping us collaborate in a way we haven't before,"* says Palacios. *"We're excited to expand this tool to more people within HP."*

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