



We reduced the New York region's collection for accounts receivable by 23 days during the COVID-19 pandemic, when businesses shut down and many customers couldn't pay. Smartsheet enabled us to understand where our customers stood and reach out to the ones who needed support. Our target is below 42 days; last year we averaged above 50, and this year we're under 27 because we can track where our customers stand.

Jenn Hilber, Business Architect, Operations, Convergent

Convergent accelerates processes and improves customer engagement with Smartsheet

As the largest privately held security integrator, Convergent aims to be its customers' best service provider regardless of industry. Smartsheet helps Convergent meet that goal by enabling better global communication and collaboration, improving transparency in customer engagement, and establishing a single system of record for all customer information, strategic decisions and insights.

"What sets us apart is our culture," says Scott Gandolfe, director of program management at Convergent. "Our culture allows us to be creative and to embrace new tools and get the organization to use them as well, helping not only our customers but also our colleagues and communities. That culture stimulates our use of Smartsheet, which neatly fills in a lot of the gaps with a tool that is flexible and adaptable. My team is able to create amazing things that, if we didn't have Smartsheet, we'd be doing manually."

Situation:

Convergent is a \$1.5 billion business with 115 locations worldwide, providing a range of services including installation and management of card readers and cameras, alarm systems, fire systems, building controls, and more. The company prides itself in creating an outstanding customer experience, but it used to be difficult to manage all the details seamlessly. Before adopting Smartsheet, Convergent relied on manual processes and printed playbooks, with no single unified process for most of its activities.

Company

Convergent Technologies

Industry

Professional Services

Company Size

5,000+ employees

Customer Profile

Convergent Technologies is a \$1.5 billion global, industry-leading systems integrator that designs, installs, and services electronic security, fire alarm, and life safety systems. Convergent's top priority is service in every way – service to customers, colleagues, and community.

Website

convergent.com

Business Situation

Convergent Technologies wanted to better serve its global security integrator customers by making its processes more efficient, improving cross-team communication, and enabling creative problem-solving.

Solution

Convergent uses Smartsheet to create a single system of record that speeds review and approvals, enables tailored customer service, and improves customer engagement.

Benefits

- **Reduced time to collect on outstanding accounts** through personalized monitoring and outreach
- **Faster project review and approval processes** so work can begin days earlier
- **Accurate, real-time views of customer information and work status** pulling data from a single system of record
- **Clear and easy reporting and meeting prep** with simplified data views and user-tailored dashboards

Solution:

Smartsheet enables Convergent to capture all of its data, best practices, and resources in a single place. As a result, teams can make strategic decisions and act on customer priorities with confidence that they have the most current and accurate information at their fingertips. From pricing sheets and device configuration trackers to project status and payments, Smartsheet gives Convergent a single system of record for the data that powers the company's customer service philosophy.

"My goals are speed, accuracy, and simplification," says Luke Rowan, global program manager at Convergent. "How fast can I accomplish this now utilizing Smartsheet? How much more accurate can I be now that I don't have to have multiple data entry points? How much simpler can I make it for my colleagues and for my customers day to day? Because the simpler it is for them, the more accurate it's going to be and the faster it's going to be. It's a cycle of improvement."

Benefits:

With Smartsheet, security integrator Convergent increases communication and collaboration, improving transparency and quality of service for its global customer base.

Faster reporting and service with a single source of client information: Each customer's needs and requirements are unique, with frequent changes as they opt into new services or modify processes. To track those changes, teams used everything from spreadsheets to sticky notes,

but the chief source of program data was the comprehensive customer playbook. The printed books were time consuming to search through and difficult to keep up to date.

"Our playbooks outline everything that touches that customer," says Vince Fillari, global program manager. "It used to be a file that was 20 to 70 pages long. When the customer would update a procedure or the use of a product, we had to find and change all those references and redistribute the document. Smartsheet eliminated all of that. I have a Smartsheet global standards page with all of the customer's requirements, sample pictures, documents, cut sheets, everything. If the customer changes something, I change it on Smartsheet, without having to email out a 10MB document that half the time — I'm being kind, 75% of the time — nobody looks at."

Client meetings and reporting are also faster and simpler with Smartsheet. Instead of spending 45 minutes walking through a printed agenda and a stack of files, the Bay Area sales and operations teams can view a single program dashboard or sheet and confirm status and next steps in 10 minutes. Program managers can quickly create reports by pulling targeted data from a single source, or create customized dashboards to display the right information for each stakeholder.

"The ability to share information is like night and day," Fillari says. "Before, if you needed to get specific information to an audience, you had to do a lot of copying and pasting from different files. You ended up thinking, 'That's not exactly what I wanted,

but that's the best I can do, given the data.' With Smartsheet, it's simple to give them a report or a dashboard very quickly. We do quarterly business reviews with our customers. In the past, I would spend a week going through files and extracting data to put together a presentation. Now, I can be ready for a quarterly business review (QBR) inside of an hour."

Up-to-date data that enables informed, tailored account management: Smartsheet has enabled Convergent to transform management of its accounts receivable (AR) processes by giving the team the latest information on payment status and customer activity. Using Data Uploader, the AR team can pull data from its less flexible accounting system into a unified view with streamlined, easier-to-read account notes. Team members can see payment status, including payments that have been received but not yet posted, which allows them to prioritize outreach based on accurate figures.

That informed outreach has also enabled the AR team to cut the New York region's time to collect on outstanding accounts by 23 days compared with the previous year. Despite shutdowns to customers' business operations during the COVID-19 pandemic, Convergent was able to use up-to-date status information to offer customers support and tailored solutions to their challenges.

Smartsheet also cuts time for sales and project review processes. Project approvals used to rely on paper forms circulated within a Convergent Technology Center (CTC) and take a week or more from submission to sign

off. Using Smartsheet forms with automated notifications, turnaround fell to two days — or just one, for urgent requests.

“Until recently, our Seattle CTC was still using paper to approve projects,” Rowan says. “From the salesperson to the admin to the administration manager, this piece of paper was being passed around. Working with Smartsheet, we built a paperless routing approval flow. What was beautiful about it was that we deployed it and got it nice and smooth right before COVID-19 hit. That was potentially going to roadblock project delivery for our office, but we were able to implement it before the pandemic could slow us down.”

Better communication and customer engagement: Gandolfe and his team are enjoying better cross-team and global communication, clearer insight into customers’ needs and status,

and greater accountability for internal processes. Customers are seeing a difference as well, with quicker turnaround for requests and an even greater level of professionalism from their Convergent teams.

“I have four or five recurring calls every week with one customer, and they know every call that I lead, there’s going to be something I’m showing from Smartsheet,” Fillari says. “It could be reports or a dashboard, depending on the nature of the call. I knew I had finally driven it home with them when the customer said, ‘Well, Vince probably has a Smartsheet for that.’ All three of my accounts know very well that I’m a firm believer that if you can’t do it in Smartsheet, it’s probably not worth doing.”

A platform that’s easy to use and personalize: Because the platform is easy to use, more and more

teams throughout the organization are creating their own solutions and finding new ways to make customers’ lives easier.

“Adoption at Convergent starts with getting the concept out there to solve problems and show efficiencies,” Gandolfe says. “Second is community: we do a biweekly knowledge sharing call and other training with our customer success center, webinars, a Teams channel, and dashboards. We recently did a sprint where in two weeks we were able to get 70 people certified. Third is creativity: We don’t tell people how they have to use it, but allow them to be creative, and that’s allowed people to solve problems we didn’t even know we had. The last thing is leadership and collaboration, with both our Smartsheet customer success team and our own IT team.”

About Smartsheet

Smartsheet (NYSE:SMAR) is a leading cloud-based platform for work execution, enabling teams and organizations to plan, capture, manage, automate, and report on work at scale, resulting in more efficient processes and better business outcomes. Today over 95,000 customers, including more than 77,000 domain-based customers and over 70 percent of the companies in the Fortune 500, rely on Smartsheet to implement, manage, and automate processes across a broad array of departments and use cases.

To learn more about Smartsheet, visit www.smartsheet.com.