



Motus Saves Time and Prevents Issues Before They Arise with Smartsheet



Reimbursing employees for work-related expenses, such as vehicle mileage, smartphones, and broadband use, can be complicated. Using Smartsheet's real-time data features, reimbursement-solutions company Motus helps clients pay their remote employees quickly and accurately.

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Smartsheet has been the most effective way for us to implement a process of interdepartmental communication. It gives us the ability to alert people right when updates are made, or when data changes, so we can address issues as they come up.

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Shea Pivnicka, Manager,
Motus Strategic Operations Team



Customer:

Motus

Industry:

Technology

Organization Size:

Medium (50-999 employees)

Region:

North America

Website:

motus.com

Pivnicka is responsible for determining efficiencies and scalable solutions across all the company's teams, particularly in operations. Through the implementation of these efficiencies, Shea helps support Motus's teams, which provide clients a solution to accurately reimburse employees for work-related expenses.

Background

"Our goal is to make work-life better for others by providing reimbursement solutions to our customers and their employees," Pivnicka says. "We have our vehicle, device, and location sectors, and through each of those three, we provide different solutions for allowing customers to properly reimburse their employees for using their personal assets for business use."

Several different teams collaborate on the company's proprietary reimbursement-solutions platform, so Pivnicka must communicate across multiple departments daily. The support teams had ideas about product improvement based on their interactions with end users; however, there was no process in place to properly provide this feedback. Motus once used Slack and email for employee communications, but Pivnicka's team created a feedback process in Smartsheet that allowed team members to enter product suggestions, which would then be sent to the product team.

"People in the operations team had good ideas and feedback for our product team, but we didn't have any sort of platform to facilitate conversation and actually create action on some of the ideas that the operations team had," says Pivnicka.

Solution

Not only has Smartsheet helped Motus improve interdepartmental communication, it's saved the operations department approximately 15 hours a month of data processing. *"That's where the Smartsheet dashboards become very helpful,"* Pivnicka says. *"We create it, we provide it to leadership, and it's always there if they want to see it again."*

Pivnicka says they've received "extremely positive feedback" from clients who can see real-time data on their own Smartsheet dashboards. *"Since there was such positive feedback from our external implementation dashboards, we will look to use Smartsheet dashboards for other customer-facing opportunities."*

Customer:

Customers also benefit from Motus' use of Smartsheet. Pivnicka says they've received "extremely positive feedback" from clients who can also see real-time data in their own dashboards.

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Utilizing Capabilities

In 2019, Motus began using Smartsheet for customer health scoring, which Pivnicka's team created using the Smartsheet Salesforce Connector. *"Previously, we would track general sentiment with a customer, like how the communication and relationship was between our account managers and customer success managers and our clients," she says. "But it wasn't until we started using Smartsheet to calculate customer health scoring that we could analyze a customer's health on a deeper level and regularly track any changes to the account. This allowed us to have more proactive conversations about customers, and more accurately predict our yearly renewals."*

The purchase of Smartsheet Advance, a bundle of capabilities such as Control Center and Dynamic View, allows Pivnicka to do even more with Smartsheet. For example, Motus created tickets in JIRA during the testing phase of one of their products. Team members involved in the testing identified any issues or bugs and submitted them as JIRA tickets to the product team. When Motus implemented the Smartsheet JIRA connector, Pivnicka says, *"We could show in Smartsheet the progress on the different JIRA tickets. We actually created a second dashboard for the next step of testing as well, and it has been extremely beneficial to make sure we have alignment across all the testers, product, and project management."*

The ability to integrate Smartsheet and JIRA isn't the only way Smartsheet Advance expands the value of the platform. Automating the processing of data has saved Motus time and allowed them to offer greater visibility to customers during their implementation process, as well as preventing issues due to human error before they happen. Smartsheet can flag changes and data that make a difference, instead of requiring Motus staff to manually check consistency or spot issues.

Templates in Control Center have also enabled Motus to onboard more customers more quickly. By using Smartsheet to manage their staffing model and more effectively track turnover and headcount, Motus can better estimate their capacity to take on more work. This is one more way Smartsheet helps the company plan for growth.

Future Expansion with Smartsheet Apps

Arguably, the greatest benefit Smartsheet has provided for Motus is the replacement of manual

In a Nutshell:

Both Pivnicka, who's self-taught in Smartsheet, and other Motus employees have had positive feedback about the program's ease of use, which means they'll continue to use it for more and more ambitious projects in the future. By automating processes and improving communication, Smartsheet provides the tools Motus needs for years of continued growth.



I'm self-taught, and it's fairly easy to pick up on, so ease of use has been very nice, especially when it comes to connecting sheets together and creating calculations, where you're referencing multiple sheets. I love that I can present only certain subsets of information of a larger underlying sheet to certain stakeholders, or certain teams. That has actually been easier than I anticipated.

Shea Pivnicka

processes with automated ones. Not only does Smartsheet reduce human error and provide real-time data, Pivnicka's team can "give admin access to certain individuals, but then other individuals who just need viewing access can't tamper with the underlying data or the dashboard. As someone who does a lot of work with data analysis, I think Smartsheet is a great solution." Now she can keep executives up to date, control their ability to edit data, and share data with different teams through a variety of sharing options.

Smartsheet's capacity for automation and consolidation are useful for, as Pivnicka says, "things that formulas don't quite cover. They can't do it all, so a big part of us [using Smartsheet Advance] was so that we could do more data analysis and expand the use of Smartsheet across more of our teams."

Pivnicka is excited to dive into Dynamic View and Pivot soon. "I'm sure these features will benefit people in similar roles to mine even more," she says. "We're constantly looking for scalable solutions to make our teams more efficient, so that we can provide a better product and do that in the most productive, efficient way possible."

Best of all, says Pivnicka, there wasn't a huge learning curve when she first started using Smartsheet. "I'm self-taught, and it's fairly easy to pick up on, so ease of use has been very nice," she says, "especially when it comes to connecting sheets together and creating calculations, where you're referencing multiple sheets. I love that I can present only certain subsets of information of a larger underlying sheet to certain stakeholders, or certain teams. That has actually been easier than I anticipated."

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