
Smartsheet Marketing Program Tracker, Team Capacity & Reports

petco Integrated Marketing
THE HEALTH +
WELLNESS CO.

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The Need

Petco Health and Wellness Company's Integrated Marketing Department faced a formidable challenge with an expansive array of hundreds of projects spanning web development, print materials, packaging, retail and new store launch initiatives, social media campaigns, photography, and trade shows.

The complexity of managing these diverse projects led to an overwhelming number of meetings and emails, consuming a significant portion of the team's capacity and creating a pervasive struggle to meet project deadlines and maintain effective communication. The team members were forced to work long hours under considerable stress, and it was evident that a solution was urgently needed.

The Action

To address these challenges, a proactive approach was taken to streamline and organize the flow of projects within the department. For individual project management, an updated, automated Smartsheet timeline system was introduced, tracking 200-300 interconnected steps and multiple delivery deadlines. This system effectively flagged at-risk items, deadlines at risk or late, and automatically sent daily reports to project owners, including project comments, updates, and identified risks.

In parallel, I developed a custom-built Smartsheet Program Tracker, featuring a main program sheet containing all projects and receiving all new intakes, that funneled relevant information to 45 smaller sheets tailored for different departments, directors, and creative services. Each department and main stakeholder had access only to the information relevant to their department, facilitating all project communication, milestone dates, approvals, and project acceptance or rejections by the individual departments.

Extensive training sessions were conducted for department heads and stakeholders to ensure a smooth transition to the new program tracker and capacity model, with ongoing support and continuous improvements as the system was launched.

The Results

The results were transformative. After successful training and implementation, the new program tracker and capacity model brought much-needed order and organization to a program consisting of over 600 ongoing projects. Real-time visibility into all project information, including business and marketing briefs, and each department's acceptance or rejection of projects, significantly reduced confusion, questions, and the need for daily meetings and emails. This freed up a substantial amount of time for the team to focus on production and project delivery.

Furthermore, the program tracker offered a capacity tracking feature, allowing individual departments to forecast their capacity for the remainder of the year based on project intakes and deadlines. This capacity planning helped in deciding which projects should be prioritized as "Above the Line" and which as "Below the Line." The program tracker also featured a series of dashboards providing a high-level overview of the Integrated Marketing Program, including project progress, risk alerts, new project intakes, and workload distribution across marketing departments.

This custom-built Smartsheet system evolved into the backbone of the department's project management process, encompassing projects of varying scales and preserving a historical record for retrospectives and lessons learned. As a result, the efficiency of project delivery significantly improved, fostering enhanced team cooperation, project organization, and capacity planning. Petco Health and Wellness Company's Integrated Marketing Department successfully transformed its operations, optimizing productivity and achieving a more structured and efficient workflow.

From Problem to Solution

Six Sigma DMAIC Project

1. Define: The problem

2. Measure: Quantify the problem

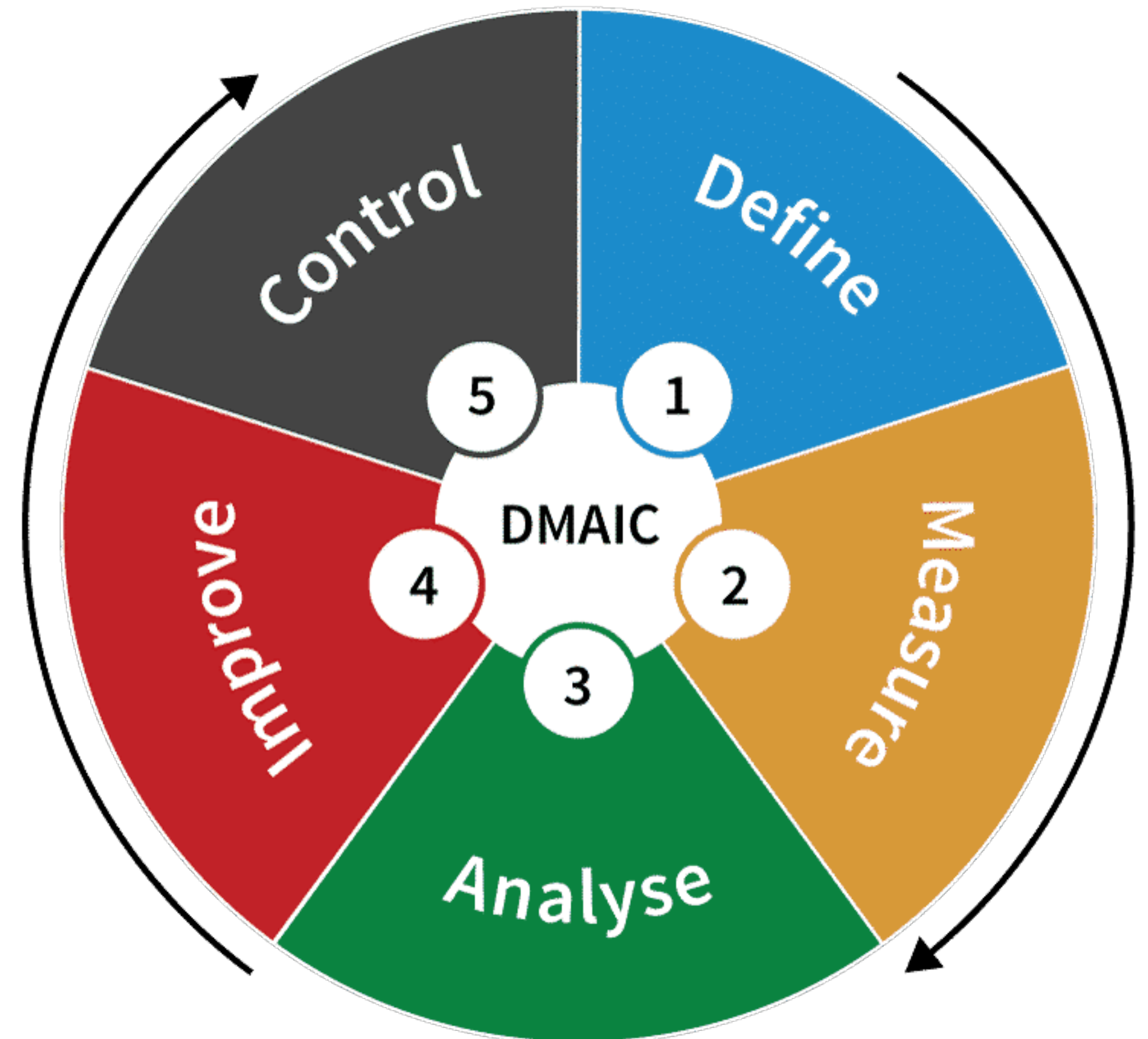
3. Analyze: Identify the cause of the problem

4. Improve: Implement and verify the solution

5. Control: Maintain the solution

DMAIC is a structured problem-solving and process improvement methodology commonly used in Six Sigma. It is a systematic and data-driven approach that helps organizations tackle process problems and continuously improve their operations. It's a versatile methodology that can be applied in various industries and settings to enhance quality, reduce waste, and achieve better outcomes.

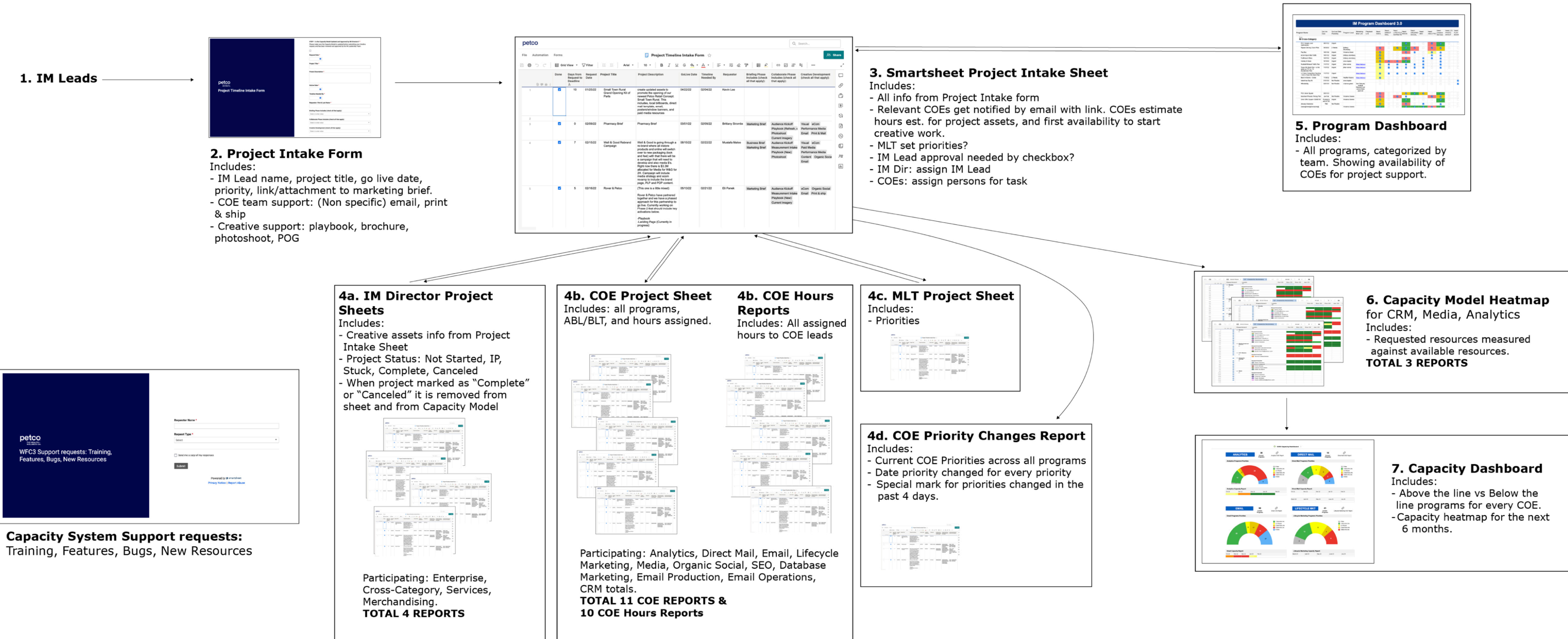
This process was applied to define PETCO's needs, plan a Smartsheet system to address those needs, pilot an initial rollout and training, followed by a full launch.



PROGRAM TRACKER STRUCTURE

An interconnected system of sheets, intake forms and reports. Starting from the intake form, the main program sheet contains all projects, links to briefs, individual project timelines, status alerts, and funnels relevant information to 45 reports tailored for different departments, directors, and creative services. Each department only reviews and updates their report containing that department's projects.

The main sheet sends information to a Program Dashboard for Program Management, a Heatmap for capacity planning and a high-level capacity dashboard showing progress and flagging risks.



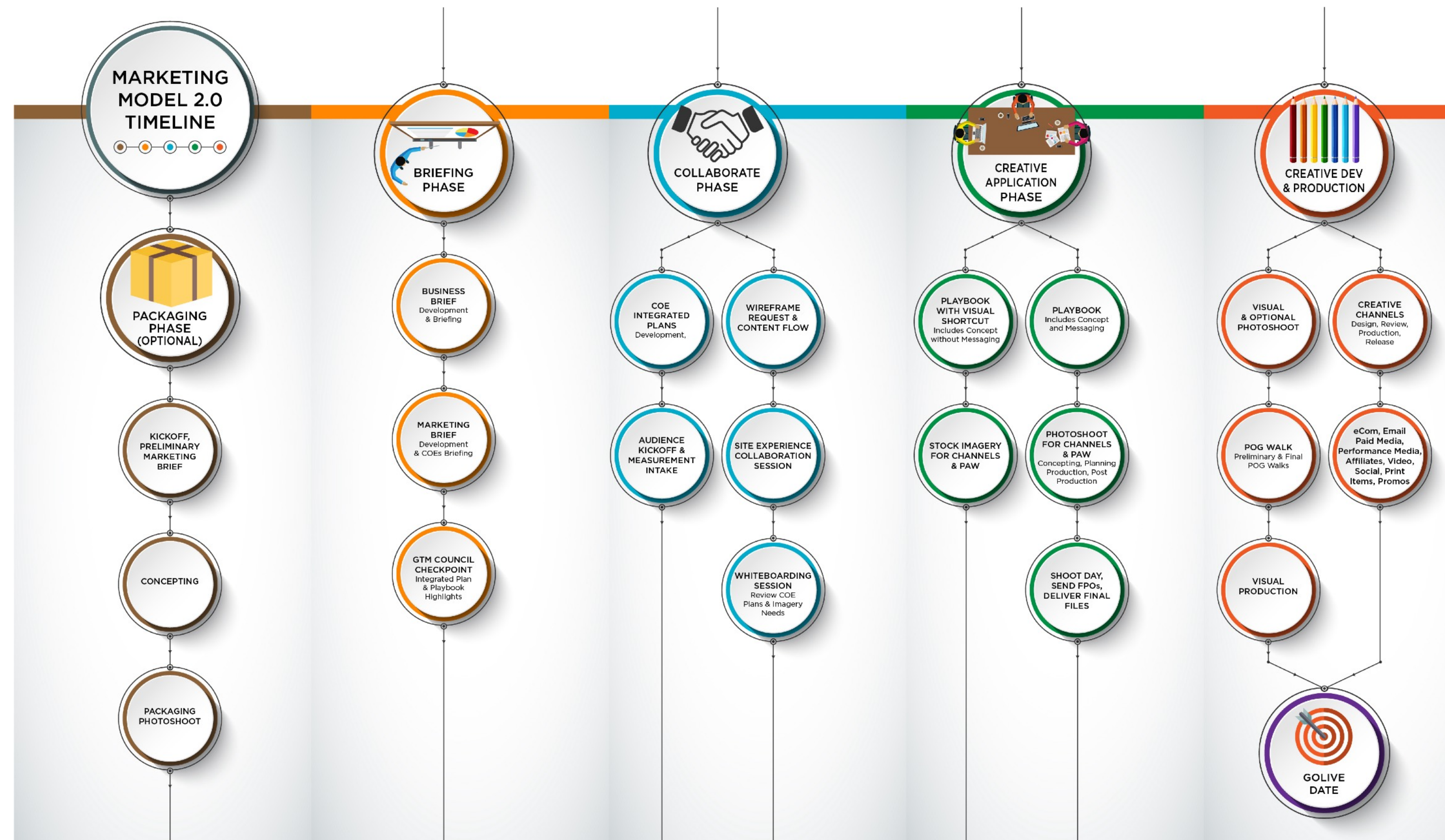
TIMELINES

An automated Smartsheet timeline system, tracking 200-300 interconnected steps using waterfall methodology combined with workback schedules, and multiple delivery deadlines.

This system effectively flagged at-risk items, deadlines at risk or late, and automatically sent daily reports to project owners, including project comments, updates, and identified risks.

The timelines are managed by project leads, and contain a Quick Status Dashboard giving a bird's eye view of the project status.

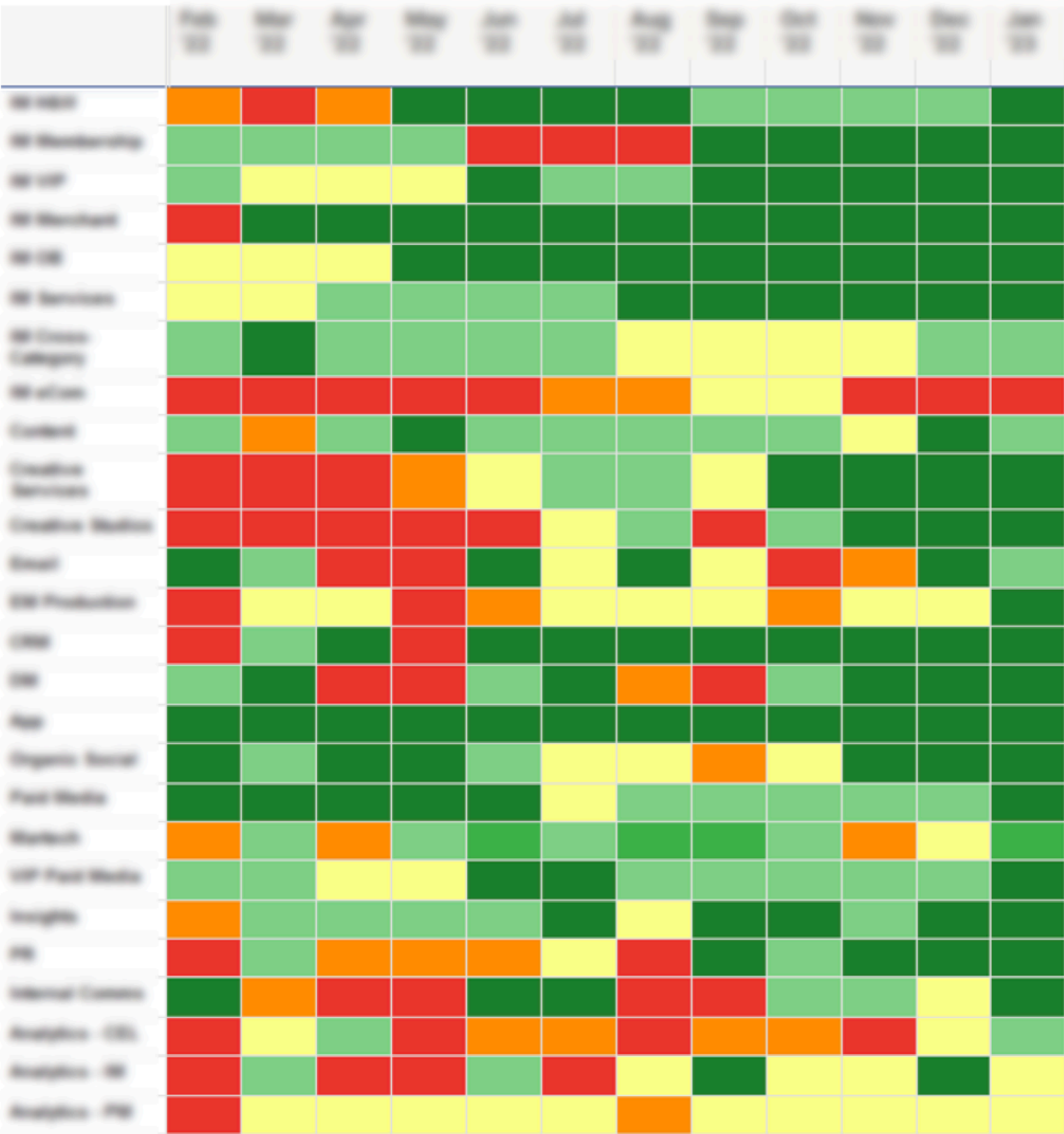
QUICK STATUS DASHBOARD		
1	Go Live Target Date (T) (in Store Go Live Date)	08/15/22
2	Timeline-Calculated Go Live Date (In Store Go Live Date)	08/15/22
3	GoLive Date Status: Days Ahead or Behind	0
		Go Live On Track
4	Project Duration (Start Date - Go Live Date)	280
5	Project Status (% of Tasks Currently Late or at Risk)	82.6087
6	Project Key Dates Off Track	0



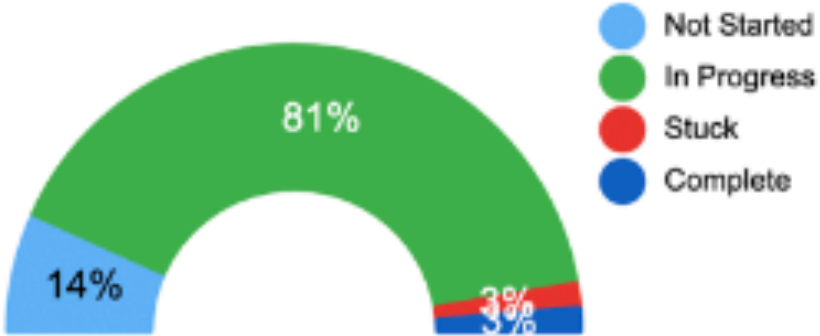
REPORTS

High-level views for management and program directors were built feeding real-time data to a heat map-style capacity forecast to estimate hiring needs. A program dashboard was created giving a top-level view of the program, aggregating all current projects into easy-to-read status graphs and flagging projects at risk.

CAPACITY FORECAST



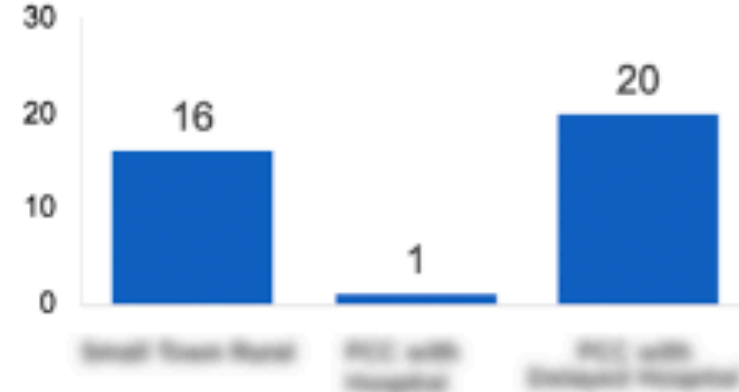
Store GO Projects Status



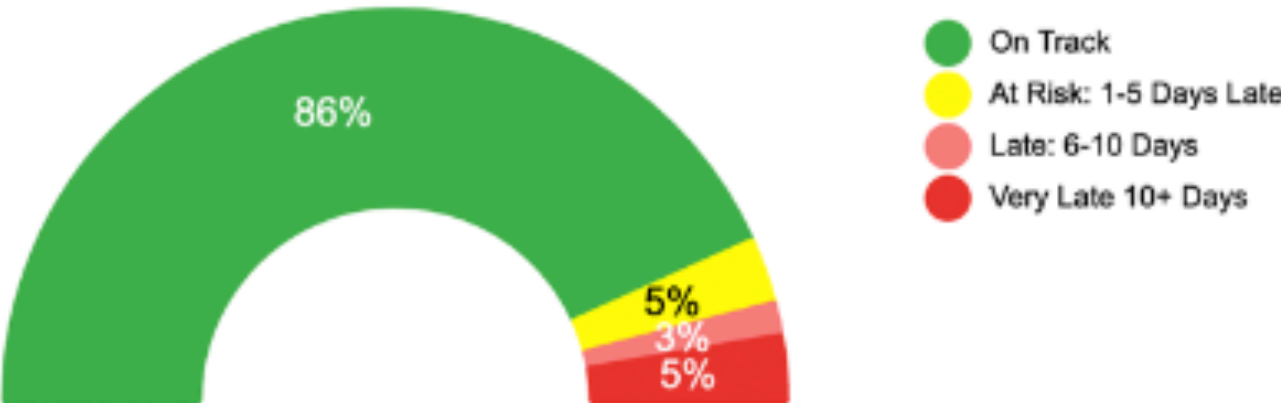
Geographical Breakdown



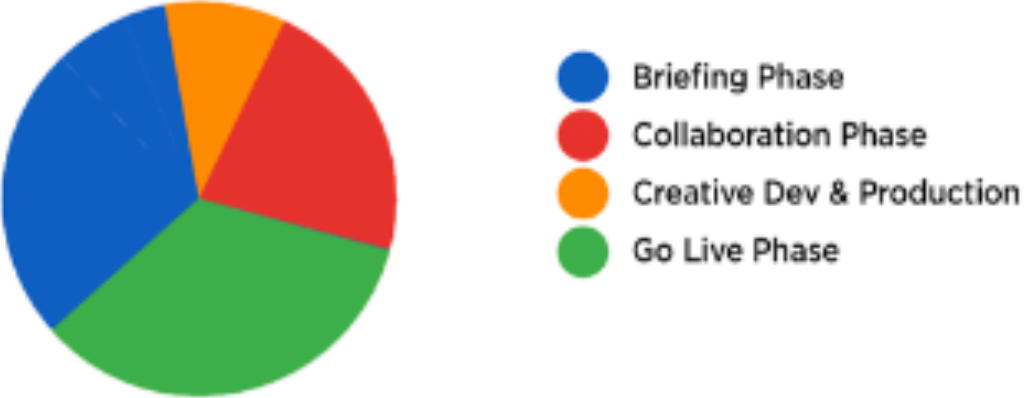
Store Types: Planned + In Progress



Store GO Projects Health



Stores In Progress: At What Stage Currently?



Store GO Projects Late Over 6 Days

Project Priority	Store Type	Store Location	Project Status	Timeline Status	Lag	Currently At	Timeline Link
2 Medium	Small Store	Phoenix, AZ	Stuck	Late	39	Briefing Phase	Link
2 Medium	Shop Store	Early TX	In Progress	Late	37	Collaboration Phase	Link
1 Low	Store w/100	Central, MI	In Progress	Late	10	Creative Dev	Link

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