



## PTC reduces marketing campaign planning and execution time by 30% with Smartsheet automation and integration

With Smartsheet, PTC uses automation and technology integration to drive more efficient and effective marketing.

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**When we originally rolled out our Smartsheet solution, we did a survey to see how much time we were saving, since that was one of the goals we were tracking. The time it takes to plan and execute marketing campaigns was reduced by 30%. Smartsheet really helped us get all of those disparate systems and disjointed processes together into one coherent flow.**

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Deveney Kowalczyk, Senior Marketing Automation Specialist, PTC



**Customer:**

PTC

**Industry:**

Technology

**Organization Size:**

Large (1,000 - 9,999 employees)

**Region:**

North America

**Website:**

[ptc.com](http://ptc.com)

PTC enables global manufacturers to realize double-digit impact with software solutions that enable them to accelerate product and service innovations, improve operational efficiency, and increase workforce productivity.

### Background

PTC leverages technology tools to optimize the effectiveness of its marketing campaigns, with the goal of improving engagement and efficiency. In addition to marketing automation tools such as Eloqua and Motiva AI, PTC's toolkit relies on Smartsheet for better process workflow and execution. As a result, the marketing automation team has already reduced time to plan and execute marketing campaigns by 30%.

*"Smartsheet has proved itself as a very valuable and established platform," says Deveney Kowalczyk, senior marketing automation specialist at PTC. "We've built our highly successful intake request process using Smartsheet, and now we are able to build on that foundation by incorporating key data points into executive-level dashboards that display our body of work. It's been a tremendous time savings to be able to see everything in one spot, and have the information update in real time, using a variety of report, metric and chart widgets to help tell the complete story. For example, we are now able to track crucial marketing trends, such as the rise of virtual event requests brought on by the pandemic. And because we've been using it for a few years now, we can look at valuable year over year data as well, which we didn't have before."*

### Making sense of a disparate martech stack

PTC enables global manufacturers to realize double-digit impact with software solutions that enable them to accelerate product and service innovation, improve operational efficiency, and increase workforce productivity. In keeping with the company's mission of using technology to help customers achieve more, the marketing team leans on technology solutions to create greater impact for its campaigns. Anna Poulakis, senior director of marketing automation, and Kowalczyk are part of a larger PTC Digital Experience and Engagement (DXE) Group that collaborates with marketing stakeholders. The group's multiple teams provide rich resources for marketing optimization, but in the past, the process could be complex and confusing.

### Customer:

Premium apps including DataMesh, Dynamic View, and Pivot App make it easy to pull information from one sheet into another to fit the needs of particular stakeholders. Integration with Slack and Microsoft Teams allows the marketing automation team to provide different groups with the information they need in the channel that works best for them.



**To implement activities through Eloqua, the marketer needs to work with different teams within DXE. Prior to using Smartsheet, this would require the marketer to work with disparate systems, different team processes, and often duplicate data entry in order to complete all the steps in the execution process. It was very time-consuming and frustrating for the stakeholder. They just didn't have a centralized place to check the status of their work, to get updates, and to really understand the end-to-end process of initiating and executing marketing activities.**

Deveney Kowalczyk, Senior Marketing Automation Specialist, PTC

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Poulakis worked with the group to map out the campaign request, execution and monitoring process, and design a Smartsheet solution that would streamline and automate as much of it as possible. Her goal was to reduce time and effort, cut out duplicate steps, and identify and eliminate barriers and opportunities for error. The result: An end-to-end solution that consolidates formerly disparate systems and moves requests smoothly through a redesigned workflow.

*"In order to lead in a digital-first world, marketing is facing added pressure to deliver more and deliver it faster. Therefore, digital operational efficiency has become extremely important to our success," said Mariana Cogan, SVP Digital Experience & Engagement (DXE) at PTC. "Agility, speed and efficiency in global organizations requires a very streamlined process with no room for waste. The operational excellence we've achieved with the help of Smartsheet allowed us to deliver a value-led digital experience that engages and converts into revenue."*

Within the first year of implementation, the team was able to improve a complex intake process, creating an estimated efficiency gain of 40 hours quarterly on that part of the system alone. Kowalczyk leads development and implementation on the Smartsheet platform to evolve the team's solution and solve new problems.

*"By using Smartsheet we were able to consolidate all of those different system steps into one coherent request process," Kowalczyk says. "We created request forms that captured critical information needed by all of the teams within the DXE. These forms feed into our master activity tracker, which acts*

### In a Nutshell:

Kowalczyk worked with him to create a dashboard that uses Dynamic View to display new requests so he could assign straight from the dashboard depending on the team's current workload, making it easy to correct any imbalances before individual team members get overloaded.

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**By using Smartsheet we were able to consolidate all of those different system steps into one coherent request process. We created request forms that captured critical information needed by all of the teams within the DXE. These forms feed into our master activity tracker, which acts as a system of record for all activities and provides project details and status updates in one spot. We use automated workflows and notifications to keep the requests running smoothly and to send updates with crucial checkpoints to all the stakeholders.**

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## Premium Apps and integration support additional needs

The DXE Group’s solution includes a set of dashboards tailored to multiple audiences, supporting regional and team-specific activity reports, executive-level dashboards, and overviews of technology such as Motiva AI reporting. Because all data is pulled in real time from a single up-to-date source, it allows more accurate decision-making and better business planning.

*“I had tasked Deveney this past year to create an easy, real-time executive-level view of all of the activities the team is working on,” Poulakis says. “Before, if we had to make a case for a budget request, I would ask the team to run some numbers: look at volume of activity that we executed upon last year, break it down by these criteria. It was always like a science project of manual data pulls and checking the data in case it wasn’t correct. It took a lot of time and wasn’t efficient. Now we have this dashboard showing me all of that in real time, and taking it even a step further to visually show the trends.”*

Poulakis and her team also take advantage of Smartsheet premium apps and integrations with other technology platforms. Premium apps including DataMesh, Dynamic View, and Pivot App make it easy to pull information from one sheet into another to fit the needs of particular stakeholders. Integration with Slack and Microsoft Teams allows the marketing automation team to provide different groups with the information they need in the channel that works best for them.

*“We have a newly acquired team that uses the Calendar App in place of Google Calendar,” Kowalczyk says. “They saw that it was an easier interface for them to make changes, and because all this information is now in Smartsheet they were able to use Slack integration to provide key information on a regular basis to the sales team for better enablement. It’s been incredibly helpful to take our*

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One recent use of Dynamic View was spurred by the changing mix of campaign activities as the COVID-19 pandemic caused readjustments to previous plans. A marketing manager on the team wanted to ensure that his team's workload would be equitably distributed even as the balance of requested campaign activities shifted to include more webinars and fewer in-person events. Kowalczyk worked with him to create a dashboard that uses Dynamic View to display new requests so he could assign straight from the dashboard depending on the team's current workload, making it easy to correct any imbalances before individual team members get overloaded.

## Creating impact beyond the marketing team

Smartsheet is having an impact at PTC well beyond the DXE Group. Poulakis is proud that her team's Smartsheet implementation has been recognized in two best-in-class industry publications and a podcast, and was presented as a changemaker story at a companywide corporate meeting (one of just a few stories honoring teams that achieved significant impact within the organization). She believes that any company that sees a need to integrate technology tools or streamline processes can make an impact by using Smartsheet as the foundation of their efforts.

*"If you're executing on campaigns and have large volumes to manage and a lot of stakeholders, I would strongly recommend Smartsheet as the tool in which to manage all of that and create automation," Poulakis says. "We're really big on process, and without Smartsheet, what we do wouldn't be possible in the way that we do it. Being able to serve our stakeholders in a timely fashion, being able to execute things efficiently; that's where things can fall apart. From both a strategy and execution perspective, it's just been a fantastic tool for us."*

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Anna Poulakis, Senior Director of Marketing Automation, PTC