



Electromek increases project visibility, improves customer communication, and saves thousands of hours annually with Smartsheet

Electromek Diagnostic Systems, based in Troy, Illinois, provides imaging products and IT services to major medical facilities throughout the region. The company services independent specialty facilities, hospitals, hierarchic veterinarian clinics, and psychiatrists.

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Rebekah Schreder, Head of Quality Management and Senior IT Project Manager at Electromek Diagnostic Systems

ELECTROMEK DIAGNOSTIC SYSTEMS

Customer:

Electromek Diagnostic Systems

Industry:

Healthcare

Organization Size:

Small (1-49 employees)

Region:

North America

Website:

electromek.com

Electromek Diagnostic Systems, founded in 1976, provides radiology and cardiology imaging equipment, visualization viewing software, and IT services to healthcare customers. The company specializes in advanced medical imaging equipment such as PACS (picture archiving and communication system) and Xray solutions, reselling and servicing equipment for customers.

Background

Every day, Electromek relies on Smartsheet software to manage projects, quality management processes, internal communications, sales opportunities, and employee schedules. "Smartsheet is my go-to tool for project management," says Rebekah Schreder, head of quality management and senior IT project manager. "It enables me to manage all our projects centrally and automatically send that information to anyone who needs it, so we know exactly what projects are in the pipeline, who's working on which project, and how far along we are in the process."

Previously, Schreder and other Electromek staff members used spreadsheets, email, and other manual processes to maintain project schedules for the company's service engineers and IT employees. "For scheduling, I'd have to sort through dozens of emails to find out which location a specific employee had to be for the week," Schreder says. "In addition, we didn't have a shared directory for project or customer information. Everything was siloed and decentralized, and I'd have to wait for someone from a different department to get back to me about a project's details. Nothing was streamlined." Without a centralized solution, Electromek was concerned about its ability to comply with International Organization for Standardization (ISO) certification standards. "Part of being certified is having a good quality management system, which requires managing a lot of documents and forms," says Schreder. "We needed to house those documents in one place and give our service engineers easy access to them."

Solution

Schreder first learned about Smartsheet in her previous role at a different company. "I was exposed to Smartsheet for sharing project information, and I was immediately impressed with it," she says. "Once I tried it out, I realized it was very easy to use for

Customer:

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Currently, Electromek manages all existing and upcoming projects within Smartsheet. Smartsheet contains reports, forms, customer contact information, and project timelines for each of the company’s PACS or Xray deployments or service requests. Through Smartsheet automations, notifications are automatically sent to each member of a project team when updates or changes are made in Smartsheet. Since the company started tracking projects in Smartsheet, it has created 262 projects for PACS and Xray implementations and service.

Electromek also integrates Smartsheet with Microsoft Teams. An employee can click on a tab within Teams and launch a Smartsheet for each new project, with project updates automatically sent to Teams when changes are made in Smartsheet. In addition, the company uses Smartsheet for tracking issues in IT. “If someone has an IT question or problem, they can submit the request and it goes directly into Smartsheet and Teams,” Schreader says. “It streamlines the overall IT process.”

Electromek relies on Smartsheet to track and update all employee schedules and time off requests. “Our service engineers can see their updated schedules in Smartsheet, and they also receive automatic email notifications about time off for people on their team,” says Schreader. The Electromek sales team manages customers and tracks new opportunities in an internal customer relationship management (CRM) tool integrated with Smartsheet. Electromek also logs all new equipment service requests in Smartsheet.

The company also uses a Smartsheet dashboard for quick visibility into project status and timelines, as well as to request and manage service vehicle usage. Another dashboard provides updated information on procedural documents and approval status for quality management forms. Electromek also maintains a customer-facing Smartsheet dashboard, which allows customers to access contact lists and project plans.

In a Nutshell:

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Electromek has also started using the Smartsheet mobile app to check employee schedules and project information. Service engineers can use the app to summarize visits to customer sites.

Improved project visibility and better customer communication

Using Smartsheet for central management, Electromek has increased its visibility into the status of all projects and schedules. "With Smartsheet, we went from decentralized processes to a completely streamlined communication solution," Schreder says. "We have high-level visibility into every project. Instead of having to look through dozens of pages of notes to find a detail about a project, I can simply look at a Smartsheet dashboard to see the key bullet points, and everything is up to date."

With better project visibility, Electromek can clearly see when projects are going off track, so project managers and customers can work to make sure timelines are met. "We can communicate much better with our customers because we have real-time data about timelines, which they can see as well," says Schreder. "Overall, this is helping us improve customer service." For example, Electromek can better anticipate problems with a project's progress and keep stalled projects on track. "This is especially important in healthcare, because patient care could be impacted by a project being late," says Schreder. "By being transparent and having information available to our customers, we can set expectations and give them confidence that things are still moving forward."

New project setup reduced from 30 hours to 30 minutes

Taking advantage of Smartsheet automations and dashboards, Electromek can create new projects much easier and faster than before. "I used to spend easily up to 30 hours a week setting up a new project, because I'd have to use different project management tools and spreadsheets to consolidate information, read through a bunch of



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emails and notes, and then search calendars to find out which service engineers would be available for that project," says Schreder. "Now, with Smartsheet, I can set up a project in 30 minutes and have it ready to go." In 2022, Schreder created 146 new projects in Smartsheet, representing a total time savings of more than 4,000 hours per year.

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Electromek is planning to build a Smartsheet dashboard for service engineers, which will replace a dry erase board used to schedule appointments and projects. "Smartsheet gives us a lot of flexibility, and we look forward to continuing to grow with it," says Schreder. "Smartsheet just makes our lives easier."

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