

Zinsworks, LLC

# Annalect case study

While highly effective in collaborating with external partners, the Annalect team struggled with internal communication and collaboration, particularly across two internal teams whose work is interdependent.



## Objectives

### Improve Communication

Improve communication between two internal teams, enabling independent workflow management.

### Improve Forecast Accuracy

Provide accurate forecasting to facilitate long-term planning, reduce surrendered hours and lost revenue.

### Minimize Management Time

Minimize time Account Management spends providing detailed direction.

## Solution

### Project Management Optimization

- Smartsheet-based project tracker
- Project templates
- Reports & dashboards

### Workflow Optimization

- Achievable workflow changes with minimal team disruption
- Roles and responsibilities alignment

## RESULTS

*Three key team members took a survey before and after the pilot with the following results:*

### Work Clarity

Unanimous improvement of clarity on short- and medium-term work and availability of resources for planning.

### Dependency Management

Unanimous improvement of understanding of cross-team dependencies.

### Time Savings

All respondents reported saving time on planning work, ranging from 1-4 hours per person weekly.



## Conclusion

We streamlined workflows and introduced a Smartsheet tracker, boosting collaboration, independence, and forecasting. The engagement set the stage for lasting improvements while providing immediate value, showcasing the power of structured problem-solving, iterative design, and flexible implementation.



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