Triple Blaze Consulting

Smartsheet Implementations Case Study

Client Focus: Organizations in healthcare, manufacturing, nonprofit, and professional services seeking to improve collaboration, automate reporting, and elevate project visibility through customized Smartsheet solutions.

Services Delivered:
- Smartsheet Design & Configuration
- Project Plan Templates & Dashboard Architecture
- Portfolio Management Rollups
- KPI Reporting & Automation
- Workflow Design & Cross-Team Collaboration
- End-User Training & Adoption Support

Smartsheet Dashboards & Workflow Buildout for a Home Healthcare Provider

The Problem

A growing healthcare agency needed a flexible, easy-to-use system to manage operational complexity, track deliverables, and enhance leadership visibility. They had no centralized method to visualize progress or ensure compliance.

The Triple Blaze Solution

1 Built tailored dashboards for team leads and executives

2 Created tracking sheets for visit durations, projects, and backup verifications

3 Applied conditional formatting, calculated fields, and automations

4 Designed workflows to meet compliance standards for visit tracking

5 Developed monthly reporting and scan review processes

"Triple Blaze Consulting is the absolute best—very quick and detailed work. They communicate regularly and deliver a quality product."

Project Plan Templates and Dashboard Rollups for a License Optimization Firm

The Problem

A professional services firm needed Smartsheet dashboards to unify tracking across five concurrent projects. They lacked a centralized view of milestones, tasks, and KPIs, making it hard for leadership to anticipate issues or intervene effectively.

The Triple Blaze Solution

1   Designed a master project plan and five connected child project templates

2   Built dashboards that surfaced upcoming milestones and open tasks

3   Enabled KPI monitoring through Smartsheet widgets and summary sheets

4   Created dynamic task lists and "to-do" views for real-time action tracking

5   Improved cross-project forecasting and coordination

> *"Triple Blaze Consulting is very organized, talented, and professional. Would absolutely recommend them for multiple job types."*

Enterprise Dashboard System for a Global Media & Sports Firm

The Problem

A major media and sports organization needed robust dashboards and reporting systems across departments for finance, scheduling, and event promotions. Manual spreadsheets and email-based workflows couldn't keep up with their growth or complexity.

The Triple Blaze Solution

1   Designed crew scheduling tools, revenue dashboards, and promotional planning sheets

2   Integrated custom dropdown logic, filtered views, and automation triggers

3   Built executive dashboards for financial tracking and cross-team alignment

4   Provided documentation and technical guides for long-term maintainability

5   Delivered AI-assisted reporting automation to enhance insights and reduce overhead

> *"Thanks again for everything you've done—amazing work. We now have tools that are easier to use, better organized, and more actionable."*

Workflow Design & Smartsheet Implementation for a Construction Firm

The Problem

A construction company needed a Smartsheet expert to design their initial workflow environment, align the platform with their project needs, and enable collaboration across teams.

The Triple Blaze Solution

1   Held working sessions to define workflows, goals, and pain points

2   Designed and configured project tracking solutions tailored to field and office use

3   Developed dashboards with milestone highlights and project summaries

4   Provided configuration documentation and end-user guidance

5   Enabled smarter communication between departments through shared views

Client engagement still in progress.

Why Organizations Choose Triple Blaze for Smartsheet

1   ✓ Proven ability to deliver Smartsheet results across industries

2   ✓ Expert in dashboard creation, reporting, and cross-sheet architecture

3   ✓ PMP and Scrum Certified Professionals with a 100% Upwork success rate

4   ✓ Known for clarity, quality, and collaboration

5   ✓ Trusted by teams in healthcare, construction, software, and media

Ready to Get More Out of Smartsheet?

Whether you're building from scratch or leveling up your dashboards and workflows—Triple Blaze Consulting delivers solutions that get results.

Visit us at triple-blaze.com