

# Wrike Brings Remarkable Transparency to HealthStream's Marketing Projects



## Interview with Luther Cale, Chief of Marketing at HealthStream

*Luther, please tell us about HealthStream and your role there. What was your primary need when you decided to use Wrike? Why did you need project management software?*

I am chief of marketing for HealthStream, a company that is the market leader in providing research and learning solutions for the healthcare industry. We have more than 2,500 hospitals using our products and services, and this number is constantly growing. So as you can imagine, that translates to a lot of work for a marketing team of 12. We are fairly distributed with a core hub of marketers in Nashville, Tenn., but also have team members in upstate New York, Colorado, Memphis and Baltimore. Being located across five states means lots of collaboration and management challenges. The main challenges were transparency and communication both within the team and outside the team. We were getting tons of work done (somehow!) but the left hand didn't always know what the right hand was doing. We needed a tool that could help us avoid miscommunications on all levels and improve project planning visibility.

*Why did you choose Wrike over other project management software?*

When I looked for a project management tool for our team, **I realized we need something agile and Web 2.0-style that worked well with our hectic and always changing project schedule.** I know that many project teams are still using Microsoft Project, but that was NOT the route we wanted or needed to go for our team work (reasons too many to enumerate, but the main three are: cost, complexity, and, you know, productivity and actually getting the stuff done :).) I reviewed about 15 options, including Nozbe, Basecamp, ClockingIT, 5 pm, Central Desktop, ActivCollab, @task, and Celoxis, among others before settling on Wrike. We even tried Nozbe in our marketing team. However, at the end of the trial, I felt it was good for an individual, but not as strong for collaborating as a team in the way that I wanted. **Wrike stood out among other solutions, thanks to its incredible integration with Outlook,** which just got even better with the Outlook plug-in!

*Why was Wrike's e-mail integration so important for your team? Do you find other Wrike features useful?*

Like most project teams, we were used to managing our tasks from e-mails. This approach was not very efficient in terms of bringing transparency to project communications and planning, until we got Wrike. Clearly showing our production schedule to all the team members was a real challenge. So, justifiably saying no to certain request or re-prioritizing/re-scheduling items when necessary was difficult. **Now Wrike lets us leverage e-mail to its full capacity.** The system allows us

### **Business:**

HealthStream is the market leader in providing research and learning solutions for the healthcare industry.

### **Challenge:**

Gaining transparency and facilitating communication both within and outside the project team.

### **Solution:**

The team members use Wrike to complement their communications and personal task management in Outlook.

### **Result:**

Clear visibility of all the project operations and improved teamwork efficiency.



to create a schedule, which can be accessed by each team member, directly from Outlook! With Wrike's ability to create tasks from e-mails and visualize them on a Dynamic Gantt Chart, creating and reviewing a production schedule has become a breeze. This is essential for a fast-paced work environment like ours. Now it's so easy for each person on the team to know what his/her part of the job is. Every team member always knows what everyone is working on in real time. This is a big step forward to transparency in our organization.

Another important thing is that Wrike's flexibility allows us to configure the system so that different parts of the project team, including clients, just see what they need to see. In Wrike, I don't have to share the entire project with someone if I don't want to. I can share project data at the project (folder) level or specific task level. It makes working with partners and clients easy and secure.

*What types of projects do you manage in Wrike?*

We have an incredibly wide range of types of projects and tasks, from "send this report to someone" to "plan a three-day customer conference for 1,000 customers and 35 partners" to "create a nine-month marketing campaign plan," and so far, **Wrike has the flexibility to handle whatever we throw at it.** I attribute a lot of this to the flexible folders structure and not being locked into one level of hierarchy. It's also great that we can both pre-plan by loading project templates via Excel AND add new folders or sub-folders as the need arises in real time. Nice job!

*What is the major improvement that Wrike brought to your business?*

I already mentioned the remarkable transparency that Wrike helped us introduce to our operations. The second big benefit for us is a significant teamwork efficiency growth. In general, we are using Wrike to PLAN projects (and keep up with project communication) and Outlook to WORK THE TASKS (and communicate about the project). The new Outlook plug-in has been fantastic for allowing this to happen. **Now our tasks in Wrike and Outlook are synchronized, so each of us has a complete workload picture in both systems.** We are following Michael Linenberger's Manage Your Now workflow for task management in Outlook. His general approach does an excellent job, starting with the reality of a modern day knowledge worker rather than some idealistic project management framework. Wrike does the same thing, so we have had good success using the two approaches together.

*Do you plan to invite more team members to Wrike?*

We will likely expand to include other parts of our organization and, certainly, the customers with whom we collaborate.

*How would you describe Wrike in just 3 words?*

Flexible. Light-weight. Powerful. Oh, one other thing – Wrike's customer service has been absolutely fantastic!