

SBV Driving Visibility & Efficiency with **monday.com**

How SBV Scaled Operations and Saved Over 3,800 Hours with monday.com in Just 6 Months

BACKGROUND & CHALLENGES

Before implementing monday.com, SBV's Delivery & Execution department struggled with decentralized information and inconsistent reporting methods.

KEY CHALLENGES INCLUDED:

- ✗ Lack of visibility into what individuals were working on
- ✗ Fragmented scheduling and document management tools
- ✗ Non-standardized reporting formats

ADVICE TO OTHER ENTERPRISES

For organizations with strict governance or compliance needs, SBV recommends:

- ✓ Customizing permissions to protect sensitive data
- ✓ Utilizing activity logs to support internal audits
- ✓ Establishing standard operating procedures to drive consistent usage
- ✓ Encouraging training and exploration for successful team adoption

Ready to streamline your operations like SBV?

Book a free consultation with The CRM Team today.

BOOK NOW

SOLUTION IMPLEMENTATION

With support from The CRM Team, SBV transitioned core delivery processes to monday.com, introducing centralized workspaces that replaced fragmented tools.

KEY CHANGES



Schedules
now managed on monday.com instead of Microsoft Project



Risk Registers
(RAID Logs) moved from Excel to structured boards



Project Documents
are consolidated into a single, accessible repository



Delivery Managers
now manage projects end-to-end from a unified platform

OUTCOMES & BENEFITS

The Transformation Resulted in:

- ✓ **A centralized platform** enabling efficient reporting and audit readiness
- ✓ **Simplified project tracking** and risk management
- ✓ **Enhanced visibility** and accountability across teams
- ✓ **Stronger compliance** through customizable permissions and activity logs
- ✓ **90%+ Sustained user adoption** and active usage
- ✓ **Over 3,800 hours saved**—boosting productivity

CONCLUSION

SBV's Delivery & Execution team now operates with clarity, control, and consistency—unlocking the full potential of work management through monday.com. The CRM Team's partnership ensured a tailored rollout aligned with SBV's compliance needs and execution standards.

"Start with a non-sensitive but impactful use case. Let teams explore and build confidence. Appoint internal champions and prioritize training. You won't regret it - monday.com is the best investment you can make. Access and governance are easily controlled, so you can scale with peace of mind."

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