

Zone & Co brings hundreds of projects into Smartsheet Control Center, improving visibility and saving hours weekly per manager

With Cheetah's help, Zone & Co unified scattered project tracking into one Smartsheet solution. The complex rollout—leveraging the full capabilities of Smartsheet's Advanced Work Management platform—delivered weekly time-savings, sharper forecasts, and full client transparency.

“With Cheetah Transformation’s help, we are now using Smartsheet to spot trends early, hold people accountable to timelines, make accurate forecasts, and prevent delays.”



Trevor Prince,
Vice President of Program Management
at Zone & Co.



Customer:

Zone & Co

Industry:

Financial Services

Organization Size:

Mid-Market
(200-1,999 employees)

Website:

zoneandco.com

Region:

North America

Zone & Co is a NetSuite-native financial operations platform built to eliminate fragmented systems and empower finance teams to scale with confidence. From billing and revenue recognition to reporting and AP, Zone's embedded SuiteApps replace disconnected tools and spreadsheets with real-time automation - all inside NetSuite.

Trusted by 4,000+ companies globally, Zone is how modern finance teams move faster, stay accurate, and lead the business forward.

Siloed tools, data, and teams

The company was previously managing hundreds of projects without a unified system. Information lived in spreadsheets, emails, and scattered platforms. "When I joined Zone & Co, I asked two questions: 'How many projects do we have, and how are they going?' We couldn't answer either," recalls Trevor Prince, Vice President of Program Management at Zone & Co. This meant the team couldn't assess project health, plan resources properly, or catch issues early. That often led to client escalations and even risked churn. "I was brought in to create structure and visibility for our projects," Prince explains.

At Zone & Co, Smartsheet was already in use—but in a limited way. Each project manager had their own setup, which made it hard to stay aligned. To bring everyone onto a single, structured platform, Prince sought the help of Cheetah Transformation, a Smartsheet Platinum Partner. "Having worked with them in the past, I knew they could help unlock Smartsheet's full potential here. Of course, I considered other tools as well, but none could match Smartsheet's integration capabilities," he explains.

A careful, collaborative, forward-thinking approach

The aim was to eliminate siloes and cut down on repetitive, manual work. Cheetah began by assessing Zone & Co's workflows. "Smartsheet can transform the way teams work—but only if it reflects the right processes. That's why we partner with clients to design workflows first, then tailor Smartsheet to make them more efficient," explains Youssef Mejri, Senior Smartsheet Consultant at Cheetah Transformation. "In a way, we also act as strategic partners—we dig deep during scoping, ask tough questions, and challenge assumptions, because that's how we deliver the best solution."

Zone & Co made sure employees were part of the journey. "Because people were all working differently, we had to show and convince them that there was a better, more efficient way of doing things," says Prince. That meant designing workflows and templates, securing team buy-in, and refining them through a few iterations before rollout. Zone & Co and Cheetah tested everything thoroughly, knowing that careful prep would save time later. Another safeguard was flexibility: Cheetah designed the solution so Zone & Co's team could adjust it themselves without needing rework or outside help.

A centralized, integrated, intricate platform

With that foundation in place, Cheetah moved to deploying Smartsheet Control Center to establish a single project management



Use case

→ Business Operations



Capabilities

→ Control Center
→ Dashboards and Reporting
→ Data Shuttle
→ DataTable

blueprint—covering everything from customer intake sheets to portfolio reporting. Cheetah then harnessed the power of Smartsheet's Advanced Work Management platform, utilising advanced features such as DataTable, Data Shuttle, and DataMesh to automate the synchronisation of data between NetSuite and Smartsheet.

This included pulling project time data from NetSuite into Smartsheet, so Zone & Co could finally see how much effort had actually gone into each project. Cheetah then created complex formula data sheets and Bridge workflows to capture more advanced metrics that linked directly to dashboards to compare that effort against the original plan and predict whether the team was likely to go over budgeted hours. “The burn-hours tracking was a complex implementation,” says Prince. “Different project types handle time differently—some break hours down by phase, others just track totals—but Cheetah made all of that work in one simple dashboard.”

Visibility at a glance

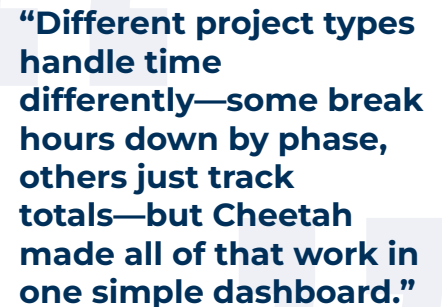
To improve visibility, Cheetah set up dashboards for consultants and project managers. Instead of spending hours building reports by hand, project managers now get one simple view of all projects. The system automatically flags risks based on clear rules—like delays, scope changes, or negative client feedback—and triggers an escalation if needed. “I can instantly see which projects are struggling, which products have more issues, and whether consultants are overloaded,” shares Prince.

Today, most departments at Zone & Co—from admin to software development to project management—rely on Smartsheet to track more than 500 projects in real time. “With Cheetah’s help, we are using Smartsheet to spot trends early, hold people accountable to timelines, make accurate forecasts, and prevent delays,” says Prince. The dashboards also bring transparency to clients. “If a customer asks for projections, we can pull them up instantly, which makes our meetings far more meaningful,” he adds.

Less effort, lowered costs

Zone & Co teams also save considerable time by eliminating manual tasks. New projects no longer take hours to set up—Smartsheet Control Center generates complete templates instantly. Weekly client updates, once five-page slide decks, are now live dynamic dashboards that refresh automatically. Preparing for quarterly board meetings is simpler, too: pulling and formatting NetSuite data happens in the background instead of eating up hours. “Each project manager saves about three to five hours every week thanks to Smartsheet,” says Prince.

Consultants and project managers are able to enter project data directly into Smartsheet instead of needing an individual NetSuite license and access. “I’d estimate we save about USD30,000 a year with the reduced number of NetSuite licenses we actually need,” says Prince.



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A strong partnership, a lasting solution

Cheetah built the system with scalability in mind—Mejri believes it can handle 10 times more projects without issue. Looking ahead, Zone & Co plans to extend Smartsheet to internal projects, giving them the same structure and visibility already applied to client work. The team is also working on integrating Zendesk, their customer support platform, so support tickets feed directly into project reporting. Longer term, they'll connect Jira, the tool their software and product teams use to track work.

The success of the rollout, Mejri believes, came from building a close partnership with Zone & Co and understanding their challenges firsthand. “For us at Cheetah, it’s never just a short-term engagement where we deliver a solution and walk away—it’s the start of a relationship,” he says. “We’ve also been in our clients’ shoes, so we know how difficult it can be to align people, build consensus, and move forward together.” For Prince, what stood out was the expertise: “Cheetah understands Smartsheet inside and out and can work wonders with formulas,” he says. “They’ve been great to work with, and I’d recommend them to anyone looking to implement a Smartsheet solution.”

