



CapabilitySource
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Proud partners of  monday.com

From Fragmentation to Global Collaboration

How The Channel Company Unified 350+ Global
Employees with CapabilitySource & monday.com



Streamlined Operations and **Slashed Costs by 35%**

A Tangled Web of Tools and Teams

Consider the operational and alignment challenge when a company goes through five mergers in just two years: hundreds of team members across different lines of business and time zones, all using different technologies, following unique processes and diverse ways of working. Imagine the complexity of information sharing, tracking and reporting challenges, and visibility gaps into what people are doing and when. These challenges - along with a need for work management precision and effectiveness - can be overwhelming, even for the bravest of leaders.

The Channel Company (TCC)—a global leader in B2B media, marketing, and events—found themselves facing these challenges following a season of growth. After a positive period of mergers and acquisitions, they were operating as five different companies under one name. With more than 350 team members spread across time zones and lines of business, each team operated with their own project management tools such as Workfront, ClickUp, monday.com and some even managing processes manually.

There was no central source of truth as explained by Noelle Robinson, VP of Business Channel Systems at The Channel Company: “Our biggest challenge was the disparate tools and processes that did not allow for collaboration and visibility across lines of business and locations.”

TCC’s leadership recognized that while their individual teams were producing exceptional work, fragmented operational infrastructure was preventing them from working as one unified team —and costing them time and money. A solution was needed: one cost-effective solution to centralize, standardize and unify workflows; streamline communication; automate campaigns, projects, tasks and assignments; and scale to support the needs of a high volume, global agency. An extra challenge: to enable each line of business to function uniquely while gaining the benefits of a single unified organization.



Choosing monday.com— and the right partner to meet their specific needs

TCC leadership began a journey to establish one central work management solution shared by all delivery teams. They started by evaluating business requirements, processes, and specific team needs. After a thorough assessment that included user input and detailed technology scoring, TCC leadership realized that no “out-of-the-box” work management technology could fully support the enterprise-level needs of a global marketing agency that provides services across agency, media, consulting, event and digital service teams. TCC needed a highly scalable, industry specific, automated and integrated technology solution that was flexible enough to meet unique team needs while standardizing and unifying work across the company.

To anchor this solution, TCC chose monday.com as the work management foundation. monday.com was chosen due to its intuitive user interface, extensibility, and favorable cost structure. But how to fully provide an agency specific solution on top of monday.com? That’s where CapabilitySource came in.



Extending monday.com into an Enterprise Creative Operations Solution

CapabilitySource—a monday.com partner specializing in marketing and agency work management solutions—was introduced to TCC as a trusted monday.com partner with deep agency experience and a focus on the needs of larger organizations like TCC. CapabilitySource's pre-built Content Supply Chain solution, Project Essentials, aligned well with TCC's agency needs and included the additional benefit of being powered by monday.com.

Together, monday.com and CapabilitySource provided a single technology solution that is enterprise grade, built for agency work management, includes sales and financial integrations, migrated legacy systems, and offers scalability and extensibility to meet current and future needs.

Key Solution Capabilities:

- **Automated One-Board Project Generation:** What once took hours of manual work—building timelines, assigning resources, coordinating across departments—now happens instantly with a few automated clicks. Custom templates gather dates, tasks, dependencies, and team assignments automatically and provide visibility to all project tasks in one monday.com board.
- **Sales and Finance Integration:** New opportunities in the CRM system now automatically trigger project creation in monday.com, enabling proactive planning and seamless handoffs between sales and delivery teams while also eliminating data re-entry and duplicate data.
- **Planned and Actual Time Tracking:** Creative teams log time easily without switching tools. Entries are automatically matched to the right people and projects, feeding work time directly into financial systems for accurate reporting.
- **Centralized Reporting:** Consolidated data flows into a centralized data lake, enabling business leaders to view detailed status and performance dashboards and generate accurate invoices and client reports.
- **Capacity Management:** Resource Managers have cross-organization visibility into worker allocations, capacity and unassigned work.
- **Unified Workflow:** From New York to Madrid to Sydney, everyone now works within a common operational framework. Projects and tasks are sharable across regions, business units and teams; allowing team members to share work and collaborate in new creative ways.



A Solution Built for People

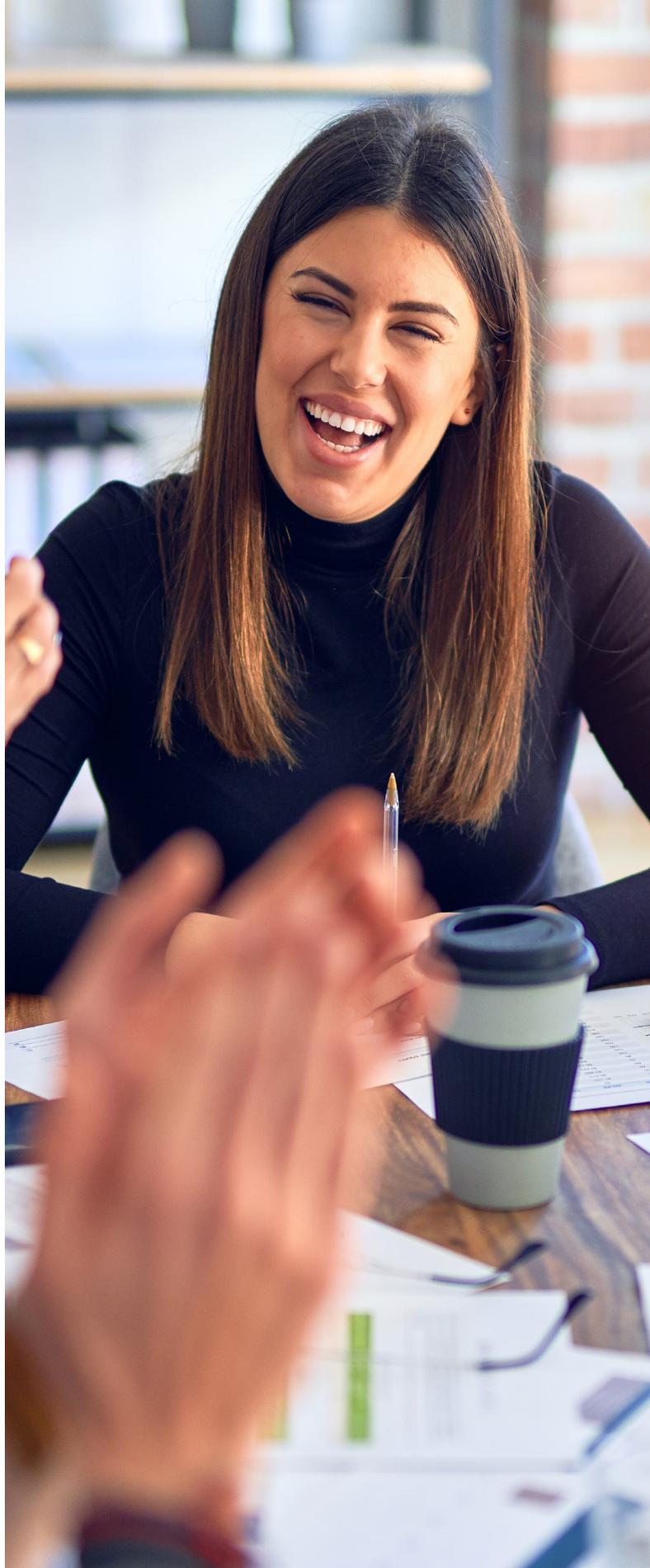
CapabilitySource took a thoughtful, phased approach to solution design using monday.com. Not only did they leverage the powerful native capabilities of the monday.com technology, but they understood how to extend monday.com to support the work processes of a large, global marketing agency. They listened to what features and capabilities were important in each line of business and provided a base framework that allowed all teams to work in a similar fashion without forcing teams into a rigid, restrictive workflow.

CapabilitySource also partnered with TCC leadership to guide team members through change management, carefully guiding teams through the solution adoption—team by team. “CapabilitySource has been instrumental in the change management with our teams; specifically, with those tied to [other systems],” Robinson said. “The turning points came in our iterations with the CapabilitySource team who were committed to making the new work experience as great as it can be.”

“Project Essentials made monday.com scalable for our business. It brought structure to our complexity. CapabilitySource didn’t just implement software—**they became part of our team.** This solution wouldn’t have worked without them.”

—Noelle Robinson

*VP of Business Channel Systems,
The Channel Company*



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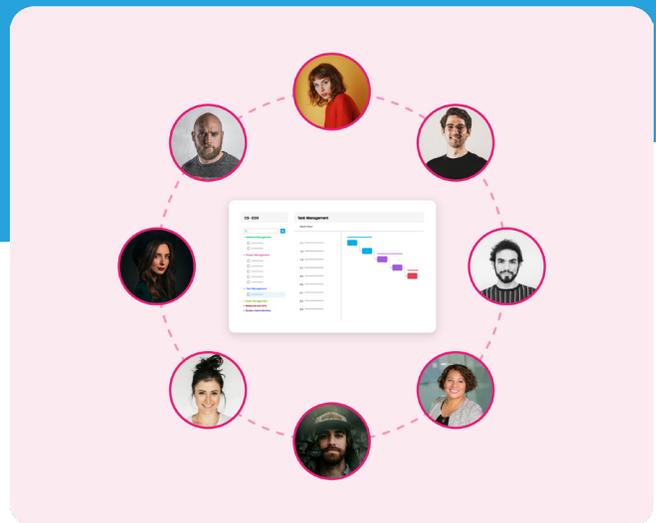
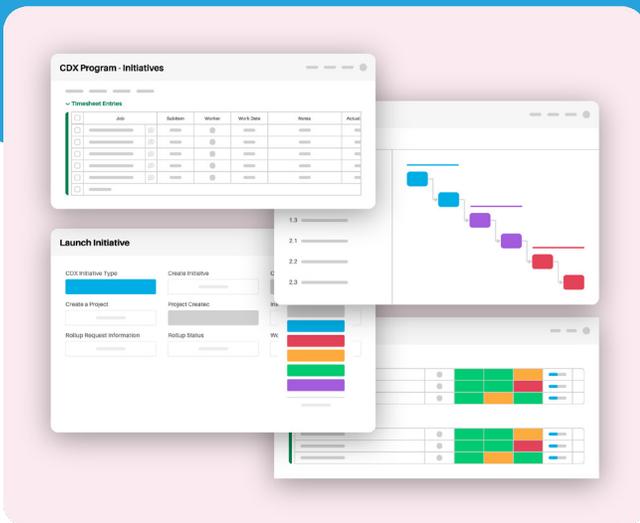
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The Results

Unity, Efficiency, and a New Way of Working

- **Reduced Project Setup:** Manual setup has decreased by 91%, freeing teams to focus on the work—not the workflow.
- **Greater Accuracy and Less Manual Entry:** Automation replaced error-prone handoffs and guesswork.
- **Cost Savings:** By consolidating into one work management system, plus automating processes and simplifying workflow, TCC is estimating an annual cost savings of almost \$100,000 due to increased efficiency.
- **Improved Collaboration:** With OneBoard Project Generation, teams across the globe can work within connected campaign structures—gaining transparency without losing the flexibility they need.
- **Resource Optimization:** Effective capacity management due to automated assignment and integrated reporting led to better allocation of resources across projects.
- **Streamlined Workflows:** Automated processes reduced manual setup and data entry by 92%, allowing teams to allocate more time to strategic initiatives.

Perhaps most importantly, the solution provided TCC's teams with one unified way of working. By reducing manual entry, automating processes and aligning workflows across lines of business, they are unlocking greater clarity, efficiency, and consistency—enabling teams to enjoy their work.



The Bottom Line

The TCC solution wasn't just about implementing software. With monday.com, CapabilitySource enabled an operational transformation.

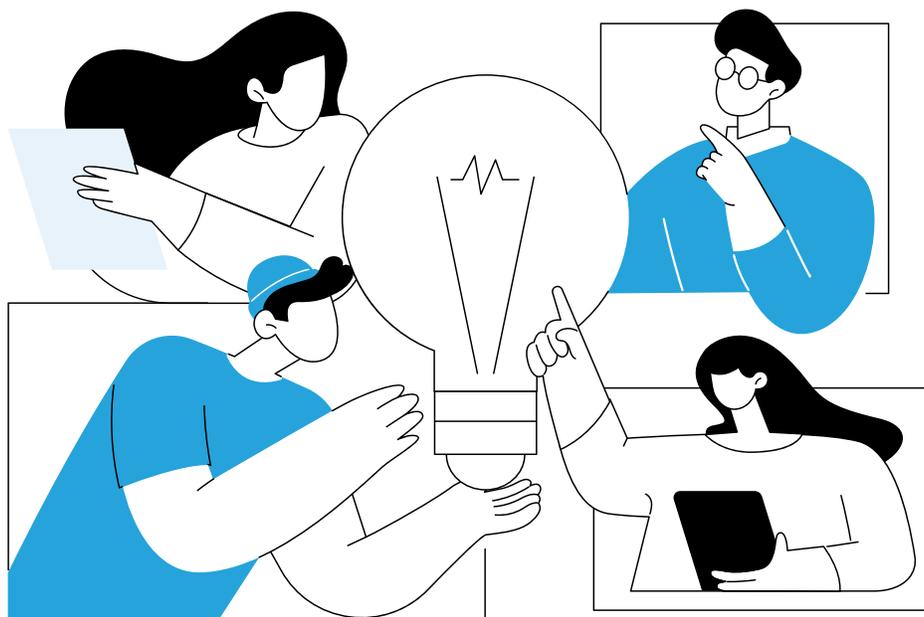
By extending the capabilities of monday.com for customized enterprise needs, The Channel Company established a scalable, integrated work management solution that supports growth, enhances collaboration, and finally brings operational harmony to a global team.



CapabilitySource

Solutions to make work more enjoyable.

Unlock your team's potential with our simple and affordable content supply chain solutions.



About The Channel Company

The Channel Company is a marketing organization that specializes in facilitating and enabling co-marketing between technology suppliers and their partner communities. They provide media, events, and marketing services with 50+ years of channel innovation. They provide support with information, guidance, services, and solutions, including digital and print media solutions.

Learn more at thechannelco.com

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