

# Walmart Canada Automates Processes & Proves Project Value With Wrike



Established in 1994, Walmart Canada serves 2.4 million customers online or in one of their 400+ stores nationwide. As the largest global retailer, Walmart is intentional about helping people save money so they can live better. With more than 11,500 retail units under 55 banners in 27 countries, Walmart remains committed to creating opportunities that bring value to customers and communities around the world.

## The Challenge

In March 2019, Walmart Canada created the Continuous Improvement team to help increase productivity and drive efficiency within the Transportation department. “We focus on project development, project governance, operational support, and fleet analytics,” explains Carolyn Lum, Senior Manager of Continuous Improvement at Walmart Canada. “We govern the entire capital process for the Transportation team, provide operational support, and develop business recommendations for senior management.”

When Lum first came into this role, she was handed a single Excel spreadsheet meant to track all Transportation projects and the active pipeline. “It was about 50 lines, and some of them had one word in a cell,” recalls Lum. “Associates were just doing things in notebooks, spreadsheets, or whatever was available to them,” reflects Nicole Fakhri, Manager of Continuous Improvement.

The pair knew their team would need a better project management system in order to streamline the work and complete projects efficiently. “Our ultimate vision was to have one place, one pipeline with full visibility. Just one complete picture, where anyone could go in at any time, without having all these calls, emails, and fragmented project review meetings,” says Lum.

### SUCCESS STORY FACTS

#### Instant

project approval

#### Eliminated

rework

#### Reduced

emails

#### One location

for all project pipeline

#### Fewer

& shorter status  
update calls

# The Solution

Eager to transition away from their insufficient and manual project management style, the Continuous Improvement team selected Wrike’s collaborative work management system to see them through this transformation. With Wrike, Walmart Canada has streamlined communication, organized and contextualized projects, automated project approvals, and leveraged key analytics and dashboard views to inform their business decisions.

## Aligning projects to corporate strategies

Wrike empowers Walmart Canada to be more strategic in which projects they initiate. “You can rank projects and stack them against the entire pipeline,” explains Fakhri. “We’re able to select the right projects, align them to our strategy, and ensure all the right resources are in place to execute them.”

“Wrike allows management to answer some key questions,” continues Fakhri. “What are we already working on? Does it align with our corporate pillars? Does it align with what we’re trying to achieve within our strategy this year? Does this align with our corporate structure? Do we have the bandwidth and resources to attempt this? Does it actually get us where we need to go in five years?” Their team is also beginning to leverage Wrike’s Work Management Proficiency Index to help them prescriptively guide their work management strategy according to industry best practices.

## Streamlining request and approval processes

Wrike helps the Walmart Canada team condense and automate repetitive tasks, such as requesting and approving new projects.

The Continuous Improvement team uses Wrike’s custom request forms to easily manage their project intake and force requesters to consider the reasons behind their request. “The main request form we use in Transportation is an extension of all the project management best practices we’ve been putting in place,” begins Lum. “Anytime anyone wants a new project added to the pipeline, they have to fill out all the fields that we’ve taught them are required for a business case.”

### SUMMARY

#### Customer

Walmart Canada

#### Headquarters

Mississauga, Ontario

#### Industry

Retail, E-commerce,  
Wholesale Operations

#### # of employees

90,000+

#### Wrike Products & Services

Enterprise, Wrike Proof,  
Wrike Analyze,  
Wrike Integrate,  
Deployment

#### Top Challenges

Stuck in spreadsheets,  
Minimal project  
management knowledge,  
Siloed communication,  
No portfolio visibility

#### Planned Integrations

SAP, Outlook, Tableau

#### Previous Solutions

Excel, Notebooks

“We’ve also automated the project approvals through a Blueprint,” notes Fakhri, “which initiates the first few tasks that any project needs before it can start: add project tasks, make sure your finances are in order, ensure you have the information and resources you need, and obtain any necessary approval ahead of time.” By using the approval feature in Wrike for this process, the Continuous Improvement team ensures that every project has its own virtual paper trail and adds a new level of transparency to their projects.

## Proving each project’s impact on the business

The Wrike platform also allows the Continuous Improvement team to quantify the business impact and value of each completed project. “One of the biggest benefits is that we’re actually tracking and validating our projects,” explains Lum. “Once a project is executed, we move it into a monitored folder within our Space, which is where Fakhri and another member of our team will validate the projected savings to see if the project is delivering on what it promised it would. This was something that we’ve never done before. We used to just get a project completed and consider it done. But now Wrike lets us look at it again and assess if we need to revisit and add a supplemental project if we’re not reaching our goals.”

Being able to assess each project’s contribution toward business goals empowers Walmart Canada to focus on their long-term trajectory and global impact.

“We have a bird’s-eye view of what we have achieved across the entire team.

We can track the actual savings we are incurring and how much CO2 emissions we’re reducing. Whatever it is that we’re trying to track, it’s so helpful to be able to see it at the project and portfolio level,” says Fakhri.

## Simplifying document revisions and versioning

One of the team’s favorite Wrike features is the document editor and versioning within Wrike Proof. “It was a game-changer,” boasts Fakhri. “Knowing that you’re on the most recent version, you’ve seen all the edits, you can directly make a change right there that will populate for anyone else to see. It’s a very collaborative tool.

Lum is thrilled that Wrike has solved their previous versioning issues: “Version control is so difficult when there are so many hands in every single project. We used Wrike Proof for one of our largest cross-functional projects. For our first Supply Chain Data Summit, we had everyone input all their data elements through a request form that we then put into a project. So now there’s one master set of full data elements for the entire division which never existed before.”

## SUMMARY

### Why Wrike

A single platform to improve collaboration, clarity, execution, and insights

### Departments using Wrike

Continuous Improvement, PMO, Strategy, Transportation, Supply Chain Planning, Logistics Operations East and West (encompasses all distribution centers), Supply Chain Reinvention/End to End, Marketing, E-commerce Studio

### Feature highlights

- Visual, interactive charts within Wrike Analyze
- Automatic document versioning within Wrike Proof
- Key financial and workload reports
- Bird’s-eye dashboards of the entire portfolio

### Website

[www.walmart.ca](http://www.walmart.ca)

Wrike gives Walmart Canada the clear feedback and easy document sharing they needed to work better and focus on the task at hand instead of struggling to decipher which documents are which.

## Using visual analytics and reports to inform decisions

The pre-built, advanced analytics within Wrike gives the Continuous Improvement team “a comprehensive overview of our portfolio as a whole,” says Fakhri. “The visual pie charts and interactive elements of Analyze are really helpful. I can quickly see what’s in the backlog, what’s due, what’s off its timeline.” And the ability to compare current project timelines with previous timelines helps Fakhri and her team understand how certain tasks impact their on-time delivery.

“The executives love the view of the pipeline through Analyze,” notes Lum.

“When we presented what we’ve built out for the Transportation Space and the full view of the pipeline, our leadership said, ‘To have this kind of visibility into the pipeline is more than we ever could have asked for.’ And that’s when they gave the green light to expand Wrike beyond our team.”

Fakhri also uses the reporting within Wrike to get a better pulse of the department’s finances and resourcing. “I really like the real-time reports,” she says. “I use them to describe how many projects one person’s working on, how much savings there is across all of the projects within a pipeline, or how much savings or capital money we have booked for next year.” These kinds of insights help the Walmart Canada Transportation team manage workloads and prioritize projects that grow the business.

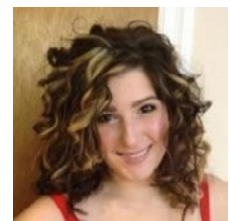
## Increasing adoption with easy deployment and unique training program

To help their team get onboarded to Wrike and effectively deploy the collaborative work management system, Walmart Canada turned to Wrike Professional Services. “The Wrike team guided us through the full deployment process and training of the Transportation team,” says Lum. “They were truly amazing. They were such a wealth of knowledge and consistently challenged the team with processes, asked us to think in different ways, and ultimately helped us optimize our processes making us operate more productively.” Plus, the Wrike Customer Success Manager assigned to Walmart Canada helps them continue their improvement via engaging weekly meetings.



“Having that visibility within Wrike of the entire pipeline in one place with real-time data that’s consistently there is one of the biggest benefits and something we’ve never had before.”

Carolyn Lum,  
Senior Manager of  
Continuous Improvement,  
Walmart Canada



“Without Wrike, it’d be difficult to make sure the right projects are getting started and that we have all the details we need.”

Nicole Fakhri,  
Manager of Continuous  
Improvement,  
Walmart Canada

To encourage adoption with new hires and further empower existing Wrike users, Lum and Fakhri created what they call Wrike Open House – an open-ended, weekly virtual meeting where anyone can ask any Wrike questions. “We wanted people to feel excited about Wrike and understand why we were using it and that we chose it to make their life easier,” explains Fakhri. “We wanted a safe space for them to come and ask for help,” adds Lum. “When you have that space, it gets people engaged.”

## The Conclusion

Wrike has transformed project management at Walmart Canada from a DIY spreadsheet approach to a sophisticated and strategic operation. With all their communication in one location, they can collaborate more effectively and easily provide context for each project and task. By leveraging Wrike’s request forms and approval features, they ensure that the right projects are being activated and prioritized. And key analytics and reports within Wrike help the Continuous Improvement team make informed recommendations to leadership.

“Everything is in Wrike,” concludes Lum. “No more emails. No more daily phone calls. We can see workload, savings, timelines, pipeline – everything. Our calls are now very high level and focus on support and next steps. We tell everyone to not make any sort of presentation; simply walk us through your project in Wrike.”



“Wrike helped us centralize our Continuous Improvement team into one place, create one version of the truth, improve our ways of working, and eliminate non-value-adding work.”

Francis Lalonde,  
Vice President  
of Transportation,  
Walmart Canada

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