

Bridging the Gap: Connecting Granular Design Workflows to High-Level Product Portfolios with monday.com

ORGANIZATION

A product manufacturing company managing complex product launches, packaging design, and technical data sheets across US and Canadian markets.

CHALLENGE

The client's Production Graphics team was operating with high internal efficiency but low external visibility. The **Production Graphics Lead** utilized **monday.com** to manage a complex array of deliverables, including:

- **Data Sheets:** Tracking versions from pre-approval to post-approval and archiving.
- **Product Packaging:** Managing complex label requirements and template changes.
- **3D Renders:** Ad-hoc requests for sales and new product launches.

However, a disconnect existed between the **Product Management** team (who operate at a high portfolio level) and the Graphics team (who operate "in the weeds").

- **Manual Handoffs:** Product Management would assign tasks in their own boards, requiring the Graphics Lead to manually replicate data into their specific workflow boards to maintain control.
- **Visibility Gaps:** Stakeholders often had to interrupt the design team to ask for status updates (e.g., "Is the data sheet approved?") because there was no centralized view linking specific asset status to the master product list.

TECHNICAL SOLUTION

The implementation consultants conducted a deep-dive discovery session to understand the Graphics Lead's philosophy. They discovered a highly sophisticated, logic-driven workflow.

"I never want to be tagged or as the owner responsible for something that I cannot actively complete... I only get tagged on something that I can actually perform an action on."

— Production Graphics Lead

The Graphics Lead had built a pristine environment using **Subitems** to track version history (v1, v2, v3) and **Automations** to archive completed projects. The system worked perfectly for them, but it was isolated from the rest of the organization.

The consultants recognized that overhauling the Graphics team's board would be a mistake. As the Lead Consultant noted during the review, it was "the cleanest monday I have ever seen."

Instead of changing the process, the solution focused on **Connectivity**.

1. The "Core Board" Concept

The team introduced a central "Core Board"—a repository of all active products derived from the client's internal system (AS400).

2. Non-Invasive Integration

Rather than forcing Product Management into the Graphics board (which would create noise) or forcing Graphics to work in the PM board (which lacked granular control), the solution involved:

- **Retaining the Graphics Workflow:** Allowing the Graphics Lead to continue using their specific board structure (Pre-approval, Post-approval, Archive).
- **Link & Sync Columns:** Creating a single column on the Graphics board to "Connect" to the Core Board.
- **High-Level Visibility:** This connection allows Product Management to see active graphic statuses (e.g., "Data Sheet: In Progress") on their high-level portfolio without needing to dig into the granular sub-tasks or interrupt the design team.

BUSINESS RESULT

By respecting the user's existing logic while introducing a layer of connectivity, the client achieved:

- **Autonomy:** The Graphics team maintained their preferred workflow and "clean" workspace.
- **Reduced Friction:** Eliminated the need for emails and meetings just to check project status.
- **Single Source of Truth:** A unified view where the Product Management team can see the lifecycle of a product launch, from conception to the final PDF render, without navigating multiple boards.

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