



**Lunette**

*menstrual cup*

# Customer Success Story

**Lunette: Moving Marketing Projects Forward with  
a Global Team and Customer Base**

## Executive Summary

[Lunette](#) is a small but fast growing global company, headquartered in the rural community of Juupajoki, Finland.

For Marketing & Social Media Manager Cathy Chapman, keeping up with all of the marketing activities is a daily challenge. As she moves from project to project, she needs to keep her team organized by managing tasks, decisions, and timelines to move everything forward.



Cathy and her team use the Lucid Meetings' agenda to contribute ideas for upcoming meetings, action items to keep everyone on task, and the meeting scheduler to initiate a meeting with potential clients in a professional way.

## Challenges small global companies all face

Working via the web, small companies have access to a global audience and can easily hire team members all over the world - yet managing to keep everyone in sync at all times can be tricky. With the right tools and processes, small teams can overcome just about any remote work task.

### 1) Moving work forward

Cathy's team is based in multiple locations - from the main headquarters in Finland to team members in Utah and Montana. She and her teammates don't see each other every day, so one of their biggest struggles was getting everyone up to speed before a weekly meeting.

In order to not forget what they wanted to discuss in each meeting, they started using Lucid's collaborative agenda editor to jot down ideas as they thought of them throughout the week. Now,

the team comes to meetings prepared because they've been able to contribute directly to the conversation ahead of time.

*"There is no reason that our team shouldn't be prepared for a meeting. It really takes a moment's glance to see what's on the agenda, and it takes a few seconds to add something. Being well organized for a meeting = more productivity. You can definitely put a price on that!"*

## 2) Task Distribution

Cathy uses [Basecamp](#) to stay on top of her projects. In meetings, the team makes decisions about what initiatives they are going to tackle, then they use [Lucid's action items](#) to assign tasks, owners and due dates to team members.

After the meeting, because [Lucid integrates with Basecamp](#), Cathy is able to easily see all of those same tasks in Basecamp with due dates and owners. This allows the team to come together and make decisions in a meeting, yet continue to move work along in their preferred project management software.

## 3) Scheduling meetings with clients

The Lunette team sometimes meets with outside clients or prospects, and they need to look professional when arranging a time for everyone to meet.

Cathy started using Lucid's [online scheduling tool](#) to streamline the scheduling process: sending suggested times, soliciting availability from attendees, and automatically finding the most favorable meeting time for the entire group. This saves time and reduces the manual work involved with multiple rounds of scheduling email.

Once the meeting is scheduled, Lucid's automated reminders send an email notice 10 minutes before a meeting, allowing the team to focus on the preparation process, and helping to ensure full attendance once the meeting starts.

*"We all appreciate the meeting reminders - Lucid does that so our team doesn't have to."*

#### 4) Documentation and easy follow up

Cathy's team takes notes in meetings as a way to keep everyone coordinated from week to week. Their preferred note taking tool used to be Evernote, yet at times participants were hearing and documenting different outcomes.

With Lucid's collaborative note taking tool, everyone in the meeting can take notes, and either add or correct any inconsistencies on the fly. Once a meeting is over, the notes are posted to Basecamp and sent participants [with the click of a button](#).

*"We looked at different apps, but Lucid stood out because it integrated with Basecamp and note taking was simple. We have totally ditched Evernote for our meetings and note taking."*

## Conclusion

Small companies have a great ability in the digital world to reach a global audience for their products. However, coordinating team members all over the globe to move work forward can present unique challenges.

Using Lucid, Cathy can easily move marketing projects forward with a high level of communication at all times. She can document decisions, assign tasks and due dates, view the entire project in Basecamp, coordinate meetings with clients or prospects in a professional manner, and easily send meeting notes to the team.