



ENGAGE

From Connection to Innovation

Harnessing Smartsheet for Business
Transformation

Tommy Maselli | Sam Harwart | *Prime Consulting Group*

v.07/16

What's the most **creative**,
silly, or **downright bizarre**
way you've used Smartsheet?

Share your wildest use case!



 smartsheet
ENGAGE

Legal

Certain information set forth in this presentation may be “forward-looking information.” Except for statements of historical fact, information contained herein may constitute forward-looking statements. Forward-looking statements are not guarantees of future performance and undue reliance should not be placed on them.

Such forward-looking statements necessarily involve known and unknown risks and uncertainties, many of which are and will be described in Smartsheet’s filings with the US Securities and Exchange Commission, and these risks and uncertainties may cause actual performance and financial results in future periods to differ materially from any projections of future performance or results expressed or implied by such forward-looking statements. Although forward-looking statements contained herein are based upon what Smartsheet management believes are reasonable assumptions, there can be no assurance that forward-looking statements will prove to be accurate, as actual results and future events could differ materially from those anticipated in such statements. Smartsheet undertakes no obligation to update forward-looking statements except as required by law.

This presentation is proprietary to Smartsheet and the content herein is confidential and intended for permitted internal use only. This content shall not be disclosed to any third party that is not under an obligation of confidentiality to Smartsheet.

Smartsheet is a registered trademark of Smartsheet Inc. The names and logos of actual companies and products used in this presentation are the trademarks of their respective owners and no endorsement or affiliation is implied by their use.

Who we are

Professional expertise and real world experience



Tommy Maselli

Customer Engagement Manager
Prime Consulting Group



Sam Harwart

Consultant
Prime Consulting Group



“

Did you get my email?

**Any
updates?** ”

Learning objectives

1. **Understand Smartsheet core capabilities** to enhance cross-functional processes
2. **Learn How to design, build, and operate** an collaborative process management system
3. **Be inspired** to bring these principles to your organization

Table of contents

1

Thinking Outside of
the PPM Box

2

How to setup and
execute a
collaborative
process system at
your organization

3

Achieving Business
Transformation

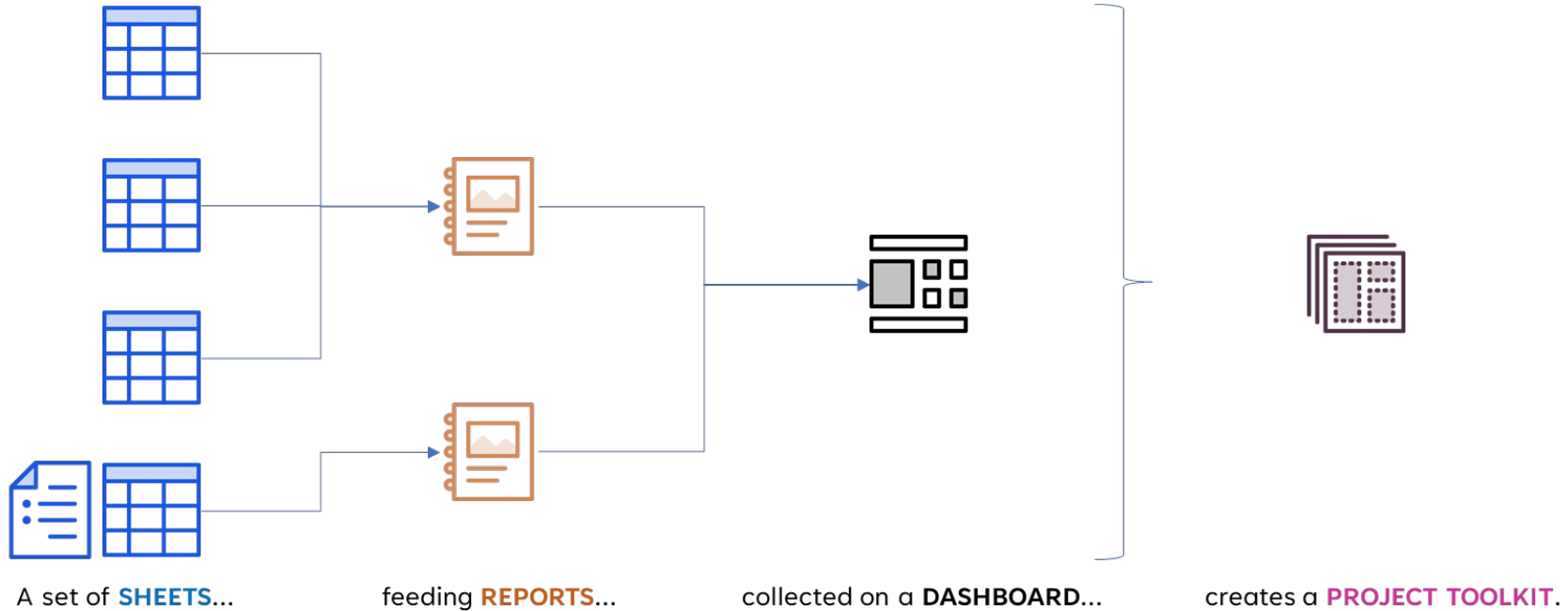
1

Thinking Outside of the PPM Box

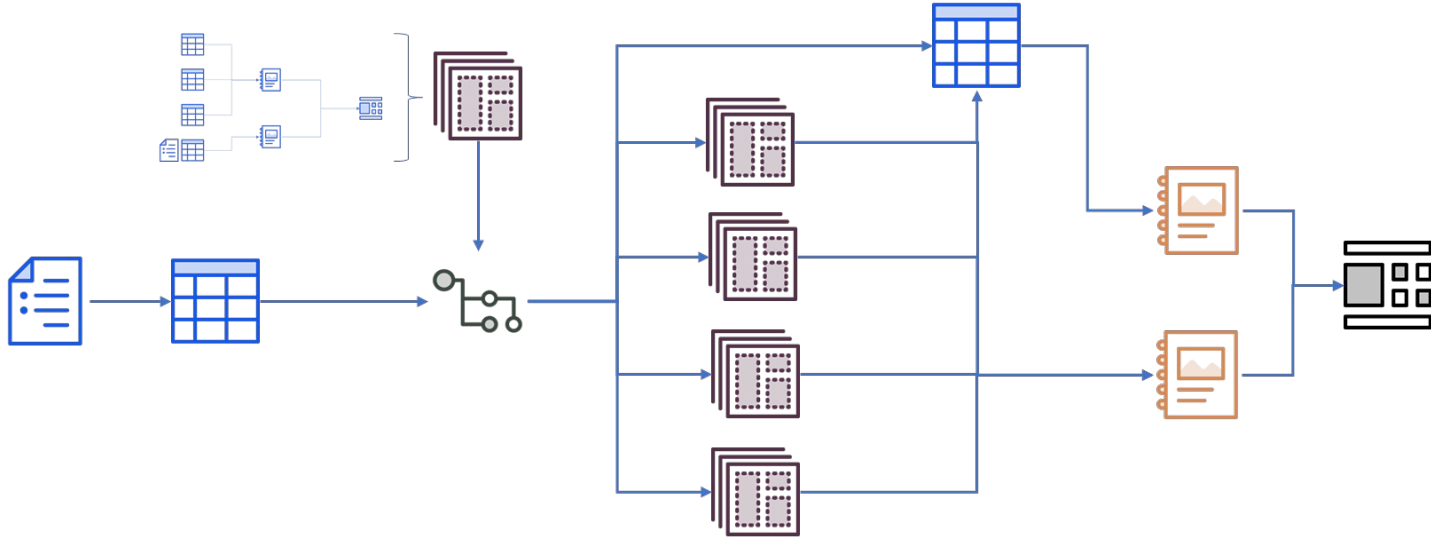
smartsheet

ENGAGE

What can you use Smartsheet for?



What can you use Smartsheet for?



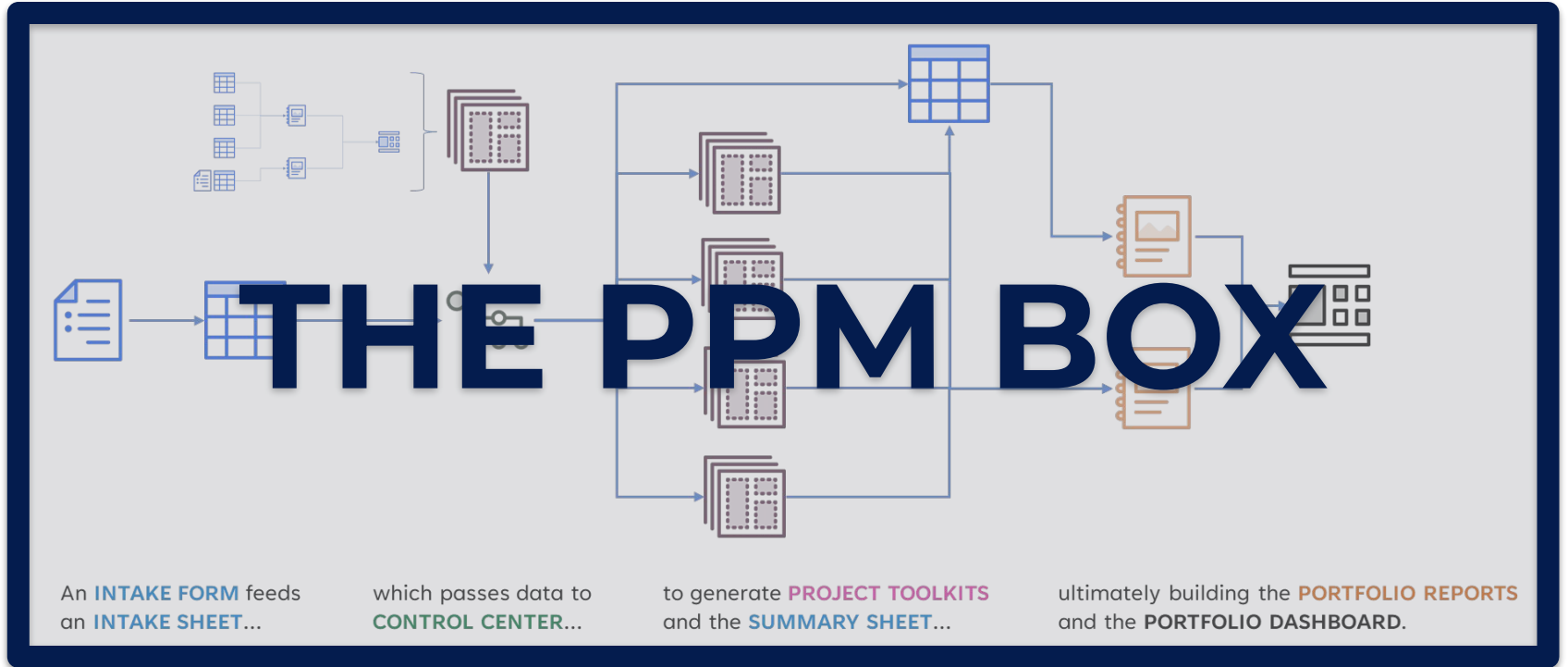
An **INTAKE FORM** feeds an **INTAKE SHEET**...

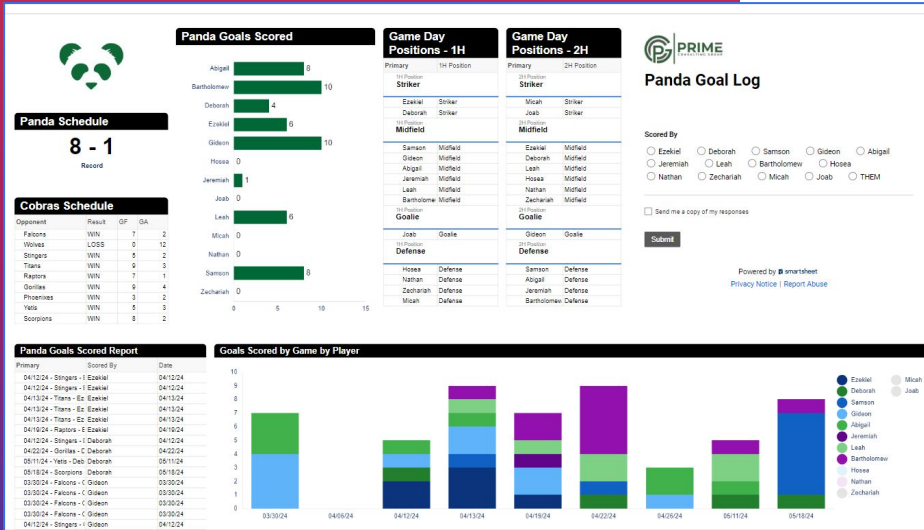
which passes data to **CONTROL CENTER**...

to generate **PROJECT TOOLKITS** and the **SUMMARY SHEET**...

ultimately building the **PORTFOLIO REPORTS** and the **PORTFOLIO DASHBOARD**.

What can you use Smartsheet for?



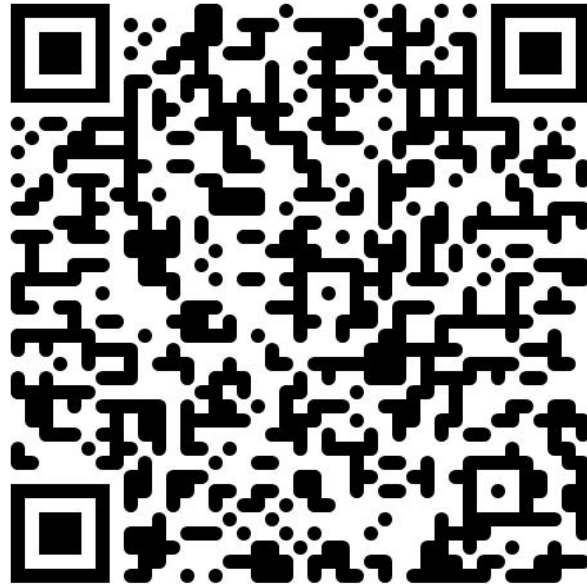


GOOOOOOOOOOAL!

Tracking Team Panda's Soccer Season


Utilizing Smartsheet's functionality for a ~~not so~~ very important use case

What's the most **creative**, **silly**,
or **downright bizarre** way
you've used Smartsheet?




What have YOU used Smartsheet for?

ENGAGE2024 From Connection to Innovation Dashboard ☆



What's the most creative, silly, or downright bizarre way you've used Smartsheet?



Tracking daily coffee consumption trends

Dashboards
Reports

sample@demo.primeconsulting.com

Ranking office plants by growth speed

Forms
Reports

sample@demo.primeconsulting.com

Monitoring snack drawer inventory

Reports
Resource Management

sample@demo.primeconsulting.com

Coordinating team synchronized dance routines

Collaboration Tools
Project Management

sample@demo.primeconsulting.com

Creating a dashboard for tracking sock color trends

Dashboards
Reports

sample@demo.primeconsulting.com

Organizing a company-wide scavenger hunt

Collaboration Tools
Project Management

sample@demo.primeconsulting.com

2

How to setup and execute a collaborative process management system at your organization

Solution Demo: Operations Escalations Management

 smartsheet
ENGAGE

Created date	Created by	Request	Description	Department	Category %	Combo %	Priority	Category Lead %	Assigned to
09/13/24 1:40 PM	John	Facility cleaning request	Submit a request for facility cleaning or maintenance services.	Facilities	General	Facilities_General	1 - High	Matthew	Sam Harwat
09/13/24 1:40 PM	David	Compliance audit request	Initiate an internal or external audit to ensure regulatory compliance.	Finance	Audits	Finance_Audits	3 - Low	Mark	Sam Harwat
09/13/24 1:39 PM	Matthew	Expense report submission	Submit a report for approval of incurred business expenses.	Finance	Expense Reporting	Finance_Expense Rept	1 - High	Luke	Sam Harwat
09/13/24 1:40 PM	Matthew	Budget adjustment request	Request a revision or reallocation of departmental budget.	Finance	Budgeting	Finance_Budgeting	1 - High	Esther	Sam Harwat
09/13/24 1:40 PM	Abraham	Invoice processing request	Submit an invoice for approval and payment processing.	Finance	Invoicing	Finance_Invoicing	2 - Medium	Mark	Sam Harwat
09/13/24 1:40 PM	Moses	Travel reimbursement request	Request reimbursement for business travel expenses.	Finance	Expense Reporting	Finance_Expense Rept	2 - Medium	Luke	Sam Harwat
09/13/24 1:39 PM	Luke	Payroll discrepancy report	Request to investigate a mismatch in an employee's payroll.	HR	General	HR_General	2 - Medium	Abraham	Abraham
09/13/24 1:39 PM	John	Employee training session scheduling	Coordinate the scheduling mandatory or optional emp training sessions.						Abraham
09/13/24 1:40 PM	Ruth	Benefits enrollment assistance	Seek help with employee's enrollment or changes.						Joseph
09/13/24 1:40 PM	Esther	New hire paperwork processing	Submit required forms for processing new employee onboarding.						Joseph
09/13/24 1:40 PM	Abraham	Overtime approval request	Seek managerial approval employee overtime hours.						Joseph
09/13/24 1:40 PM	David	Employee performance review submission	Submit completed performance evaluations for review.						Joseph
09/13/24 1:13 PM	Luke	VPN	Need VPN client or secure option for traveling						David
09/13/24 1:13 PM	Mark	Brandfolder DAM	Please administer our new Brandfolder						David
09/13/24 1:13 PM	Mark	New computer	MacBook Pro, 1TB						David
09/13/24 1:13 PM	Matthew	Replacement badge	Misplaced and need to acc office next week.						David
09/13/24 1:13 PM	Matthew	Phishing Test to Employees	Configure email to test employee information security aware						David

Request *
Enter a title for your escalation request.

Description *
Enter details for your escalation request.

Department *

- Facilities
- Finance
- HR
- Information Technology
- Operations
- Procurement
- Sales
- Supply Chain

Priority *

3 - Low 2 - Medium 1 - High

Send me a copy of my responses

Powered by smartsheet
[Privacy Notice](#) | [Report Abuse](#)

Sheets and Forms

Track your escalations, progress, request status, email and contact information for each individual involved

- Request form feeds directly into the intake sheet
- Automations can be configured for approvals of requests, notification of receipt of requests, and when the orders are fulfilled
- Automated workflows can move rows between sheets so you can track and archive when a request has been fulfilled
- Process approved requests

Reports

Summarize current escalations, identify workload imbalances, and more

- Quickly pull data from the sheets to get accurate, up-to-date visibility into current open escalations, requests in progress, and completed requests
- Organize the escalations by status, priority, department or individual assigned

Request	Description	Created by	Priority	Status	Start Date	End Date	Trend
Total							
Assigned to David							
VPN	Need VPN client or secure network option for traveling	Luke	3 - Low	Complete	09/09/24	09/03/24	
Brandfolder DAM	Please administer our new DAM, Brandfolder	Mark					
Phishing Test to Employees	Configure email to test employee information security awareness	Matthew					
Assigned to Ruth							
Tableau report	Closed won & lost by rep	John					
CSV of Partner Sales	Please configure a automated CSV export from CRM	John					
Assigned to Sam Harwat							
Expense report submission	Submit a report for approval of incurred business expenses.	Matthew					

Request	Description	Department	Category	Priority	Assigned to	Status
Total						Count: 34
Facilities						Count: 1
In Progress						Count: 1
Facility cleaning request	Submit a request for facility cleaning or maintenance services.	Facilities	General	1 - High	Sam Harwat	In Progress
Finance						Count: 9
In Progress						Count: 4
Compliance audit request	Initiate an internal or external audit to ensure regulatory compliance.	Finance	Audits	3 - Low	Sam Harwat	In Progress
Budget adjustment request	Request a revision or reallocation of departmental budget.	Finance	Budgeting	1 - High	Sam Harwat	In Progress
Invoice processing request	Submit an invoice for approval and payment processing.	Finance	Invoicing	2 - Medium	Sam Harwat	In Progress
Travel reimbursement request	Request reimbursement for business travel expenses.	Finance	Expense Reax	2 - Medium	Sam Harwat	In Progress
Not Started						Count: 5

Request	Description	Assigned to	Start Date	End Date	Audits	Priority	Assigned to	Status
Total								Count: 34
Blocked								Count: 10
1 - High								Count: 1
Blocked								Count: 1
Add to SSO page	Need to add our DAM, Brandfolder.	David	09/17/24	09/22/24				Count: 8
In Progress								Count: 8
Facility cleaning request	Submit a request for facility cleaning or maintenance services.	Sam Harwat	09/13/24					
Budget adjustment request	Request a revision or reallocation of departmental budget.	Sam Harwat	09/13/24					
Employee performance review submission	Submit completed performance evaluations for review.	Joseph	09/13/24					
Purchase order approval	Request approval for a purchase order before proceeding with procurement.	Moses	09/13/24					
Procurement request submission	Submit a request for purchasing goods or services for the company.	Moses	09/13/24					
Inventory restocking request	Notify procurement for restocking of low or out-of-stock items.	John	09/03/24					
Shipping delay notification	Alert regarding delays in the shipment of goods or materials.	John	09/13/24					
Traffic Jam Clearing	There's a messy traffic jam in the truck yard, disrupting operations.	Esther						
Not Started								Count: 1
Permissions	Please assign admin permissions	David	09/13/24	09/19/24				Count: 9
2 - Medium								Count: 9
In Progress								Count: 9
Invoice processing request	Submit an invoice for approval and payment processing.	Sam Harwat	09/13/24					
Travel reimbursement request	Request reimbursement for business travel expenses.	Sam Harwat	09/13/24					

The screenshot displays the Smartsheet 'Escalation Tracker' interface. A workflow configuration window is open, showing the following details:

- Trigger:** When rows are added or changed
- When:** Assigned to changes to: Any Value
- Run workflow:** When triggered
- Action:** Alert someone (Assigned to)

The background table contains the following data:

Request	Description	Department	Category	Combo	Priority
Facility cleaning request	Submit a request for facility cleaning or maintenance services.	Facilities	General	Facilities_General	1 - High
Compliance audit request	Initiate an internal or external audit to ensure regulatory compliance.	Finance	Audits	Finance_Audits	3 - Low
Expense report submission	Submit a report for approval of incurred business expenses.	Finance	Expense Reporting	Finance_Expense Rep	1 - High
Budget adjustment request	Request a revision or reallocation of departmental budget.	Finance	Budgeting	Finance_Budgeting	1 - High
Invoice processing request	Submit an invoice for approval and payment processing.	Finance	Invoicing	Finance_Invoicing	2 - Medium
Travel reimbursement request	Request reimbursement for business travel expenses.	Finance	Expense Reporting	Finance_Expense Rep	2 - Medium
Payroll discrepancy report	Request to investigate an employee's payroll	Human Resources	Payroll	HR_Payroll	Medium
Employee training session scheduling	Coordinate the scheduled mandatory or optional training sessions.	Human Resources	Training	HR_Training	Medium
Benefits enrollment assistance	Seek help with employee enrollment or changes	Human Resources	Benefits	HR_Benefits	Medium
New hire paperwork processing	Submit required forms processing new employee onboarding.	Human Resources	Recruitment	HR_Recruitment	Medium
Overtime approval request	Seek managerial approval for employee overtime hrs.	Human Resources	Time Management	HR_Time Management	Medium
Employee performance review submission	Submit completed performance evaluations for review	Human Resources	Performance	HR_Performance	Medium

Automated Workflows

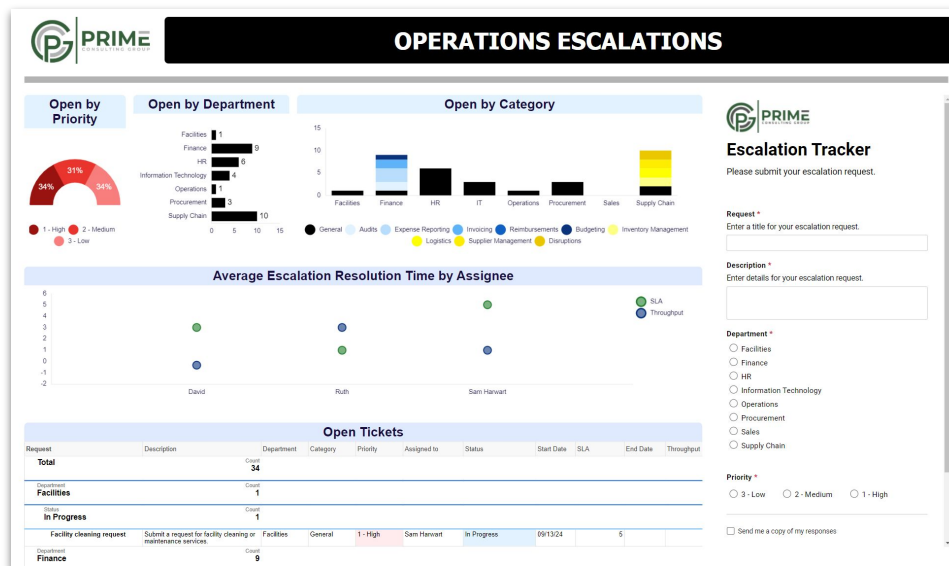
Provide your team reminders, alerts and create additional efficiency

- Send alerts and requests to specific users
- Send tailored approval requests, approval messages, and approval alerts
- Auto-assign deadlines using formulas
- Let users know when their escalation has been addressed or if more information is needed

Dashboards

The most important information when you need quick top-level information

- Visibility into metrics
- Critical calculations ready-to-go, like your supply burn rate so you know the speed at which your various inventory is being used and where you need to focus on getting new inventory
- Surface valuable information, links, and resources
- Create a view for people directly responsible for inventory requests and fulfillment



Live Demo

3

Tying it all together

Achieving Business Transformation

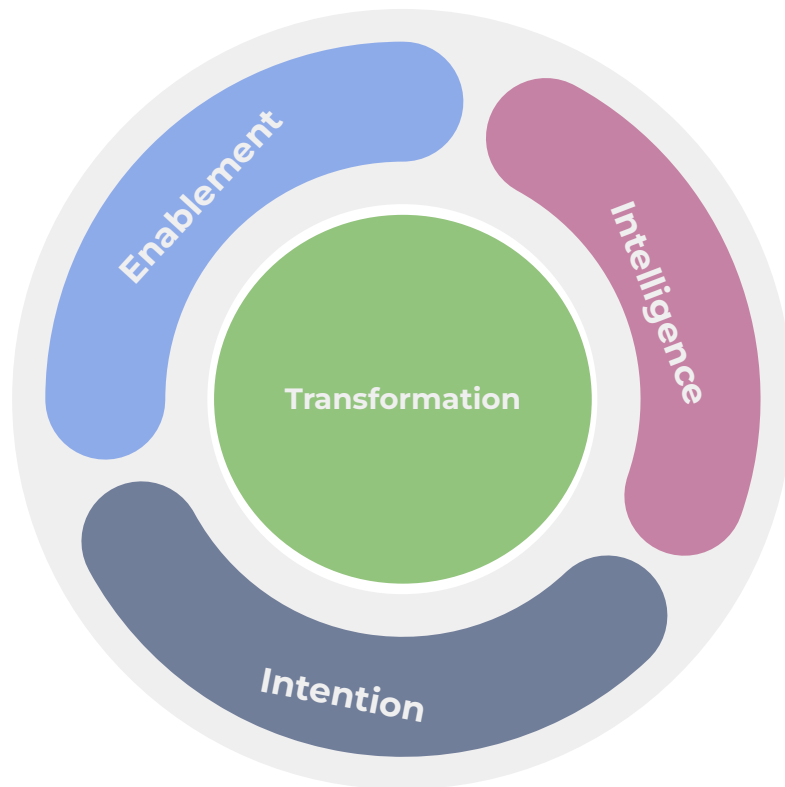
smartsheet

ENGAGE

Core Capabilities

To achieve transformation

- **Views**
Grid, Gantt, Timeline, Card, Board, Calendar, Reports, Dashboards
- **Automation**
Alerts, Update Request, Approvals, Assignments, Update Data
- **Team Collaboration**
Sharing, Attachments, Conversations, Proofing, Notifications





“It is hard to fail, but it is worse never to have tried to succeed.”

- Theodore Roosevelt

Q&A

Register for upcoming User Groups



Continue to expand your Smartsheet skills and connections by attending a **User Group**.

Smartsheet User Groups

- **Discover** how others are using Smartsheet
- **Network** with the Smartsheet team and your peers
- **Virtual** and **in-person** events around the globe

Connect with us on LinkedIn!



Tommy Maselli

tommy.maselli@primeconsulting.com



Sam Harwart

sam.harwart@primeconsulting.com



Take the survey

We'd love to hear your thoughts on the session.

Open this session in the mobile app, click "Survey,"
and answer two questions — it's that easy!

Thank you.

 smartsheet

ENGAGE

Visit us at Booth #603!



Share your experience at ENGAGE

by participating in the conversation on social media!
Use **#SmartsheetENGAGE** and tag Smartsheet
in your posts all week long.



@smartsheet



@smartsheetplatform



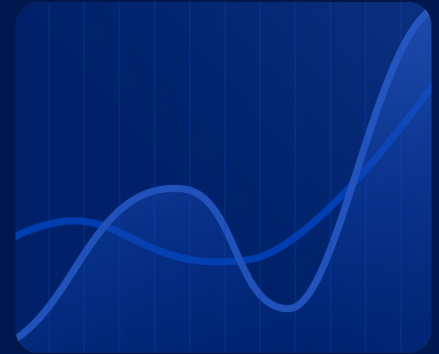
@smartsheet



@smartsheet



@smartsheet



 smartsheet

ENGAGE



Booth #603