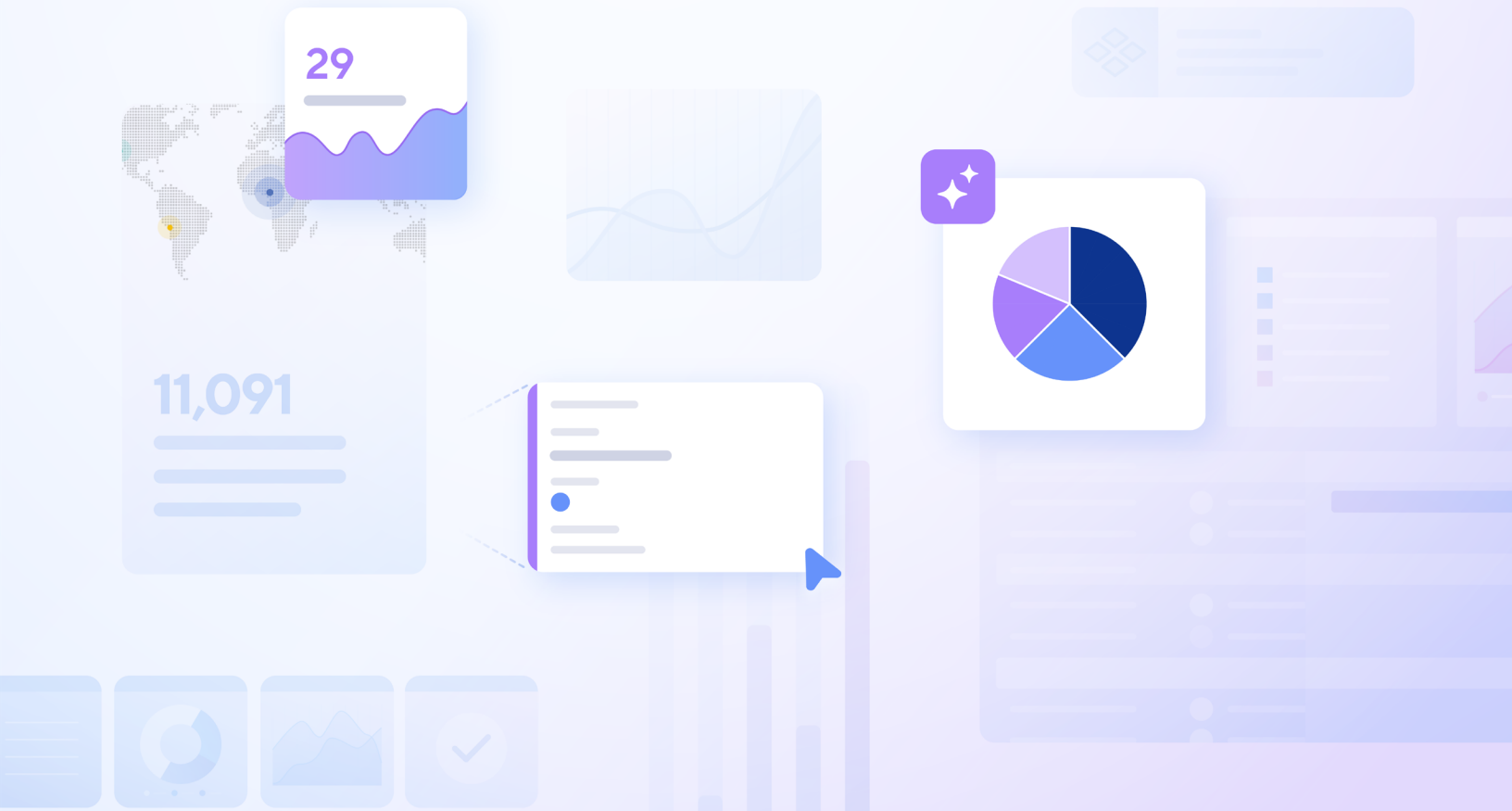
THE ENTERPRISE WORK MANAGEMENT PLAYBOOK

How leading enterprises use Smartsheet to drive success



smartsheet

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Introduction

Today's enterprises need more than basic project management tools. To lead, they must balance innovation, agility, and efficiency across departments, geographies, and teams. They need project and portfolio management (PPM) solutions that empower professionals to manage work at scale while adhering to stringent IT and security standards.

99%

of PPM professionals say their organization would benefit from better enabling technology that helps them adapt to change.

From the Smartsheet *The 2025 project and portfolio management priorities report*

Why work management leadership matters

In today's fast-paced market, work happens across teams, tools, and time zones — but without connected data, streamlined collaboration, and efficient workflows, silos form, productivity suffers, and innovation stalls. Businesses need scalable, cross-functional solutions to connect people, processes, and technology — ensuring teams have the tools for seamless collaboration across internal and external stakeholders. The key? Empower employees to build and adapt these solutions without relying on IT to make it happen.

Traditional tools fall short because they lack the ability to manage advanced workflows and complex project portfolios while maintaining enterprise-grade security. They struggle to support large data sets and seamless collaboration across stakeholders, leading to inefficiencies. Home-grown or IT-configured tools often fail to scale, adding to IT backlogs and delaying the creation of workflow-based solutions. In addition, siloed data and fragmented tools further hinder efficiency, limiting organizational potential.

Organizations need modern, collaborative work management solutions that empower end users with low-code/no-code capabilities while integrating with existing enterprise systems for streamlined data access. These solutions must enable secure and efficient collaboration across teams and stakeholders, providing robust reporting and visibility to support executive decision-making. They should offer the flexibility to scale as organizational needs evolve, ensuring long-term adaptability and growth.

Smartsheet empowers teams to achieve this by unifying people, processes, and technology.

Work management leadership enables organizations to:

Drive visibility and alignment across complex projects.

Accelerate innovation by streamlining workflows and fostering collaboration.

Scale operations with enterprise-grade security and integrations.

Drive operational excellence and deliver measurable outcomes that impact business growth.

The enterprise work management framework

To lead in work management, enterprises must excel in four key areas: visibility, collaboration, automation, and governance. Leveraging AI alongside these pillars enhances agility and efficiency, enabling organizations to navigate with confidence in a complex business landscape.

Visibility: A single source of truth

Organizations need centralized data and workflows for transparency, alignment, and informed decision-making. Smartsheet delivers real-time insights through Dashboards, Reports, and Sheet Summaries, enabling stakeholders to track KPIs and progress with ease. With a unified source of truth, enterprises eliminate guesswork, streamline goals, and fast-track business success.

Collaboration: Unified work execution

Modern enterprises rely on cross-functional teamwork, but siloed communication creates inefficiencies. Smartsheet enhances collaboration with features like Collaborative Sheets, Dynamic View, and Conversations, keeping teams aligned and working in context. By streamlining communication and fostering accountability, organizations can accelerate execution and keep projects on track.

Automation: Scaling with efficiency

Manual processes waste resources, increase errors, and hinder innovation. Enterprises need automation to optimize workflows and boost productivity. Smartsheet leverages AI to optimize workflows, reduce manual effort, and provide actionable insights, enabling enterprises to support fast, efficient growth at any scale.

Governance: Enterprise-grade control

Enterprises need security, compliance, and scalability to manage vast data and complex workflows. Smartsheet Admin Center, Security Controls, and enterprise-grade integrations ensure robust governance. IT leaders can enforce compliance and control access, while enabling secure and scalable operations.

By excelling in visibility, collaboration, automation, and governance, enterprises can transform work management, drive innovation, and stay ahead in a competitive landscape. Smartsheet provides the tools to achieve these outcomes, empowering organizations to work smarter, faster, and with greater impact.

Key takeaways

Visibility

- **Smartsheet solution:** Dashboards, Reports, and Sheet Summaries provide real-time insights into work progress
- **Benefits:** Stakeholders can align goals, monitor KPIs, and make decisions faster

Collaboration

- **Smartsheet solution:** Collaborative Sheets, Dynamic View, and Conversations allow seamless communication
- **Benefits:** Teams break down silos and execute work in context, ensuring alignment and accountability

Automation

- **Smartsheet solution:** Automations for approvals, notifications, and task updates
- **Benefits:** Teams save time, reduce errors, and focus on higher-value initiatives

Governance

- **Smartsheet solution:** Admin Center, Security Controls, and Integrations with enterprise systems (SSO, DLP, etc.)
- **Benefits:** IT leaders can manage access, data, and enterprise-level workflows with confidence

Steps to achieving work management leadership

Leading in work management requires more than just the right tools — it demands a strategic approach that fosters efficient collaboration, real-time visibility, and standardizing best practices. Below are essential steps to optimize workflows, empower teams, and drive business success at scale.

1 Build the foundation

Work management leadership starts with a strong foundation. Identify team challenges, align leaders on a shared vision, and establish Smartsheet as the central platform to enhance collaboration and drive impact.

Take these steps:

- [ ] Identify key work management challenges across teams ensuring you have a clear understanding of pain points and opportunities.
- [ ] Align executive sponsors and department leaders on the vision, to drive buy-in and collaboration.
- [ ] Establish Smartsheet as the central platform for managing critical work.

30%

efficiency gains experienced by organizations that implement team-centric approach to transformation effectively, according to a McKinsey report.

2 Drive adoption

Next, deliver quick wins by rolling out solutions like Project Portfolio Management. Provide teams with training for smooth adoption and leverage Smartsheet Professional Services for custom solutions that drive impact faster.

Take these steps:

- [ ] Roll out key solutions and use cases for immediate value (e.g., Project Portfolio Management, Marketing Campaign Management).
- [ ] Empower teams with training and onboarding resources.
- [ ] Leverage Smartsheet Professional Services to create complex workflows and solutions.

35%

higher project success rates have been observed in organizations utilizing Project Portfolio Management (PPM) compared to those that don't employ such methodologies, according to a study by Dart.

3 Innovate

Use AI to reduce manual work, freeing teams to focus on strategy. Scale with advanced solutions that standardize processes and drive efficiency. Foster continuous improvement by refining workflows, embracing innovation, and optimizing work.

Take these steps:

- [ ] Leverage Smartsheet AI and automation features to streamline repetitive tasks, reduce errors, and boost efficiency.
- [ ] Utilize premium add-ons like Control Center, Bridge, and Brandfolder to standardize processes and drive consistency across teams.
- [ ] Foster a culture of continuous improvement by analyzing workflow performance, refining processes, and adopting new technologies.

40%

greater operational efficiency is the impact AI and machine learning automation have delivered across various sectors, streamlining processes and reducing manual effort.

FlairHR

4 Automate workflows and scale solutions

Connect workflows across departments for better visibility and collaboration. Scale adoption with resource management for capacity planning, automation for efficiency, and advanced reporting for insights. Integrate Smartsheet with enterprise tools for seamless, data-driven workflows and solutions.

Take these steps:

- [ ] Connect teams across departments by centralizing work in Smartsheet, ensuring transparency and real-time collaboration.
- [ ] Scale adoption by implementing solutions for resource management, automation, and advanced reporting, to drive efficiency and impact.
- [ ] Integrate Smartsheet with essential tools like Microsoft, Salesforce, and Jira, creating a seamless, data-driven workflows.

75%

of employees regard collaboration and teamwork as essential parts of the workplace.

Go Remotely

5 Measure success

Use data insights to track progress, efficiency, and impact. Drive continuous improvement by gathering feedback and refining processes. Align stakeholders by demonstrating measurable outcomes, ensuring ongoing support and long-term success.

Take these steps to build a strong foundation:

- [ ] Use dashboards and reports to showcase ROI, efficiency gains, and team productivity.
- [ ] Use Smartsheet forms to collect structured feedback from teams on workflows, pain points, and areas for improvement.
- [ ] Link feedback data to Smartsheet automation, reports, and project plans to track how optimizations are implemented and measure their effectiveness over time.

15-25%

reduction in operational costs and significant cost savings realized by organizations implementing data-driven decision making.

6Sigma

Why Smartsheet for the enterprise

Leading enterprises choose Smartsheet for its seamless blend of flexibility, power, and security to manage work at scale. Built for complex workflows and cross-functional collaboration, Smartsheet integrates with existing data and tools while maintaining enterprise-grade security and scalability. With unmatched adaptability and dedicated support, Smartsheet empowers teams to drive innovation, streamline operations, and achieve business success.

Flexibility: A platform tailored to your business

Smartsheet adapts to the unique needs of any organization, providing the flexibility to build solutions that align with specific business objectives. Whether automating repetitive tasks, customizing workflows, or designing tailored dashboards, Smartsheet empowers teams to work the way they want. Its low-code/no-code capabilities make it easy for users at all levels to configure solutions that enhance productivity and efficiency.

Interoperability: A connected enterprise ecosystem

Providing seamless integration with essential business applications, Smartsheet enhances enterprise connectivity and efficiency. With seamless integration into Microsoft Teams, Google Workspace, Salesforce, Jira, and other essential tools, Smartsheet eliminates silos and keeps data flowing efficiently across systems. By unifying technology stacks, organizations can streamline workflows, improve collaboration, and enhance decision-making with real-time insights across all platforms.

Security: Enterprise-grade protection and compliance

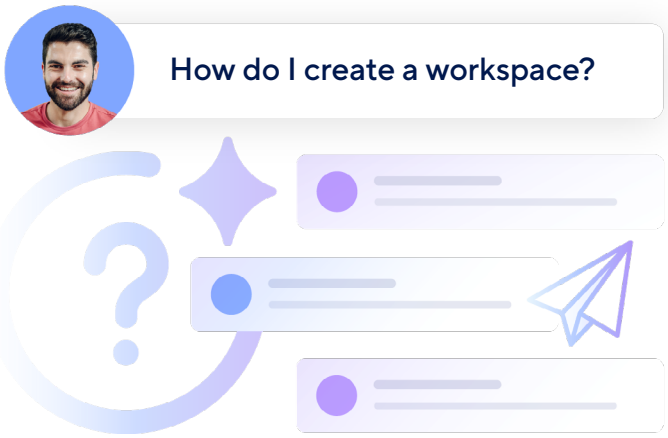
With robust security, governance, and compliance capabilities, Smartsheet is a trusted solution for enterprises handling sensitive data and mission-critical operations. It offers advanced access controls, encryption, and regulatory compliance certifications, ensuring organizations meet industry standards while safeguarding information. From user authentication to data protection, Smartsheet provides a secure foundation for businesses operating in highly regulated environments.

Scalability: Powering growth at any level

The platform's scalable infrastructure allows organizations to manage projects and workflows of any size, from department-level initiatives to enterprise-wide programs. Its advanced capabilities support complex project management, resource allocation, and automation, ensuring businesses can grow without limitations. Whether handling a single project or orchestrating thousands across global teams, Smartsheet provides the visibility and control needed to drive success at scale.

Customer support: Comprehensive resources for success

Enterprises benefit from Smartsheet extensive onboarding resources, professional services, and training programs, ensuring teams quickly adopt and maximize the platform's capabilities. With dedicated support channels and expert guidance, organizations can optimize their workflows and drive long-term success. Additionally, AI-powered tools help accelerate adoption, enabling users to unlock value faster through intelligent automation, recommendations, and streamlined processes.



Actionable insights

Unlock innovation

Democratize solution-building with low-code/no-code tools.

Harness enterprise-grade security for end-user-driven innovation.

Enhance collaboration

Facilitate seamless internal and external collaboration.

Offer pre-built integrations with tools like Jira, Salesforce, and Microsoft.

Drive operational excellence

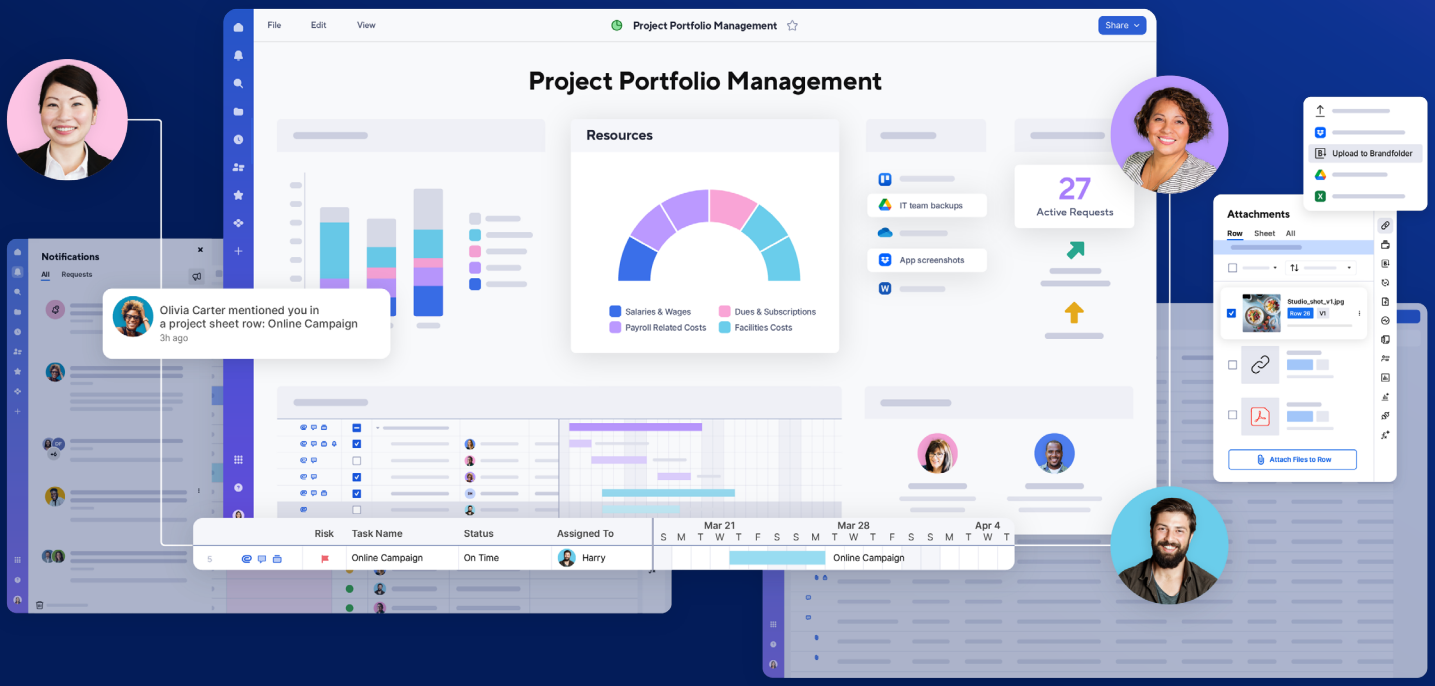
Automate complex workflows to reduce manual effort.

Provide real-time insights for better decision-making.

Scale with confidence

Support for large-scale projects (e.g., run multiple portfolios of up to 60,000 projects).

Enterprise-grade reliability with 99.9% uptime and robust SLAs.



Smartsheet in action

Leading enterprises rely on Smartsheet to solve challenges across teams by providing powerful solutions for work management and collaboration. Project and Portfolio Management ensures alignment on project goals, resources, and deliverables, keeping teams on track. Marketing Operations streamlines campaign planning, asset management, and execution for greater efficiency.

IT and PMO teams leverage Smartsheet to manage enterprise-wide initiatives, governance, and reporting with clarity and control. Resource Management optimizes workloads and capacity planning, ensuring teams operate at peak efficiency. Operational excellence is achieved through workflow automation, driving standardization and process efficiency across the organization.

Scenario 1: Business PMO — Automation and optimization

Business PMO teams use Smartsheet to automate workflows and optimize processes, ensuring standardized execution, improved visibility, and greater efficiency across enterprise-wide initiatives.

1 Initiate: Submitting a project request

A team member submits a new project request through a centralized intake form in Smartsheet. The form captures key details such as project objectives, estimated resources, and priority level.

2 Automate: Routing for approval

The request is automatically assigned to the appropriate approver based on predefined workflows. Notifications are sent to decision-makers, who can review, approve, or request additional details — all within Smartsheet.

3 Track: Monitoring project pipeline

Once approved, the project request moves into the pipeline, updating a real-time dashboard. Stakeholders gain visibility into project status, upcoming initiatives and resource availability at a glance.

4 Optimize: Streamlining progress tracking

Teams execute work while tracking milestones, dependencies, and deliverables. Automated updates and reminders keep tasks on schedule, ensuring nothing falls through the cracks.

5 Report: Gaining actionable insights

Leaders access dynamic reports showcasing project progress, bottlenecks, and overall portfolio health. These insights drive informed decision-making, helping PMOs allocate resources effectively and align initiatives with business priorities.

6 Iterate: Continuous improvement

With a structured intake and reporting system in place, teams regularly assess workflow efficiency, identify opportunities for optimization, and refine processes to enhance future project execution.

90%
productivity boost

The Cisco Public Sector team used Smartsheet DataMesh and Control Center to cut hours and effort out of the workday.

$1M
saved annually

at Sutherland using Smartsheet, with real-time business visibility for leadership.

Scenario 2: Enterprise PMO (EPMO) — Strategic alignment and portfolio optimization

Enterprise PMO (EPMO) teams use Smartsheet to drive strategic alignment and portfolio optimization, ensuring enterprise-wide visibility, governance, and data-driven decision-making for maximum business impact.

1 Define: Establishing strategic alignment

Leadership sets enterprise-wide priorities, defining key business objectives and success metrics. The Enterprise PMO (EPMO) creates a structured project intake framework to ensure all initiatives align with these strategic goals.

2 Plan: Prioritizing and approving projects

Teams submit project proposals through a centralized intake system. Automated workflows assess alignment with organizational objectives, resource availability, and potential impact. Approved projects move forward based on data-driven prioritization.

3 Track: Managing enterprise-wide portfolios

Once initiated, projects are categorized within a portfolio dashboard, providing executives and PMOs with real-time visibility into ongoing initiatives. Automated tracking ensures alignment with timelines, budgets, and strategic milestones.

4 Optimize: Identifying risks and resource gaps

Portfolio reporting highlights dependencies, risks, and bottlenecks across multiple projects. Advanced analytics help EPMOs assess progress, adjust priorities, and reallocate resources as needed to maintain efficiency and maximize impact.

5 Report: Enabling data-driven decision-making

Customizable reports provide leadership with insights into portfolio performance, ensuring informed decision-making on funding, workforce allocation, and strategic direction. The ability to compare projected vs. actual outcomes helps refine future planning.

6 Evolve: Driving continuous improvement

With a structured framework in place, the EPMO regularly reviews performance data to refine governance models, optimize workflows, and ensure future projects continue driving enterprise-wide success.

200

projects tracked

end-to-end using Smartsheet at DirectTV in a centralized view. The projects in that portfolio continue to expand and evolve.

500

hours saved across one team

Bayer built a project and portfolio management solution in Smartsheet, as well as a tool for tracking company and team-level objectives.

Navigating the approval process

Implementing Smartsheet at the enterprise level requires a strategic approach to gain approval from key stakeholders across IT, Security, and Procurement. By aligning with governance requirements, demonstrating seamless integration, and showcasing Smartsheet flexible licensing, you can streamline the approval process and drive organizational adoption.

Preparation: Aligning with stakeholders

Before proposing Smartsheet for enterprise approval, it's essential to ensure alignment with internal governance and compliance requirements. Involve IT, Security, and Procurement early in the process:

- **IT & Security Alignment —** Collaborate with IT and Security teams early in the process to confirm Smartsheet meets governance, compliance, and data protection standards. This proactive approach prevents roadblocks later in the approval cycle.
- **Procurement Readiness —** Present a compelling case to Procurement, emphasizing the Smartsheet flexible licensing options and transparent cost structure to demonstrate scalability and cost efficiency.

Positioning Smartsheet for key decision-makers

Effectively positioning Smartsheet value across departments ensures a smoother approval process. Address specific concerns and priorities for IT, Security, and Procurement:

- **IT —** Smartsheet seamlessly integrates with enterprise systems such as Microsoft, Salesforce, and Jira, reducing the complexity of managing multiple tools and minimizing administrative overhead.
- **Security —** With enterprise-grade security features, Smartsheet meets compliance standards for data governance, encryption, and user access control, ensuring safe and secure information management.
- **Procurement —** Smartsheet offers dynamic licensing models that adapt to business needs, providing cost-effective scaling without unnecessary overhead, making it a sustainable long-term investment.

By preparing thoroughly and tailoring the Smartsheet value proposition for each stakeholder group, enterprises can accelerate the approval process and drive successful implementation.

Next steps: Become a leader in enterprise work management

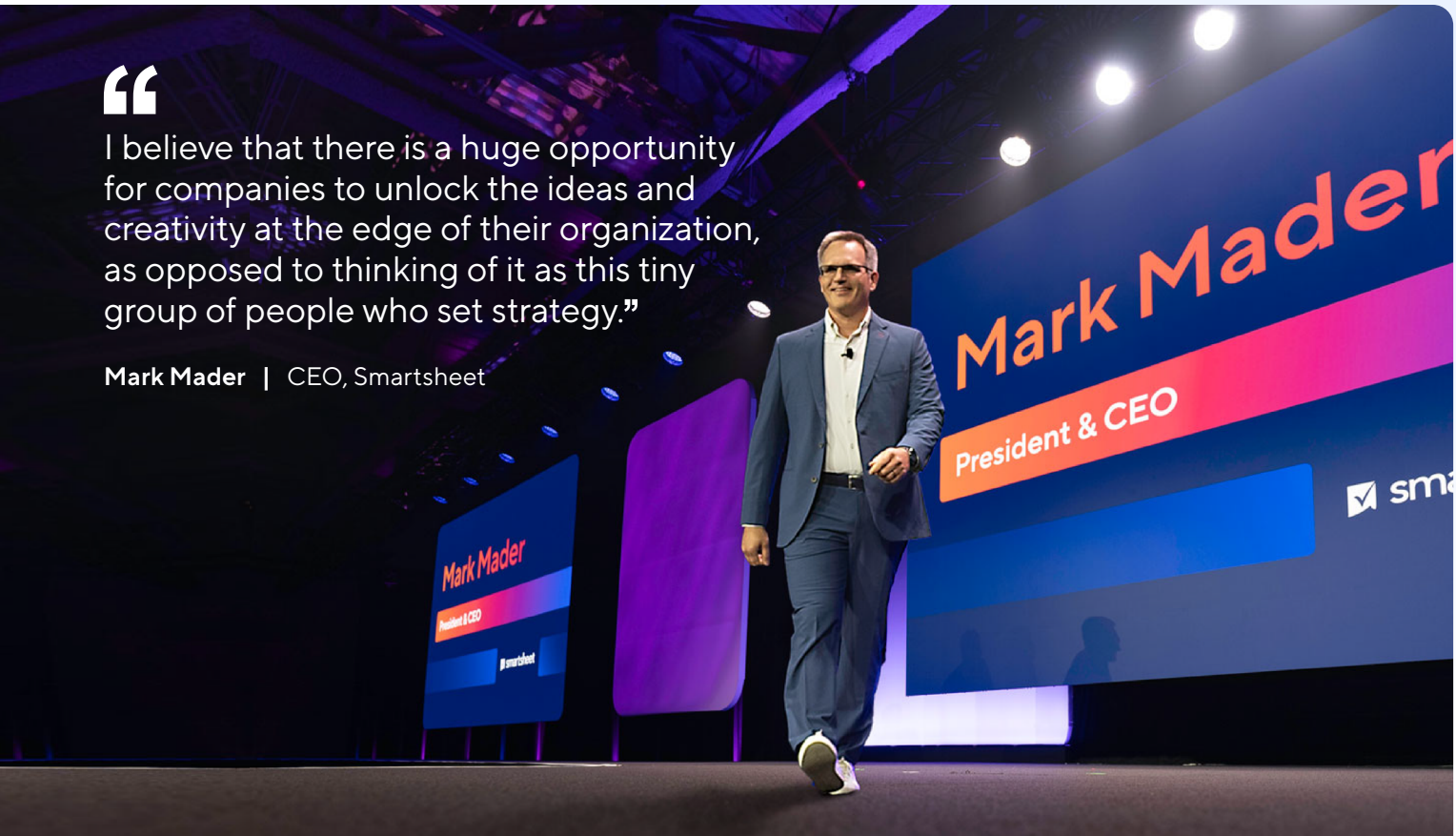
Bringing Smartsheet to your enterprise

Request a demo: Explore the possibilities

The best way to understand the product's impact is to see Smartsheet in action. Schedule a **consultation with our Enterprise Success Team** to explore how Smartsheet capabilities align with your organization's needs. Our experts will guide you through advanced solutions, enterprise integrations, and automation features that enhance productivity, improve collaboration, and drive work management excellence. Whether your focus is project portfolio management, resource planning, or enterprise-wide automation, a live demo provides a hands-on look at how Smartsheet can solve your most pressing challenges.

Start building: Empower teams and scale innovation

The Smartsheet low-code/no-code platform enables teams to build custom workflows, reports, and dashboards without requiring IT intervention. With pre-built templates and automation features, your organization can quickly configure Smartsheet to fit specific business needs. From automating approvals and tracking enterprise-wide projects to integrating with Microsoft, Salesforce, Jira, and more, Smartsheet helps teams scale efficiently. Start leveraging Smartsheet today to accelerate innovation, enhance collaboration, and drive measurable results.



"I believe that there is a huge opportunity for companies to unlock the ideas and creativity at the edge of their organization, as opposed to thinking of it as this tiny group of people who set strategy."

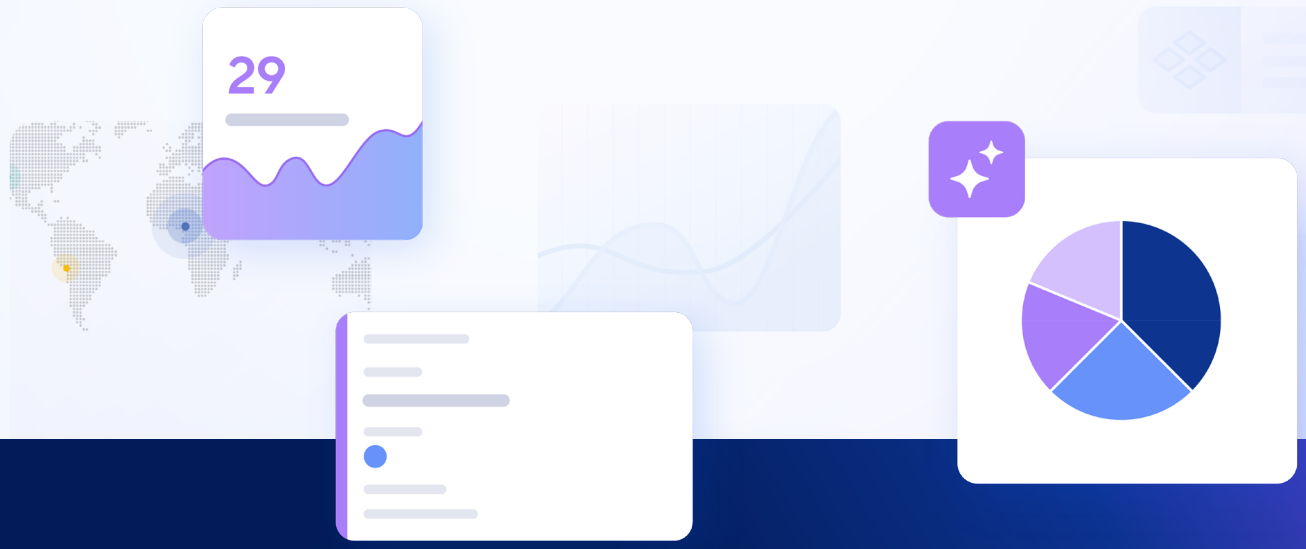
Mark Mader | CEO, Smartsheet

Closing thoughts

Work management leadership isn't just about tools — it's about creating a culture of innovation, execution, and scalability that empowers teams to thrive in today's fast-moving business landscape. True leadership in work management requires visibility across projects, streamlined collaboration, and the agility to adapt to changing priorities — all while maintaining security and compliance at scale.

With Smartsheet, enterprises gain a powerful, flexible platform that enables teams to automate workflows, align projects with strategic goals, and integrate seamlessly with existing enterprise systems. Whether managing portfolios, optimizing resources, or driving operational excellence, Smartsheet provides the infrastructure needed to break down silos, accelerate decision-making, and scale success across the organization.

By embracing enterprise-wide work management, your organization can stay ahead of the competition, empowering teams to deliver measurable business impact — all within a secure, governed, and scalable environment.



To learn more about how Smartsheet can help you become a leader in work management, contact us to request a live demo.

Contact us

Notes

About Smartsheet

Smartsheet is the AI-powered enterprise work management platform trusted by millions of people at companies across the globe, including approximately 85% of the 2024 Fortune 500 companies. As a pioneer and market leader in this category, Smartsheet delivers powerful solutions fueling performance and driving the next wave of innovation.

Visit www.smartsheet.com to learn more.

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