



ENGAGE

# Perfecting the art of IT prioritization

Are you doing the most impactful work?

# 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.

# Session Speakers

Who are we anyways?



**John Parsons**  
Consulting Manager



**Josh Jones**  
Sr. Solutions Engineer



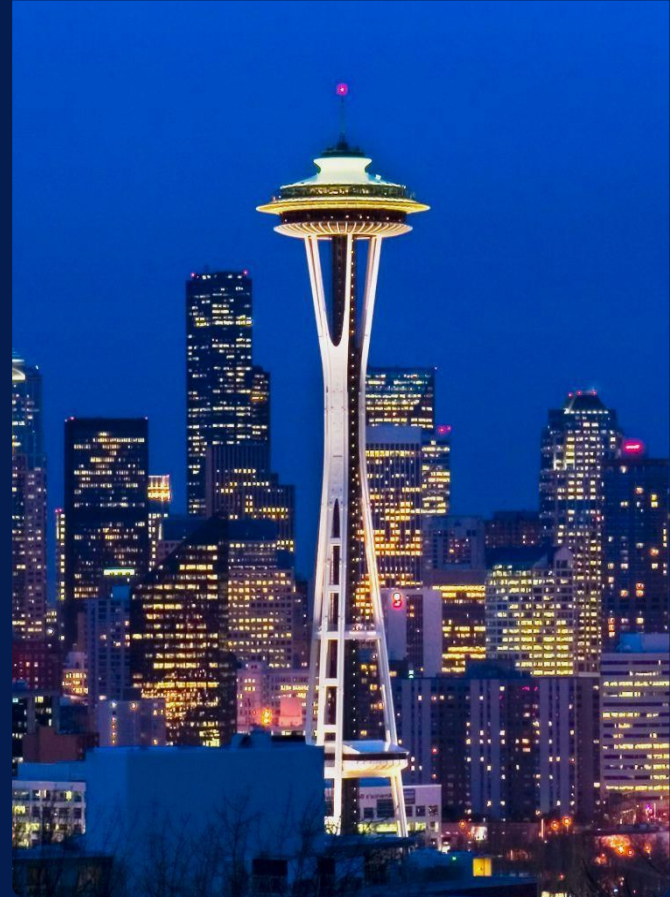
# Learning Objectives and Agenda

You should leave here feeling confident about:

- 1 What prioritization is, what it is not  
And **why it's critical** to your business
- 2 Common prioritization approaches  
Learn **how to implement** prioritization based on overall maturity
- 3 How to elevate your prioritization maturity  
Align the **people, process, and tools** to achieve your strategic goals

# First Things First

Let's get acquainted




1

## What prioritization is, and what it is not

*“When everything is a priority, nothing is a priority”*

smartsheet

ENGAGE



**“ There is nothing so useless  
as doing effectively that  
which should not have  
been done at all. ”**

- Peter Drucker



# First Priority

## Definition

### **Portfolio Prioritization**

*Port·fo·li·o Pri·or·i·ti·za·tion*

**Definition:** The process of ranking and selecting projects or initiatives within a portfolio of work based on their alignment with strategic objectives, resource availability, and potential benefits.

# Prioritization in Daily Work

What is prioritization and what is it not

**'Top 100 Projects'**

**'Adapting to Changing Demands'**

**'Risk Mitigation'**

**'The Business wants it'**

**'Unifying people and process'**

**'Machine Learning work'**

**'Highest Value Work'**

**'It's AI based'**

**'Flip a Coin to see'**

**'Alignment of the Work and Strategy'**

**'I said to do this'**

**'Doing the Right Things'**

**'It has more AI'**

**'The research said we had to'**

**'Tied to strategic initiatives'**

# Do we really need it?

Understanding the benefits

In a word...

# YES!

But why?

Increased  
project success

50%

ROI  
improvement

25%

Resource  
efficiency

30%

Reduced time  
to value

25%

Alignment to  
strategic goals

60%

# 2

## Common prioritization approaches

And how to implement them in Smartsheet

 smartsheet  
ENGAGE

# When 'Prioritization' Isn't Prioritization

What to look for when starting from scratch...

## What to look for

- Informal, ad-hoc decision-making
- Intuitive judgments, minimal data
- Reactive, vocal stakeholder influence
- Resource and documentation limitations

## Example 'Approaches'

### Intuitive Judgement

Decisions based on experience and gut feeling

### First-in, First-out (FIFO)

Projects handled in the order they arrive

### Squeaky Wheel

Order based on urgency and most vocal stakeholders

### Single-Criterion Ranking

Order based on a single factor like cost or urgency

# The Maturity Journey

How do we know what we need

## Initial



- Process exists, but followed inconsistently
- Low stakeholder engagement
- Minimal data usage
- Limited, if any, documentation

## Defined



- Utilizes an established and consistent process
- Regular stakeholder collaboration
- Improved data usage
- Improved documentation

## Optimized



- People and process are tightly aligned to a tool and framework
- Deep stakeholder engagement
- Extensive data usage
- Robust documentation

# Initial Maturity Prioritization

Evolve as you grow...

## What to look for

- **Basic process** but inconsistent
- Minimal data used to inform decisions
- Limited stakeholder involvement
- Resource constraints
- Limited documentation

## Example Approaches

### Simple Scoring Model

Scoring projects on simple predefined criteria.

### MoSCoW Method

Categorize as Must have, Should have, Could have, Won't have

### Eisenhower Matrix

Prioritizing based on urgency and importance

# Demo

Initial Maturity Level





# Defined Maturity Prioritization

Getting things dialed in...

## What to look for

- Established, consistent processes
- Structured and agreed upon frameworks
- Regular stakeholder collaboration
- Improved documentation and management of resources
- Increased data used for driving decisions

## Example Approaches

**Weighted Scoring Model**

**Advanced scoring with weighted criteria**

**Weighted Shortest Job First (WSJF)**

Prioritizing based on cost of delay and job size

**Balanced Scorecard**

Evaluating projects from multiple perspectives

# Demo

Defined Maturity Level



3

## How to elevate your prioritization maturity

Optimize and accelerate results

 smartsheet  
ENGAGE

# Traits of an Optimized Prioritization Process

Let's turn it up to 11!

- ✔ Advanced process that is clearly communicated across the organization
- ✔ Robust documentation and change management
- ✔ Comprehensive framework that aligns to organizational objectives
- ✔ Deep stakeholder engagement and agreement
- ✔ Optimal resource management
- ✔ Proactive insights driven by extensive data utilization

# Key Factors for Successful Prioritization

Taking it a step further

## Process

- **Standardization:** Establish clear, consistent processes for prioritization.
- **Documentation:** Maintain thorough and up-to-date records of decisions, statuses, and criteria.

## Culture

- **Collaboration:** Foster a collaborative environment with active stakeholder engagement.
- **Risk Tolerance:** Understand and align the organization's risk tolerance with prioritization decisions.

## Continuous Improvement

- **Feedback Loops:** Implement regular review and feedback mechanisms.
- **Data Utilization:** Leverage data and analytics to refine prioritization frameworks.
- **Adaptability:** Be prepared to adjust frameworks as organizational needs and external conditions change.



# Demo

Optimized Maturity Level

# Recap of learnings

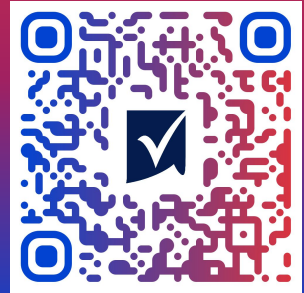
What did we say you should leave knowing?

- ✓ **Overview of prioritization**  
The **What, When,** and **Why**
- ✓ **How to apply these learnings to your process**  
Use common frameworks in Smartsheet
- ✓ **Evolving prioritization in your process**  
Know where your process is, where it can go from here, and have the knowledge to do it

# Next steps...

- **Evaluate your maturity** - Take the maturity assessment to get more actionable insights.
- **Attend SEA41** - Learn how to actually **do** the priority work **at scale**.
- **Attend SEA7** - Learn how to ensure the work you are doing is having the desired outcomes.
- **Attend SEA36** - Learn about integrating Smartsheet with the rest of your techstack.
- **Visit the PPM booth** - Chat with us about your end to end project management process.

## Maturity Assessment



## 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



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

# 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



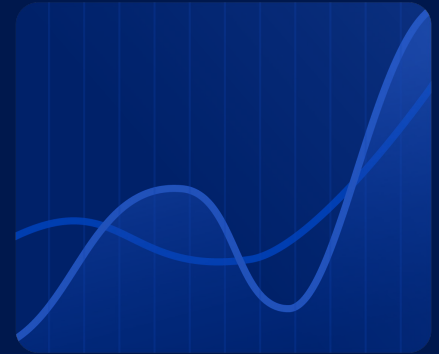
@smartsheet



@smartsheet



@smartsheet



smartsheet

# ENGAGE

# Appendix

# Prioritization Approaches (Initial)

- Simple Scoring Model:  
<https://www.smartsheet.com/content/project-scoring>
- MoSCoW Method:  
<https://www.agilebusiness.org/dsdm-project-framework/moscow-prioririsation.html>
- Eisenhower Matrix:  
<https://www.forbes.com/sites/hillennevins/2023/01/05/how-to-get-stuff-done-the-eisenhower-matrix-aka-the-urgent-vs-the-important/>

# Prioritization Approaches (Defined)

- Weighted Scoring Model:  
<https://www.smartsheet.com/content/project-scoring>
- Weighted Shortest Job First:  
<https://scaledagileframework.com/wsjf/#::~:~:text=Weighted%20Shortest%20Job%20First%20>
- Balanced Scorecard:  
<https://online.hbs.edu/blog/post/balanced-scorecard>