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Elevate Marketing's Strategic Influence

Positioning the Marketing Department as a
Strategic Partner

v.07/16

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Meet Your Hosts!



Liz Miller

VP and Principal Analyst
Constellation Research, Inc.



Stephanie McAndrew

Manager, Strategic Solutions
Smartsheet

MODERN MARKETING: THE WORK OF GROWTH STRATEGY



3 TRENDS

no really. everything is fine

A photograph of a couple in formal attire. The woman is wearing a white lace dress with large fabric flowers and long white gloves. The man is wearing a black tuxedo jacket over a white vest and shirt. They are holding hands. A semi-transparent purple rectangular box is overlaid on the center of the image, containing the text 'INTERLOPERS' in large white letters and 'formal & informal engagement hubs' in smaller white letters below it.

INTERLOPERS

formal & informal engagement hubs

in·ter·lop·er

**a person who becomes
involved in a place or
situation where they are not
wanted or are considered
not to belong**

A smiling man with a blue cap and glasses, wearing a red sweater, has his right hand raised in a gesture. The word "MARKETING" is written in large, bold, white capital letters across the center of the image, partially overlapping his hand and sweater. The background is a solid blue color.

MARKETING

The Formal Engagement Hub

focuses on the overall orchestration of the customer's journey, the content and assets that power that journey, the data that informs personalization and optimization of those stages and how "owned" channels of engagement connect with those that are "paid" and "earned"

A group of five dogs of various breeds are sitting on a green wooden ledge. From left to right: a brown and black dog, a white dog with long, shaggy fur, a small brown dog, a black and tan dog, and a large brown and black dog. The background is a bright blue sky with scattered white clouds. The text "EVERYONE ELSE" is overlaid in large, white, bold, sans-serif capital letters across the middle of the image.

EVERYONE ELSE

An Informal Engagement Hub

can exist anywhere across the enterprise, and typically DOES NOT log into traditional marketing tools and are not involved with establishing or executing marketing strategy or project workflows. They are, none the less, engaging with customers, employees or prospects.

A 4x6 grid of raccoons, each wearing a hoodie in either yellow or blue. The raccoons are shown in various poses, some looking forward, some to the side, and some with their heads down. The word "SUCCESS" is overlaid in the center in a large, white, bold, sans-serif font.

SUCCESS

A close-up photograph of a dog's head and neck being sprayed with water from a high-pressure hose. The dog's mouth is open, and its fur is wet and matted. Water droplets are captured in mid-air around the dog's head. A hand is visible on the left, holding the blue and red hose. A semi-transparent purple rectangular box is overlaid across the center of the image, containing white text.

DROWNING

creation explosion. data implosion



Make Unlimited Variations Of Your Image Using This Free AI Tool



Source: Jim Clyde Monge, Medium Blog

A man with dark hair and a beard, wearing a blue textured suit jacket over a light blue shirt, is sitting and looking down. He has a gold earring, a gold watch, and a gold ring. The text "MEET JARRED" is overlaid in large white letters.

MEET JARRED



THE DOUBLE LIFE OF MY BILLIONAIRE HUSBAND

We Will Love Again

The Double Life of...
Sebastian Klein is a loser and a...

Snatched a Billionaire to be ...

Married at First Sight

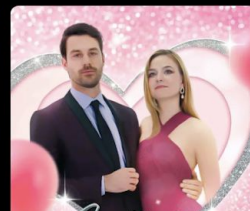
Fated to My Forbidden Vam...

Curse of the Dragon King

Deadly Affair with My Broth...

Flash-Married and Utterly S...

Daily Best Selling





[Fated to My Forbidden Vampire] - Get APP and enjoy full episod...

Updated 6 days ago
View full playlist



[Deadly Affair with My Brother-in-Law] - Get APP and enjoy full...

View full playlist



Forbidden Love Affair [Ms. Swan, Teach Me Love] [Bound b...

View full playlist



Fanged Lovers [Love Me, Bite Me] [Fatal Attraction: The Hybri...

View full playlist



[Curse of the Dragon King] - Get APP and enjoy full episodes now!

View full playlist



[We Will Love Again] - Get APP and enjoy full episodes now!

View full playlist



[Ms. Swan, Teach Me Love] - Get APP and enjoy full episodes now!

View full playlist



[Married for Greencard, Stayed for Love] --Get APP and enjoy fu...

View full playlist



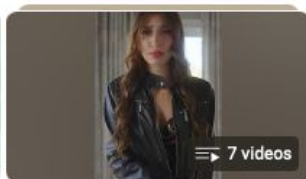
[Her Desired Alphas] -Get APP and enjoy full episodes now!

View full playlist



[Snatched a Billionaire] - Get APP and enjoy full episodes now!

View full playlist



🔥 Your Thoughts Wanted!

View full playlist



[I Married as the Replacement Bride] - Get APP and enjoy full...

View full playlist



[30 Days Til I Marry My Husband's Nemesis] - Get APP...

View full playlist



[My Mate is A Vampire] -Get APP and enjoy full episodes now!

View full playlist



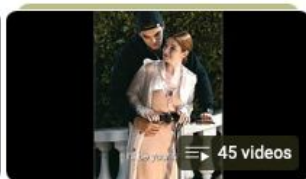
[Love Me, Bite Me] -Get APP and enjoy full episodes now!

View full playlist



👤 Dating My Boss [GoodBye, My CEO!] [I Got Married without Yo...

View full playlist



⭐ Sweet Revenge [30 Days Til I Marry My Husband's Nemesis]...

View full playlist



👤 Falling for the Alpha [True Luna] [Her Desired Alphas] [My...

View full playlist





Playful_Animal_273 · 1mo ago

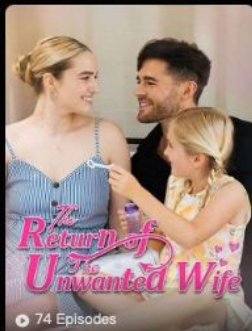
Horrible horrible acting but I can't look away! 😂😂

Must-sees

More >



Undercover Duo



The Return of the Unwanted Wife



After Divorce: I Become Heiress



Love's Detour to Destiny



Trails of Hope: His Journey Back Home (DUBBED)



Masked Magnate: The Dominant Son-in-Law

Trending

More >



Ascension to the Lost Throne



Her Journey Beyond the Script



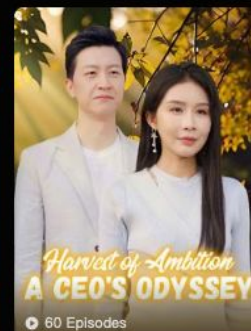
Hidden Hero: His Time to Shine



Scented Memories: Tracing Love's Lost Path



One Night to Forever



Harvest of Ambition: A CEO's Odyssey



Surprise Vows with My CEO Husband

CEO

Sweetness

Katherine uncovers her fiancé's infidelity on their wedding day. Subsequent challenges, including betrayal by her closest friend and overwhelming wedding debts, pave the way for an unexpected turn as an elderly man presents an opulent betrothal offering to marry Katherine.

▶ Play



Atlante's Mistaken Fiancée

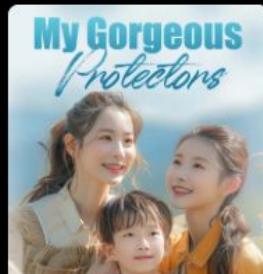
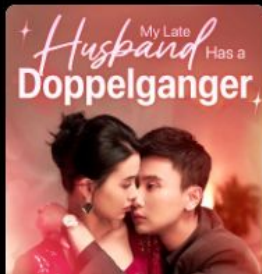
To ruin her mother's plan of marrying her off to a total stranger, she decides to go undercover in his company. But on her...



My Five Brilliant Little Geniuses

After an amorous night with Liam, her long-time sweetheart, Leona, the daughter of a wealthy family, found him...

You Might Like



HOW MARKETING WORKS

EXPERIENCE STRATEGIES

EXPERIENCE PLATFORMS

EXPERIENCE AUDIENCES

CX

Customer Experience

EX

Employee Experience

PX

Partner Experience

MX

Market Experience

Traditional CMS

Headless CMS

Mobile Web

Data Lake

Analytics

Commerce

Knowledge Management

CDP

Asset Management

Mobile App

Social

Marketing Automation

Customers

Employees

Partners &
Channels

HOW MARKETING REALLY WORKS

EXPERIENCE STRATEGIES

EXPERIENCE PLATFORMS

EXPERIENCE AUDIENCES

CX
Customer Experience

EX
Employee Experience

PX
Partner Experience

MX
Market Experience

Traditional CMS

Mobile Web

Headless CMS

Data Lake

Analytics

Commerce

Knowledge Management

CDP

Asset Management

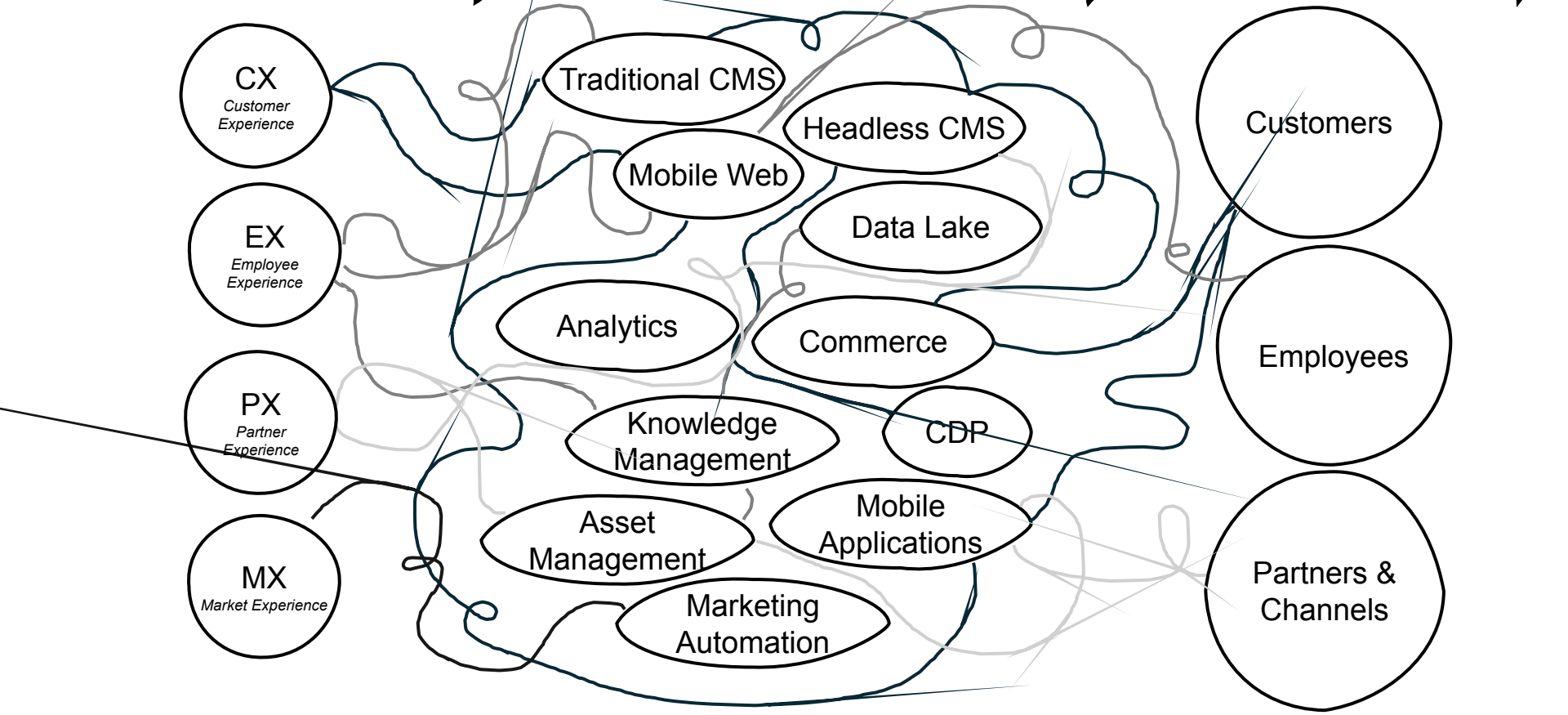
Mobile Applications

Marketing Automation

Customers

Employees

Partners & Channels



A close-up photograph of a tiger's face, showing its eyes, nose, and whiskers. The image is overlaid with a semi-transparent purple rectangular box containing white text. The text reads "FROM / FOR" in large, bold, sans-serif capital letters, followed by "data from decisions vs data for decisions" in a smaller, lowercase sans-serif font.

FROM / FOR

data from decisions vs data for decisions

PROVING

JUSTIFYING

OPTIMIZING

APOLOGIZING

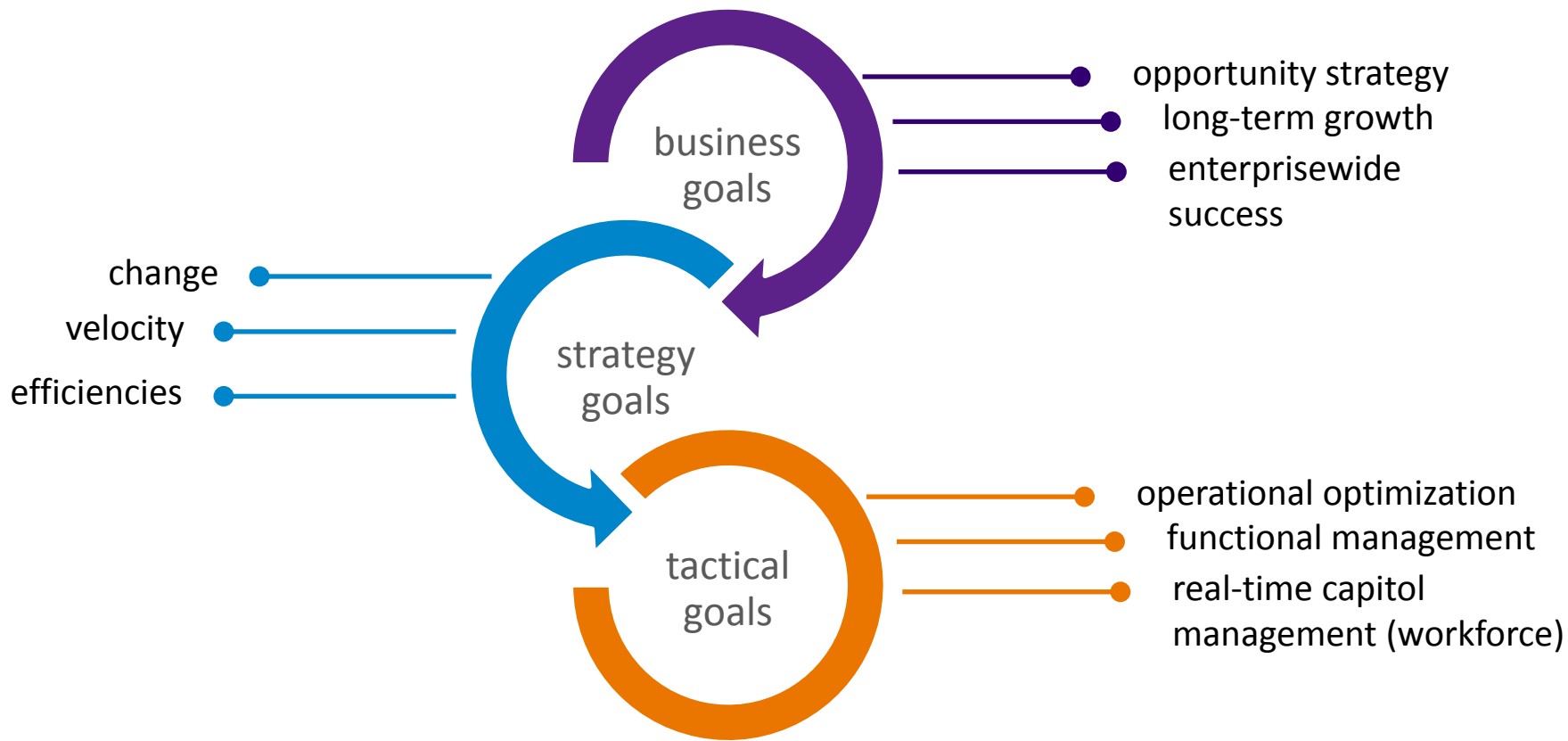
FROM
decision
s

FOR
decisions

INTERROGATION

EXPLORATION

EXPERIMENTATION



Session Objectives

Overview

1. Evaluating workflows to establish solution framework
2. Step-by-step guide to building a marketing work management solution.
3. Enhancing visibility and decision-making with effective tools and techniques.
4. Advanced strategies for optimizing your solution to maximize impact.

1

Evaluation Framework

Establishing Your Solution Requirements

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Team design and organization, primary workstreams

Visibility - who cares? What do they care about?

Delivery & endpoints

External data or system requirements

Work execution

Team design and organization, primary workstreams

Visibility - who cares? What do they care about?

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Delivery & endpoints

External data or system requirements

Work execution

2

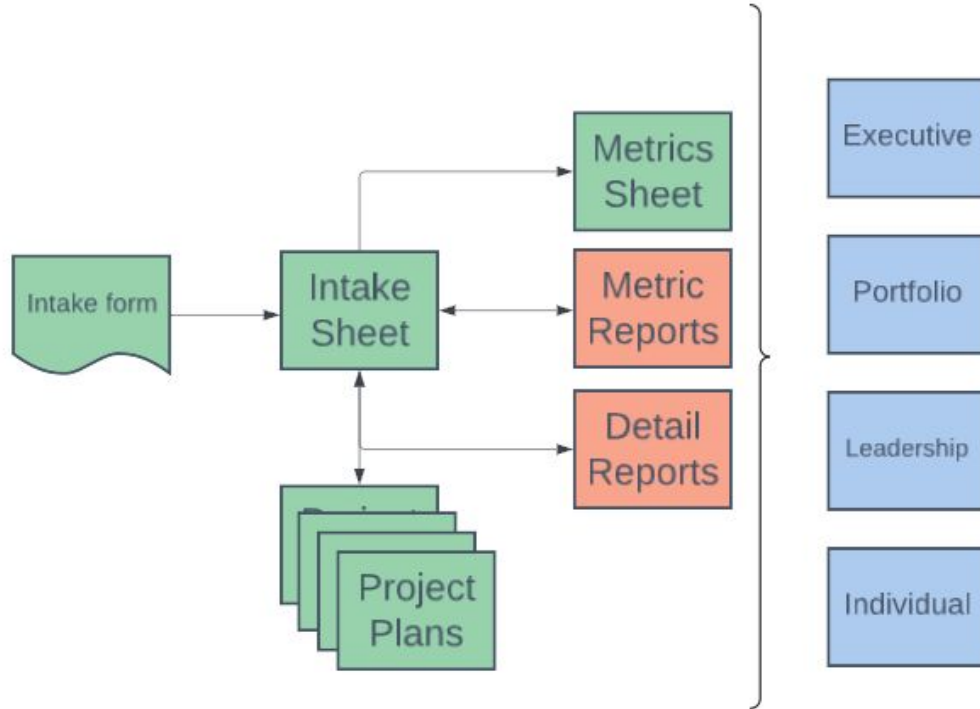
Building Blocks

Practical Solution Design and Best Practices

 smartsheet
ENGAGE

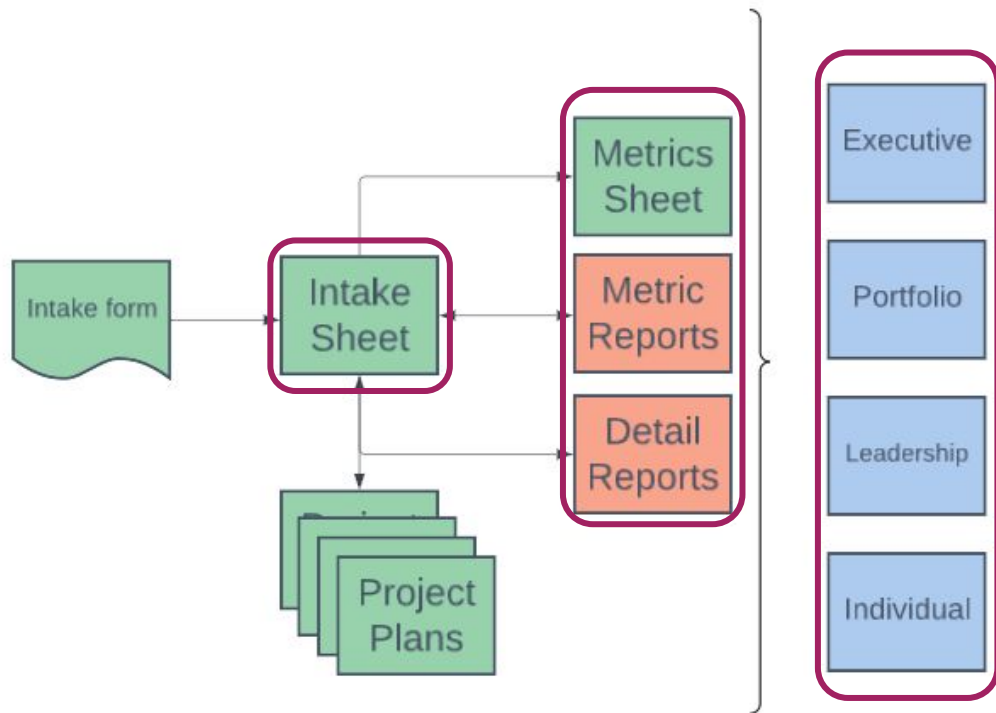
Building Blocks

Simplified



Building Blocks

Simplified



Foundation Building

Intake Sheets

What goes in my *intake sheet* (Primary Listing)

- Decision Inputs (Dates, Budget, Stakeholders, Alignment)
- Reporting Dimensions
- Default Values and Formula Fields (look ups, common metrics, health, AI, etc)
- Simple or Complex Indicator / Do I need to a project plan?

Programs / Campaigns

Dimensions to Consider

- The basics
 - Title, dates, description, owner
- Briefing (messaging, target, theme, etc)
- Budget
- Approval/Status
- Owner / Contributors
- Objective / Program Alignment
- Type
- Reach
- Audience / Segment
- Channels
- LOB/Product/Brand/Etc
- Performance/Impact*

Programs / Campaigns

Dimensions to Consider

- The basics
 - Title, dates, description, owner
- Briefing (messaging, target, theme, etc)
- Budget
- Approval/Status
- Owner / Contributors
- Objective / Program Alignment
- Type
- Reach
- Audience / Segment
- Channels
- LOB/Product/Brand/Etc
- Performance/Impact*

**Use consistent column names between sheets where possible to simplify reporting.*

Content / Request Mgmt

Dimensions to Consider

- The basics
 - Type, Title, Description, Status
- Requestor (name/email, team)
- Dates / Projected Delivery
- Approvals
- Team
- Assigned To
- Briefing (formats/requirements)
- Objective / Program Alignment
- SLA / LoE
- Proof Insights (turn these on!)*

Formulas, Metrics & Automations

Examples to facilitate reporting and data visualization (and make your life easier!)

Additional columns in your primary intake sheet -

- Health Measurements (custom)
- Capture Dates (when complete or status changes - *multiple*)
- Change Field Value (EG: when date > Launch Date, change to “In Market”)
- Auto Fields (Date created, modified, etc)
- Measure from date created to date delivered
- Using Formulas OR Look Up Sheets:
 - Automate Projected Delivery Date w/SLAs and monitor changes over time
 - Automate effort / estimated hours & resource rates (blended or direct)
 - Performance/Outcomes (more on this later)



Don't forget to try the AI formula features!

REFERENCE: Formula Examples

Examples to facilitate reporting and data visualization (and make your life easier!)

Unlock precision data retrieval
with INDEX, MATCH, and
COLLECT

Wednesday @ 2:30 PM

[Formulas workspace in the solutions gallery!](#) (Search "Formulas" in the Solution Gallery)

[Functions List](#)

Health Measurement Example (Symbol): =IF([At Risk]@row = 1, "Down", IF(AND(Finish@row < TODAY(), [% Complete]@row <> 1), "Down", IF(Status@row = "Complete", "-", IF([% Complete]@row > 0.5, "Up", "Unchanged"))))

DateDiff: Use NETDAYS OR NETWORKDAYS

INDEX Match - Pull in default values based on other row values

IFERROR to keep it clean: =IFERROR(formula, "") OR: =IFERROR(formula, "REVIEW")

[Referencing another sheet](#) - AKA Cross-Sheet References



Don't forget to try the AI formula features! And, check out Table View for new formula builder view.

Setting Up Your Intake Process

Dynamic Form - Quick Tips

← Fireside Request Details

Form Settings

Active Open Form Share Form Save

Fields

Remove All Add All

- Attachment
- Latest Comment
- ProjectTitle
- Status-Sub
- Approved
- RequestDT
- Assigned To
- Project Manager
- Proj Plan Required

+ New Field

Form Elements

- H Heading/Description
- Divider
- File Upload

Select or enter value

Program

Select or enter value

Request Priority *

Normal

Category * Logic

Select or enter value

Campaign *

N/A

Request Title * *

Other Asset Type *

Field Settings

Category
Dropdown List

Field Logic

Label

Help Text

B I U A

Required

Hidden

Display As

- Dropdown (Single Select)
- Vertical Radio Buttons
- Horizontal Radio Buttons

Default Value

Select

Connecting Project Plans

Streamline product development
processes for faster time to market

Wednesday @ 10:30 AM

Program	Type	Plan Required	Link	Owner	Start	Finish	Health
A	Integrated	Yes	LINK	Jen	10/15/24	11/30/24	
B	Social	No		Steph	11/1/24	11/18/24	
C	Social	No		Liz	11/8/24	11/20/24	

If you're not using Control Center - make sure you know what fields in your intake sheet need to be updated/linked when you connect a new project plan. Examples may include: health, date changes, % complete/progress

Get some data in there - test it out!

File Automation Forms Connections Dynamic View

Campaign Roadmap ☆

Share ▾

Grid View Filter Off Arial 10 B I U C A

Pr...	Approval	Campaign ID	Campaign Name	Description	Primary Hero	Status	Brand	Start	Finish	Days to Launch	Owner	Stakeholders	Campaign Type	Objective Alignment	Strategic Goal	Budget	Health	Prgrn
1	Approved	3M0003	Unleash Your Inner Superhero	Encourages active lifestyle in children using superhero imagery.		Complete	Sonata	01/09/25	12/16/24	150	Bryanna Dubreuil	Brooklyn Jansen, Everett Crosse, Michael Loughrey	Brand Awareness Campaign	Promote New Products or Increase ARR, Competitive Growth, Lead Generation	Acquisition Growth, Engagement	\$1,500,000	Good	
2	Declined	3M0022	Lost-in-Time: Rediscover the Past	Revisits a publishing house's classic literature collection with new designs and online discussions.		Requested	Silver Creek	06/23/24	10/26/24	15	Tamika Marshall	Brooklyn Jansen, Bruce Ferguson, Michael Loughrey	SEO Campaign	Competitive Growth, Lead Generation	Growth Retention	\$150,000	Warning	
3	Approved	3M0004	Escape the Ordinary: Explore Unique Destinations	Promotes a travel agency specializing in unique and exotic destinations through social media challenges and influencer partnerships.		In Progress	Silver Creek	10/26/24	02/18/25	75	Harley Sterling	Bruce Ferguson, Everett Crosse, Michael Loughrey	Product Launch Campaign	Increase ARR, Competitive Growth, Improve retention rates	Acquisition Growth	\$750,000	Good	
4	Approved	3M0005	Beyond the Ordinary: Experience in Every Bite	Introduces a new restaurant with a focus on innovative culinary creations through chef interviews and interactive social media challenges.		In Progress	Sonata	11/30/24	03/25/25	110	Kai Sanjima	Brooklyn Jansen, Bruce Ferguson, Everett Crosse	SEO Campaign	Promote New Products or Increase ARR, Competitive Growth	Acquisition Growth	\$1,100,000	Good	
5	On Hold	3M0008	The Power of Connection: Building Community	Promotes a co-working space designed to foster collaboration and build community with virtual networking events and member testimonials.		Requested	Sonata	08/18/24	09/25/24	6	Tamika Marshall	Brooklyn Jansen, Everett Crosse, Michael Loughrey	Product Launch Campaign	Promote New Products or Increase ARR, Competitive Growth	Engagement	\$60,000	Warning	
6	Under Review	3M0009	Unlock Your Creative Potential: Artist Within	Encourages artistic expression by promoting new art supplies with online tutorials and social media challenges.		Requested	Silver Creek	01/09/25	03/10/25	150	Brooklyn Jansen	Brooklyn Jansen, Bruce Ferguson, Everett Crosse, Michael Loughrey	Video Marketing Campaign	Elevate thought leadership, Competitive Growth	Growth Retention	\$1,500,000	Warning	
7	Approved	3M0010	Embrace the Unexpected: Discover the Joy of Spontaneity	Promotes an adventure travel company specializing in spontaneous trips with user-generated content contests and flash sales.		New	Sonata	10/21/26	02/11/27	800	Bryanna Dubreuil	Brooklyn Jansen, Bruce Ferguson, Michael Loughrey	Brand Awareness Campaign	Promote New Products or Increase ARR, Competitive Growth, Lead Generation	Acquisition	\$8,000,000	Good	
8	Declined	3M0011	The Past, Reimagined: Explore Like Never Before	Promotes a new interactive museum experience using AR technology with social media teasers and behind-the-scenes glimpses.		Requested	Silver Creek	06/16/24	10/15/24	4	Paul Finley	Everett Crosse, Kai Sanjima, Michael Loughrey	Product Launch Campaign	Promote New Products or Increase ARR, Competitive Growth	Engagement	\$42,000	Warning	
9	Approved	3M0012	Write Your Own Story: Craft Your Career	Empowers individuals to design their professional journeys through inspirational stories, interactive assessments, and webinars with industry experts.		New	Sonata	08/16/24	12/09/24	4	Kai Sanjima	Brooklyn Jansen, Everett Crosse, Michael Loughrey	SEO Campaign	Promote New Products or Increase ARR, Competitive Growth	Engagement	\$42,000	Good	

3

Representing Impact

Reporting & Data Visualization

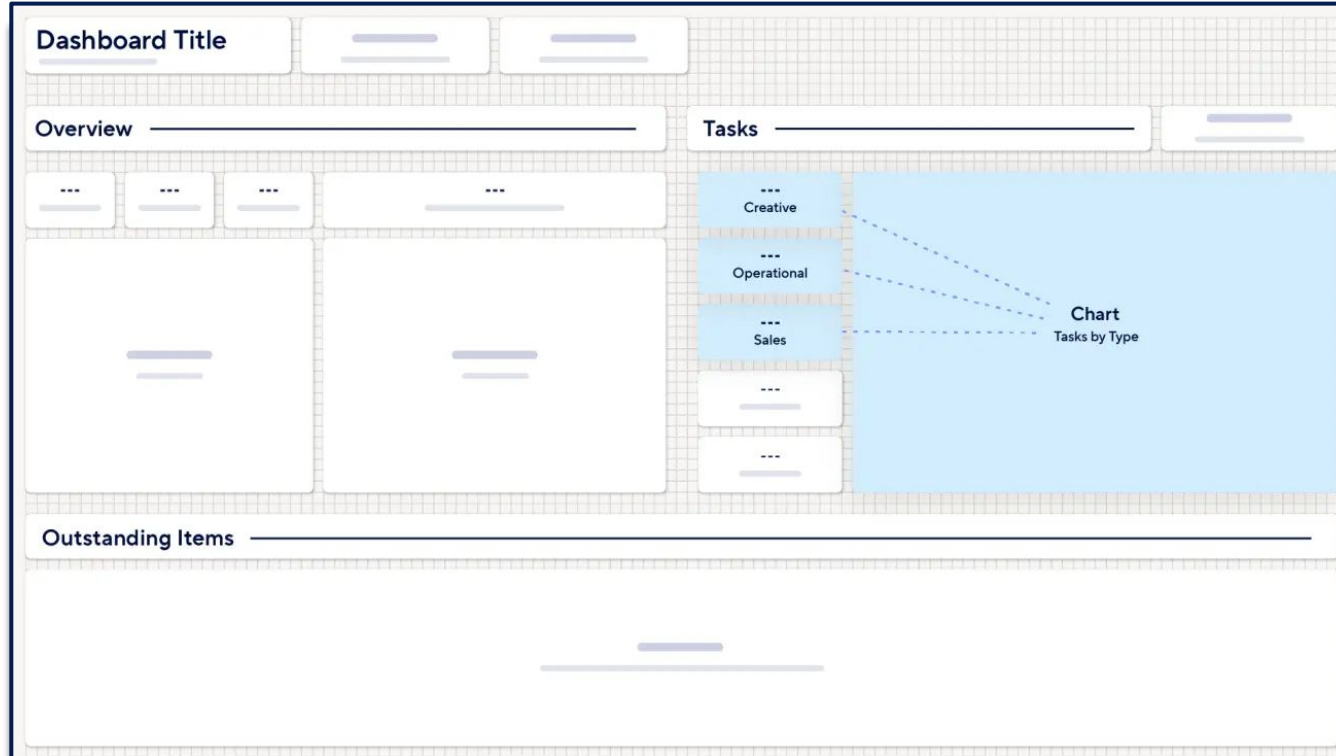
Best practices for data organization, aggregation, reporting, visualization

smartsheet

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Sketch it out

<https://www.smartsheet.com/content-center/product-insights/smartsheet-tips/smartsheet-dashboard-design-effective-layouts>



Metrics Sheets vs. Reports

Which one should I use?

Metrics sheets

- Manual effort to create, harder to include data from multiple sheets
- Stable / limited set of categories
- All functions available for summarization
- Include in charts or metrics widgets
- Not usually intended to be accessed by users
- No 'current user' function

Reports

- Easy to create; include data from multiple sheets
- Dynamic / large set of categories
- Limited functions for summarization
- Use for charts but not metrics widgets
- Embed as-is on dashboards
- Expand / collapse groups
- Easily incorporates 'current user' filter

Metrics Sheet

What? Why?

Primary Column	Metrics
- Cycle Time	
Awaiting Review	31
In Review	19
Review Complete	33
- Provisioned Status	
Yes	25
Pending	2
- Requests by Status	
New	7
Under Review	5
Approved	27
Hold - Need More Info	3
Rejected	5
- Requests by Objective	
DEI	8
Employee Engagement	14
Customer Support	6
Revenue Growth	10
Expand AI Capabilities	9
- Requests by Department	
Finance	9

Metrics Sheet

What? Why?

Primary	Placeholder	Budget	Portfolio Budget Remaining	Committed	Total Budget Requested	Spend	Remaining	Remaining %	Audience	Conversion Rate %	MQL
	Enter Current Year	2023						0			
- 2023											
- 2023 - Budget	Budget	\$7,750,000.00	\$4,676,000.00	\$3,074,000.00	\$6,044,000.00	\$1,227,477.84	\$4,816,522.16	78%	1,842,592	5.6%	103,863
Tier 1	2023 - Budget - Tier 1	\$4,000,000.00	\$3,200,000.00	\$800,000.00	\$3,300,000.00	\$26,359.78	\$3,273,640.22	83%	715,786	9.4%	67,200
Tier 2	2023 - Budget - Tier 2	\$2,000,000.00	\$948,000.00	\$1,052,000.00	\$1,202,000.00	\$663,000.00	\$539,000.00	60%	439,488	3.4%	14,916
Tier 3	2023 - Budget - Tier 3	\$1,250,000.00	\$28,000.00	\$1,222,000.00	\$1,522,000.00	\$538,118.06	\$983,881.94	122%	615,374	3.5%	21,747
Tier 4	2023 - Budget - Tier 4	\$500,000.00	\$500,000.00	\$0.00	\$20,000.00	\$0.00	\$20,000.00	4%	71,944	0.0%	0
- 2023 - Segments	Segments			\$3,074,000.00	\$6,044,000.00	\$1,227,477.84	\$4,816,522.16		1,842,592	0.0%	
All	2023 - Segments - All			\$1,870,000.00	\$4,370,000.00	\$1,118,000.00	\$3,252,000.00	26%	1,289,188	0.0%	0
Current Customer	2023 - Segments - Current Customer			\$60,000.00	\$530,000.00	\$18,654.52	\$511,345.48	4%	240,954	0.0%	0
Prospect	2023 - Segments - Prospect			\$992,000.00	\$992,000.00	\$48,359.78	\$943,640.22	5%	148,090	0.0%	0
Prior Customer	2023 - Segments - Prior Customer			\$152,000.00	\$152,000.00	\$42,463.54	\$109,536.46	28%	164,360	0.0%	0
- 2023 - Objective	Objective										
Promote New Products or Services	2023 - Objective - Promote New Products or Servic			\$2,357,000.00	\$5,157,000.00	\$695,014.30	\$4,461,985.70				
Increase ARR	2023 - Objective - Increase ARR			\$1,560,000.00	\$4,060,000.00	\$495,014.30	\$3,564,985.70				
Competitive Growth	2023 - Objective - Competitive Growth			\$1,670,000.00	\$4,620,000.00	\$521,014.30	\$4,098,985.70				
Lead Generation	2023 - Objective - Lead Generation			\$800,000.00	\$3,450,000.00	\$26,359.78	\$3,423,640.22				
Improve retention rates	2023 - Objective - Improve retention rates			\$550,000.00	\$550,000.00	\$450,000.00	\$100,000.00				
Increase brand awareness	2023 - Objective - Increase brand awareness			\$42,000.00	\$42,000.00	\$16,463.54	\$25,536.46				
Improve conversion rates	2023 - Objective - Improve conversion rates			\$42,000.00	\$42,000.00	\$22,000.00	\$20,000.00				
Elevate thought leadership	2023 - Objective - Elevate thought leadership			\$620,000.00	\$640,000.00	\$503,000.00	\$137,000.00				
- 2022											
- 2022 - Budget	Budget	\$7,750,000.00	\$3,050,000.00	\$4,700,000.00	\$4,700,000.00	\$4,653,000.00	\$47,000.00	61%	1,977,422	0.1	103,863
Tier 1	2022 - Budget - Tier 1	\$4,000,000.00	\$700,000.00	\$3,300,000.00	\$3,300,000.00	\$3,267,000.00	\$33,000.00	83%	1,465,786	0.0	67,200
Tier 2	2022 - Budget - Tier 2	\$2,000,000.00	\$1,800,000.00	\$200,000.00	\$200,000.00	\$198,000.00	\$2,000.00	10%	61,636	0.2	14,916
Tier 3	2022 - Budget - Tier 3	\$1,250,000.00	\$650,000.00	\$600,000.00	\$600,000.00	\$594,000.00	\$6,000.00	48%	225,000	0.1	21,747
Tier 4	2022 - Budget - Tier 4	\$500,000.00	-\$100,000.00	\$600,000.00	\$600,000.00	\$594,000.00	\$6,000.00	120%	225,000	0.0	0
- 2022 - Segments	Segments			\$4,700,000.00	\$4,700,000.00	\$4,653,000.00	\$47,000.00		1,977,422	0.0	
All	2022 - Segments - All			\$4,350,000.00	\$4,350,000.00	\$4,306,500.00	\$43,500.00	99%	1,850,000	0.0	0
Current Customer	2022 - Segments - Current Customer			\$0.00	\$0.00	\$0.00	\$0.00		0		0
Prospect	2022 - Segments - Prospect			\$150,000.00	\$150,000.00	\$148,500.00	\$1,500.00	99%	65,786	0.0	0
Prior Customer	2022 - Segments - Prior Customer			\$200,000.00	\$200,000.00	\$198,000.00	\$2,000.00	99%	61,636	0.0	0
- 2022 - Objective	Objective										
Promote New Products or Services	2022 - Objective - Promote New Products or Servic			\$3,550,000.00	\$3,550,000.00	\$3,514,500.00	\$35,500.00				

REFERENCE: Common Formulas

Mostly cross-sheet references w/some insheet simple summaries

- You can see here why we pull aggregations in to the primary intake sheets - you don't want to keep up w/these formulas across hundreds of project plans 😓

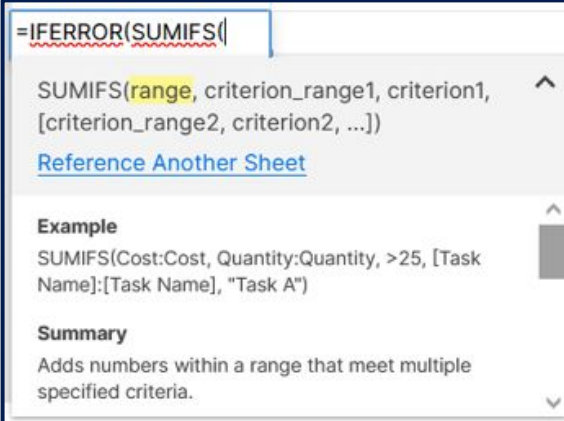
Commonly using countif(s) and sumif(s) formulas, average, min/max etc., use **IFERROR to keep in clean**

CountIF & CountIFS

- COUNTIF(range, criterion)
- COUNTIFS(range1,criterion1,[range2criterion2...])

SumIF & SumIFS

- SUMIF(range, criterion, [sum_range])
- SUMIFS(range, criterion_range1, criterion1,[criterion_range2, criterion2...])



The screenshot shows a spreadsheet formula editor with the following content:

- Formula bar: `=IFERROR(SUMIFS(|`
- Function tooltip: `SUMIFS(range, criterion_range1, criterion1, [criterion_range2, criterion2, ...])`
- Link: [Reference Another Sheet](#)
- Section: **Example**
- Example text: `SUMIFS(Cost:Cost, Quantity:Quantity, >25, [Task Name]:[Task Name], "Task A")`
- Section: **Summary**
- Summary text: "Adds numbers within a range that meet multiple specified criteria."

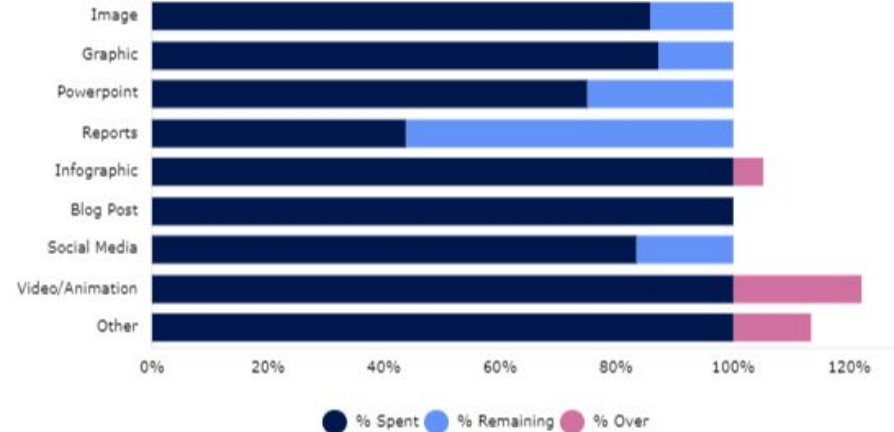
Using Reports for Data Visualization

To support chart widgets

Request Type	% Spent	% Remaining	% Over
Image	86%	14%	0%
Graphic	87%	13%	0%
Powerpoint	75%	25%	0%
Reports	44%	56%	0%
Infographic	100%	0%	5%
Blog Post	100%	0%	0%
Social Media	83%	17%	0%
Video/Animation	100%	0%	22%
Other	100%	0%	13%



























SPEND VS BUDGET



Using Reports for Detailed Presentation

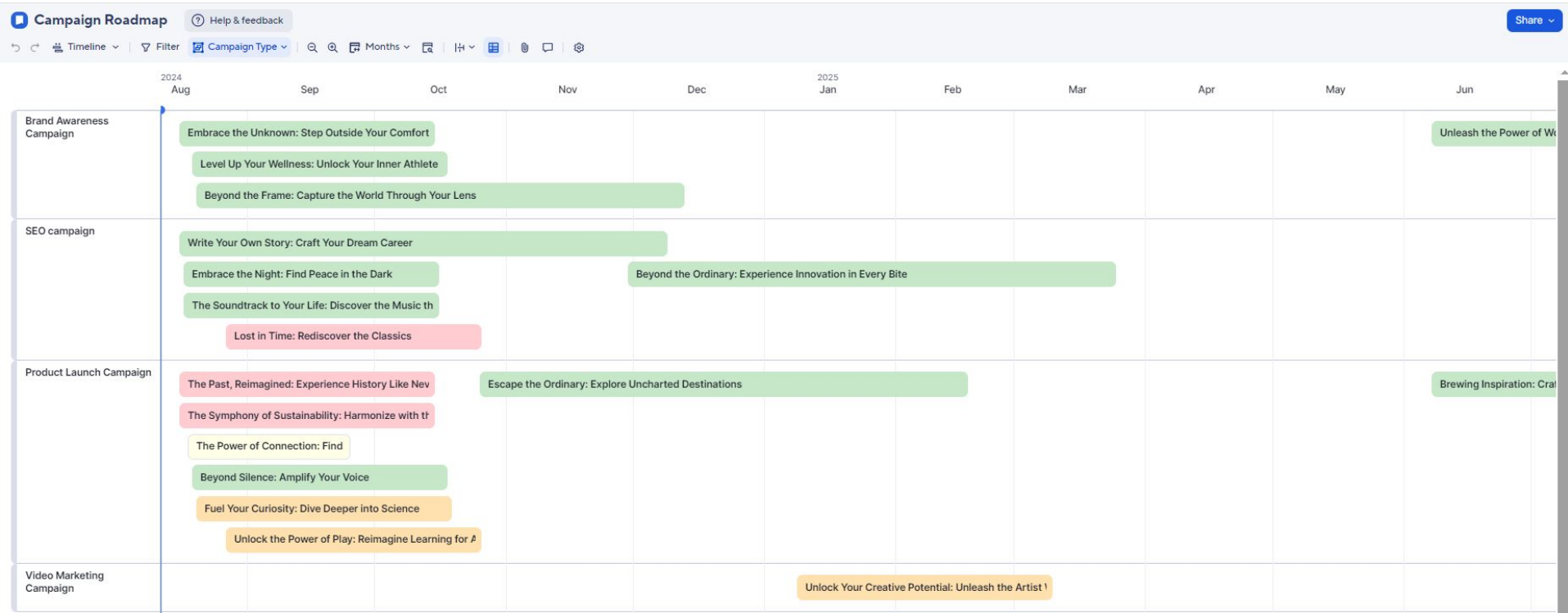
Presenting focused, detailed data

	Asset Title	Job #	Reviewers	Legal Review	Routing/Revision Status	Date Review Status Changed	SLA	Stage Due Date	Expected Completion Date	Proof Status	Requested By	Requesting Department	Requested Due Date	Hero Image/Final Image
	<div style="display: flex; align-items: center;"> 🔍 🗨️ 📧 </div>													
	<div style="display: flex; align-items: center;"> ▼ Task Due Completed </div>													
1	<div style="display: flex; align-items: center;"> 🔍 🗨️ 📧 </div> Home-Tile-Photo-Experience Hub	REQ-006	<i>customizer will replace this cell with your contact</i>	 Vera Bowers	Completed	07/25/24	28	09/03/24	09/17/24	Approved	<i>customizer will replace this cell with your contact</i>	Sales	08/20/24	
	<div style="display: flex; align-items: center;"> ▼ Task Due Due in Next 10 days </div>													
2	Social Campaign	REQ-005	 Harry Riggs	 Kai Sanjima	Assigned for Build	08/09/24	14	08/29/24	09/12/24		<i>customizer will replace this cell with your contact</i>	Sales	08/20/24	
3	Video Assets template	REQ-013	<i>customizer will replace this cell with your contact</i>	 Kai Sanjima	Assigned for Build	08/12/24	14	08/30/24	09/13/24		 Harry Riggs	Services	09/04/24	
4	<div style="display: flex; align-items: center;"> 🔍 🗨️ 📧 </div> Engage Hero Home	REQ-018	 Harry Riggs  Jamal King  Kelly Smart  Vera Bowers	 Kai Sanjima	In Revision	08/12/24	14	08/30/24		In Review	 Harry Riggs	Marketing	09/10/24	
	<div style="display: flex; align-items: center;"> ▼ Task Due Due in Next 5 days </div>													
5	<div style="display: flex; align-items: center;"> 🔍 </div> Social Media Series Content - Employee	REQ-003	 Jamal King	 Kai Sanjima	Assigned for Build	08/06/24	14	08/26/24	09/09/24		<i>customizer will replace this cell with your contact</i>	Marketing	08/23/24	
6	<div style="display: flex; align-items: center;"> 🔍 🗨️ 📧 </div> Video Assets	REQ-008	 Harry Riggs  Kelly Smart  Vera Bowers	 Kai Sanjima	In Revision	08/16/24	5	08/23/24	09/06/24	Requires Changes	 Harry Riggs	Product	08/30/24	

NEW!

Views to Include

Include links out to important views



NEW!

Views to Include

Campaign Roadmap Help & feedback

Board | Filter | Approval | [Grid] [Zoom] [Share] [Refresh] [Close] [Settings]

Approved (13) | Under Review (3) | On Hold (1) | Declined (3) | + Add lane

Approval: Uncategorized (0)

Embrace the Unexpected: Discover the Magic of Spontaneity
[Campaign Dashboard](#)
10/21/26
Brand Awareness Campaign

Promote New Products or Services

Increase ARR Competitiv... +1

Acquisition

\$8,000,000

Unlock the Power of Play: Reimagine Learning for All Ages
08/27/24
Product Launch Campaign

Promote New Products or Services

Increase ARR Competitive Gro...

Growth Engagement

\$150,000

The Power of Connection: Find Your Tribe
08/18/24
Product Launch Campaign

Promote New Products or Services

Increase ARR Competitive Gro...

Engagement

\$60,000

Lost in Time: Rediscover the Classics
08/27/24
SEO campaign

Competitive Growth Lead Gen...

Growth Retention

\$150,000

smartsheet
ENGAGE

Views to Include

Embed directly or link out

Tier	Status	April 2023 Apr 01 to Apr 30	May 2023 May 01 to May 31	June 2023 Jun 01 to Jun 30	July 2023 Jul 01 to Jul 31	August 2023 Aug 01 to Aug 31	September 2023 Sep 01 to Sep 30
							<div data-bbox="1352 262 1497 338"> </div> <div data-bbox="1352 343 1497 420"> <p>Plan / Do / Scale Brooklyn Ja https://app.smartsheet.com/11/04/2023</p> </div>
	Build				<div data-bbox="975 431 1342 507"> <p>Take a Break! Bruce Ferguson - https://app.smartsheet.com/dashboards/7GMFHJ97qRM6ch2JMR9j3JcgHH3qpFHHXJ6GQX1 - 07/24/2023 to 08/11/2023</p> </div>		
Tier 2	Review	<div data-bbox="396 595 569 704"> <p>Product Showcase - https://app.smartsheet.com/dashboards/7GMFHJ97qRM6ch2JMR9j3JcgHH3qpFHHXJ6GQX1 - 04/01/2023 to 04/30/2023</p> </div>	<div data-bbox="589 595 956 677"> <p>Creative Operations & Campaign Management - https://app.smartsheet.com/dashboards/7GMFHJ97qRM6ch2JMR9j3JcgHH3qpFHHXJ6GQX1 - 05/11/2023 to 06/24/2023</p> </div>				
	Build						<div data-bbox="1168 518 1497 595"> <p>Growth Push Everett Crosse - https://app.smartsheet.com/dashboards/7GMFHJ97qRM6ch2JMR9j3JcgHH3qpFHHXJ6GQX1 - 08/01/2023 to 09/01/2023</p> </div> <div data-bbox="1352 715 1497 791"> <p>New Products Paul Finley - https://app.smartsheet.com/11/04/2023</p> </div>
Tier 3	Review			<div data-bbox="782 802 956 835"> <p>Supporting Benefits - 06/01/2023 to 06/30/2023</p> </div>	<div data-bbox="975 802 1149 835"> <p>Product Showcase - 07/01/2023 to 07/30/2023</p> </div>	<div data-bbox="1168 802 1497 835"> <p>Accelerate 2.0 Kai Senjima - 08/01/2023 to 10/06/2023</p> </div>	
	Build	<div data-bbox="396 857 569 955"> <p>Pike Appreciation - https://app.smartsheet.com/dashboards/7GMFHJ97qRM6ch2JMR9j3JcgHH3qpFHHXJ6GQX1 - 02/24/2023 to 04/12/2023</p> </div>					
	In Market	<div data-bbox="396 971 956 1048"> <p>Scaling Event Management - https://app.smartsheet.com/dashboards/7GMFHJ97qRM6ch2JMR9j3JcgHH3qpFHHXJ6GQX1 - 04/18/2023 to 06/12/2023</p> </div>					

Details

Data Attachments (1) Comments (0)

Campaign Name:
 Plan / Do / Scale

Start: 02-Sep-2023 **Finish:** 04-Nov-2023

Owner: Brooklyn Jansen

Dashboard:
<https://app.smartsheet.com/dashboards/7GMFHJ97qRM6ch2JMR9j3JcgHH3qpFHHXJ6GQX1>

Tier: Tier 1

Status: Review

Health: -

Objective Alignment:
 Promote New Products or Services Increase ARR
 Competitive Growth Lead Generation

Strategic Goal: Acquisition

Description:

Open Row

Audience Dashboards

[Dashboard Widgets / Overview](#)

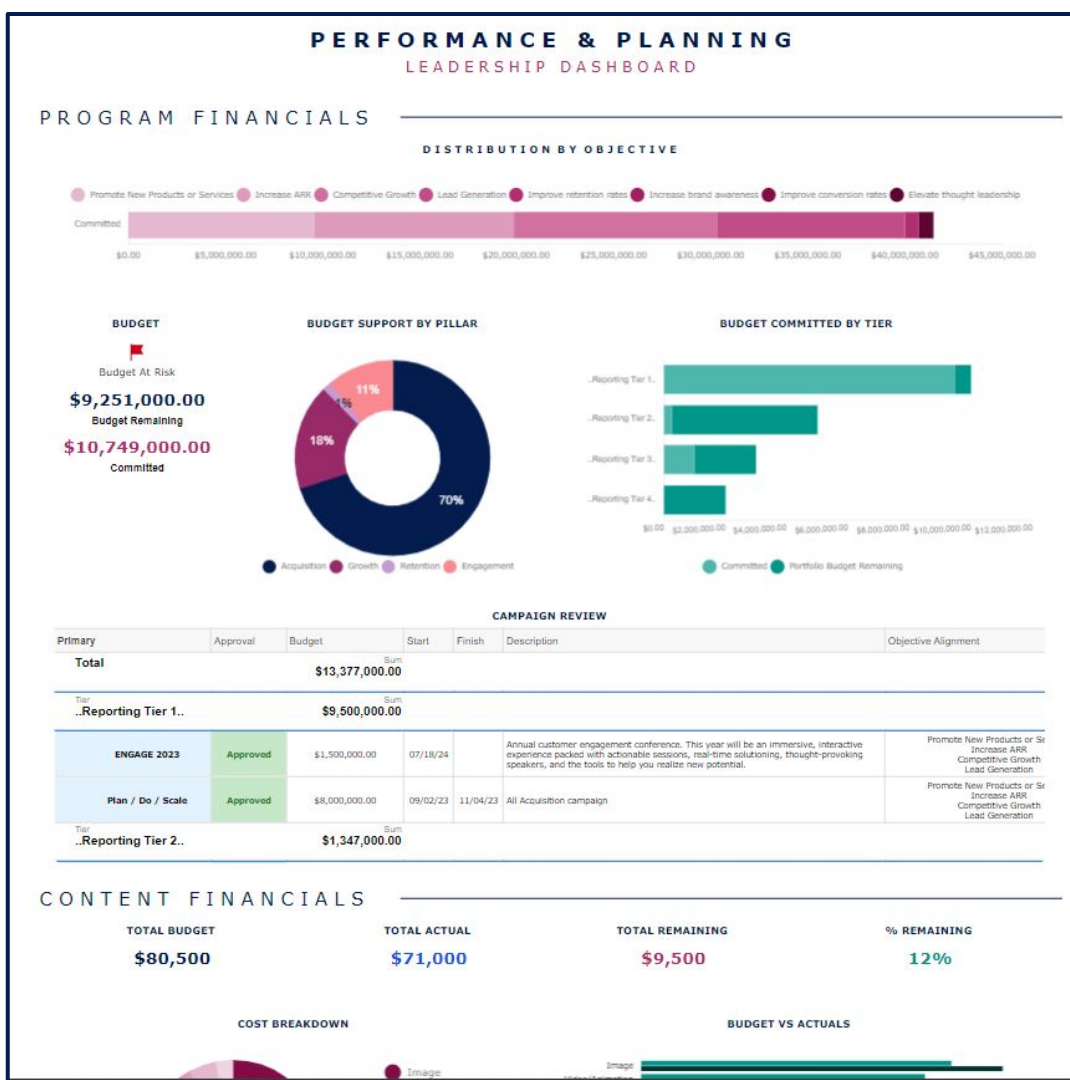
[Charts](#) for comparison

[Metrics](#) for direct outcomes

[Reports](#) for detailed outcomes

[Published Views](#) enable interactivity

Title, Text, Links, Web Content



Audience Dashboards

[Dashboard Widgets / Overview](#)

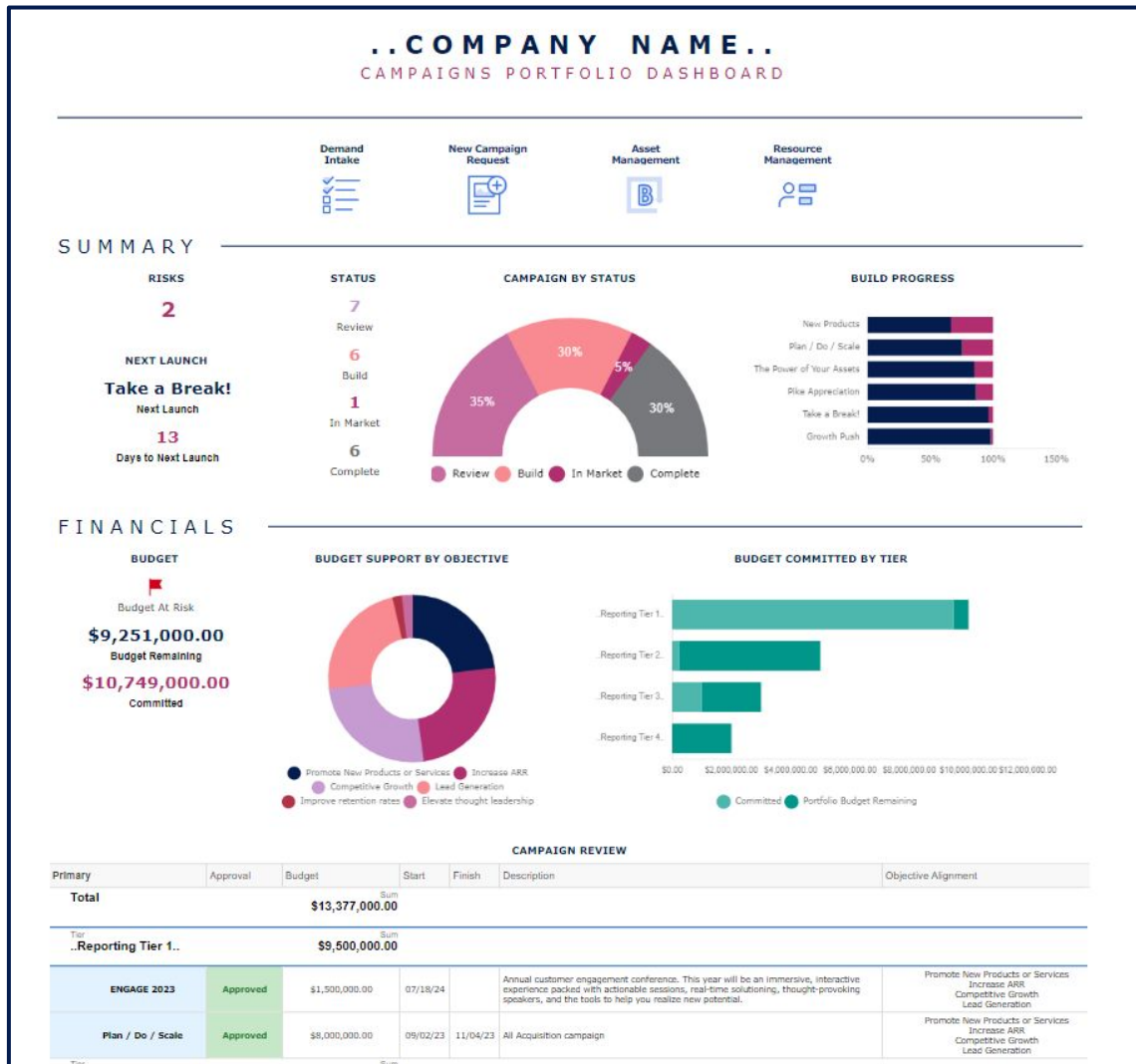
[Charts](#) for comparison

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Audience Dashboards

[Dashboard Widgets / Overview](#)

[Charts](#) for comparison

[Metrics](#) for direct outcomes

[Reports](#) for detailed outcomes

[Published Views](#) enable interactivity

Title, Text, Links, Web Content

.. COMPANY NAME.

MANA

Creative solutions to your creative team's biggest challenges

Tuesday @ 2:30 PM

Asset Management



Resource Management



STATUS

FLAGGED

1

VERSION AVG

2.50

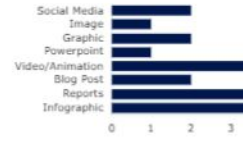
BY REQUEST STATUS



BY REQUEST TYPE



AVERAGE VERSIONS BY TYPE

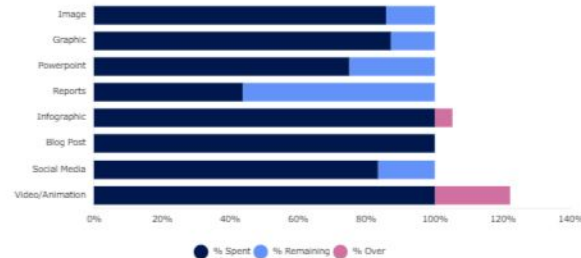


ON-TIME DELIVERY



BUDGET

SPEND VS BUDGET



BUDGET HEALTH



TOTAL BUDGET

\$80,500

TOTAL ACTUAL

\$71,000

TOTAL VARIANCE

\$9,500

VARIANCE %

12%

Audience Dashboards

[Dashboard Widgets / Overview](#)

[Charts](#) for comparison

[Metrics](#) for direct outcomes

[Reports](#) for detailed outcomes

[Published Views](#) enable interactivity

Title, Text, Links, Web Content



Consider the User Experience

Closing tips

- Every dashboard should have a primary audience and be intentional for that audience
 - Use links to provide easy access to supporting assets, sites, views
- Consider what's interactive and what's view only - make sure widgets are set up properly for this
- Simplicity - less clicks, less interpretation, clear, concise and impactful

4

Advance Plays

BI Integration, Data shuttle and Brandfolder Insights

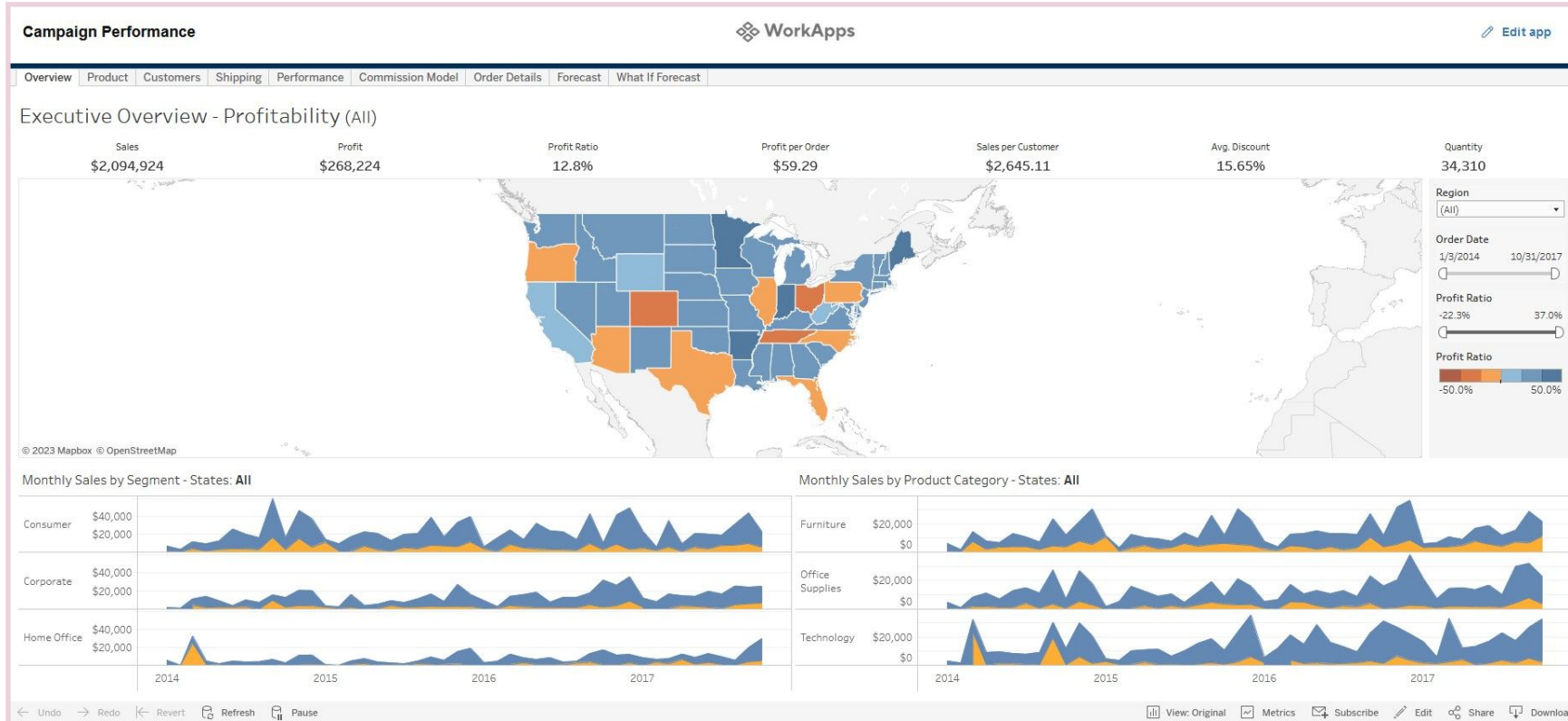
smartsheet

ENGAGE

Don't Reinvent the Wheel

Tableau & Power BI

[Embed on a dashboard](#) - Use the Web Content Widget



Data Onboarding

Data Shuttle

Data Shuttle

< Dashboard / Create a workflow

● Source

● Target

● Filters

● Mapping

● Run options

● Expressions

● Sharing settings

● Name workflow

Select your source file

Log in to your storage service and select your source file.

Source Location

Smartsheet Attachment

i Do you need help getting your data into a supported format? [Learn more](#)

Supported file types: CSV, XLSX, Google Sheets

Max file size: 1000MB

Search or select file

Choose attachment by

Name

Attachment Name

Name

Content Insights

Smartsheet + Brandfolder

Stephanie's Profile

My Boards

Notifications 456

Action Required

Integrations

SETTINGS

User Settings

Notification Settings

Insights Data in Smartsheet

Automatically send your Insights asset performance data to Smartsheet. This includes user data as well as...

Get tips on how to effectively manage the data in our [Knowledge Base](#).

Stop Data Syncing

Brandfolder Name	Data Sync Status
RFP Knowledge Base	⊘ Not synced to Smartsheet
Work in Progress	🔄 Synced on 8/12/2024
Marketing Automation Team	🔄 Synced on 8/12/2024 ⋮ <input checked="" type="checkbox"/>
Smartsheet Events	🔄 Synced on 8/12/2024 ⋮ <input checked="" type="checkbox"/>

Asset Type	Name	Length	View...	Share...	Download...	View...	Sh...	Do...	D-Rank	S-Rank	V-Rank	R-Rank
44	Sun Hat Social Ads	18	4	0	0	1,257	2,84	1,10	172	163	200	81
197	Circular	8	1	0	0	1,612	2,20	1,13	169	73	199	88
15	Beachside Relaxation	20	8	0	2	1,822	1,03	564	184	143	198	160
32	Sonata Ad 13	12	1	0	1	1,979	2,31	6,03	65	88	197	149
169	Culinary-Greece-425345	22	1	0	0	2,051	2,26	1,63	158	70	196	157
140	Sonata Awareness Display	24	2	0	0	2,423	1,77	8,57	15	96	195	148
2	Poolside in Thailand	20	35	1	5	2,967	2,63	4,64	105	49	194	20
112	Luxury Accommodations for a Perfect	43	2	0	0	3,094	1,49	6,09	64	120	193	29
25	Vertical Logo - Black	21	4	0	0	4,185	1,03	5,39	80	142	192	188
143	Assist-navy-close	17	2	0	0	4,509	2,39	8,75	10	61	191	128
75	Luxury cruise liners through the most	64	3	0	0	4,706	486	1,65	157	180	190	63
35	Beachside Strolls	17	5	0	1	4,911	2,91	8,15	25	28	189	117
118	Sonata Assist 2nd Generation	28	2	0	0	5,206	2,79	2,95	130	43	188	92
48	Banff Travel Brochure	21	4	0	0	5,533	1,43	8,17	24	122	187	53
81	Take a dip where you can't tell where	63	3	0	0	5,644	818	6,99	54	161	186	75
154	Exotic infinity pools with unending se	45	2	0	0	5,917	2,84	200	190	37	185	126
142	The Most Beautiful Place on the Moor	36	2	0	0	6,933	2,88	9,07	2	32	184	125
121	Culinary-Tuscany-173498	23	2	0	0	7,945	2,66	194	191	47	183	9
138	Relax in style at poolside luxury resor	41	2	0	0	9,239	2,98	5,37	81	22	182	189
67	Sonata - Winter 2017 Issue	26	3	0	0	9,287	1,16	8,25	23	134	181	23
31	Perfect Day Florence - Travel Guide	35	6	0	0	9,515	435	6,46	57	184	180	144
8	New Family Events	17	7	2	1	9,709	278	4,49	108	191	179	50
113	Sonata - Fall 2018 Issue	24	2	0	0	10,391	655	1,62	159	168	178	135
61	Sonata-Presentation-Template	28	4	0	0	10,891	1,42	374	187	123	177	115
95	Brand Portal Mocks	18	3	0	0	10,931	2,35	2,04	151	65	176	140
83	See the storied Byzantine monastery	35	3	0	0	10,973	3,07	1,11	171	19	175	183
108	chocolate-ad.png	16	2	0	0	11,171	1,56	8,86	6	113	174	61
111	Social Post 1080x1920	21	3	0	0	11,691	2,21	9,08	1	72	173	95
179	Culinary-Greece-254635	22	1	0	0	11,981	2,45	755	181	58	172	41
153	Header Sonata	13	2	0	0	12,161	1,55	905	178	114	171	163
9	Banff amazing tours for all!	29	4	2	0	12,291	3,20	82	198	8	170	22
161	Culinary-Greece-056987	22	1	0	0	12,351	454	10	200	182	169	35
191	Canyon	6	1	0	0	12,691	496	4,13	113	179	168	10
72	Lounge in 5 star spas and saunas	32	3	0	0	12,771	2,84	4,34	110	35	167	119

Wrap Up!



Unpacking

That was a LOT!



Strong Foundation

Evaluation and building blocks



Audience Based Outcomes

Enhancing visibility and decision-making



Optimization & Continuous Improvement

Optimizing your solution to maximize impact

Resources

Sessions, Booths, Reference Sites & More

Additional Resources:

[Solution Center Templates](#)

[Marketing Maturity Assessment](#)

**Come see us after session or @ booth:
Smartsheet for Marketers & Creatives**

Other sessions to check out!

- Tackling marketing inefficiencies: Less talk, more action
- Unlock precision data retrieval with INDEX, MATCH, and COLLECT
- Streamline product development processes for faster time to market
- Getting Started with Dashboards
- Formulas: Building blocks for data analysis
- Smartsheet charts unpacked: Elevate your dashboard game
- Creative solutions to your creative team's biggest challenges
- How to get your marketing department to embrace Smartsheet
- Scaling Smartsheet Data Shuttle
- Drive organizational change without friction

Follow up with your account team to arrange a call with one of our marketing SMEs (myself or one of my team)

Next steps...

- Q&A
- Let's Chat
- Visit the booths

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