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Smartsheet for Services Delivery

SEA08

Maximize Efficiency with Seamless Integration

v.07/16

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Meet your speakers!



Olivia Ripps
Senior Manager, PPM
Practice



Tim Arland
Smartsheet Solutions
Director



Learning Objectives

What will you learn today?

- ✓ Discover how Smartsheet's **Services Delivery Framework** can **improve outcomes** across industries and customer projects.
- ✓ Learn how Smartsheet's workflows **combine data and feedback** to give you **better business insights**.
- ✓ See how Smartsheet's Professional Services team **connects data to outcomes, improving customer experiences and driving growth**.

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Smartsheet Services
Delivery Overview

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Services Delivery Personas

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The Story of an
Engagement Manager,
Customer and P&L Leader

4

Next Steps

1

Smartsheet Services Delivery Overview

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Services Delivery Overview + Types of Delivery



Technology Services

Advisory and implementation services enabling technology solutions to drive business outcomes



Professional Services

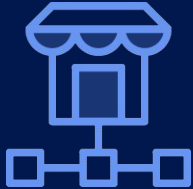
Traditional advisory and value added consulting focused on optimizing business processes



Specialty Services

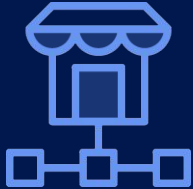
Consulting or delivery services for specific highly specialized industries or outcomes

Common Challenges



Scaling the business

Common Challenges

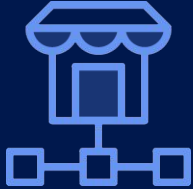


Scaling the business



Resource management

Common Challenges



Scaling the business

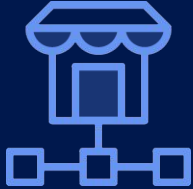


Resource management



Visibility

Common Challenges



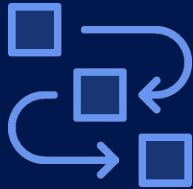
Scaling the business



Resource management

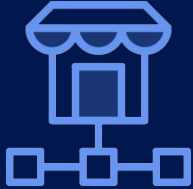


Visibility



Growing projects & complexity

Common Challenges



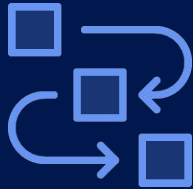
Scaling the business



Resource management



Visibility



Growing projects & complexity



Delighting my customers

Common Challenges

Scaling the business: As demand increases, how can I scale my delivery processes and resources while maintaining customer satisfaction?

Resource management: How do ensure the right resources are in the right places at the right times to meet project demands without compromising delivery timelines or quality?

Growing projects and complexity: how can apply standard frameworks to individual projects to manage complexity while increasing my ability to scale?

Visibility into the business: Having a single point to view the critical parts of my business is crucial to productivity and long term success but can be difficult to manage

Delighting my customers: What can I do to make it easier for my customers to have real time visibility and collaboration on our shared critical projects?

Smartsheet's Services Delivery Solution



Pipeline
Management



Backlog & Capacity
Forecasting



Engagement Planning



Engagement
Delivery



Business & Operational
Reporting



Operational
Excellence

Enterprise Work Management Platform

Smartsheet's Services Delivery Solution



**Pipeline
Management**



**Backlog & Capacity
Forecasting**



Engagement Planning



**Engagement
Delivery**



**Business & Operational
Reporting**



**Operational
Excellence**

Enterprise Work Management Platform

Monitor & Capture Demand:

- Pipeline Monitoring
- New Opportunity Tracking
- RFP Responses
- Scoping, Risk, and Cost Estimation
- Proposal/Quote Approval
- Win/Loss Review
- Contract Management

Smartsheet's Services Delivery Solution



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Management



Backlog & Capacity
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Prioritize Projects:

- Resource Forecasting
- Revenue & Margin Forecasting
- Backlog Prioritization
- Change Requests
- Resource Skills & Capacity

Smartsheet's Services Delivery Solution



Pipeline
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Backlog & Capacity
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Staff & Kickoff Projects:

- Resource Staffing
- Schedule and Milestone Planning
- Scope Review
- Budget Forecasting
- Engagement Initiation & Onboarding

Smartsheet's Services Delivery Solution



Pipeline
Management



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Deliver Services through Defined Methodology:

- Schedule, Deliverables & Milestones Tracking
- Risks, Actions, Issues, and Decisions Tracking
- Budget & Expense Tracking
- Resource & Time Tracking
- Requirements Management
- Customer Collaboration
- Status Reporting
- CSAT Surveying

Smartsheet's Services Delivery Solution



Pipeline Management



Backlog & Capacity Forecasting



Engagement Planning



Engagement Delivery



Business & Operational Reporting



Operational Excellence

Enterprise Work Management Platform

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Visibility for Clients & Internal Leadership:

- Bookings, Revenue, Expense, Margin KPI Tracking
- Resource Utilization, Hiring & Bill Rate Analysis
- Engagement Scorecards & Exception Reporting
- Risk Insights
- CSAT Trends
- Investments & Service Credits
- Lessons Learned
- Compliance & SLAs

Smartsheet's Services Delivery Solution



Pipeline Management



Backlog & Capacity Forecasting



Engagement Planning



Engagement Delivery



Business & Operational Reporting



Operational Excellence

Enterprise Work Management Platform

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- Lessons Learned
- Compliance & SLAs

Operations Management:

- Updates & Enhancements
- Usage and Compliance
- Managing Users & Access
- Configuration
- Ad hoc Requests

Real Business Outcomes



**Improved engagement
management operations**

Real Business Outcomes



**Improved engagement
management operations**



Real-time collaboration

Real Business Outcomes



**Improved engagement
management operations**



Real-time collaboration



**Comprehensive
reporting**

Real Business Outcomes



**Improved engagement
management operations**



Real-time collaboration



**Comprehensive
reporting**



**Enhanced compliance
& auditability**

Real Business Outcomes



**Improved engagement
management operations**



Real-time collaboration



**Comprehensive
reporting**



**Enhanced compliance
& auditability**



Customer satisfaction

Real Business Outcomes

1. **Enhanced Internal Project Management:** Integrating Smartsheet's robust project management capabilities with PSA and other financial management tools ensures seamless project tracking, budgeting, and forecasting.
2. **Enhanced Collaboration:** Foster better collaboration between project managers and customers. Shared data and insights ensure all stakeholders are aligned on project status, budgets, and financial goals.
3. **Comprehensive Reporting:** Smartsheet's customizable reporting tools and financial analytics create comprehensive reports that cover both project performance and financial health.
4. **Increased Visibility and Control:** Improve overall project governance with integrated dashboards that provide a holistic view of project and financial status, enabling more informed decision-making.
5. **Repeatability and Scalability:** Support the growth of your organization by easily creating templates in Smartsheet to get repeatability in the delivery model. As projects and financial requirements grow, the integration can adapt to meet evolving needs without significant disruptions.
6. **Enhanced Compliance and Auditability:** Ensure compliance with financial regulations and improve auditability by maintaining consistent and accurate financial records.
7. **Customer Satisfaction:** Deliver better project outcomes and customer experiences by ensuring projects are completed on time and within budget.

2

Services Delivery Personas



Alex Thompson

Engagement Manager

Oversees successful service delivery and client relations.

- Manage customer relationships and expectations.
- Oversee project planning and execution.
- Provide project status reports.



Alex Thompson

Engagement Manager

Oversees successful service delivery and client relations.

- Manage customer relationships and expectations.
- Oversee project planning and execution.
- Provide project status reports.

Alex has challenges with:

1. Lack of Standard Methodology
2. Fragmented Communication Channels
3. Manual Report Outs

Jessica Lee

Customer

Represents the client receiving the services.

- Define service requirements and expectations.
- Provide feedback and communicate concerns.
- Collaborate to resolve issues.



Jessica Lee

Customer

Represents the client receiving the services.

- Define service requirements and expectations.
- Provide feedback and communicate concerns.
- Collaborate to resolve issues.

Jessica has challenges with:

1. Misalignment on Project Expectations/Outcomes
2. Uncertainty about Project Progress
3. Lack of “Partnership” with Delivery Team



Michael Ramirez

P&L Leader

Manages financial performance of service delivery.

- Analyze revenue and profitability.
- Track financial performance and report to senior leadership.
- Provide financial insights for decision-making.



Michael Ramirez

P&L Leader

Manages financial performance of service delivery.

- Analyze revenue and profitability.
- Track financial performance and report to senior leadership.
- Provide financial insights for decision-making.

Michael has challenges with:

1. Lack of Performance Insight
2. Manual Data Aggregation
3. Visibility & Risk Management Gaps



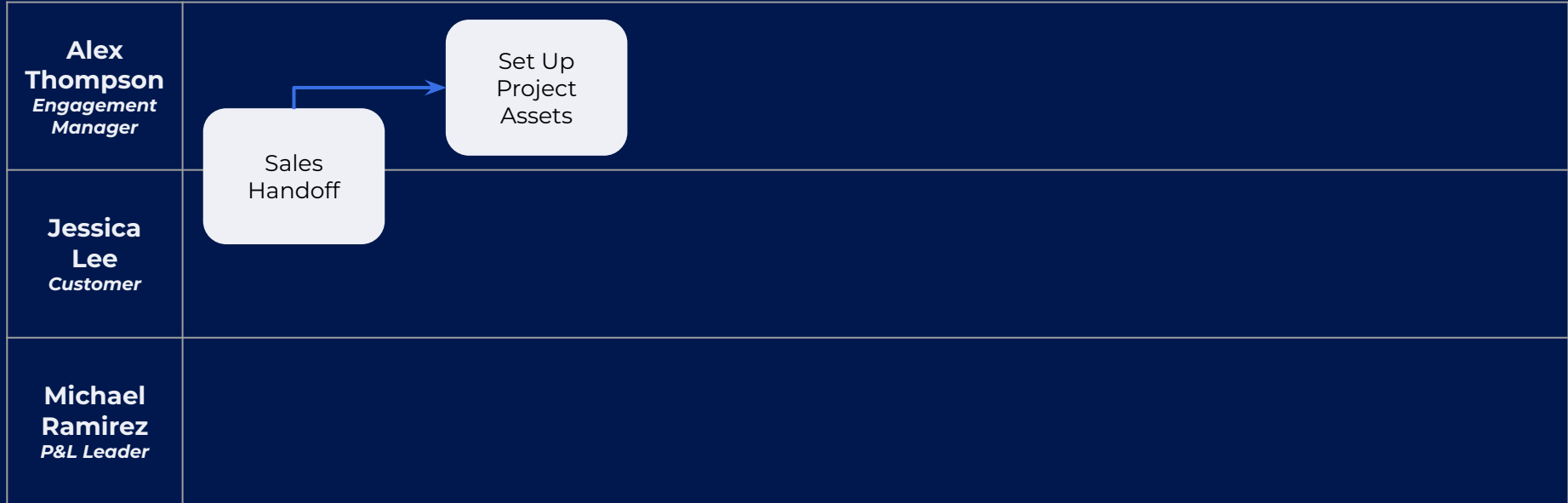
Our Desired Future State

Process Flow

Alex Thompson <i>Engagement Manager</i>	
Jessica Lee <i>Customer</i>	Sales Handoff
Michael Ramirez <i>P&L Leader</i>	

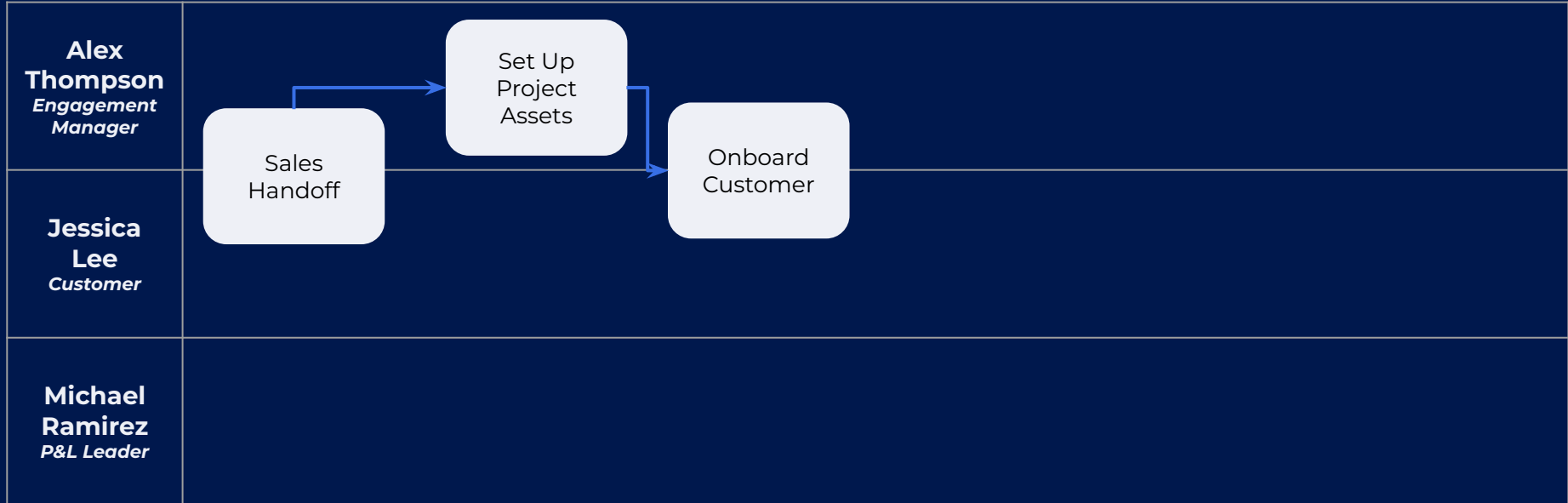
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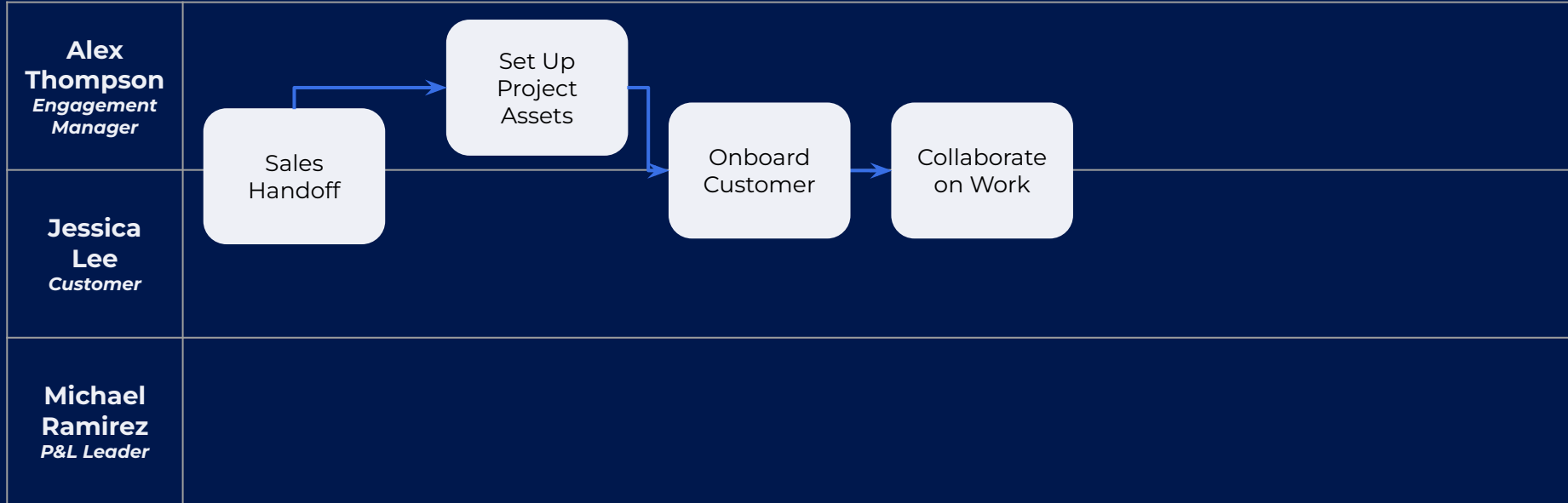
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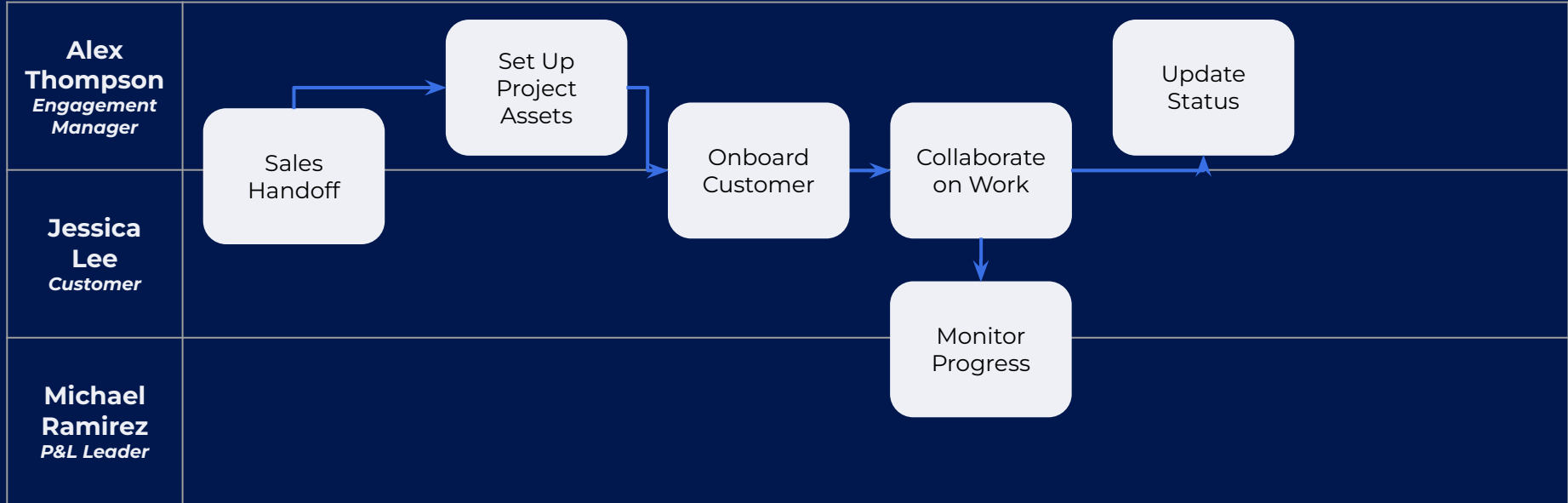
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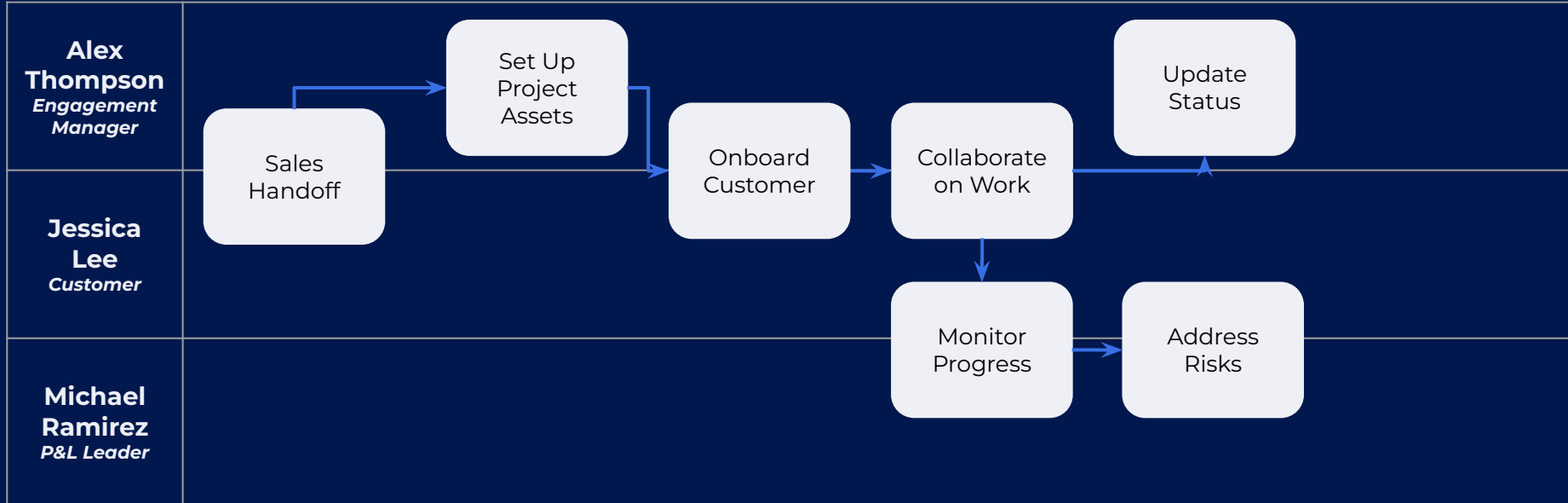
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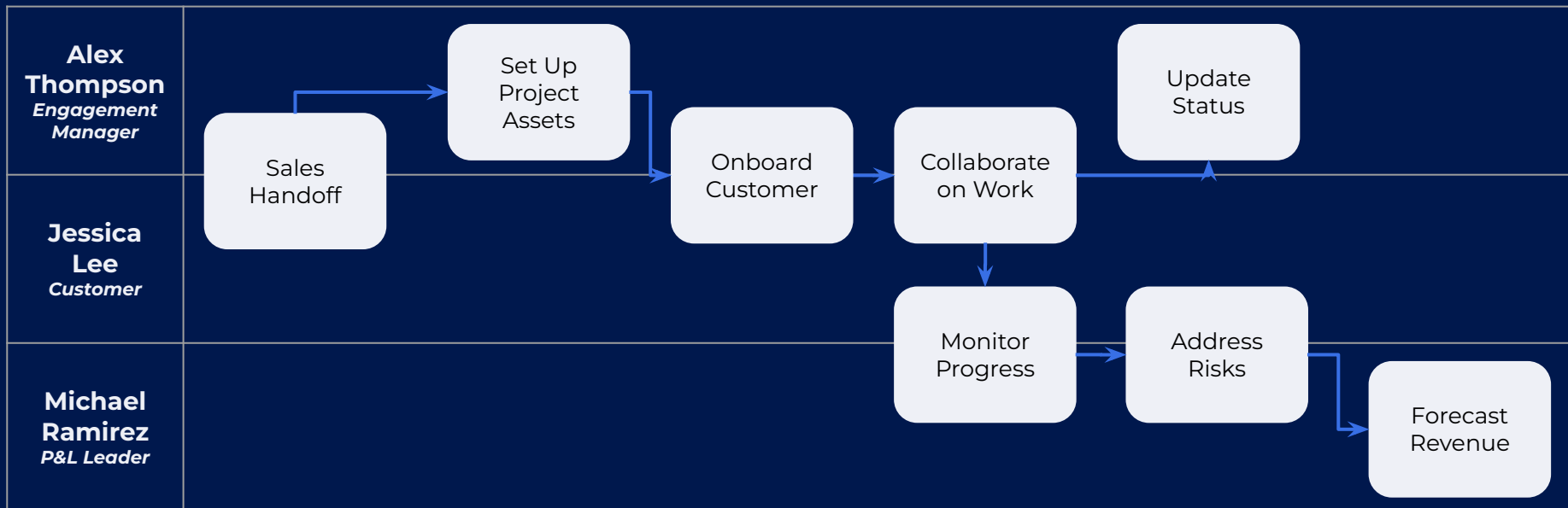
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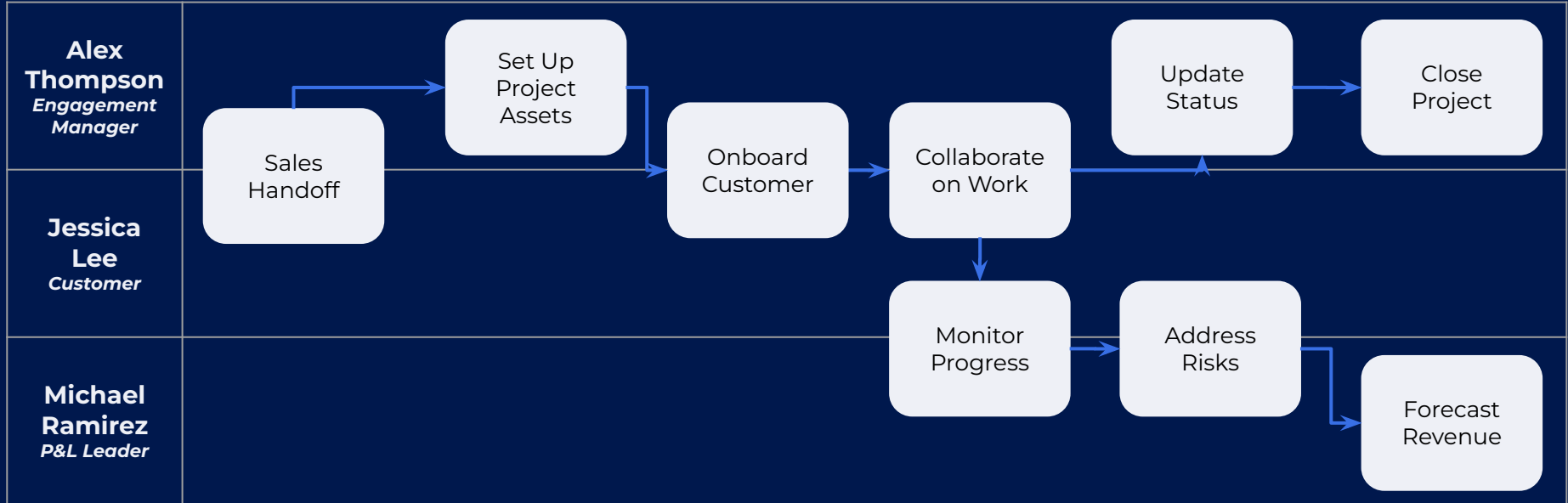
Our Desired Future State

Process Flow




Our Desired Future State

Process Flow



Services Delivery Solution

Prioritized Workflows



Pipeline
Management



Sales
Handoff

Pipeline
Monitoring

Services Delivery Solution

Prioritized Workflows

Pipeline
Management

Engagement
Planning

Sales
Handoff

**Set Up
Project
Assets**

**Onboard
Customer**

Pipeline
Monitoring

**Schedule and Milestone
Planning**

**Engagement Initiation
& Onboarding**

Services Delivery Solution

Prioritized Workflows

Pipeline
Management

Engagement
Planning

Engagement
Delivery

Sales
Handoff

Set Up
Project
Assets

Onboard
Customer

**Collaborate
on Work**

**Update
Status**

**Monitor
Progress**

**Address
Risks**

Pipeline
Monitoring

Schedule and Milestone
Planning

Engagement Initiation &
Onboarding

**Schedule, Deliverables &
Milestones Tracking**

**Risks, Actions, Issues, and
Decisions Tracking**

Customer Collaboration

Status Reporting

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Services Delivery Solution

Prioritized Workflows

Pipeline
Management

Engagement
Planning

Engagement
Delivery

Pipeline Business & Operational
Reporting

Sales
Handoff

Set Up
Project
Assets

Onboard
Customer

Collaborate
on Work

Update
Status

Monitor
Progress

**Address
Risks**

**Forecast
Revenue**

**Close
Project**

Pipeline
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Risk Insights

**Bookings, Revenue,
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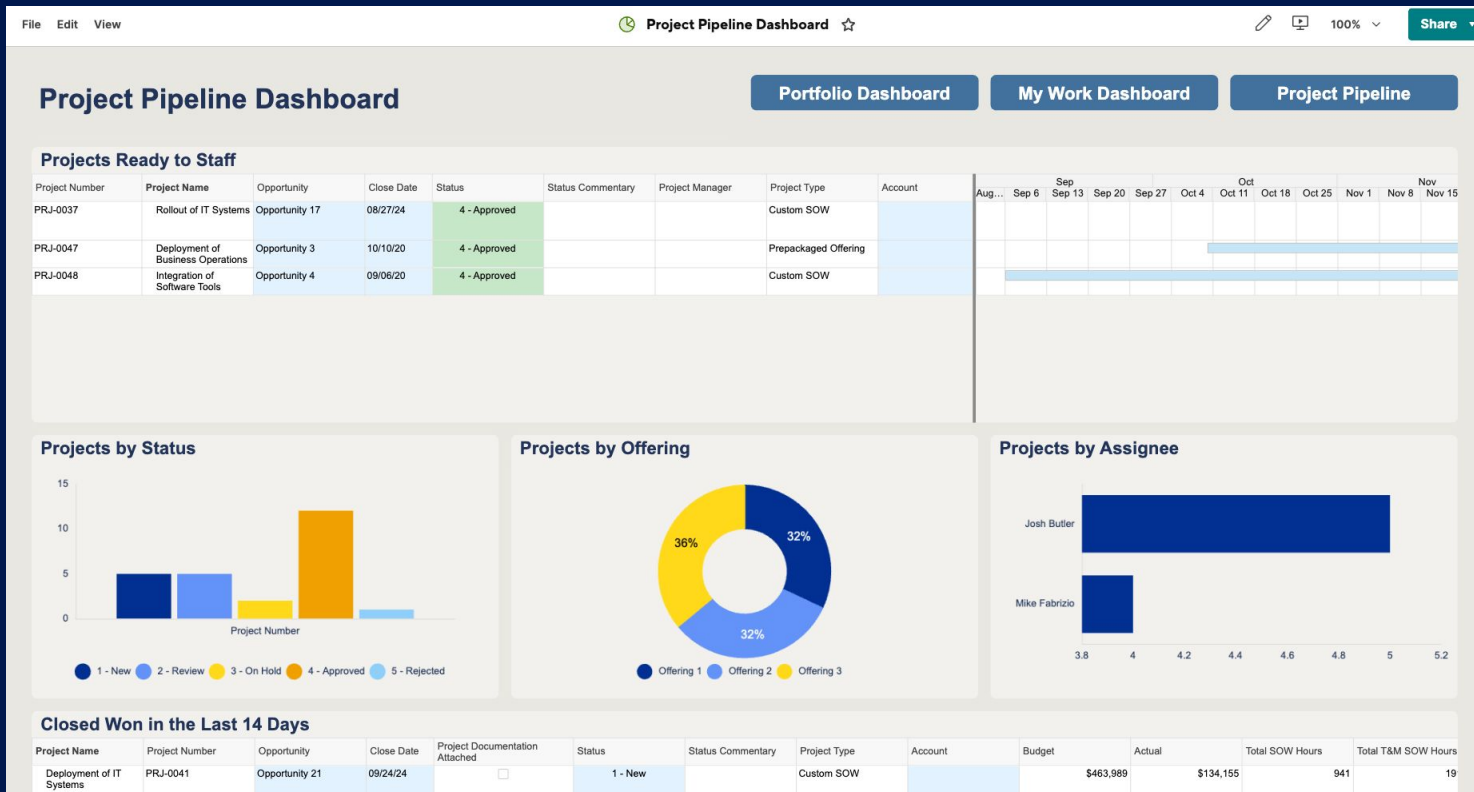
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3

Smartsheet Demo

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Project Pipeline Dashboard



Project Dashboard

File Edit View

Project Dashboard - Implementation of Cloud Soluti ☆

100%

Share

Implementation of Cloud Solutions
Dashboard

Olivia Ripps
Project Manager

Global Tech
Client Account

1 - Planning
Project Stage

Documentation

Project Progress

Manage Tasks

08/13/24

Start Date

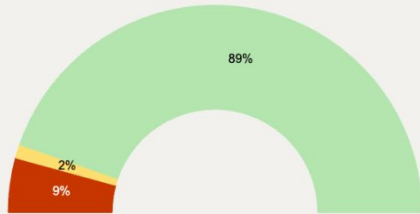
02/14/25

End Date

4

Overdue Tasks

Tasks by Health - Implementation of Cloud Solution



Past Due Tasks - Implementation of Cloud Solutions

Task Name	Description	Start Date	End Date	Status	Health
1 - Planning		08/13/24	09/04/24		●
2 - Analysis		09/05/24	09/16/24		●
Requirements Research		09/05/24	09/13/24	2 - In Progress	●
Benefits realization re		09/16/24	09/16/24	2 - In Progress	●

Project Status

Update Status

Overall

Scope

Schedule

Budget

Resource

Trend

Scope Trend

Schedule Trend

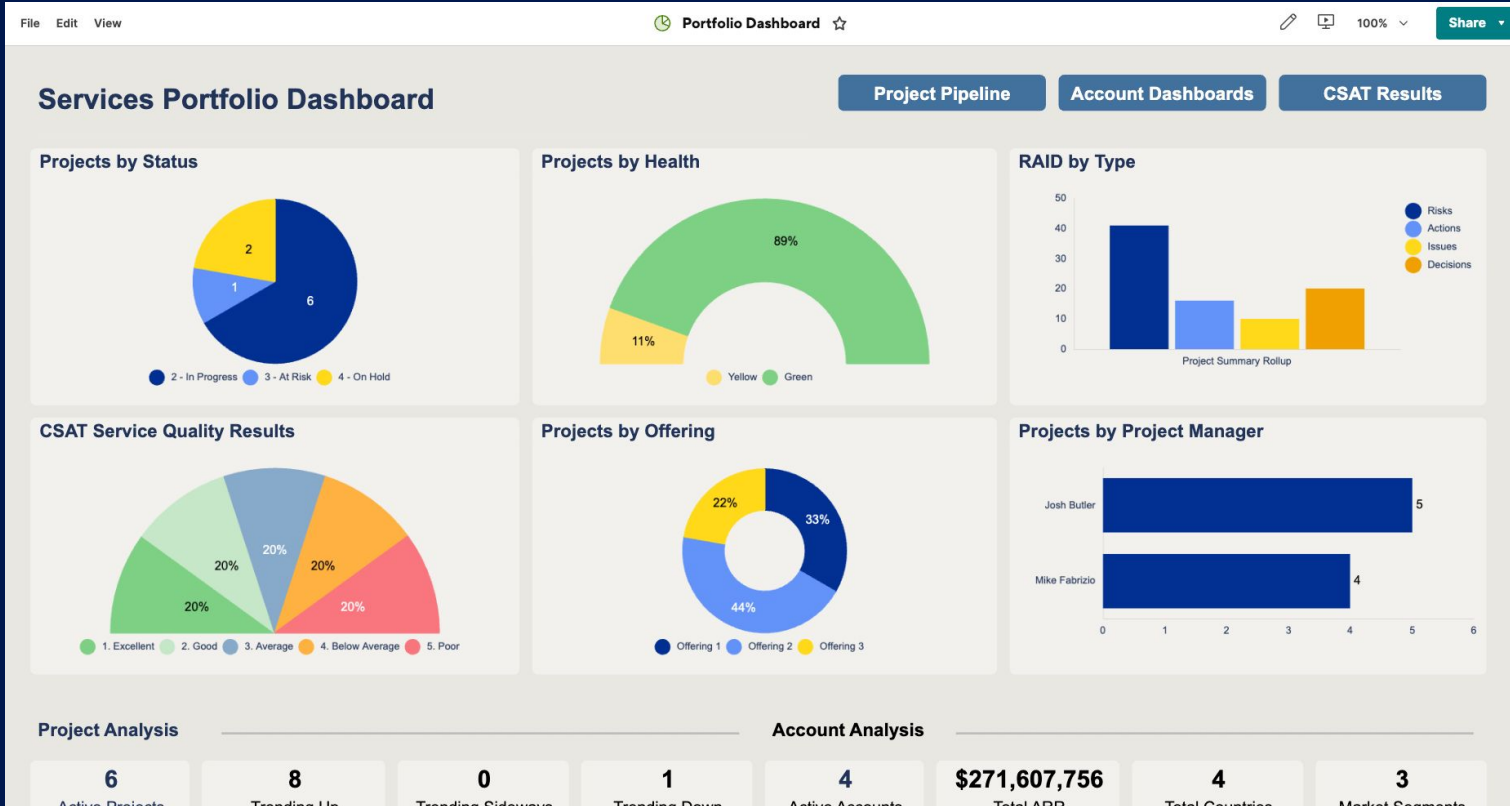
Budget Trend

Resource Trend

Status Updates Log

Executive Summary	Project Details	Project Status	Accomplishments	Looking Ahead	Active Risks	Up
Project awaiting kickoff	Challenges scheduling with stakeholders	1 - Not Started				

Portfolio Dashboard



External Account Dashboard

File Edit View
🕒 External Account Dashboard - Global Tech ☆
📄 100% ▾
Share ▾

Global Tech Dashboard

3

Total Projects

Daniel Lopez

Account Manager

Key Contacts

Overview

Budget Health

RYG Budget: 0 0.5 1 1.5

Schedule Health

RYG Schedule: 0 1 2 3 4

Scope Health

RYG Scope: 0 1 2 3 4

Projects by Status

Project Status

- 1 - Not Started
- 2 - In Progress
- 4 - On Hold

Project Status Summary

Project Dashboard	Project Name	Project Status	RYG Schedule	RYG Scope	RYG Budget	Accomplishments
	Project Client A-01	1 - Not Started	●	●		
	Project Client A-02	2 - In Progress	●	●		
Project Dashboard	Implementation of Cloud Solutions	4 - On Hold	●	●	●	TEST

Milestones

Open Milestones by Projects

Task	Description	Assigned To	Oct 20					Oct 27										
			S	M	T	W	T	F	S	S	M	T	W	T	F	S	M	T
Project Name: Implementation of Cloud																		
	Client Approvals																	
	Client Build Approval																	
	Go Live																	
	Milestone																	

Risks

Open High Priority RAID

RAID/Feedback Item	Type	Status	Description	Resolution / Mitigation Plan	Assigned To (Client)	As

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Internal Account Dashboard

Global Tech
Internal Dashboard

3
Total Projects

Daniel Lopez
Account Manager

Account Dashboard

Key Contacts

Account Overview



Global Tech
Legal Company Name

\$79,823,498.00
Annual Recurring Revenue

3367
Employee Count



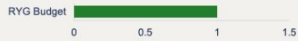
Brandi Collins
Primary Contact

Primary Contact Email

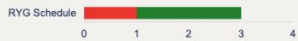
Primary Contact Phone

Projects Overview

Budget Health



Schedule Health



Scope Health



Projects by Status



Project Status Summary

Project Dashboard	Project Name	Project Status	RYG Schedule	RYG Scope	RYG Budget	Accomplishments
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Project Dashboard	Implementation of Cloud Solutions	4 - On Hold	●	●	●	TEST

4

Next Steps

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Recap of Learnings

What have you learnt today?

- ✓ Discover how Smartsheet's **Services Delivery Framework** can **improve outcomes** across industries and customer projects.
- ✓ Learn how Smartsheet's workflows **combine data and feedback** to give you **better business insights**.
- ✓ See how Smartsheet's Professional Services team **connects data to outcomes, improving customer experiences and driving growth**.

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

Next steps...

- Attend SEA10 - Learn how to scale your projects to more complex programs and portfolios while achieving consistency in intake, execution, and reporting.
- Attend SEA17 - Join the Smartsheet Solutions Team and customers for a panel discussion into leveling up your services delivery business.
- Attend SEA36 - Learn about integrating Smartsheet with the rest of your techstack.

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.

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Share your experience at ENGAGE

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



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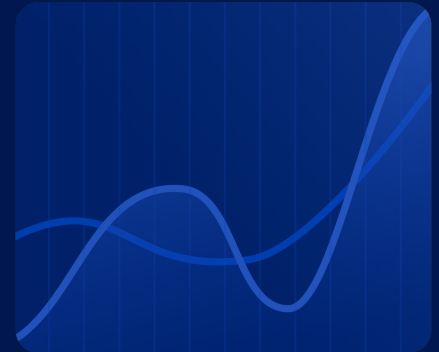
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