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Tips & Tricks for using AI

Become a Smartsheet AI prompt pro

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v.07/16

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Corey Engelhart
Sr. Solution Engineer

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Today’s Tasks

1

Demystify Smartsheet AI capabilities

2

Master the art of engaging with AI

3

Leave with practical next steps

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“What once made you unbeatable now only keeps you competitive.”

- Unknown

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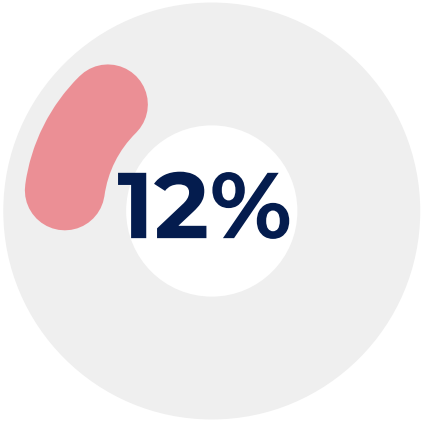
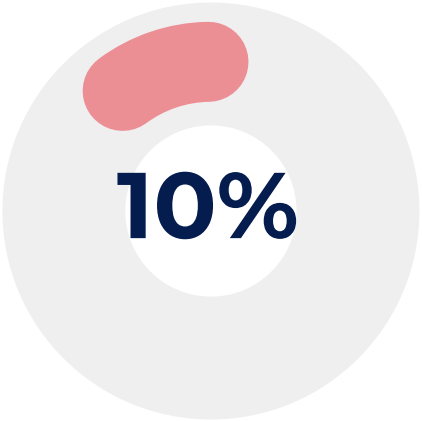
Customer usage

Use AI tools at work

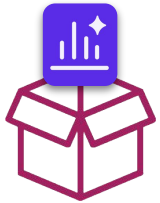


“Fear of the unknown”



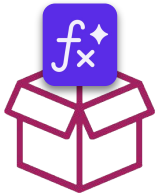
“Unsure where to begin”

The unboxing



Analyze data

“Tell me about my sheet...”



Generate formula

COUNTIF... huh??

Text and summaries

“Translate description from English to Japanese”

Get Help

“Can Datamesh use a Report as a source?”

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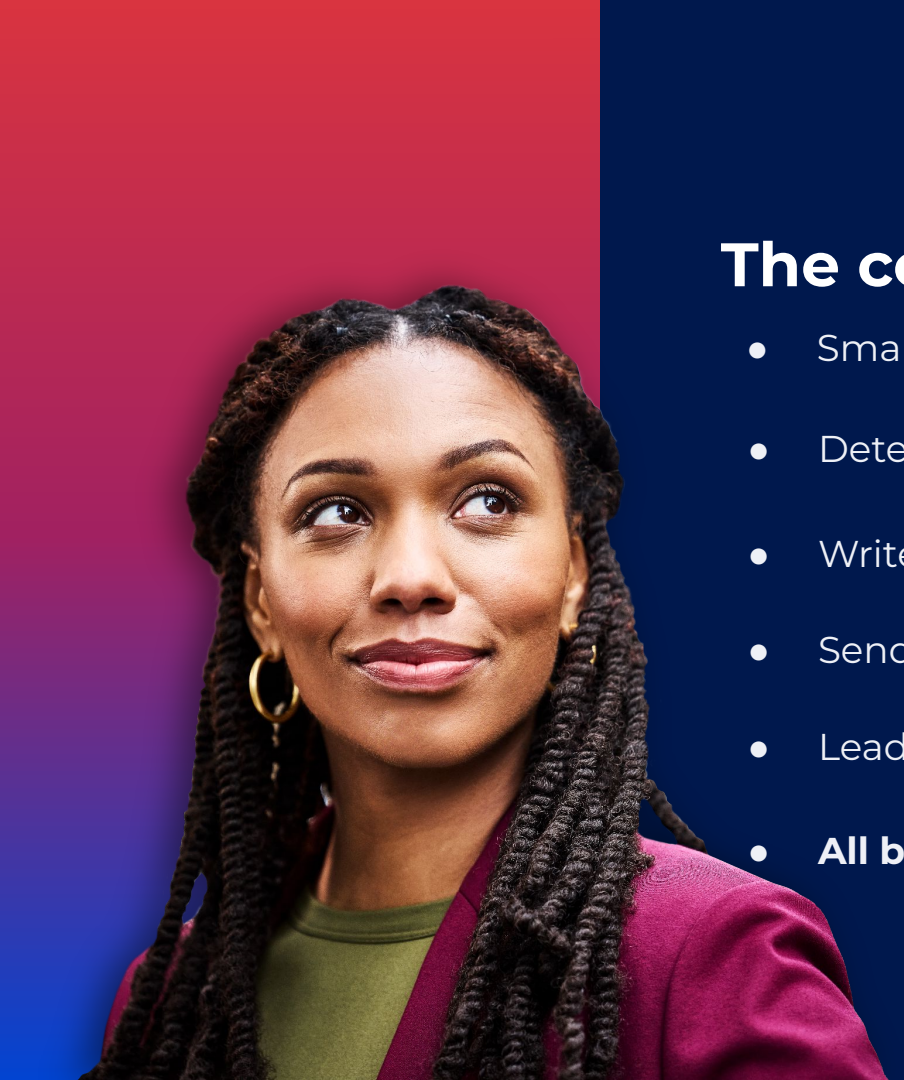

The college recruiter

- Smartsheet form at college fairs
- Determine viable candidates
- Write personalized letter
- Send follow-up postcards inviting to apply
- Leadership report on impact of trip
- **All by this Friday!**

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Steps to prompting

1. What is my objective?
2. What is the best tool for the job?
3. Write version 1
   a. Use specific references
   b. Type like you'd speak
4. How can I learn from that error?
5. Repeat

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How to know which tool to use?

Analyze Data

- Surface new insights
- Digest qualitative data (sentiment, etc.)
- Summarize what my sheet is doing
- Create ad hoc charts
- **Point-in-time result is acceptable**

Generate Formula

- Outcome entirely accessible in cell data
- Needs to scale beyond ten rows
- Needs to be dynamic

Text & Summaries

- Needs intelligence beyond sheet data
- Produce novel content inspired by sheet data
- Produce unique output row (up to 10 at a time)
- **Point-in-time result is acceptable**

Get Help

- The Smartsheet guru of your dreams
- General Smartsheet knowledge, not your stuff

Demo

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Build a culture of AI

- Commit to trying just one thing
- Look for incremental time-savings
- Maintain a “prompt library”
- Talk about it
- Always ask “Can AI do this better?”

Be creative and have fun!

Thank you

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Next steps...

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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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

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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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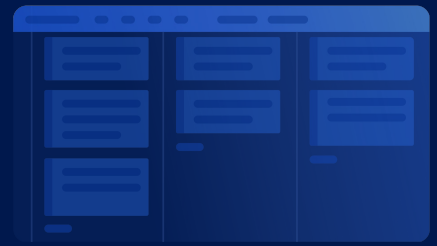

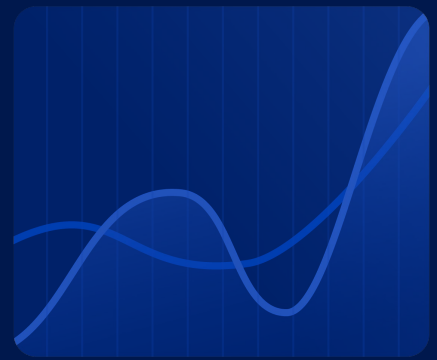

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