



ENGAGE

Managing data across your advanced solutions

Cell links, cross-sheet formulas and beyond

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Today's presenters

Who the heck are we?!



James Lee
Senior Product Manager



Bob Fraser
Principal Product Manager





“ Data is the
most valuable
resource in the world,
more valuable than oil
or gold.

The Economist, 2017

What we'll be covering today

Feat. best practices, demos and even a feature sneak peak

1

Challenges and Best Practices of Data Management

2

Applying these best practices in Smartsheet with the help of cell links and cross-sheet formulas

3

How you can apply these best practices in the future, with **Connections!**

Learning objectives

Let's keep it simple!

1. Understand the 4 best practices of Data Management and why they are important
2. Be able to apply those best practices within Smartsheet

1

Challenges and Best Practices of Data Management

What to care about and why you should care about your data

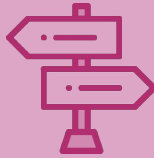


Importance of Data for Modern Organizations

First we mine for coal, then we can use it to generate electricity



Operational data



Informed decision making

Data empowers organizations to make informed decisions based on empirical evidence rather than intuition or guesswork.

Business Intelligence data



Driving innovation

Data enables organizations to identify insights and trends to gain a competitive edge.



Ineffective data management is a massive issue for companies of all sizes

From small start ups, to multinational enterprises



For small companies

Increases the time it takes to get things done, costing precious dollars

Caps their ability to innovate quickly and remain competitive

For large companies

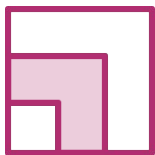
Improper decision making leads to costly mistakes

Legal issues due to improper compliance



Key challenges when managing Smartsheet data

It's not just for IT teams with sprawling databases



Volume & Complexity

There is a wealth of data existing both inside and outside of Smartsheet, existing in various locations and formats. This increases the management and technical overheads.



Quality & Consistency

Incomplete, inconsistent or duplicate data leads to inaccurate insights, unreliable decision-making, and inefficient business processes.



Security & Compliance

Businesses must implement robust access controls and adhere to various regulations (like GDPR or HIPAA) to safeguard sensitive data while maintaining data usability.



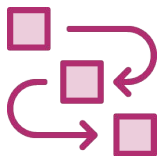
Managing change

It is inevitable that businesses and processes evolve. How can the data that exists in Smartsheet continue to be leveraged in the future as change is implemented?

Best Practices for better data management

And you don't need to be a technical guru to implement them

Planning



Understand the data lifecycle

From creation of data to its inevitable deletion, understanding the lifecycle of data is extremely important to know when continuity is important, who needs access to data and when and how long it needs to be maintained.

Quality & Consistency



Standardize data structures

Ensure that data is stored in a uniform format across all systems and departments to reduce discrepancies and easier to perform data analysis



Re-use over redundancy

Minimize the chances of duplicate or conflicting data entries, which can lead to inaccuracies, confusion and mistrust in the data.

Security & Compliance



Drive for team-based ownership

The responsibility to establish clear controls and comply with varying requirements should be the those who understand the data the most.

2

Applying Data Management best practices within Smartsheet

What scenarios are applicable and what tools you can use



Understanding the Data Lifecycle

From the creation of data to its inevitable deletion

Why is it important?

Understanding the data lifecycle ensures that data is effectively managed, used, and maintained throughout its existence.

Typical Stages

- 1. Creation/Collection:** Data is generated or collected from various sources
- 2. Processing/Storage:** Data is cleaned, transformed, and organized for analysis or other use cases.
- 3. Analysis:** Data is analyzed to extract insights, make decisions, or drive business intelligence.
- 4. Sharing/Distribution:** Insights derived from the data are shared with relevant stakeholders or integrated into applications.
- 5. Archiving:** Data that is no longer actively used is archived for long-term retention or regulatory compliance.
- 6. Destruction:** Data is securely destroyed when it is no longer needed to prevent unauthorized access or misuse.



Understanding the Data Lifecycle

Example: Software Customer Feedback

- 1. Creation/Collection:** User submits feedback via a feedback form on a particular page of the product
- 2. Processing/Storage:** The feedback item is tagged with the specific area of the product, timestamped, anonymized and sent to the feedback sheet
- 3. Analysis:** PMs analyze the feedback to identify themes and trends
- 4. Sharing/Distribution:** Insights are used in product strategy decks to improve product
- 5. Archiving:** Out of date or old feedback is archived for historical analysis
- 6. Destruction:** Feedback data that is deemed irrelevant or exceeds the retention period is securely deleted.



Yuoko, Smartsheet user

"I love Dashboards, and I use it to track and communicate progress to my stakeholders. However I want to customize the theme so it is in line with my company branding."

Demo time 🕒

Let's map out a data lifecycle



Understanding the Data Lifecycle

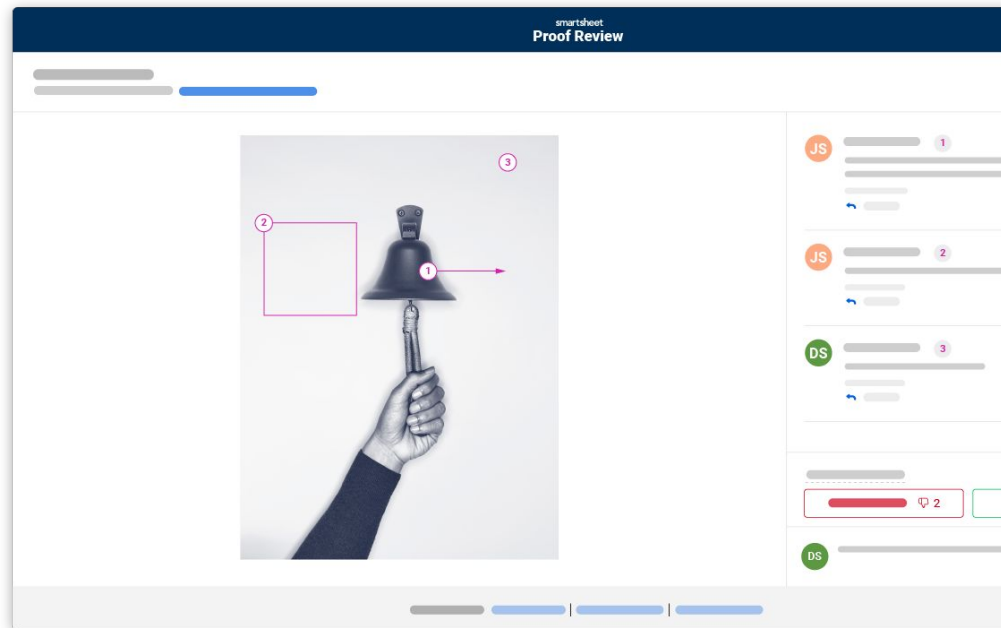
Mapping the lifecycle of data in Smartsheet

1. Planning/Mapping:

- a. **What:** Something that will help you map out data lifecycle visually will also allow you to plan out how you want to build your solution in Smartsheet
- b. **How:** Miro, LucidChart, good old pen and paper!

2. Socializing/Aligning:

- a. **What:** Uploading your lifecycle map will allow you to drive alignment with various teams and stakeholders
- b. **How:** Proofs, WorkApps



Ensuring Quality & Consistency

Trusting the data you're using

Why is it important?

Data quality you can trust and you know is managed centrally ensures rapid decision making across complex programs

Typical Stages

- 1. Templating:** Build out a template using
 - a. Cell links
 - b. Cross sheet formulas
- 2. Ingress:** Data Shuttle / RM imports per instance for standardization (with standard ETL patterns)
- 3. Archival / Completion:** Automated Workflows to action / retire data

Promoting team-based ownership in solutions

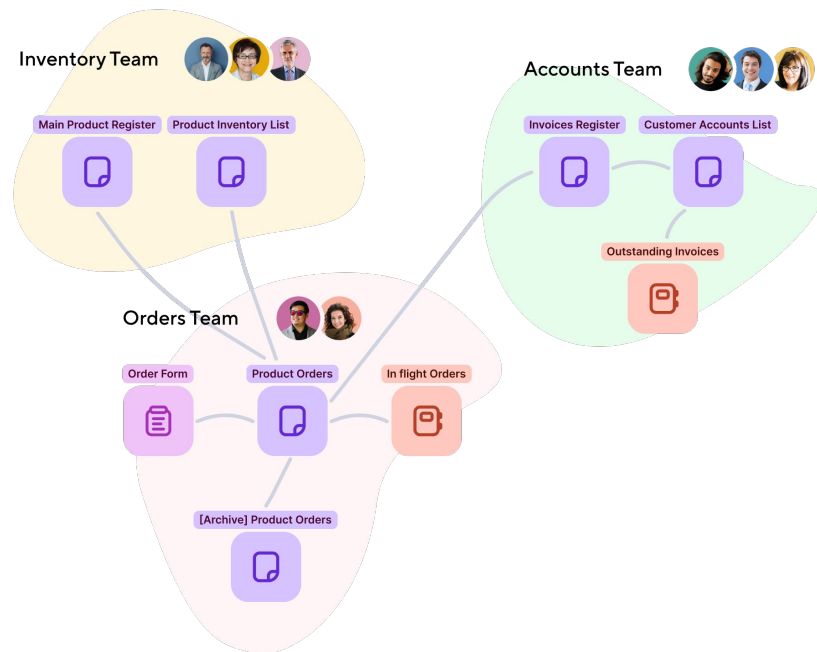
To ensure proper data compliance and privacy

Why is it important?

To ensure compliance and privacy requirements are being adhered to while enabling others in the organisation to get their work done.

What is it

- 1. Clear accountability:** Assigning ownership, ensures that data is handled appropriately and correct stakeholders are responsible for addressing compliance issues.
- 2. Regulatory compliance:** Determine any regulatory requirements around data consent, privacy or right to be forgotten (like GDPR (EU), HIPAA (US), CCPA (US), PCI DSS (Global))
- 3. Understanding dependencies:** Determine what data other teams depend on, where and what should remain private



Driving compliance via team based ownership

Example: Software Customer Feedback

- 1. Creation/Collection:** Users are presented with a data collection disclaimer in line with data collection regulations (GDPR, CCPA)
- 2. Processing/Storage:** Certain data is anonymized or tagged as confidential in line with data privacy regulations (like GDPR, HIPAA, CCPA)
- 3. Analysis:** Data is analyzed to identify trends and insights.
- 4. Sharing/Distribution:** Only anonymized, non-PII or non-confidential information can be shared outside of the bounds of a team in line with data privacy regulations (like GDPR, HIPAA, CCPA)
- 5. Archiving & Destruction:** Data that exceeds retention periods or that is explicitly requested for destruction must be deleted in line with data retention and right to be forgotten regulations (GDPR, CCPA, HIPAA)



Yuoko, Smartsheet user

“I’m moving on from my organization and would like all my data related to Smartsheet to be deleted”

Demo time 🕒

Let's tighten up
our data
compliance!



Promoting team-based ownership in solutions

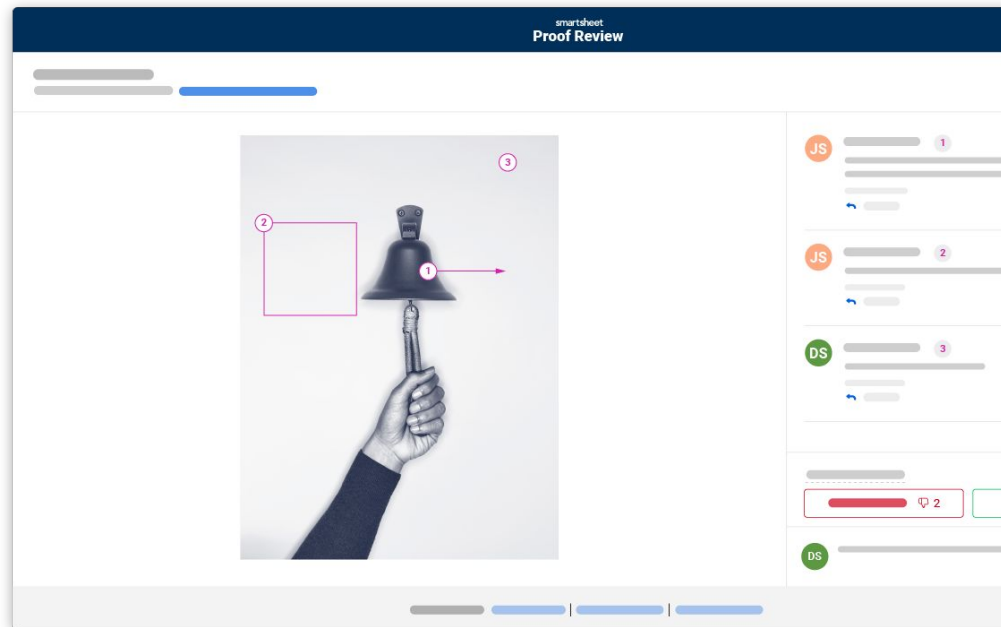
Ensuring compliance and privacy is baked in from the start

1. Regulatory Planning

- a. **What:** Define areas of ownership and regulatory responsibilities upfront
- b. **How:** Do it alongside the data-lifecycle mapping!

2. Safe sharing of data with other teams

- a. **What:** When other teams require access to your data to drive their work, create a compliant splice (removing any PII or confidential data)
- b. **How:** DataMesh or Cross-sheet formulas allow you to push a slice of non-confidential data for use in their processes



3

Introducing our new Data Linking Experience

How you can be managing data in the near future!











Linden Ave Task

	Task ID	Task	Task Status	Contractor ID	Contractor Name
1	LIN-AVE-001	Put up the walls	Completed	CON-001	First Down Lumber
2	LIN-AVE-002	Connect the electricity	Completed	CON-002	Receiving Electricity
3	LIN-AVE-003	Hook up the plumbing	Completed	CON-003	Running Plumbing
4	LIN-AVE-004	Add the floors	In progress	CON-004	Catching Paint
5	LIN-AVE-005	Paint the house	Not started	CON-005	Line Electricity

Connections

+ Add

- 
 Bringing in 6 columns from: [Linden Ave Tasks](#)
- Connection type:  Column connection ⓘ Active ●
- 
 Bringing in 2 columns from: [Master Budget Report](#)
- Connection type:  Column connection ⓘ Active ●
- 
 Bringing in 2 columns from: [Project Contractors](#)
- Connection type:  Column connection ⓘ Active ●
- 
 Bringing in 7 columns from: [Linden Ave Tasks](#)
- Connection type:  Column connection ⓘ Active ●

COMING IN EARLY '25

Your Data, Seamlessly in Sync

Reference data across your sheets, reports and DataTables

- **Link one or more columns** from different sheets based on a unique ID, allowing you to easily reference related data in the context of your sheet.
- **View and manage** all your data references in the context of your sheet, making it easy to keep track of and modify connections as needed.



Demo time 🕒

Let's check it
out in action

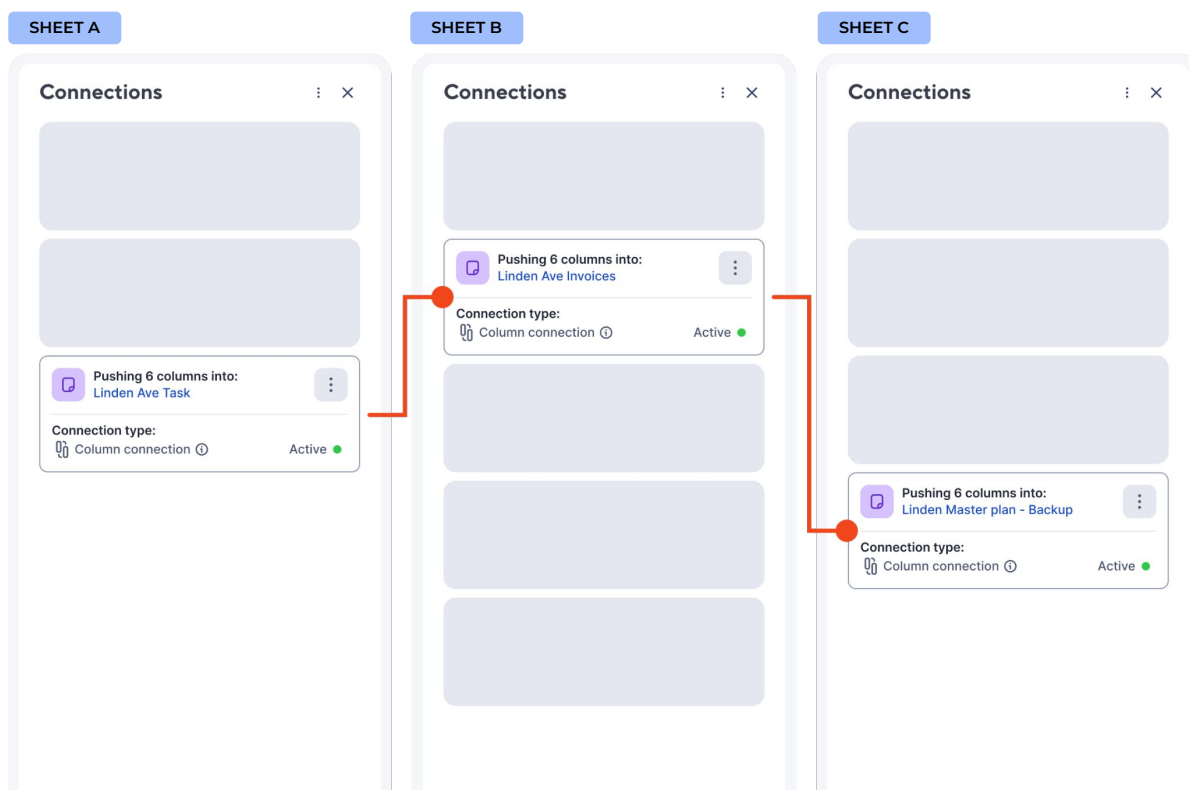
Meeting the data management best practices

Increasing visibility of how and where data is being used



Understand the data lifecycle

- Traverse sheets to understand where and how your data is being used
- In the future we want to be able to visualize this lifecycle in a single view



Meeting the data management best practices

Ensuring only responsible users can create connections, while still enabling all other users



Drive for team-based ownership

- Connections will be aligned to Workspace permissions
- Only those with access to the source sheets can use that data in other places
- However, while anyone can view connected data in the target sheet, they cannot access all source data

Procurement
Team



Project Contractors

Master Inventory List

Third Party Contractor List

Project Management
Team



Linden Ave Tasks

Master Budget Report

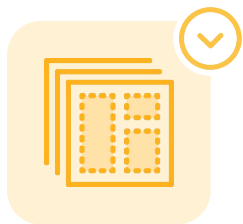
Accounts
Team



Linden Ave Invoices

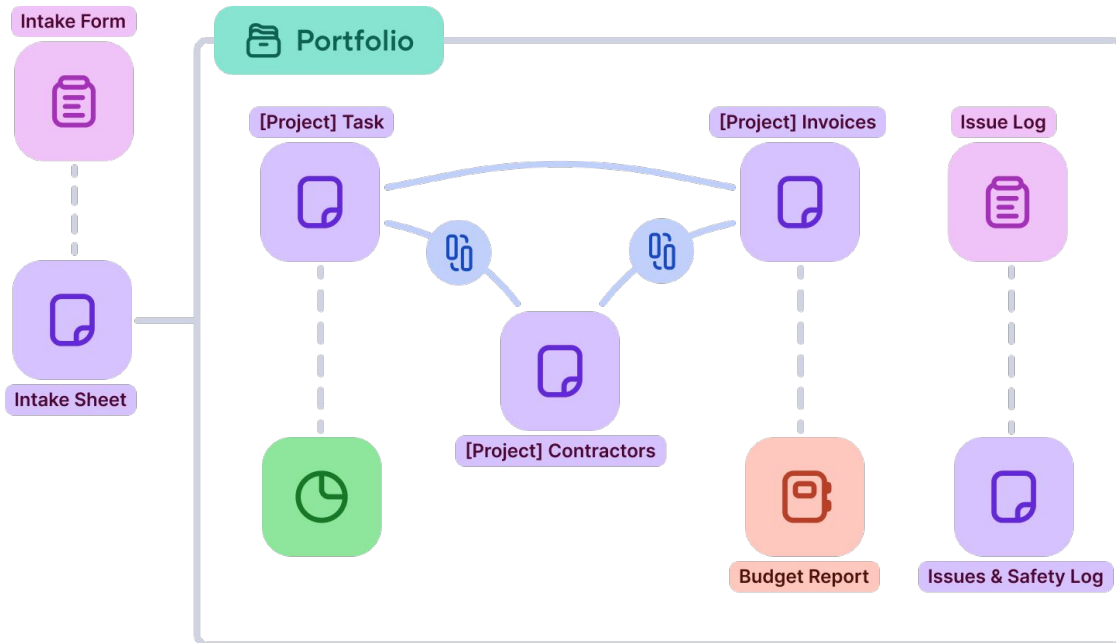
Meeting the data management best practices

Creating standardized solutions that will scale with your organization



Standardize data structures

- Smartsheet offers structure to your data sets through Templates and Portfolio Blueprints.
- You will be able to use new column links in Templates and Portfolio Blueprints in mid-2025.



How to get involved

Help us make this feature the best it can be

1. **Give us your feedback @ Engage:** Try the prototype down at the Integrations & Connections booth
2. **Sign up for the Beta Program:** Be the first ones to try out the new feature when it's ready
3. **Sign up for EAP**

Learning objectives

Still keeping it simple!

1. Understand the 4 best practices of Data Management and why they are important
 - a. Understand your data lifecycle
 - b. Standardize data structures
 - c. Re-use over redundancy
 - d. Drive for team-based ownership
2. Be able to apply those best practices within Smartsheet

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...

- See us at the booth and **try out the Data Linking prototype**
- Go check out the **INDEX/MATCH breakout session** to learn in more detail how to re-use data across solutions
- Go along to the **Product Roadmap session** to learn about all the other great things coming to Smartsheet

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

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



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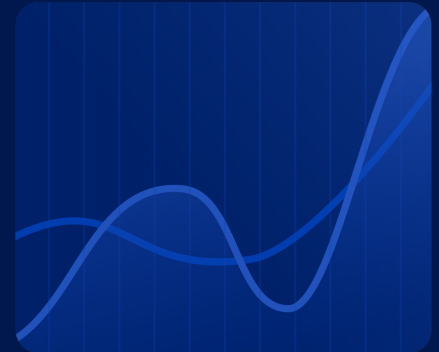
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