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Drive Organizational Change, Without Friction

Presented by Smartsheet and Zeiss



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v.07/16

Introductions

We are your change champions!



Christoph Hoffmann
Global Product Manager



Brenda Ssaaka
Professional Services Sales
Manager



Alexis Barone, MSOD
Sr Solutions Specialist, PPM



Learning Objectives

What are we here for?

- 1** Define change
We have to define it to understand it
- 2** Understand that resistance is natural
It's going to happen; let's lean into it
- 3** Utilize Smartsheet
It's why we're here!
- 4** Call to action
We have homework for you

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What's on today's agenda?

1

Definitions

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Human Behavior &
Resistance

3

Tips & Tricks

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Demo

1

Let's define change

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What is Change?

Change is the act or process of becoming different, altering, or transforming something from its original state to a new state.

Introducing Remote Work Policies

Implementing a New Software System

Updating a Workflow

Changing Your Name

Starting a Healthier Lifestyle

Moving to a New Location

Learning a New Skill

Launching a New Product

By a show of hands...

How many of you recognize the value of that change?

How many of you want **to** change?

How many of you want **to lead** change?



What is Change Management?

Organizational Change Management (OCM) refers to the structured approach and set of practices used to guide and support individuals, teams, and organizations through transitions or transformations.

Note: this is not the same as systems change management as it is focused on **people, not process.**

Half of change initiatives fail, and only **34% are a clear success.**

2

Navigating the human element

Understanding and addressing the people side of change

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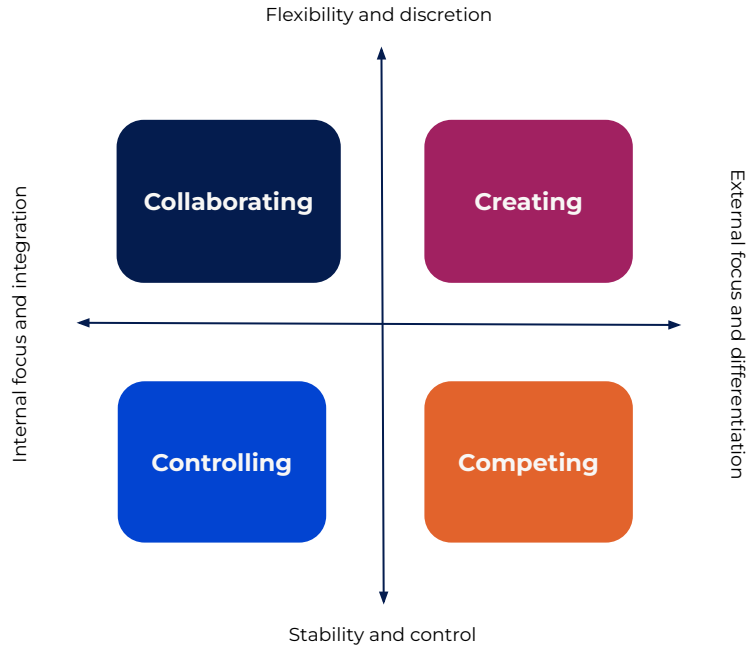
“ People don’t resist
change. They resist
being changed.”

Peter Senge

Why we resist change



Let's talk culture!



Cameron, K. and Quinn, R. 2011. **Diagnosing and Changing Organizational Culture: Based on the Competing Values Framework.** San Francisco, CA: Jossey-Bass.



Resistance to change

Emotional response

Communication and engagement

Motivation and buy-in

Behavioral adaptation

3










What now?

Tips for managing change, without friction

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Understand your audience

Program	Point of Contact	Contact Phone	Address	Program Impact on Stakeholder	Stakeholder Influence on Program
Digital Transformation Initiative					
Connected Enterprise	 Paul Finley	894-774-5492	Suite 41	!	-
Smart Tech Integration	 Harley Sterling	342-522-8559	16th Floor	-	↓
Data Revolution	 Brooklyn Jansen	348-338-4036	Room 1387	↓	!
Innovate IT 2024	 Diana Kennedy	585-801-2611	11th Floor	-	↓
Customer Experience Evolution	 Victoria Pearson	186-205-0856	PO Box 29726	!	!
Agile Workforce Solutions	 Aviv Perez	213-878-6743	17th Floor	-	↓
Sustainable Infrastructure Development					
Green Cities 2025	 Guadalupe Garcia	844-113-6140	Apt 87	!	!
Renewable Energy Expansion	 Bruce Ferguson	619-997-1714	Room 307	-	↓
Smart Transportation Network	 Harry Riggs	752-607-0935	Suite 19	↓	!

File Automation Forms Connections Dynamic View **Communication Plan** ☆

Grid View Filter Arial 10 B I U G A A

	Priority	Channel	Phase	Status	Communication	Purpose	Audience	Owner	Cadence
1	!	Survey	Planning	Complete/Sent	Pulse Survey	The Pulse survey captures stakeholder sentiment on a variety of key dimensions critical to the success of the initiative	Executive Sponsor Key Stakeholders Champions End-Users	Executive Sponsor	One Time
2	!	Other	Planning	Complete/Sent	Why Statement	Leverage survey results to draft a 2-3 sentence statement outlining why this change is being implemented, including an answer to the question "what's in it for me?"	Key Stakeholders Champions End-Users	Project Manager	One Time
3	!	Email	Planning	Approved	Change Kickoff	Introduce the project to the core project team using the change narrative, inform them of the upcoming Project Kickoff and thank the core project team in advance for their efforts throughout the engagement.	Executive Sponsor Key Stakeholders Champions End-Users	Project Manager	One Time
4	-	Email Instant Message	Implementation	Revisions	Key Milestone Update	Update the core team and any additional audiences who will be involved in the implementation phase about the progress made, and expectations moving forward.	Champions End-Users	Project Manager	Bi-Weekly
5	-	Email Instant Message	Implementation	In Progress	Key Milestone Update	Update the core team and any additional audiences who will be involved in the implementation phase about the progress made, and expectations moving forward.	Champions End-Users	Project Manager	Bi-Weekly
6	!	Meeting	Implementation	New	Solution Progress Review	Review solution progress against requirements, and discuss any revisions needed headed into the second half of the implementation.	Key Stakeholders Champions	Project Manager	One Time
7	-	Email Instant Message	Implementation	New	Key Milestone Update	Update the core team and any additional audiences who will be involved in the implementation phase about the progress made, and expectations moving forward.	Champions End-Users	Project Manager	Bi-Weekly
8	-	Email Instant Message	Implementation	New	Key Milestone Update	Update the core team and any additional audiences who will be involved in the implementation phase about the progress made, and expectations moving forward.	Champions End-Users	Project Manager	Bi-Weekly
9	!	Email Instant Message	Implementation	New	Training Announcement	Inform All End Users about upcoming solution training sessions, expectations for each training session, and readiness assessment following training.	Champions End-Users	Project Manager	One Time
10	!	Meeting	Implementation	New	Training	Solution training	Key Stakeholders Champions End-Users	Project Manager	Weekly
11	-	Survey	Implementation	New	Post-Training Survey	Post implementation check-in reinforcing the benefit of the change.	Key Stakeholders Champions End-Users	Project Manager	One Time
12	-	Meeting	Reinforcement	New	Office Hours	Post implementation check-in reinforcing the benefit of the change. Where possible, consider celebrating wins and results. Address any applicable recommendations from the Reinforcement Plan, and feedback / suggested inputs from Change leaders.	Champions End-Users	Champions	Weekly
13	↓	Email	Reinforcement	New	Did You Know?	Bi-Weekly communication outlining key features of the	Champions	Champions	Bi-Weekly

Plan your communications

New!

Leverage our redesigned Timeline & Board Views

The image displays two views of the Smartsheet Communication Plan interface. On the left is the **Timeline** view, showing a calendar for 2024 with a vertical line for September. The timeline is divided into three phases: **Planning** (blue), **Implementation** (pink), and **Reinforcement** (purple). On the right is the **Board** view, which organizes tasks into columns based on their status: **New** (10), **In Progress** (1), **Revisions** (1), **Approved** (1), and **Complete/Se** (1). A **Details** panel on the far right provides information for a selected task.

Board View Task Details:

- Task 1 (New):** Solution Progress Review. Status: Meeting. Description: Review solution progress against requirements, and discuss any ... Audience: Key Stakeholders, Champions. Project Manager: One Time.
- Task 2 (In Progress):** Key Milestone Update. Status: Email, Instant Message. Description: Update the core team and any additional audiences who will be... Audience: Champions, End-Users. Project Manager: Bi-Weekly. 11/22/24.
- Task 3 (Revisions):** Key Milestone Update. Status: Email, Instant Message. Description: Update the core team and any additional audiences who will be... Audience: Champions, End-Users. Project Manager: Bi-Weekly. 11/08/24.
- Task 4 (Approved):** Change Kickoff. Status: Email. Description: Introduce the project to the core project team using the change ... Audience: Executive Sponsor, Key Stakeh... Project Manager: One Time. 10/25/24.

Details Panel:

- Priority: High
- Channel: Meeting
- Phase: Implementation
- Status: New
- Communication: Solution Progress Review
- Purpose: Review solution progress against requirements, and discuss any revisions needed headed into the second half of the implementation.
- Audience: Key Stakeholders, Champions
- Owner: Project Manager
- Other: [None]
- Planning: Leverage s 2-3 senten
- Cadence: One Time
- Key Stake: [None]
- End-Users: mm/dd/yyyy
- Project Ma: One Time
- End Date: mm/dd/yyyy

Evaluate and pivot

Feedback Form

We want to hear from you! Let us know your thoughts on this implementation, as well as any suggestions you have for ensuring adoption.

Stakeholder Group *
Select or enter value

I am confident that our current Smartsheet implementation will positively impact my job.
 1 - Strongly Disagree 2 - Disagree 3 - Neutral 4 - Agree
 5 - Strongly Agree

I understand the importance of the Smartsheet implementation for the future success of the organization.
 1 - Strongly Disagree 2 - Disagree 3 - Neutral 4 - Agree
 5 - Strongly Agree

I understand the importance of the Smartsheet implementation on my role.
 1 - Strongly Disagree 2 - Disagree 3 - Neutral 4 - Agree
 5 - Strongly Agree

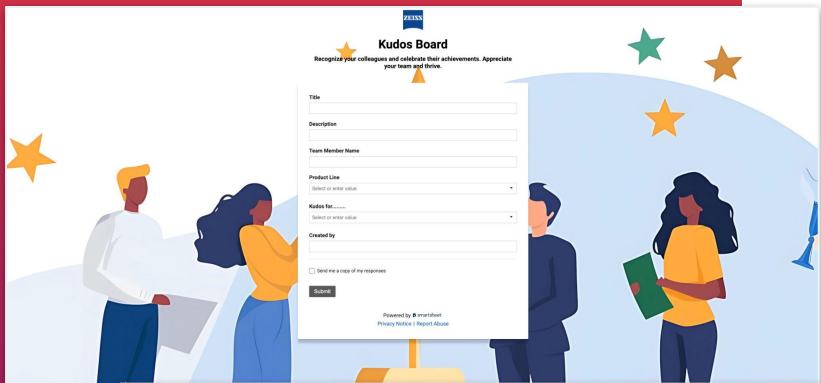
I can articulate the vision and key objectives of our current Smartsheet implementation.
 1 - Strongly Disagree 2 - Disagree 3 - Neutral 4 - Agree
 5 - Strongly Agree

I feel that I have received adequate information and training that have prepared me to successfully perform my role.
 1 - Strongly Disagree 2 - Disagree 3 - Neutral 4 - Agree
 5 - Strongly Agree

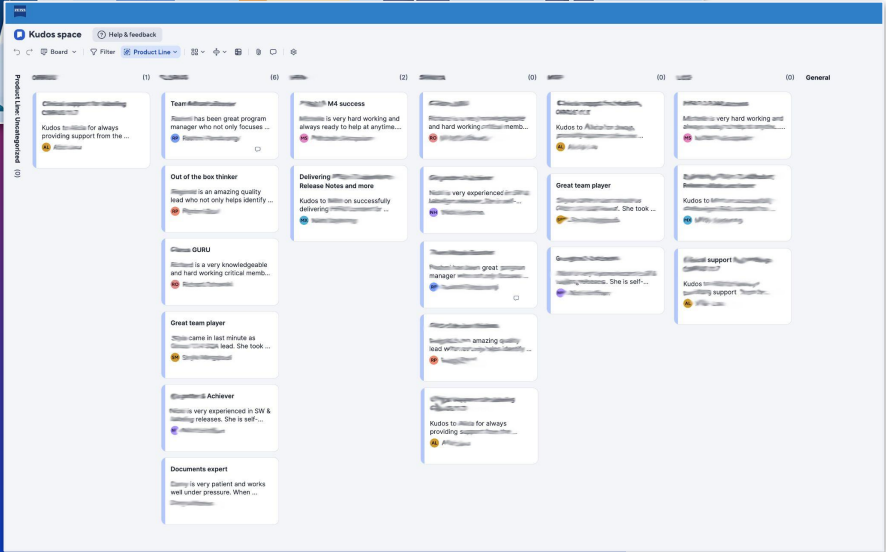
File Dynamic View **Feedback Form Results**

Grid View | Sheets | 1 Sheet | 9 Columns | Filter Criteria | 1 Group | 1 Summary | Sort

Primary	Sentiment	Sentim. Score	Question 1	Question 2	Question 3	Question 4	Question 5	Additional Feedback
Total		Avg 4						
▼ Stakeholder Group Business Technology		Avg 3						
1	★★★★★	3	3	3	3	3	3	We've received no information on how this solution will be used with the rest of our technology stack.
2	★★★★★	4	4	4	3	3	4	
3	★★★★★	3	2	4	2	4	4	I don't know how this impacts my role as an infrastructure engineer.
▼ Stakeholder Group Finance		Avg 5						
4	★★★★★	4	4	5	4	4	4	
5	★★★★★	5	5	5	5	5	5	
▼ Stakeholder Group People Operations		Avg 4						
6	★★★★★	4	5	4	4	4	4	I'm clear on what Smartsheet can do for project management but are there any people operations specific ways we can use it? Excited to dive in!
7	★★★★★	3	3	4	3	3	3	Can this be used for new employee onboarding?
▼ Stakeholder Group Program Management		Avg 5						
8	★★★★★	5	5	5	5	5	5	It would be helpful to have a personal dashboard.
9	★★★★★	5	5	5	5	5	5	I would love more training on how to create my own dashboard.
10	★★★★★	5	5	5	5	5	4	I need a way to see all of my projects in one view - the project dashboards are great but I'm managing multiple projects at a time.
▼ Stakeholder Group Sales		Avg 2						
11	★★★★★	2	3	2	2	2	2	There has been no communication about how this impacts Sales.



Celebrate key wins



4

Demo

Let's see this in action!

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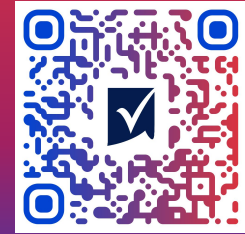
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Learning Objectives

What did we learn?

- 1** Definitions of change and change management
We have to define it to understand it
- 2** Understand that resistance is natural
It's going to happen; let's lean into it
- 3** Utilize Smartsheet
It's why we're here!
- 4** Call to action
Create a stakeholder analysis in Smartsheet

Maturity Assessment



Next steps...

- **Visit the Projects, Programs, and Portfolios Booth** - Attend our Tiny Tutorials at the booth to learn the tips and tricks for managing your projects and programs effectively.
- **Assess your PPM maturity** - Take the PPM maturity assessment to understand how to optimize your project portfolios.

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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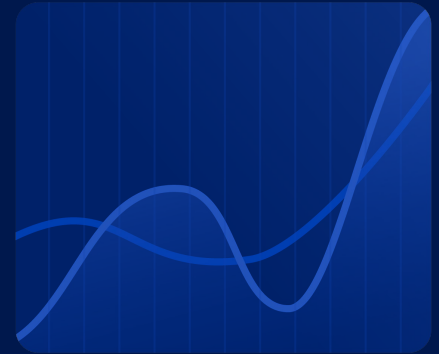
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