smartsheet

ENGAGE

Smartsheet in higher education

Driving long-term institutional sustainability



Legal

Certain information set forth in this presentation may be "forward-looking information." Except for statements of historical fact, information contained herein may constitute forward-looking statements. Forward-looking statements are not guarantees of future performance and undue reliance should not be placed on them.

Such forward-looking statements necessarily involve known and unknown risks and uncertainties, many of which are and will be described in Smartsheet's filings with the US Securities and Exchange Commission, and these risks and uncertainties may cause actual performance and financial results in future periods to differ materially from any projections of future performance or results expressed or implied by such forward-looking statements. Although forward-looking statements contained herein are based upon what Smartsheet management believes are reasonable assumptions, there can be no assurance that forward-looking statements will prove to be accurate, as actual results and future events could differ materially from those anticipated in such statements. Smartsheet undertakes no obligation to update forward-looking statements except as required by law.

This presentation is proprietary to Smartsheet and the content herein is confidential and intended for permitted internal use only. This content shall not be disclosed to any third party that is not under an obligation of confidentiality to Smartsheet.

Smartsheet is a registered trademark of Smartsheet Inc. The names and logos of actual companies and products used in this presentation are the trademarks of their respective owners and no endorsement or affiliation is implied by their use.



Speakers



Joe Meehan Senior Solutions Engineer



Tracy Disque, MHA, PMPPMO & Performance Improvement Director,
Johns Hopkins Medicine



Agenda

Introduction

2

Building a PMO

3

Fellowship Management

4

Go-Do's!





Learning objectives

Learn how Smartsheet customers within the higher education are using Smartsheet to manage simple and complex processes

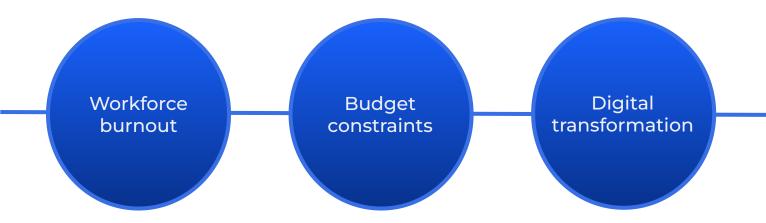
Learn how to standardize and scale management of a portfolio of projects across departments and across campus in Smartsheet

Learn how consistency, transparency, and communication can drive program and student success



Higher education continues to evolve

Increasing demands









Tracy Disque, MHA, PMP

PMO & Performance Improvement Director

Assistant Program Director, JHM Administrative Fellowship Program

- 15 years of experience in the healthcare industry
- Project and change management certified
- Developed a team of 30 with only two incremental resources





Johns Hopkins Medicine







2.8M

Johns Hopkins Medicine receives more than 2.8 million patients and nearly 337,000 emergency room visits annually. 931 K

With more than 50 care locations, Johns Hopkins Community Physicians receives more than 931,000 patients each year.

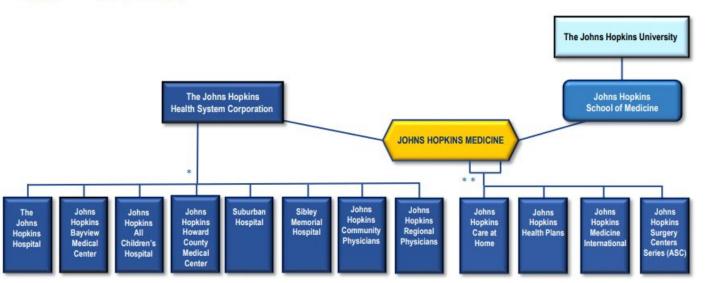
164 K

Johns Hopkins Home Care treats nearly 164,000 adults and children in Central Maryland annually.

smartsheet ENGAGE



Organizational Structure





^{*} These entities are 100% owned by The Johns Hopkins Health System Corporation

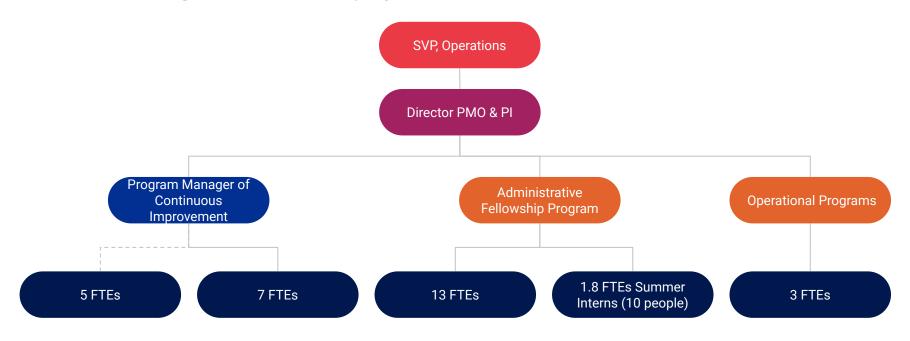
^{**} These entities are 50%/50% joint ventures between The Johns Hopkins Health System Corporation and The Johns Hopkins University Johns Hopkins Regional Physicians is a subsidiary of Johns Hopkins Medical Management Corporation

JHM Medicine PMO - Journey

Woah! We are 30 FTEs and growing. We need Control Center to leverage automation. I need a PM tool. I think we should try Smartsheet. Thanks for starting the team. You can hire two people. 2021 We have a problem. **▼** smartsheet

Office of Health System Operations

Current state org chart. There are project resources who do not connect into this team.





Early journey





Implementation of Control Center & enhanced department workflows

Enhancing project creation through project closure.



Enhance project tools to create scalability and create automation where applicable.



Track project and portfolio performance with nonsubjective key performance indicators.

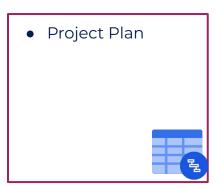


Improve communication with project stakeholders and entity leadership.



Control Center: Standard tools

At the time of implementation



- Project Charter
- Stakeholder
 Management Plan
- RAID Log
- Artifact Repository
- Budget Tracker



- Project Dashboard
- Portfolio
 Dashboard
- My Work



- Project Request Form
- Projects by PM
- Projects in close out
- My project updates
- Multiple reports for dashboards



- Notice of new project
- Accepting new project
- Charter approval
- Monthly updates





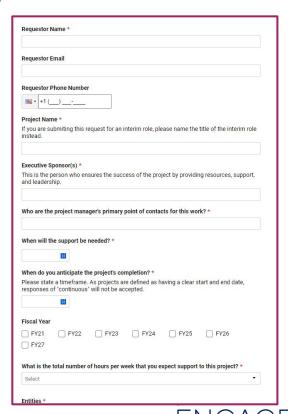
Requestor submit a request via a **Smartsheet Form**.





Automation notifies Director & Program Manager of new project.





Status	Project Manager	Project Name	Requestor Name	Requestor Email	Requestor Phone Number	Exec
						0
Accepted	Leighton Dennie		Tracy Disque			Lisa I
Accepted	NS Natasha Shah		: Joseph Primavera	•		Justin
Accepted	BB Brian Bair (JS) Josephine Stommel		Tracy Disque			Lisa I
Accepted	Emma Brindley		Amy Phillips			Cory
Accepted	Amberly Huynh		I Lisa Ishii			Chery
New	•		(Hannah Kozaczek			Kai S



Project Manager completes **Update Request** acknowledging they have received the project.

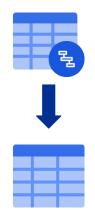






eld	Description
PROBLEM, BUSINESS CASE & GOALS	
State the problem or issue.	
State the business case.	
State the goals/metrics.	
State the key deliverables.	Enter Deliverables here
Provide a Project Overview for the Project Dashboard	Enter Overview here
State the estimated cost savings.	
PROJECT SCOPE	
Describe what is within the project boundaries.	
Describe what is outside of the project boundaries.	
TEAM POINTS OF CONTACT	
Stakeholder Management Plan	
Executive Sponsor	< <sponsors>></sponsors>
Project Lead	< <pre><<pre>roject Lead>></pre></pre>
Project Manager	
Consultant	
Steering Committee	
Work Group A	
Work Group B	





Project Manager completes **Project Plan**.



Project Manager completes **Stakeholder Management Plan, RAID Log, Artifact Repository**, and **Budget Tracker** as required by the project.





Project Plan with Gantt Chart



At Risk	Project Milestone	RAG Status	Task Name	Description	Start Date	End Dat	M T	wg 18 W T	F S	SS
			Navigation							
			■ Project Information							
	1		• Summary							
	-		<pre><- < Project >></pre>							
P	0		Planning							
	*		Project Kickoff							
P	☆		Complete Project Charter							
P	*		Project Charter Approved							
F	☆									
			■ Design							
F	*		Milestone							
F	☆									
P	☆									
			- Execution							
	☆		Execution Kickoff							

- Task
- Assigned To
- At Risk Flag
- Start/End Date
- Duration
- Hours
- Predecessors
- Default phases and tasks



Stakeholder Management Plan



Tracking stakeholders by entity, commitment level, impact, influence, and involvement.

Stakeholder Name	Title / Role	Point of Contact	Contact Phone and Address	Entity	Commitment Level	Impact	Influen	Involve	What is important to the stakeholder?
■ Navigation									
■ Project Information	1								
Project Name	< <project>></project>	•							t -
Project Manager	Mohammed Altaee, Tracy Disque	•							
Requestor Name	< <requester name="">></requester>	•							
Executive Sponsors	< <sponsors>></sponsors>	4							
Project Lead	< <project lead="">></project>	•							
Entities	< <entities>></entities>	•							
Strategic Scorecare	< <scorecare>></scorecare>	4							
Project Overview	Enter Overview here	4							
Key Deliverables	Enter Deliverables here	•							
Summary								1	
■ Stakeholders	T CONTRACTOR OF THE CONTRACTOR				*			+	k.
< <enter first="" here="" stakeholder="">></enter>			1	•					





Tracking risks, assumptions, issues, and decisions.

Portfolio Report	Туре	Description	Details	Priority	Impact	Likelihood	RAID Score	Status	Owner	Resolution / Mitigation Plan	Target Mitigation
0			0		0	0	⊕ f×			0	Date
	l ^e	■ Navigation						1			
		■ Project Information	- 11			*					
		Project Name	< <project>></project>	4	12	No.	4	X		*	
		Project Manager	Mohammed Altaee, Tracy Disque	4							
		Project Type	< <project type="">></project>	4							
		Requestor Name	< <requester name="">></requester>	4							
		Executive Sponsors	< <sponsors>></sponsors>	4							
		Project Lead	< <project lead="">></project>	4							
		Entities	< <entities>></entities>	4							
		Strategic Scorecare	< <scorecare>></scorecare>	4							
		JHM Top Five	< <jhm five="" top="">></jhm>	•							
		■ Summary									
		RAID Log	- 11		1					111	
-	Risk	Test Risk		-	4 - Critical	3 - Probable	12	In Progress	Tracy Disque	Consulting legal	
P	Assumption	Test Assumption		1				Requires Validation	🏇 Tracy Disque		
日	Issue	Test Issue		1	1 - Low		10	Complete/CI	Tracy Disque	New resource identified.	
B	Decision	Test Decision	Made by the decision committee	_							





A central place for storing all key documents

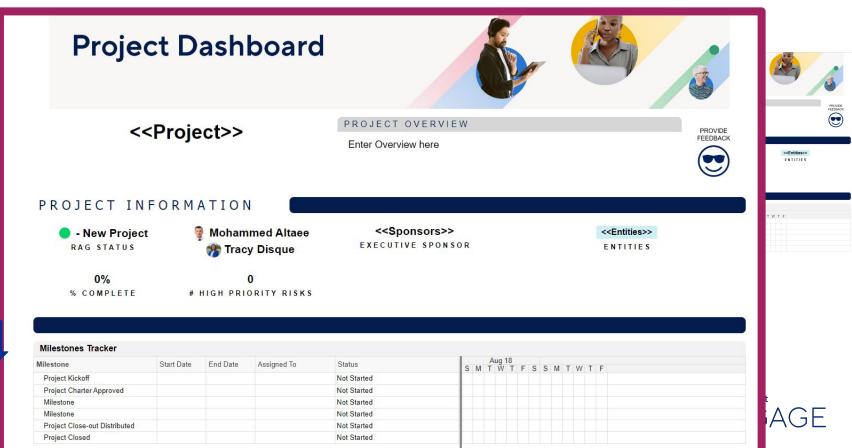
	0 = i	Doc. Number	Document Name	Description	Date	Created
1	a		Navigation			
9	a		♣ Project Information) E
16	a		■ Summary			
17	a		Total Artifacts	·	3	
8	a		■ Artifact Repository			
19	0	PROJ-001	Kick off presentation		08/19/24	08/19/24 12:57 PM
0	0	PROJ-002	Contract	Consult: Turtle Consulting	08/30/24	08/19/24 12:59 PM
21	0	PROJ-003	Data Analysis	Functions D-J	09/20/24	08/19/24 12:59 PM
2						
3						







Category	Category Description	Budgeted Amount	Actual Amount	Variance ⊕ f _x	Date Posted	Notes	Entity
■ Navigation	A .			N .			
Project Information							
■ Summary				-			
Total Budgeted \$	\$2,000,000						<u>'</u>
Total Actual \$	\$725,000						
Total Variance \$	\$1,275,000						
Budgeted \$ - All Children's Hospit	\$0						
Budgeted \$ - Bayview Medical Ce	\$0						
Budgeted \$ - Howard County Med	\$0						
Budgeted \$ - Johns Hopkins Care	\$0						
Budgeted \$ - Johns Hopkins Com	\$0						
Budgeted \$ - Johns Hopkins Hea	\$0						
Budgeted \$ - Johns Hopkins Hea	\$2,000,000						
Budgeted \$ - Johns Hopkins Hosp	\$0						
Budgeted \$ - Johns Hopkins Inter	\$0						
Budgeted \$ - Johns Hopkins Surg	\$0						
Budgeted \$ - School of Medicine	\$0						
Budgeted \$ - Sibley Memorial Ho:	\$0						
Budgeted \$ - Suburban Hospital	\$0						
■ Expenses							
Project Budget		\$2,000,000.00	\$0.00	\$2,000,000.00	07/05/24		Johns Hopkins Health
Widget ABC expense			\$75,000.00	-\$75,000.00	08/16/24	cc. 450004002000	Johns Hopkins Health
Widget ZY expense			\$50,000.00	-\$50,000.00	08/16/24	cc. 450004002000	Johns Hopkins Health
Consulting expense			\$600,000.00	-\$600,000.00	08/30/24	cc. 450004002000	Johns Hopkins Health





Project information flows from all sheets into the **Portfolio Dashboard**. It is used during team huddles.







Page 1 of 4

Portfolio Dashboard



OFFICE OF HEALTH SYSTEM OPERATIONS



Welcome!

This dashboard is designed to help key stakeholders see, at a glance, the amount of active projects, their status, and other important rollup information. You can see the detailed status of each project at the bottom of the dashboard. If you have any questions, please don't hesitate to contact the office team.















PORTFOLIO OVERVIEW [CURRENT FY]



PROJECT PIPELINE



TOTAL PROJECTS

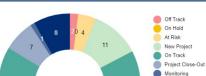
PROJECTS BY OUTCOME





ACCEPTED PROJECTS BY RAG STATUS





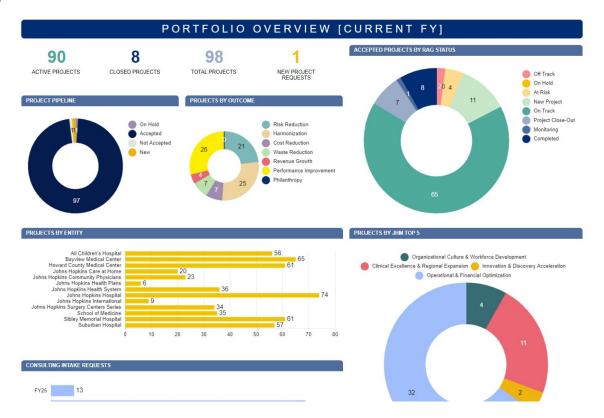






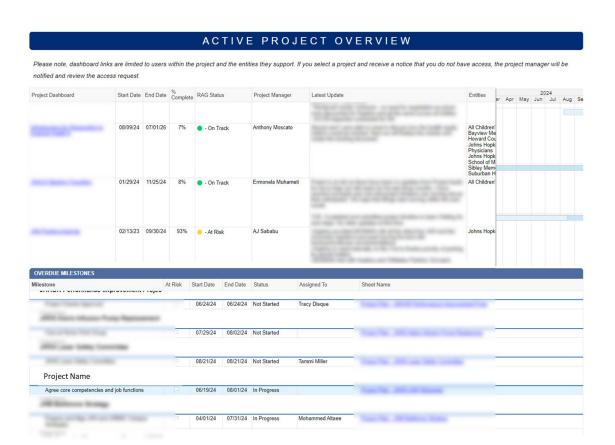


Page 2 of 4



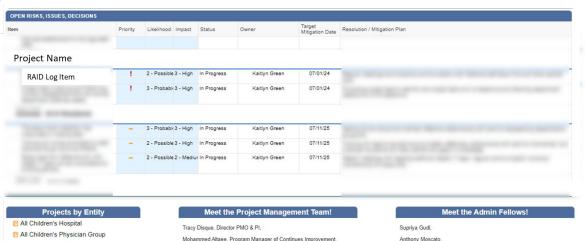


Page 3 of 4





Page 4 of 4



Projects by Entity All Children's Hospital All Children's Physician Group Bayview Medical Center Howard County Medical Center Johns Hopkins Care at Home Johns Hopkins Community Physicians Johns Hopkins Health Plans Johns Hopkins Health System Johns Hopkins Health System Johns Hopkins Hospital Johns Hopkins Regional Physicians Johns Hopkins Regional Physicians Johns Hopkins Surgery Centers Series Johns Hopkins University School of Medicine

Sibley Memorial HospitalSuburban Hospital

Meet the Project Management Team! Tracy Disque, Director PMO & PI, : Mohammed Altaee, Program Manager of Continues Improvement, Nicole Fitzpatrick. Clinical Program Director of Recall Management, Rohan Dhamane, Project Manager IV, : Tammi Miller, Sr. Performance Improvement Specialist, AJ Sababu, Sr. Performance Improvement Specialist, Kaitlyn Green, Sr. Performance Improvement Specialist Rashmi Singh, Technical Project Administrator, Josie Stommel, Project Coordinator, | Kyler Dessau, PM Brian Bair, Sr. Performance Improvement Specialist,

Supriya Gudi,	
Anthony Moscato,	
Ermonela Muhamei,	
Muhammad Qadir	
Neharika Singh,	
Sydney Stepney,	
Cionne Gourrier,	
Emily Kapins,	
Leighton Dennie,	
Madison Fox	
Natasha Shah,	
Tyler Alexander,	
Emma Brindley,	





Project is ready to be closed. Project Manager **celebrates team's success** via HR Applause Program.





Project Manager completes a **Project Close Out Report** in Word, distributes as a PDF, and uploads to the **Project Artifact Repository**.



	JOHNS HOPKINS	
-11 60 1		
Table of Conte		
Project Manager's R	eport	
Review of the Busine	ess Case	
Entities		
Review of Objectives	5	
Costs		
Key Milestones		
Scope		
Financial Benefits		
Non-Financial Ben	efits	
Review of the Produ	cts	
Quality		
Handover of Prod	ucts/Operations	
Summary of Outst	anding or Follow Up Actions	
Risks and Issues		
Key Lessons Learned		
Project Report Out D	istribution	
Sponsor Review / Fe	edback	





Project Manager closes all open action items in the **Project Plan** and **RAID Log**. Project marked as "closed".





Director **Archives** the project via **Control Center** next quarter. Archived projects each have their own folder in the **Archived Project Workspace**.



Monthly updates

We leverage monthly updates to provide a high-level summary of how the project is going and push our dashboard to executives.







Project Managers complete their **My Project Updates Report** within 48 hours.



Director **reviews**Project Managers' **responses** and
solicits additional
information as
needed.



...

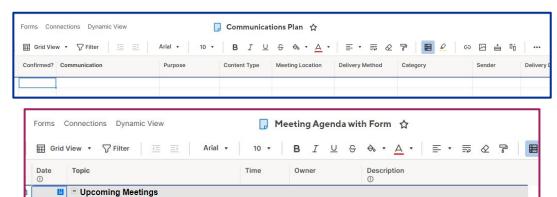
Director **e-mails** a **link** to the **Dashboard t**o executives with a call out to any key successes or needs.



What's next

We are actively implementing the following additional sheets:

- Communication Plan
- Meeting Agenda
- Lessons Learned Repository
- Continue implementation and expansion of Resource Management



20 minutes

20

20 minutes

20

[Insert name]

[Insert name]

[Insert Meeting date as text here]

[Insert Meeting date as text here]

[Insert agenda topic]

[Insert agenda topic]

[date]

[date]



[Add appropriate details in description column

and/or in the row attachments and comments)

[Add appropriate details in description column

and/or in the row attachments and comments]

Key takeaways

- Start with small changes
- Loudly celebrate your team's success with the tools.
- Consistency is critical.
- Communicate frequently and often.
- The tools do not define your day-to-day, they enhance it!

Control Center enhanced our success:

- Reputation as "a team that gets things done"
- Scalability
- Consistency
- Risk reduction







JHM Administrative Fellowship Program

Using Smartsheet in Trainee Management



JHM Administrative Fellowship Program

A two-year post graduate program hosting 6 fellows per class.



The Johns Hopkins Medicine
Administrative Fellowship
provides a diverse and inclusive
environment that develops
future executive leaders who will
confront the challenges of
healthcare administration and
shape the opportunities along a
dynamic healthcare continuum.





Program Management

Leveraging Smartsheet for efficient program management.



2023-2026 cohorts with program director Dr. Lisa Ishii.

- Rotation Schedules
- Rotation Reminders
- Fellow Evaluations
- Preceptor Evaluations
- Annual Program Planning
 - Graduation
 - Orientation
 - Leadership Leagues



Rotation Management

How do we keep all of our stakeholders informed?











Rotation Management

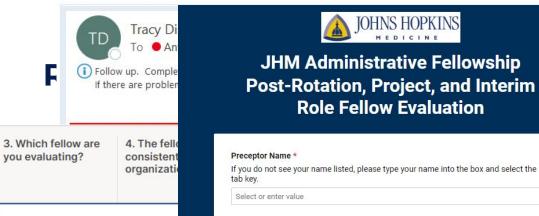


Class	Rotation	Rotation Cancell	Fellow	Fellow Interests	Start Date	End Date	Preceptor	Preceptor Admin
2023-2025	Patient Safety & Quality		Anthony Moscato	Anthony is in	08/28/23	09/08/23	AG Angela Green	AD Aissata Dialle
2023-2025	ACCM		Anthony Moscato	Anthony is int	09/11/23	10/06/23	E Erin Blume	SD Sarah Danih
2023-2025	Medicine		Anthony Moscato	Anthony is int	10/09/23	11/03/23	Matt Lautzenheiser	Eleni Georga

- A **primary sheet** with all fellows rotations, preceptors, and preceptor admin.
- The sheet has **formulas** to calculate one and four weeks prior to the rotation.
- As evaluation links are confidential, they are kept in a separate sheet. A link to the evaluation sheet is listed for an automation alert.

4 Week Reminder	1 Week Reminder	Preceptor Survey Link	Fellow Survey Link
07/31/23	08/21/23	https://app.smartsheet.	https://app.smartsheet.
08/14/23	09/04/23	https://app.smartsheet.	https://app.smartsheet.
09/11/23	10/02/23	https://app.smartsheet.	https://app.smartsheet.





prepared. *

Jiait Date, 07/2

End Date: 08/09

Fellow Survey: h

Fellow Survey Link

https://app.smartsh

Rotation or Role * If the fellow filled an interim role or completed a project for your department, please select "interim role" or "project" (as applicable) even if your department is in the drop down list. Select 3. Which fellow are you evaluating? * Select 4. The fellow showed consistent organizational and planning skills. * $\bigcirc 2$ $\bigcirc 3$ $\bigcirc 4$ $\bigcirc 5$ Please provide additional information as to why you rated the fellow a 1 or 2 in their organzational and planning skills.

5. The fellow was consistently dependable and reliable, being punctual and well-

6. The fellow was able to set priorities and follow-through on commitments. *

5 5 5

4.70588

9. The fellow showed

initiative and

creativity...

8. The fellow

analytical...

N/A

demonstrated strong

4.75

5

5

5

г

Report to Show Trend by Rotation

smartsheet ENGAGE

10. The fellow was

able to work well

4.785

under...

4 N/A

3

Rotation Management



Admin Fellowship by Rotations		JUL 01, 2024 TO JUN 30, 2025	Filter Off	Filter Off		
Rotation	Q3 2024 Jul 01 to Sep 30	Q4 2024 Oct 01 to Dec 31	Q1 2025 Jan 01 to Mar 31	Q2 2025 Apr 01 to Jun 30		
NCR	NCR Anthony Moscato Carolyn Carpenter - Fellow: amoscat3@jh.edu - 07/01/2024 to 07/25/2024	NCR Neharika Singh Carolyn Carpenter - Fellow: nsingh43@jh.edu - 11/18/2024 to 12/20/2024	Carolyn Carpenter - Fellow. ekapins1@jh.edu - 03/31/2025 to 04/25/2025			
	Carolyn Carpenter - Fellow: cgourri1@jh.edu - 08/26/2024 to 09/20/2024 Carolyn Carpenter - Fellow: mfox50@jh.edu - 12/30/2024 to 01/24/2025					
	Carolyn Carpenter - Fellow: Idennie1@Jh.edu - 09/23/2024 to 10/18/2024		Carolyn Carpenter - Fellow: nshah88@jh.edu - 02/24/2025 to 03/21/2025			
		Carolyn Carpenter - Fellow: talexa34@jh.edu - 10/21/2024 to 11/15/2024	Carolyn Carpenter - Fellow: ebrindl2@jh.edu - 01/27/2025 to 02/21/2025			
Supply Chain	Burton Fuller - Fellow: cgourri1@jh.edu - 09/23/2024 to 10/18/2024			Burton Fuller - Fellow: talexa34@jh.edu - 04/14/2025 to 05/09/2025		
	Burton Fuller - Fellow: Idennie1@jh.edu - 08/26/2024 to 09/20/2024	Burton Fuller - Fellow: nshah88@jh.edu - 11/18/2024 to 12/20/2024	Burton Fuller - Fellow: ebrindi2@jh.edu - 03/10/2025 to 04/11/2025			
	Burton Fuller - Fellow: mfox50@jh.edu - 07/15/2024 to 08/09/2024					
JH Home Care	JH Home Care Ermonela Muhameti Rachel DeSantis - Fellow: emuhame1@jh.edu - 08/12/2024 to 08/23/2024	JH Home Care Anthony Moscato Rachel DeSantis - Fellow. amoscat3@jh.edu - 12/09/2024 to 12/20/2024	JH Home Care Supriya Gudi Rachel DeSantis - Fellow: sgudi1@jh.edu - 01/27/2025 to 02/07/2025			
Development	Development Supriya Gudi - Fellow. sgudi1@jh.edu - 07/15/2024 to 07/26/2024			Robin Ingram - Fellow: nshah88@jh.edu - 06/23/2025 to 07/04/2025		
	Development Supriya Gudi - Fellow. sgudi1@jh.edu - 02/10/2024 to 02/21/2	025				
	Development Sydney Stepney Robin Ingram - Fellow, sstepne4@jh.edu - 07/01/2024 to 07/12/2024					
	Robin Ingram - Fellow. Idennie1@jh.edu - 08/12/2024 to 08/23/2024					
	Robin Ingram - Fellow, elaipen1@jh.edu - 07/08/2024 to 08/09/2024					
Food & Nutrition	Food & Nutrition Muhammad Qadir Keiy Murofushi - Fellow. mqadir1@jh.edu - 07/01/2024 to 07/12/2024	Food & Nutrition Supriya Gudi dclar102@jh.edu - Fellow: sgudi1@jh.edu - 10/07/2024 to 10/18/2024		dclar102@jh.edu - Fellow: ekapins1@jh.edu - 04/28/2025 to 05/09/2025		
		Food & Nutrition Sydney Stepney dclar102@jh.edu - Fellow, sstepne4@jh.edu - 11/04/2024 to 11/15/2024				
		dclar102@jh.edu - Fellow: talexa34@jh.edu - 12/09/2024 to 12/20/2024				
JHSCS	JHSCS Anthony Moscato Sarah Disney - Fellow. amoscat3@jh.edu - 09/23/2024 to 10/18/2024					
		JHSCS Ermonela Muhameti Sarah Disney - Fellow: emuhame1@jh.edu - 12/3	10/2024 to 01/24/2025			
Facilities	Facilities Supriya Gudi - Fellow: sgudi1@jh.edu - 08/26/2024 to 09/06/2024	Facilities Sydney Stepney Sally MacConnell - Fellow: sstepne4@jh.edu - 10/21/2024 to 11/01/2024	Facilities Neharika Singh Sally MacConnell - Fellow. nsingh43@jh.edu- 01/27/2025 to 02/07/2025	Sally MacConnell - Fellow: ebrindi2@jh.edu - 04/14/2025 to 04/25/2025		
	Sally MacConnell - Fellow: hhweepe1@jh.edu - 07/08/2024 to	Sally MacConnell - Fellow: Idennie1@jh.edu - 12/09/2024 to 12/20/2024	25 to 04/04/2025			



Annual program planning

- Templates per event housed in a workspace.
- Leverage standard project plans to reproduce the events year-over-year with the same consistency.



35th anniversary picture with all current and former fellows still at JHM with program and executive leadership.



Program savings

Through the use of Smartsheet, the Administrative Fellowship Program has seen an **annual savings** of \$66,000.

The tool has made it possible to **scale** the program across the organization and have **transparency** of program activities.

2020: 3 fellows per cohort = 6 trainees

2024: 6 fellows per cohort + 1 Military fellow + 8 summer interns + 2 SingHealth summer fellows = **23 trainees**



2023-2026 cohorts, 2024 Army-Baylor Fellow, and 2024 SingHealth Fellows.



Key takeaways

Streamline management of projects, programs, and portfolios across campus

- Standardize processes & provide consistency
- Improve collaboration & communication
- Increase transparency & accountability
- Mitigate risks



Next steps...

Industry Solutions Booth

Continue the conversation about this session and learn about other higher education solutions.

Tuesday + Wednesday

Industry Meet & Eat

Connect and share learnings with higher education peers over lunch.

Wednesday | 11:45 a.m.-12:45 p.m.

PPM Maturity Assessment

Gauge where you're at in your project & portfolio management journey.

Projects, Programs, & Portfolios Booth

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



smartsheet

ENGAGE