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# Rise and Thrive with the User Subscription model



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v.07/16

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# Speakers



**Michael Hubbard**  
Chief Customer Officer



**Ben Canning**  
SVP, Product Management

# Agenda

**1**

We made some changes!  
Why did we make them?

**2**

Let's dig in! What do those  
changes really mean?

**3**

Stop, demo time! What do  
SysAdmins need to do?

**4**

You have questions, we  
have answers! Let's talk  
about the road ahead.

1

# We made some changes!

Why did we make them?

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**We empower  
anyone to  
drive  
meaningful  
change.**

The Smartsheet Mission

# LUCID

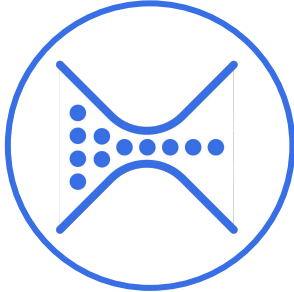
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# Lucid Motors

## Current Challenges



**Bottleneck with  
approvals**



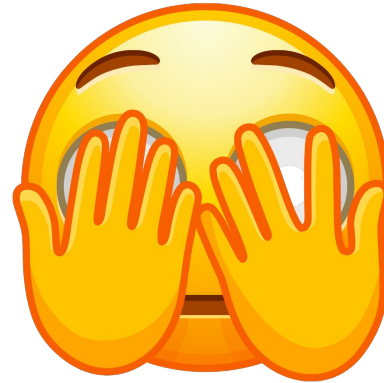
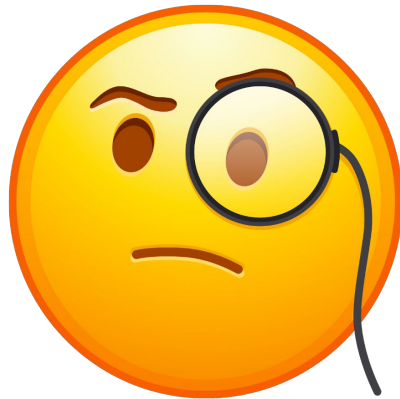
**Challenges with  
usage reporting**



**Seen as expensive  
by senior leaders**

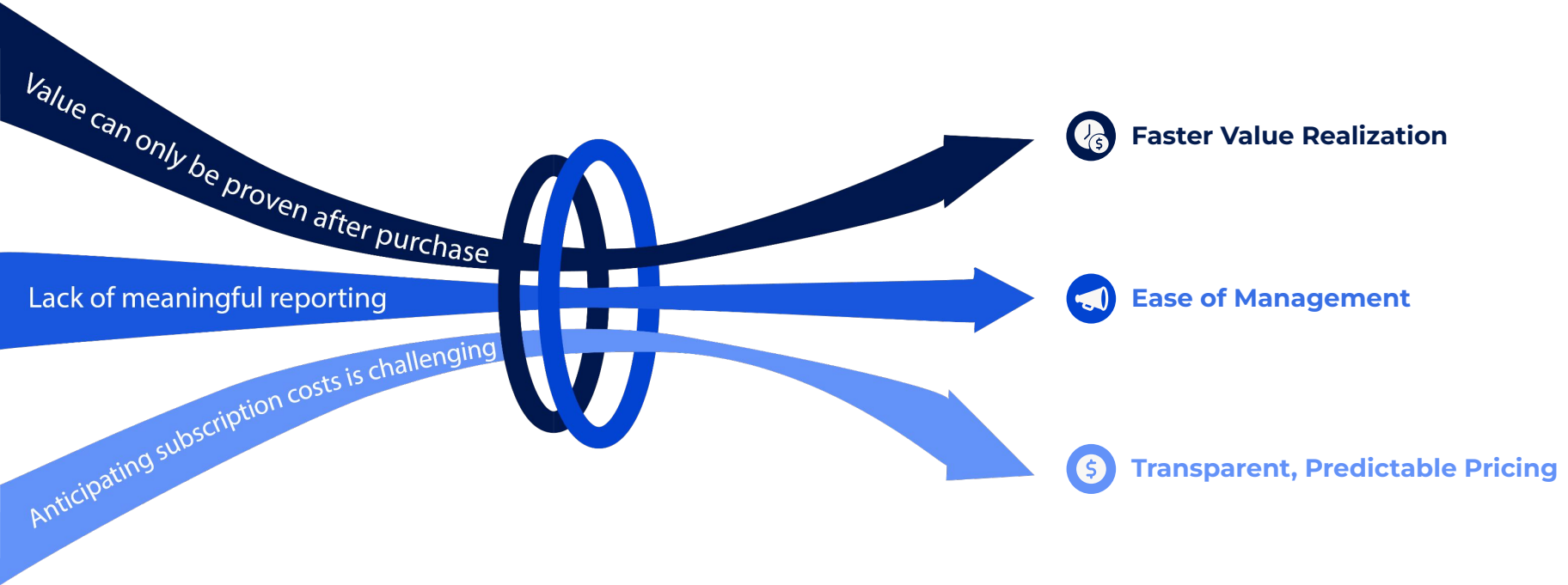
# Lucid Motors

## Current Challenges



# Compounding Innovation Bottleneck

Hindering the ability for everyone to make meaningful change



2

**Let's dig in!**

What do those changes mean?

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# Let's make it simple to understand exactly what we've done

Easy as 1, 2, 3...4, 5



**Streamlined the way we price**



**Reduced the number of user types**



**Simpler for users to realize value**



**Easier to manage users**

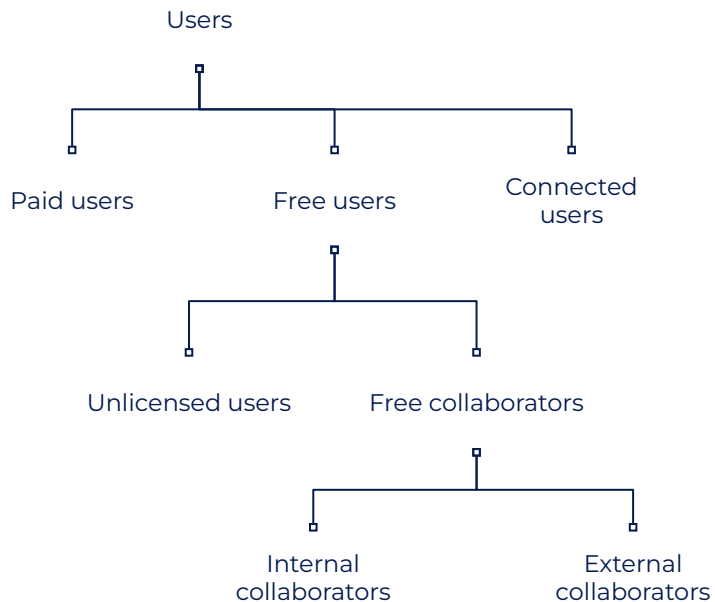


**Introduced quarterly true-ups**

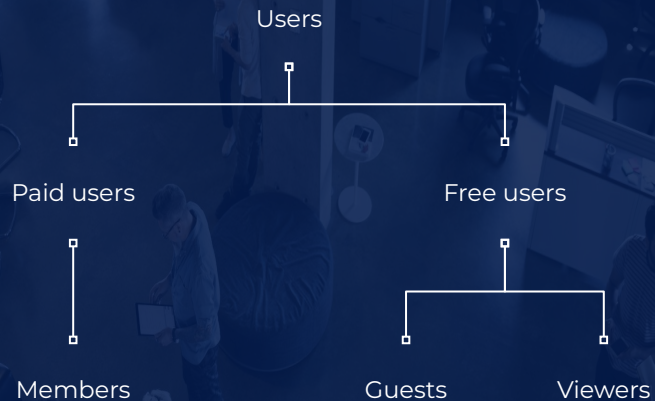
# Streamlined pricing & reduced user types



## LEGACY COLLABORATOR MODEL



## NEW! USER SUBSCRIPTION MODEL



# Members now get more value



MEMBERS



FREE  
COLLABORATORS

	MEMBERS	FREE COLLABORATORS
Create new sheets, reports, dashboards, or forms	✓	X
Change permissions or manage sharing settings	✓	X
Unlock rows or columns	✓	X
Access automated workflows	✓	X
Use AI formulas, texts, and charts	✓	X
Track workloads	✓	X

# Simpler to realize value

i.e., provisional use

## Try before you buy

Understand the full value of Smartsheet before purchasing additional subscriptions or add-on capabilities.

## Seamless growth

Adapt your business processes with ease when you have the tools you need at your fingertips.

## Smart spending

Consciously purchase what you need when value has been realized and growth has been experienced.

Smartsheet Admin Center

### Users and true-up

Page last updated Jul 23, 2024, 1:00 PM ⓘ True-up ⓘ More actions ▾

True-up (15)

27, 2024 In reconciliation ⚠️ 25 days left Current annual plan 10 Purchased Members True-up 5 Members Auto payment due on Dec 28, 2024 \$627.00

User domain ▾ Last active ▾ Showing 15 of 15 Search Clear

User type	Previous downgrades	Duration in current user type	Highest sharing permissions	Last active
Member ▾	0	1 month	Admin	Yesterday
Member Can create, edit, comment, or view. ✓	0	4 months	Admin	2 months ago
Guest Can edit, comment, or view, and can only be users whose accounts are external to the organization domains associated with your account.	0	6 months	Admin	1 month ago
Viewer Can only view.	0	1 month	Admin	3 days ago
No access Removes a user's access to all items shared with them.	0	2 months	Admin	1 month ago
Member ▾	0	2 months	Admin	1 month ago



Smartsheet Admin Center

## User types and true-up

Page last updated Jul 23, 2024, 1:00 PM

All users (90) True-up (15)

For usage period: Sept 1, 2024 - Nov 27, 2024

In reconciliation: ⚠️ 25 days left

Current annual plan: 10 Purchased Members

True-up: 5 Members

Auto payment due on Dec 28, 2024: \$627.00

User type | User domain | Last active | Showing 15 of 15 | Search

Name	User type	Previous downgrades	Duration in current user type	Highest shared permission
<input type="checkbox"/> Adam Bennett External adam.bennett@external.com	Member	0	1 month	Admin
<input type="checkbox"/> Alice Carter alice.carter@mbfcorp.com	Member Can create, edit, comment, or view.	0	4 months	Admin
<input type="checkbox"/> Ben Davis ben.davis@mbfcorp.com	Guest Can edit, comment, or view, and can only be users whose accounts are external to the organization domains associated with your account.	0	6 months	Admin
<input type="checkbox"/> Bill Burns External bill.burns@external.com	Viewer Can only view.	0	1 month	Admin
<input type="checkbox"/> Catherine Evans cat.evans@mbfcorp.com	No access Removes a user's access to all items shared with them.	0	2 months	Admin
<input type="checkbox"/> Collin Smith collin.smith@mbfcorp.com	Member	0	2 months	Admin

# Making it easier to manage users

## Introducing reconciliation periods

### Predictable cadence

As your users collaborate with one another now you can easily manage all of your users, at the same time, every quarter.

### Control cost

Understand where your costs are coming from and easily allocate the appropriate access based on how your users are interacting with Smartsheet.

### Usage Visibility

Make responsible purchasing decisions with expected visibility through the Admin Center and Plan Insights.

3

## Stop, Demo Time!

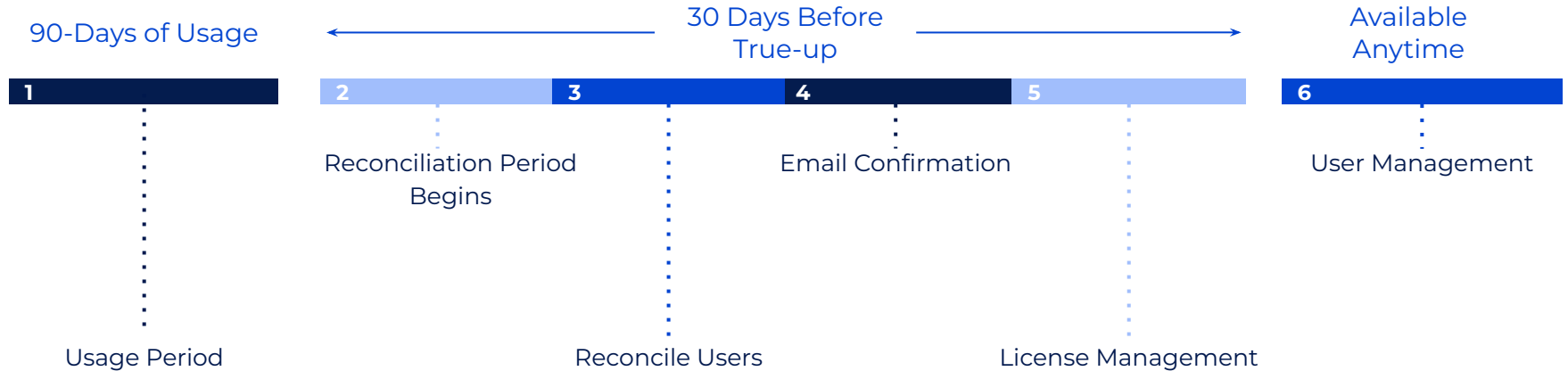
What do SysAdmins need to do?

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# Predictable quarterly reconciliation process

Important to remember!



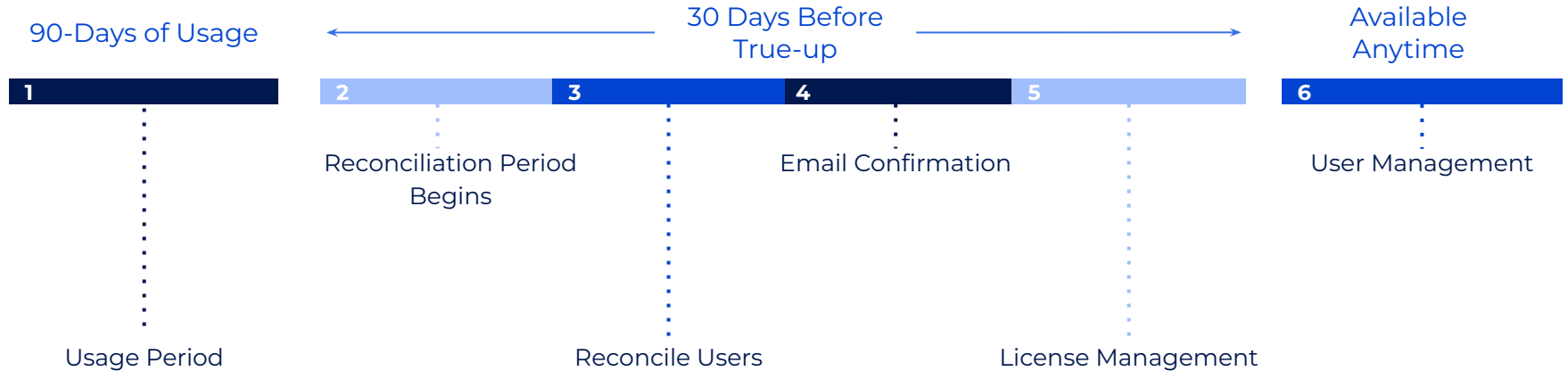


# A Day in the Life of a SysAdmin



# Predictable Quarterly Reconciliation Process

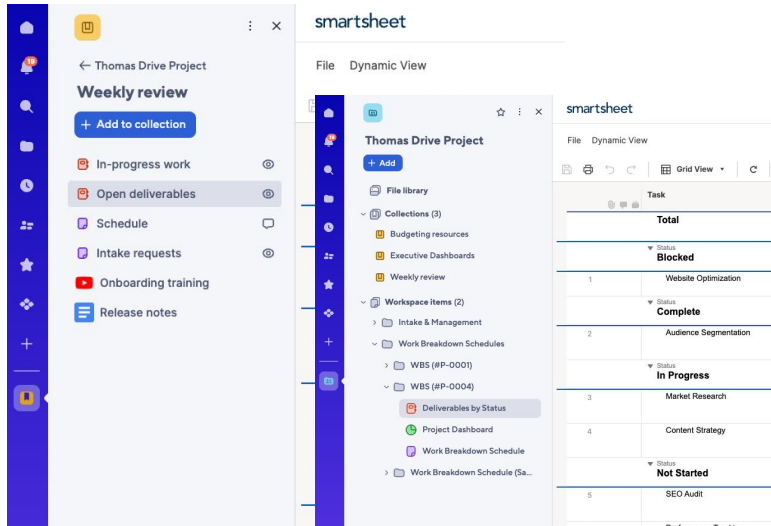
Important to remember!



# Newest innovations will only be available to new plans

Okay...what does THAT mean?

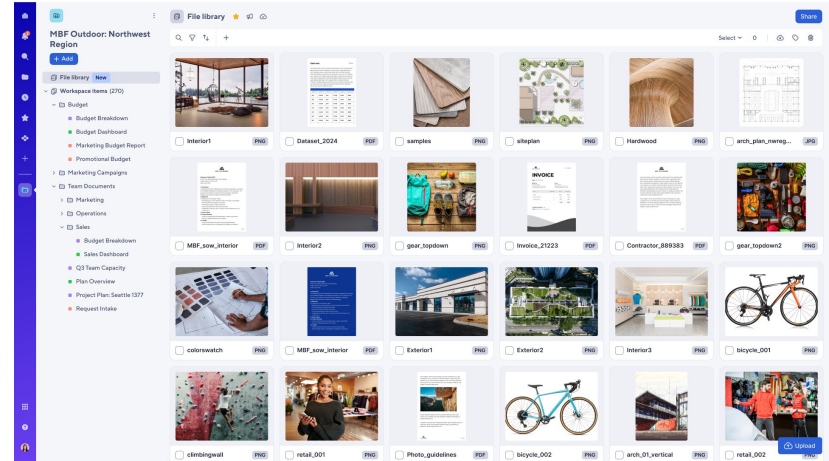
## Workspace Collections



The screenshot shows the Smartsheet interface for a workspace named "Thomas Drive Project". On the left, a sidebar lists various collections: "Weekly review", "In-progress work", "Open deliverables", "Schedule", "Intake requests", "Onboarding training", and "Release notes". The main area displays a "File Dynamic View" for the "Thomas Drive Project" workspace. It shows a "Task" list with columns for "Total", "Status", and "Task". The tasks are categorized by status: "Blocked", "Complete", "In Progress", and "Not Started".

Total	Status	Task
	Blocked	
1	Website Optimization	
	Complete	
2	Audience Segmentation	
	In Progress	
3	Market Research	
4	Content Strategy	
	Not Started	
5	SEO Audit	

## File Library



The screenshot shows the Smartsheet File Library interface for a workspace named "MBF Outdoor: Northwest Region". The library displays a grid of files, including images, PDFs, and spreadsheets. The files are organized into folders and sub-folders, such as "Budget", "Marketing Campaigns", "Marketing", "Operations", and "Sales". The files are displayed in a grid view, with each file having a thumbnail and a name.

File Name	Thumbnail
Interior1	[Interior 1]
Dataset_2024	[Dataset 2024]
samples	[Samples]
siteplan	[Site Plan]
Hardwood	[Hardwood]
arch_plan_newreg...	[Arch Plan Newreg...]
MBF_low_interior	[MBF Low Interior]
Interior2	[Interior 2]
gear_topdown	[Gear Topdown]
Invoice_21223	[Invoice 21223]
Contractor_889383	[Contractor 889383]
gear_topdown2	[Gear Topdown 2]
collateralweb	[Collateral Web]
MBF_low_interior	[MBF Low Interior]
Exterior1	[Exterior 1]
Exterior2	[Exterior 2]
Interior3	[Interior 3]
bicycle_001	[Bicycle 001]
climbingwall	[Climbing Wall]
retail_001	[Retail 001]
Photo_guidelines	[Photo Guidelines]
bicycle_002	[Bicycle 002]
arch_01_Lvertical	[Arch 01 Lvertical]
retail_002	[Retail 002]



# Simplification of our entire ecosystem

## Shifting to Advanced Work Management

Confidently grow your business, unify your  
platforms, and upskill your employees

# Innovation unblocked starting in 2025

Renewing into a new way to of doing business with Smartsheet

- Renewal date will drive migration
- Established process and enablement
- Access to new features at renewal





# Lucid Motors

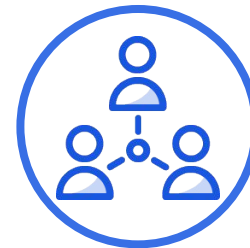
Future state



**Time savings**



**Easier to realize value**



**Simpler to collaborate**



# Q&A

If we don't get to your question, our experts are waiting for you at the User Subscription booth in the Expo Hall!

4

**We're excited for what's next!**

Let's talk about the road ahead.

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# Next steps

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

# What can you do today?

- Come by the User Subscription Model booth to:
  - Learn more
  - Get tips and tricks
  - Talk to experts
- Reach out to your account team for additional support
- Provide feedback via the survey in the mobile app

## 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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