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# ONETREMCO

## Enhancing "OneTremco" with Smartsheet

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v.07/16

# The experts.

**Rachel Wrobel**
Director, Product Operations

Tremco “Roofing”

**Jason Hidek**
Manager, Digital Solutions

Tremco “Sealants”

**Kristin Komassa**
Senior Solutions Engineer

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# Today's objectives

## What we plan to teach you in this session

### Simplicity in the complex

Understand how to **combine** the power of the Smartsheet **advanced apps** to build highly complex yet effective solutions.

### The foundation of portfolios

Understand how to set up **DataTable** as a portfolio view of various work throughout a company by **centralizing** information into a singular Smartsheet for executive reporting.

### Building more connections

Learn how the Smartsheet **Salesforce Connector** can be utilized to build connections between siloed teams to **manage** numerous complex & fast moving projects easily.

# Table of contents

## A Smartsheet journey


1 Setting the stage

2 Advancing the flow of data

3 Enabling collaborative sales

4 “OneTremco”


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Although we are a small team, we manage numerous complex, fast-moving projects and rely on Smartsheet to help keep the group up-to-date and on-track.
Kelly - Salesforce Admin Team

With Smartsheet, we can build to address every research group's unique needs while still collecting consistent data.
David - Research & Development

One of the standout features of Smartsheet is its ability to streamline project management.
Rachel - Roofing Products Group

**Smartsheet is Awesome!!!**
**Philip - Roofing Business Development Team**

1

# Setting the stage

**The journey from two divisions to “One Tremco”**

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Dryvit Nudura Willseal

TREMCO
Roofing & Building Maintenance

TREMCO
Commercial Sealants & Waterproofing

wti PureAir Control Services

**Our vision is to help create a world in which all the structures where we live, work, and play are as beautiful and strong on the outside as they are safe and comfortable on the inside.**

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# Our Smartsheet journey

## Sound familiar?

**2015**

3 licenses
4 assets

**2020**

Jason & Rachel discover the power of Smartsheet

**2022**

Smartsheet Advanced

**2024**

200 licenses
22k assets

# Siloed divisions creating simple solutions

## Why Smartsheet?

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“The incorporation of Smartsheet has played a pivotal role in (this) increased efficiency, contributing significantly to our overall

**success**

and our ability to Lead With Safety.”

~Tremco Safety Team

**“Smartsheet has revolutionized the way my team and I manage our workload, providing us with unparalleled visibility.”**

**Adam Welder**

CORE Production Logistics Supervisor

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**“Smartsheet has allowed us to consolidate and customize our tracking of all work associated with acquisitions. Large cross-functional teams are able to collaborate in real time.”**

**Amy Woodard, PMP**

Manager - Compliance & Project Management
Tremco Commercial Sealants & Waterproofing

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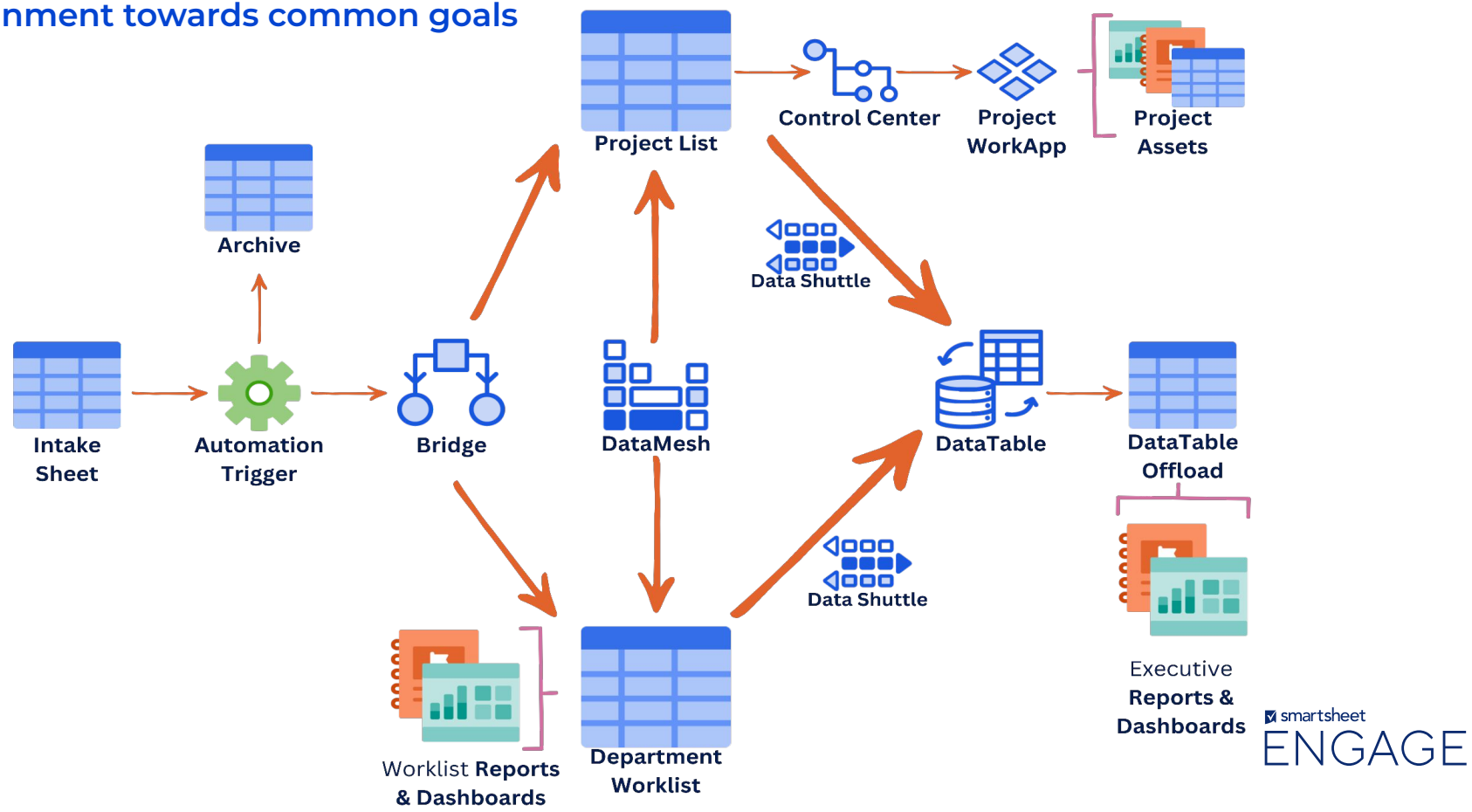
# Advancing our solutions

## Alignment towards common goals

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# Advancing the flow of data

**Using Bridge & advanced tools to control data flow**

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# Architecture goals

## Elegant and simple

# Let’s create a company

**Our company has four departments**

Project Management

Research & Development

Testing / Quality Assurance

Business Operations

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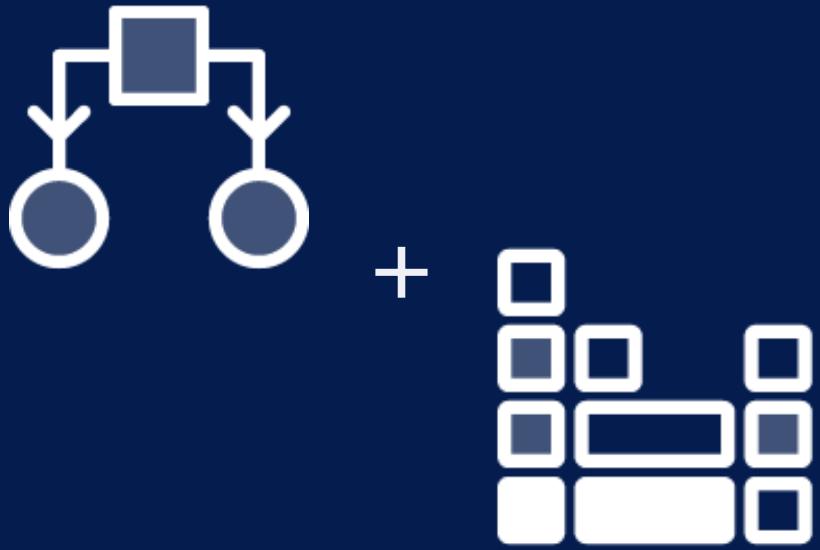
# Department worklist requirements

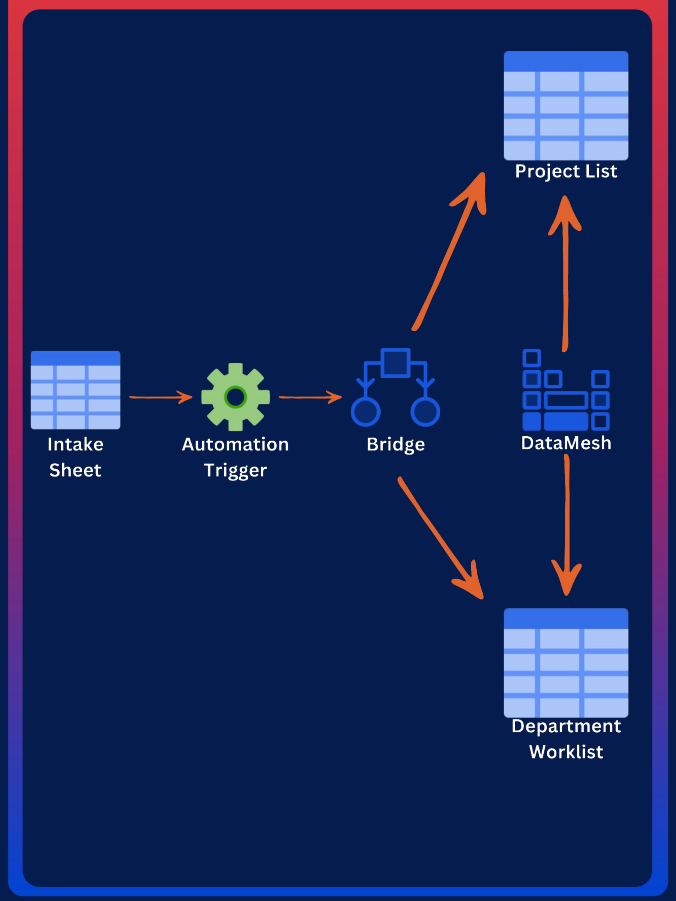
## Each onboarded department has a Smartsheet “worklist”

Solution architecture requires **key columns** for all department worklists

| ID | PMO ID | Title | Description | Lead | Status | Update |
|---|---|---|---|---|---|---|
| DS0001 | | **Finish new testing procedures and publish** | *Update the FY22 testing procedures with the new federal changes and publish* | Tom Wilson | Active | Reviewing Draft with committee |
| DS0002 | PMO662 | **Onboard new software client** | *Onboard new Software client Snoopy Inc with the standard implementation connections* | Gary Roberts | Active | Waiting for PM to schedule kickoff |
| DS0003 | | **Standard Testing Quite for Woodstock, Inc** | *Run standard testing suite and send normal results package* | Christina Wilson | Hold | Final plans and setups. |
| DS0004 | | **Annual Report Completion** | *Complete the annual report and budget packet for Novembers budget review* | Tamara Jones | Active | Just need to clean it up with new org changes |

# Bridge & DataMesh



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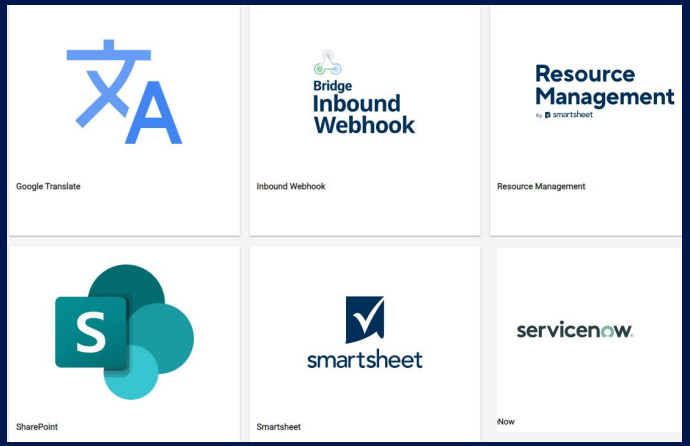
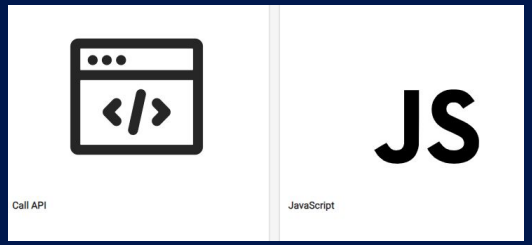
# What is Bridge?

## Where to find it & why you'd use it

- Bridge is a workflow tool that can **connect** to many other apps and services directly
- **External** | *domain.bridge.smartsheet.com*




- WHY: **instantaneous** action
- Sends information quickly throughout our Smartsheet solution

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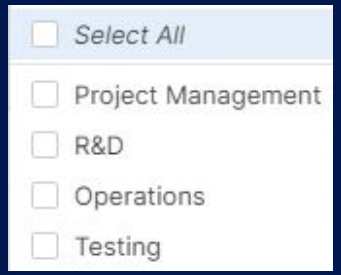
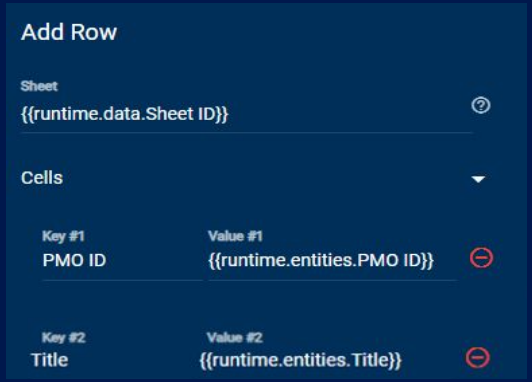
# Bridge basics

## Move key information from a primary sheet

- Bridge **trigger** is a multi-select column that lists each department




- Via Bridge's "Add Row", selected fields (**PMO ID**, **Title**) are automatically added as a new row to the department worklist(s)

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# Bridge creates a new item on sheet

**Fields are created on the respective department worklist**

- Smartsheet **alert** workflow automation notifies the manager
- Department-specific fields can then be completed

| ID | PMO ID | Title | Status | Description | Business Category | Lead |
|---|---|---|---|---|---|---|
| DS0001 | | **Finish new testing procedures and publish** | Active | *Update the FY22 testing procedures with the new federal changes and publish* | Process Improvement | Tom Wilson |
| DS0003 | | **Standard Testing Quite for Woodstock, Inc** | Hold | *Run standard testing suite and send normal results package* | Customer Experience | Christina Wilson |
| DS0004 | | **Annual Report Completion** | Active | *Complete the annual report and budget packet for Novembers budget review* | Process Improvement | Tamara Jones |
| DS0002 | PMO662 | **Onboard new software client - Snoopy Inc** | NEW | | | |

# DataMesh to the department worklist

## DataMesh pulls in additional information

- Now with the “**PMO ID**” on the department worklist, DataMesh can be utilized to bring in additional information from the **primary** sheet to the department **worklist**:
  - Project manager,
  - WorkApp link,
  - Start/finish dates,
  - etc.

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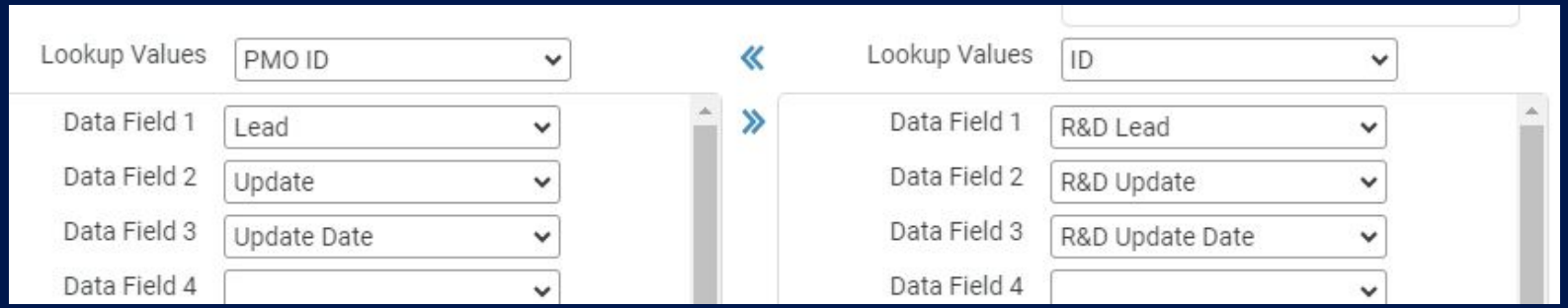
# DataMesh back to the primary sheet

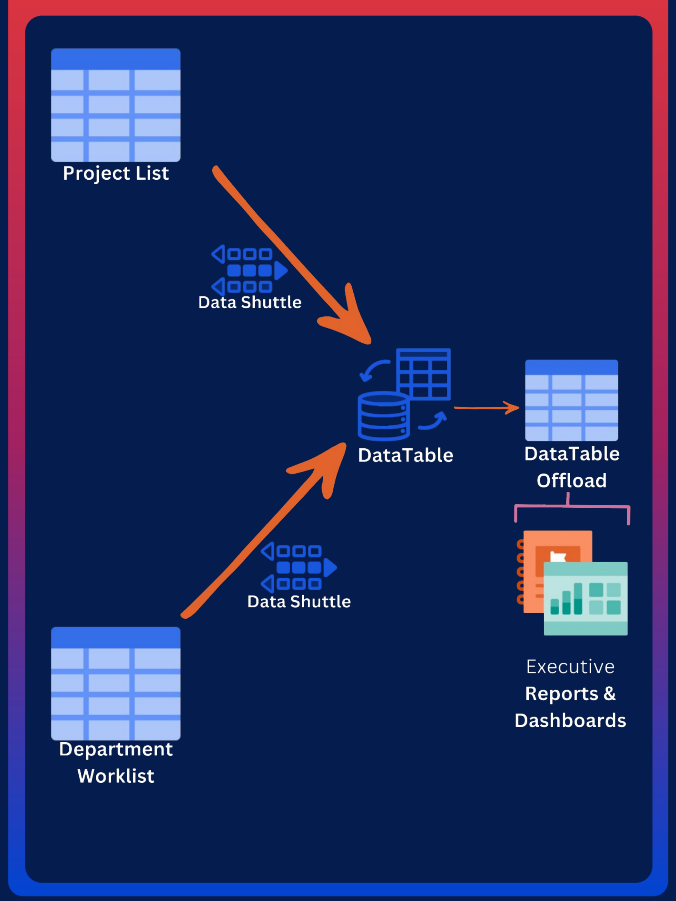
**DataMesh pulls key information from department worklists**

- A second DataMesh is created to pull information from a department **worklist** to the **primary** sheet:
  - Lead,
  - Update,
  - Other columns as needed.



# Data Shuttle & DataTable

+

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# Portfolio Reporting

## Use DataTable for portfolio reporting & executive KPI metrics

How can I **consolidate** the data from all departments?

Option 1 - Create metrics sheets at the department level and feed multiple dashboard widgets?

Option 2 - Use DataTable!

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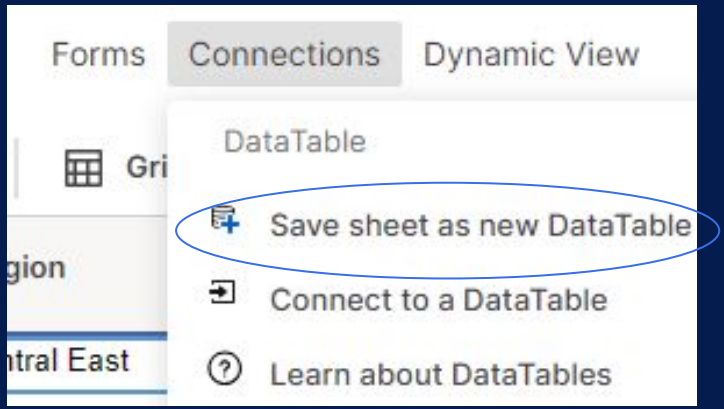
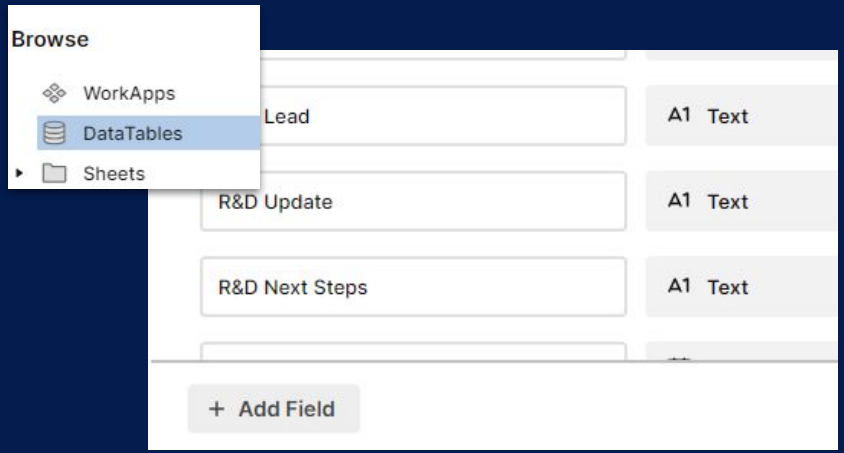
# DataTable highlights

## Setup recommendations

- Two ways to create:
  - From an existing Sheet
  - Manually creating the table/fields




- Column names CAN be different from any of the underlying sheet columns
- Only add the ones you want, with corresponding Data Shuttle filters

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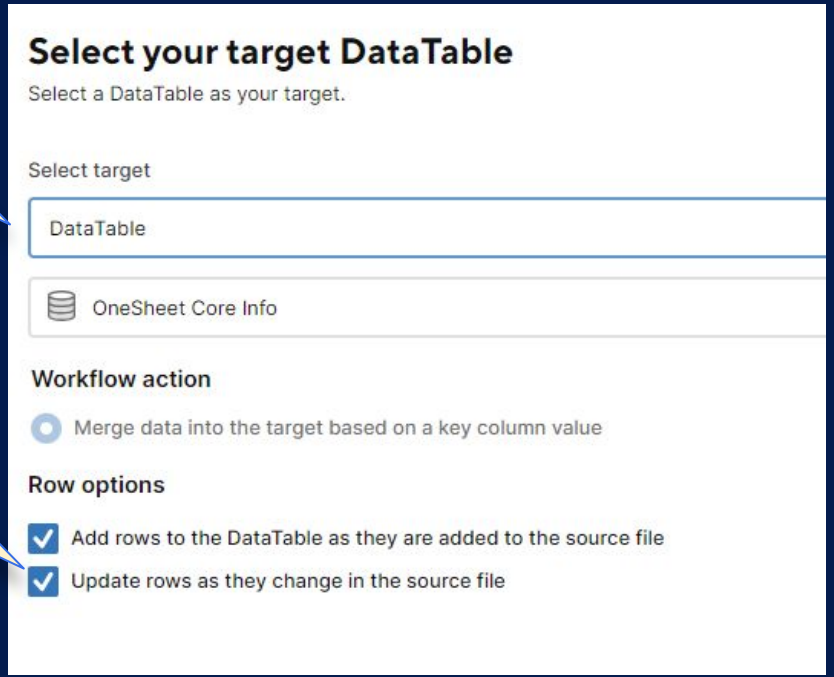
# Connecting to DataTable

DataTable is a choice in the **Select target** field when creating a Data Shuttle

**While target always defaults to 'Sheet' you can select 'DataTable'**

**Add & Update values from latest exported .csv into the DataTable**

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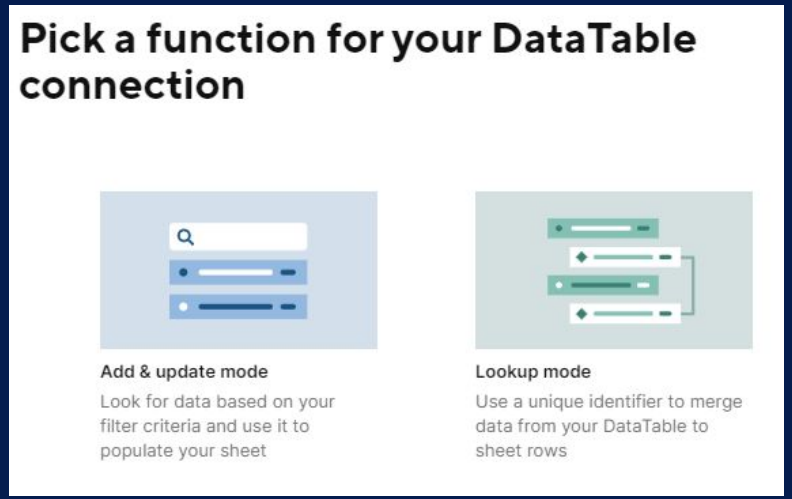
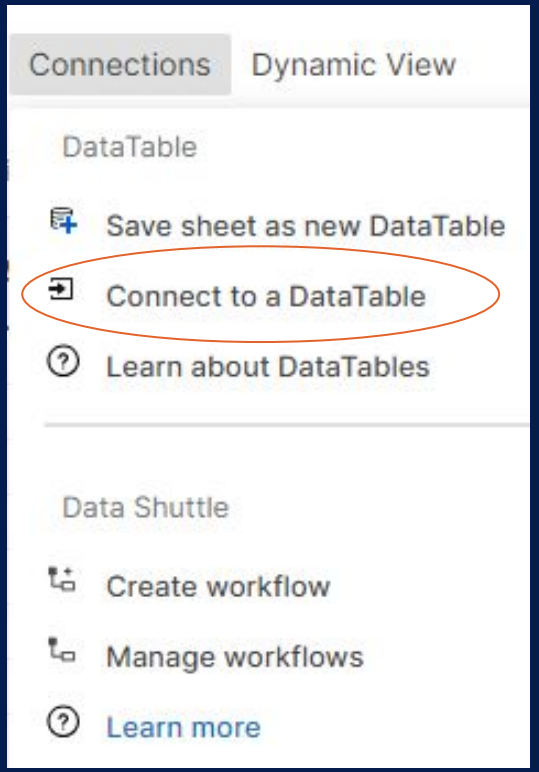
# Offloading DataTable

## Using the single-step DataTable sheet connector

- DataTable **holds** the information
- To **analyze** the data - offload to a Smartsheet

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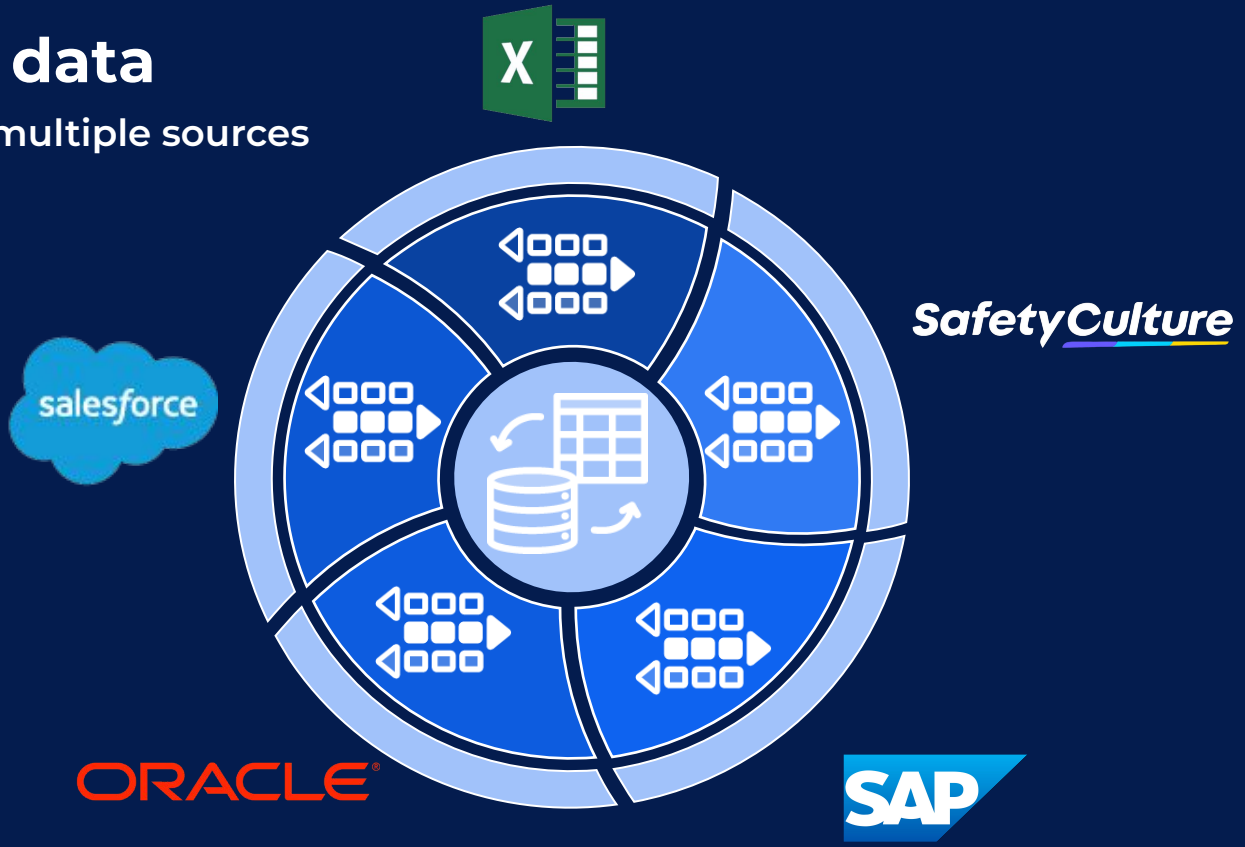
# Consolidating data

DataTable aggregates multiple sources

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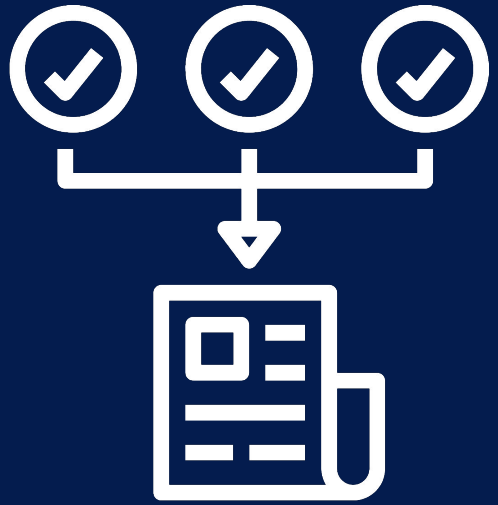
# Single source of truth

## Single Smartsheet solution holds all the data



Data analysis departments can easily create clean, **trusted portfolio reports** for key executive metrics.

3

# Enabling collaborative sales

**Salesforce data connector**

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# Apples & Oranges

## Managing sales differently

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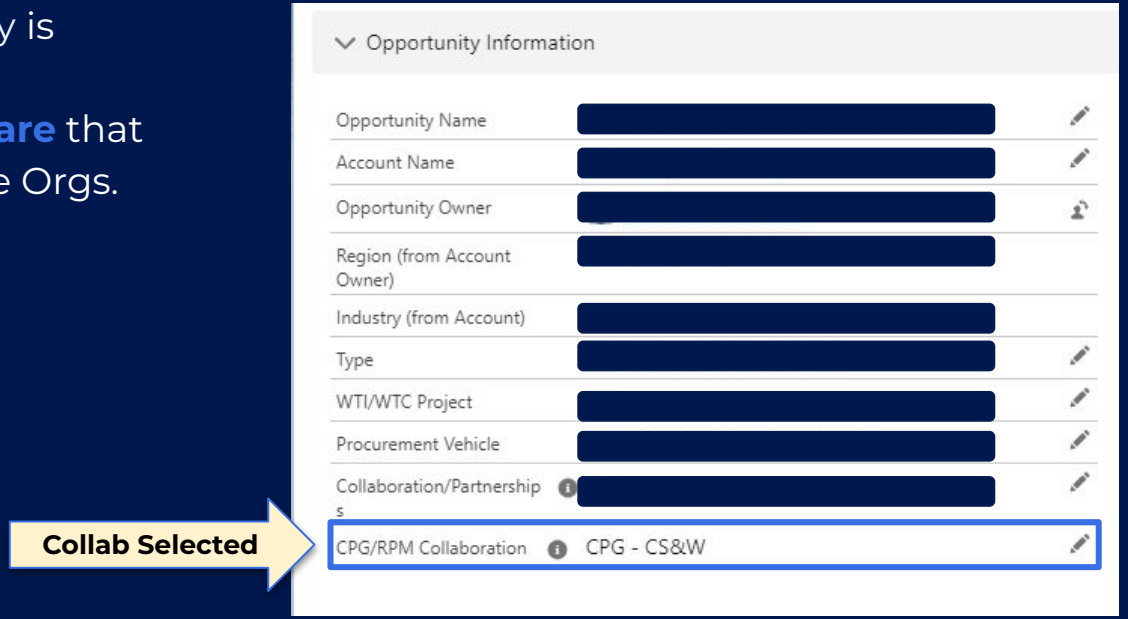
# The obstacle

## Multiple Salesforce Orgs

Whenever a Roofing Opportunity is marked as a **collaboration** with Sealants, we needed a way to **share** that lead despite our siloed Salesforce Orgs.

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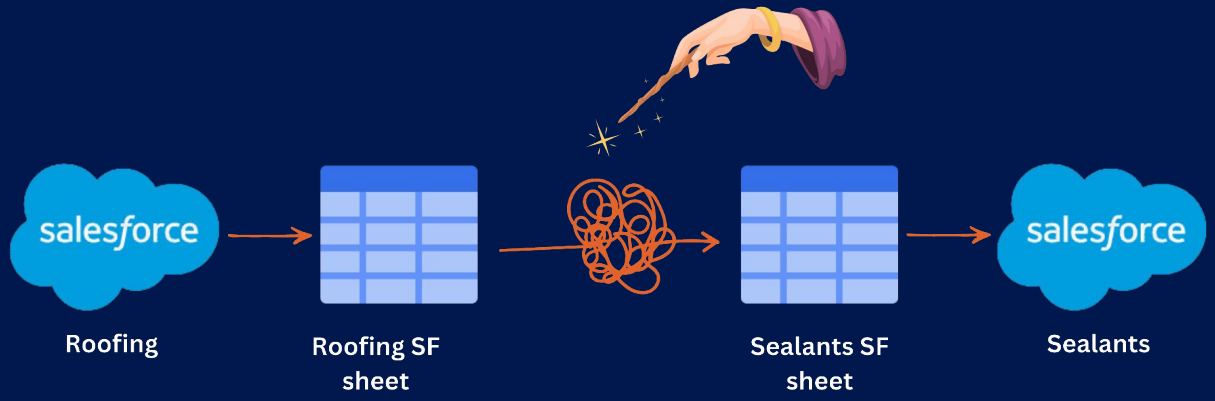
# The solution

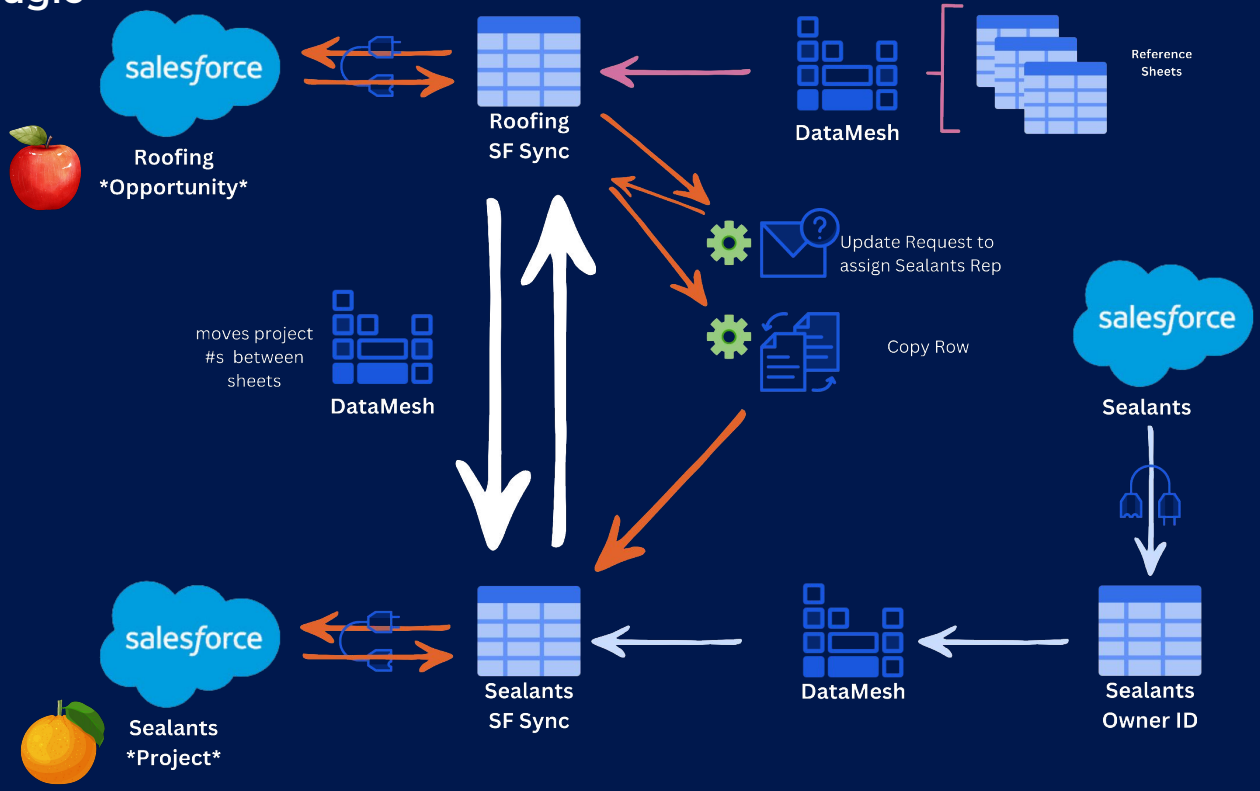
**Smartsheet Salesforce Connector + DataMesh**

1. Collaboration field is populated (the **trigger**),
2. Key fields are **pushed** from the  Roofing Salesforce to a Roofing SF Smartsheet as a new row,
3. Various workflows work behind the scenes to **mesh data & copy** the row into a Sealants SF Smartsheet,
4. Then **synced** to the Sealants Salesforce.



# Bridging the gap between Salesforce Orgs

## Aka the “Magic”

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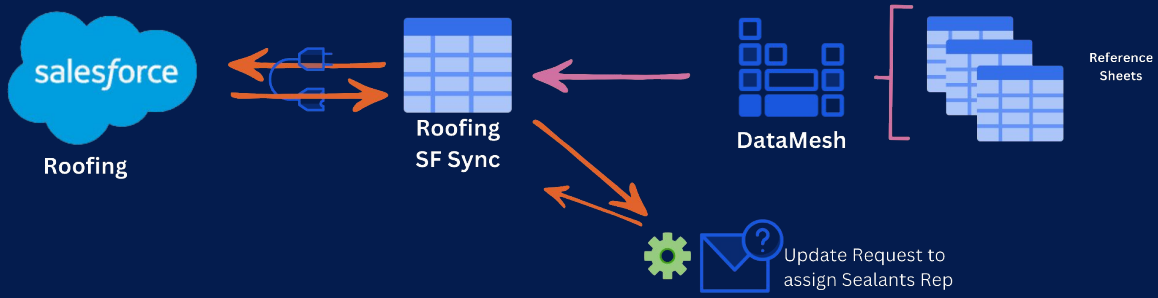
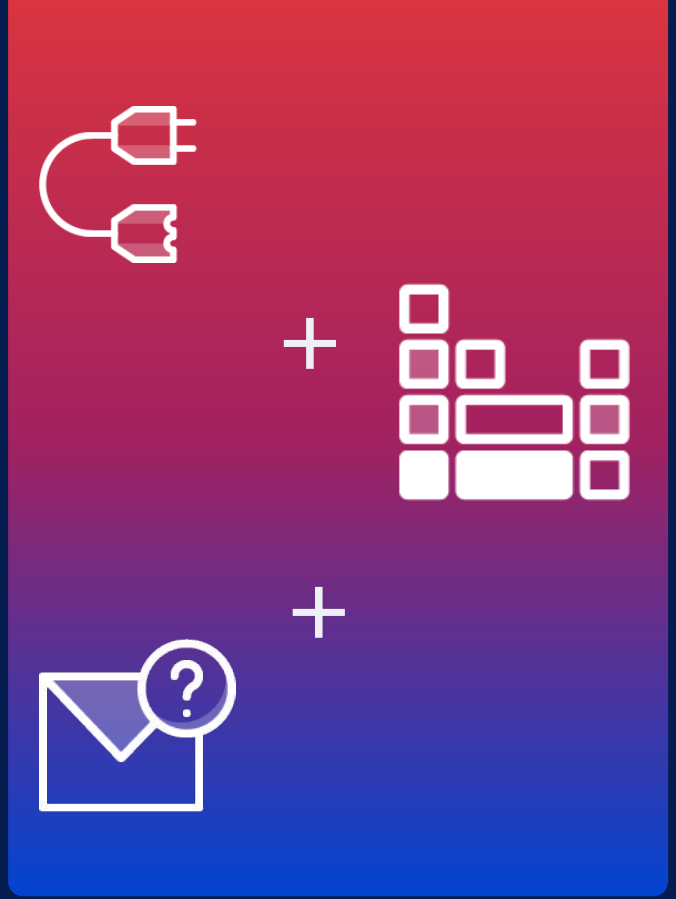
# The “Magic”

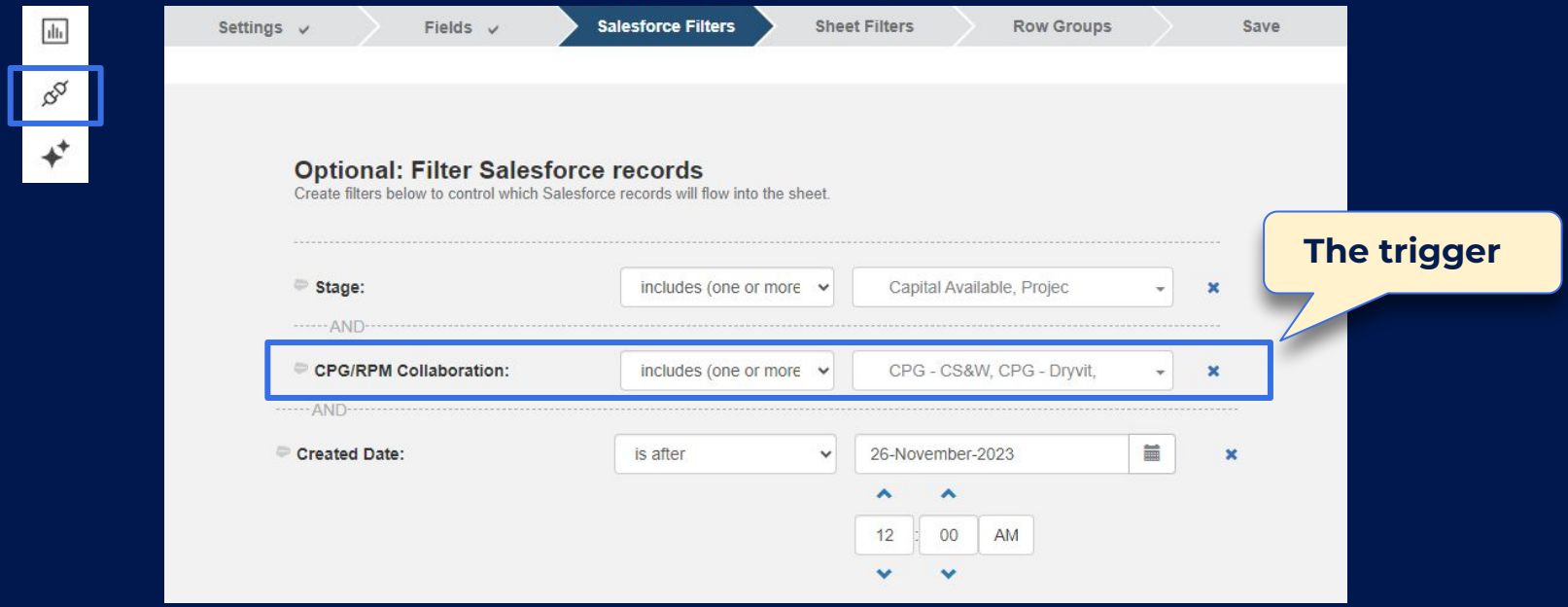
## Part 1



# The set-up

## Salesforce to Smartsheet

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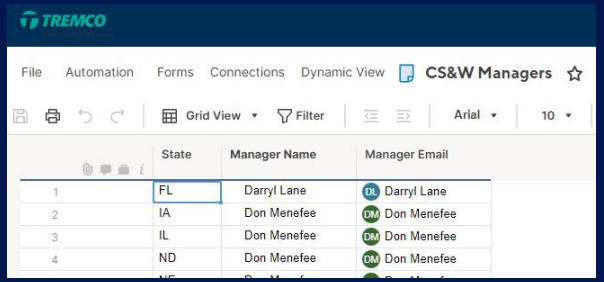
# Acquiring more info

## DataMesh adds in key data




A **DataMesh** uses the state to populate the Sealants Manager's name & email from a reference sheet.

An **Update Request** is utilized to enter the Sealants Sales Rep details.

| TRBM Opportunity ID | Opportunity Name | CS&W Rep Email | CS&W RM Review | RM Update Request | CS&W Regional Manager Name | CS&W Regional Manager Email |
|---|---|---|---|---|---|---|
| 006EY000003FppaYAC | Hot Rubber Waterproofing | | Pending | 01/18/24 | Tom Thornton | tthornton@tremcoi |

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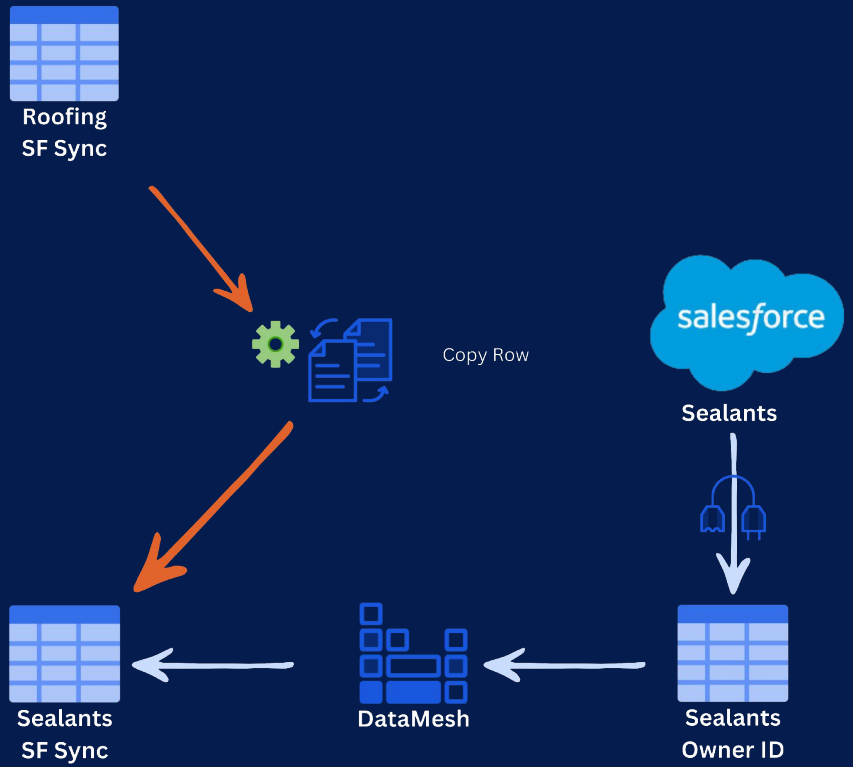
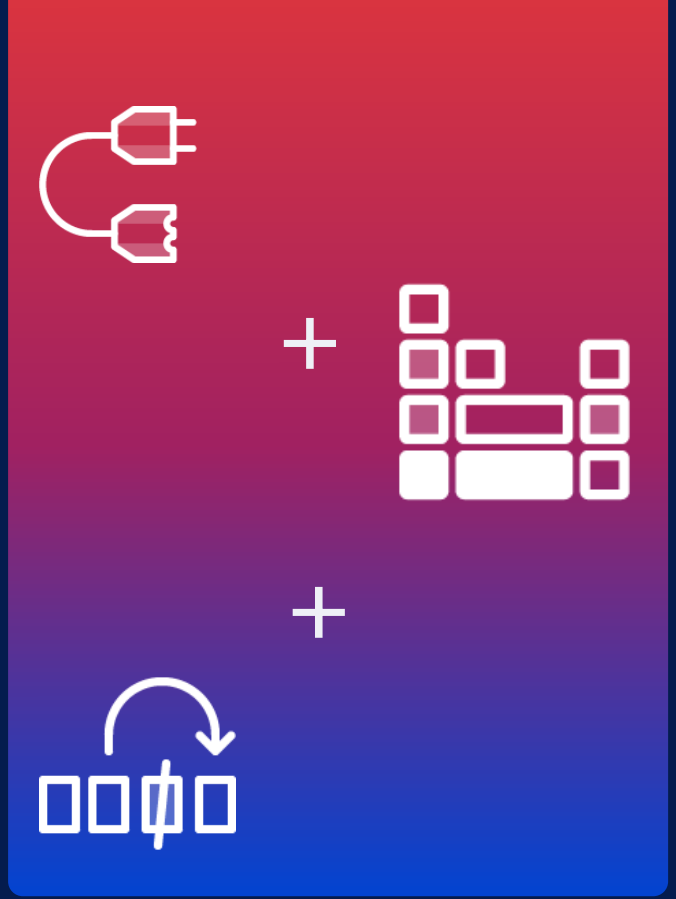
# The “Magic”

## Part 2



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# Roofing data added to Sealants SF Smartsheet

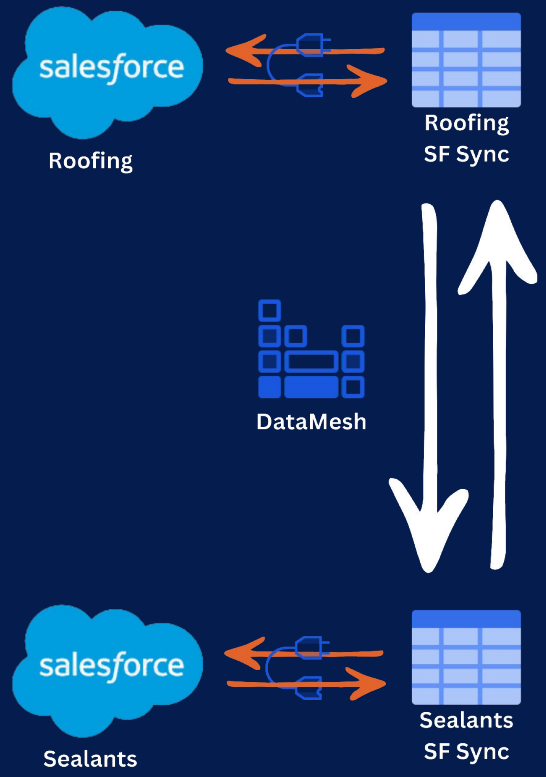
**“Copy a row” workflow is triggered**

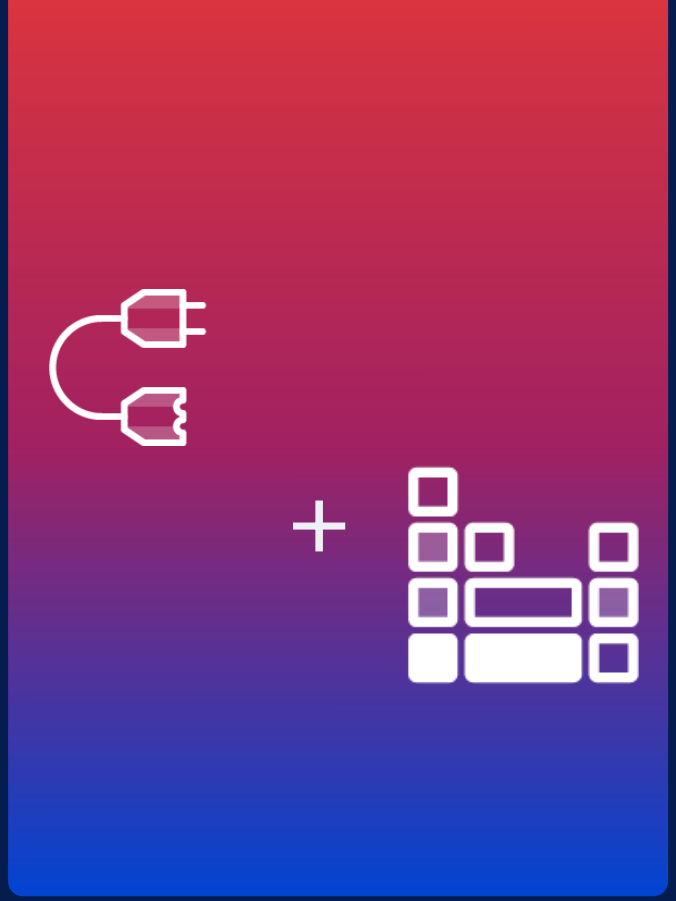
- The row is **copied** to the Sealants SF Smartsheet via an automated workflow.
- Sealants SF Smartsheet is **synced** with the Sealants Salesforce to grab the Sealants Owner ID.

| | CS&W Collab | Opportunity Name | CS&W Rep Response | CS&W Owner ID | CS&W Rep Name | CS&W Rep Email |
|---|---|---|---|---|---|---|
| 1 | ☑ | Test 08NOV2023 | Acknowledged | 00530000006HjgPAAS | C. Ken Hope | khope@tremcoinc.com |
| 2 | ☑ | Test 2 08NOV2023 | Acknowledged | 00530000006HjgPAAS | C. Ken Hope | khope@tremcoinc.com |
| 3 | ☑ | US Farathane/Striping | Acknowledged | 005Qp000000JlxhIAC | George Goad | ggoad@tremcoinc.com |

# The “Magic”

## Part 3 (final)



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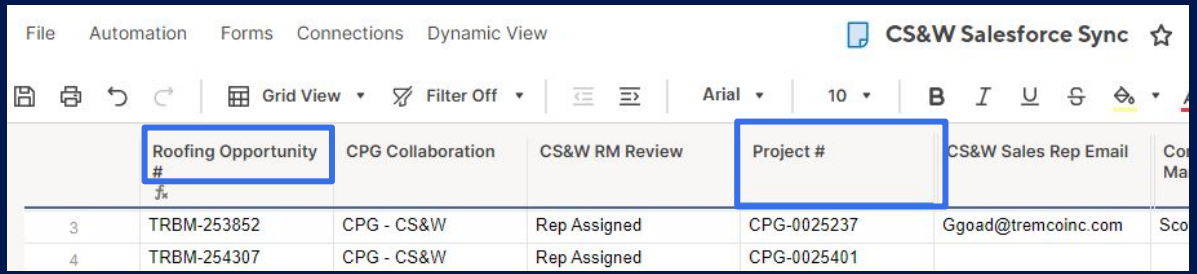
# Aha!  Collaboration engaged!

**The Connector brings in key details into Sealants Salesforce**

- The row is **pushed** into Sealants Salesforce as a construction project object.
- The Project # from Salesforce is **pulled** onto the Sealants SF Smartsheet.
- A **DataMesh** pushes the Sealants Project # to the Roofing SF Smartsheet, ultimately syncing it into the Roofing Salesforce.

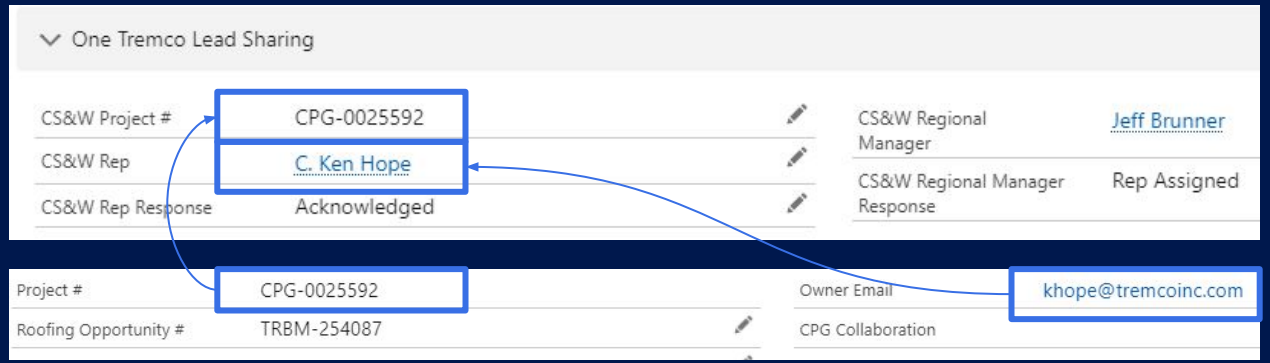


# Shared details across orgs

**Fields of key details are created in each Salesforce Org**

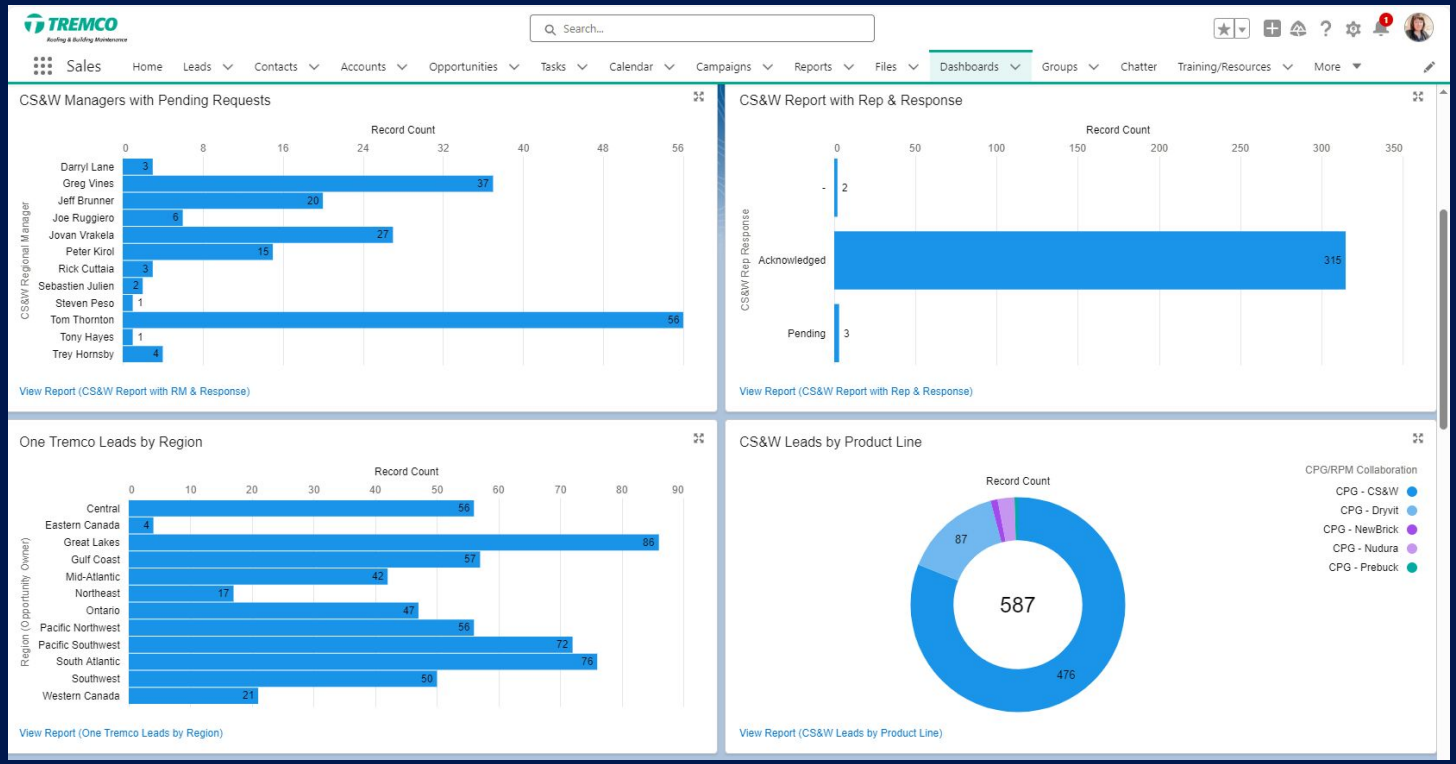
The opportunity object in the Roofing Salesforce and the construction project object in the Sealants Salesforce **both** have fields to capture each other's **key** details:

- Project #s
- Sales Rep
- Regional Manager



# Visibility for all

## “OneTremco” dashboards in each Salesforce Org

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4

# “OneTremco”

**Connecting across brands, departments, teams, and processes**

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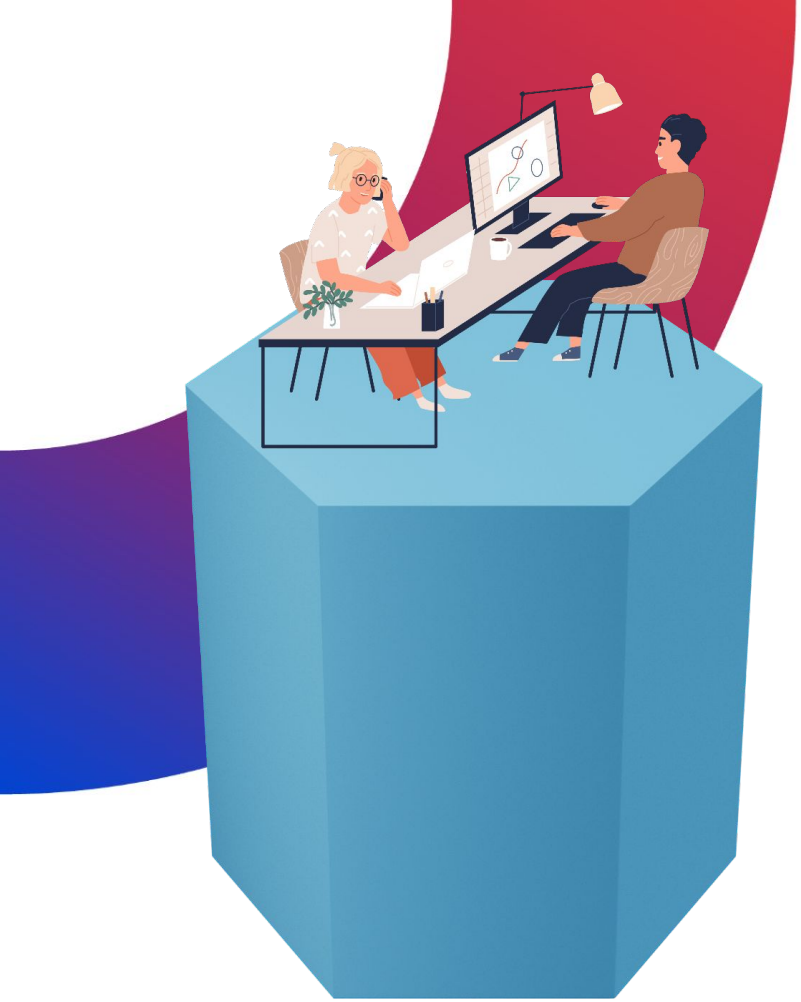

# ONETREMCO

**“If you want to go fast, go alone.
If you want to go far, go together.”**

**-African Proverb**

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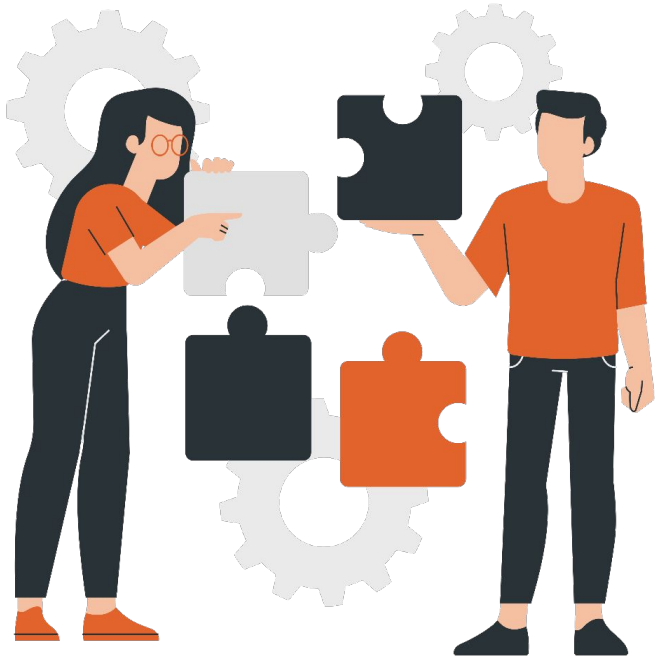
# Coming together to go further

## Smartsheet advances & enhances our ability to do more every day



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# Thank you!

## Recap and next steps

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# Recap

## What we learned today...

### Simplicity in the complex

- Utilize **consistent** terminology/naming
- **Combine** premium capabilities
- **Minimize** manual data entry

### The foundation of portfolios

- Combine **multiple datasets** in DataTable
- A single source of truth creates data **confidence**

### Building more connections

- Smartsheet Connectors **bridge the gap** across systems of record
- **Automate** data consistency

# Next steps...

- Stop by the Smartsheet booths to speak with product experts!
- “Advanced power-user tips to up-level your Smartsheet experience” - today at 4!
- “The future of workflows: How Iron Mountain creates advanced solutions with API and Bridge” - tomorrow at 10:30!
- Specific questions on workflows shared today? Connect with the Tremco team members!

## 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.

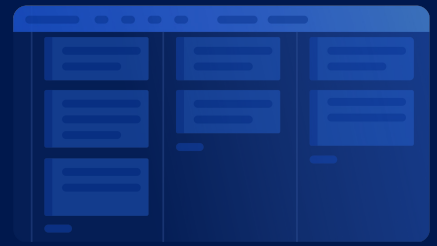
**@smartsheet**

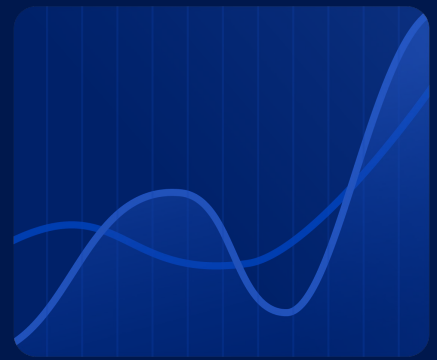
**@smartsheetplatform**

**@smartsheet**

**@smartsheet**

**@smartsheet**





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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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