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Developing an end-to-end Work Management solution in Smartsheet



smartsheet

ENGAGE

v.07/16

What we will run through today

1

Introduction & Learning objectives

2

Before Smartsheet

3

Simple, Flexible, Scalable

4

Where next?

Learning Objectives

What are you going to learn today?

- You will learn how Control Center can be used to scale out across the organization into new teams
- You will learn how to prioritize requirements and when they should be collected in your solution workflow
- You will learn how WorkApps can create curated view and manage user experience

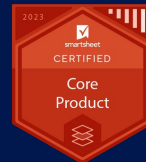
Who are we?



Jeffrey Manning, MBA
PMP
Project Portfolio
Management Lead,
Bayer Crop Science

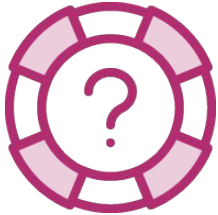


Dom Wooldridge
Snr Strategic Solutions
Engineer, Smartsheet



The before state

Situation in North America Product Supply before: Chaotic and inconsistent



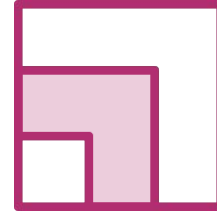
Disparate Solutions

Every team created and made up their own solutions with different tools (XL, PPT, Access, SharePoint)



Old, inaccurate data

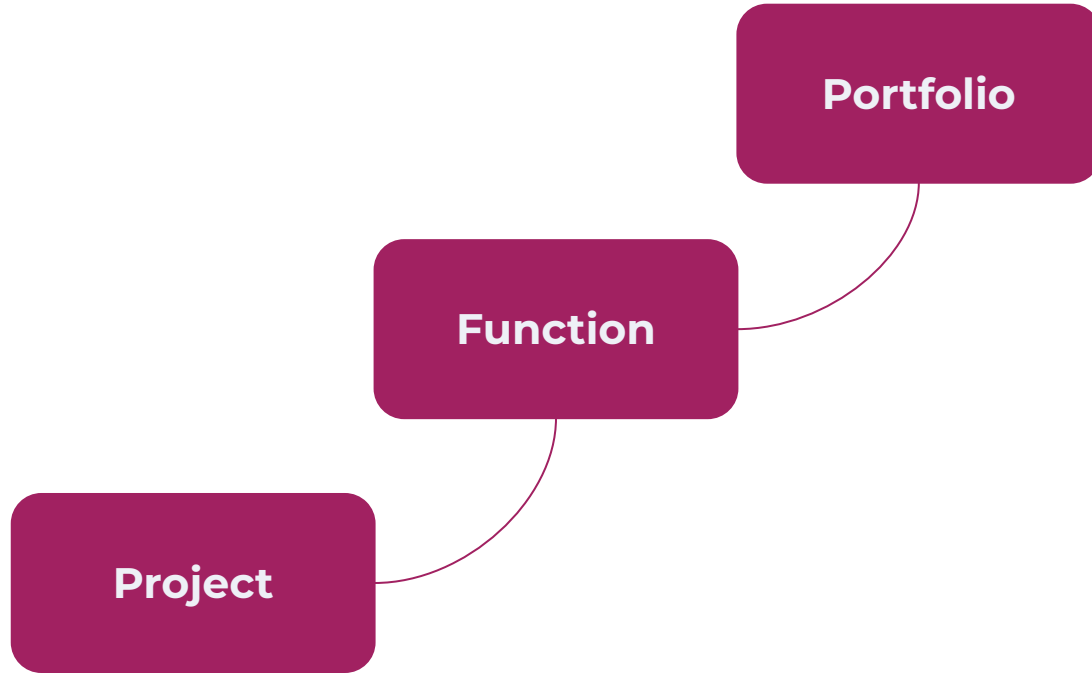
Lots of time spent collecting and combining data from multiple sources for reporting - by which point it is out of date.



Smartsheet use not optimized for scale

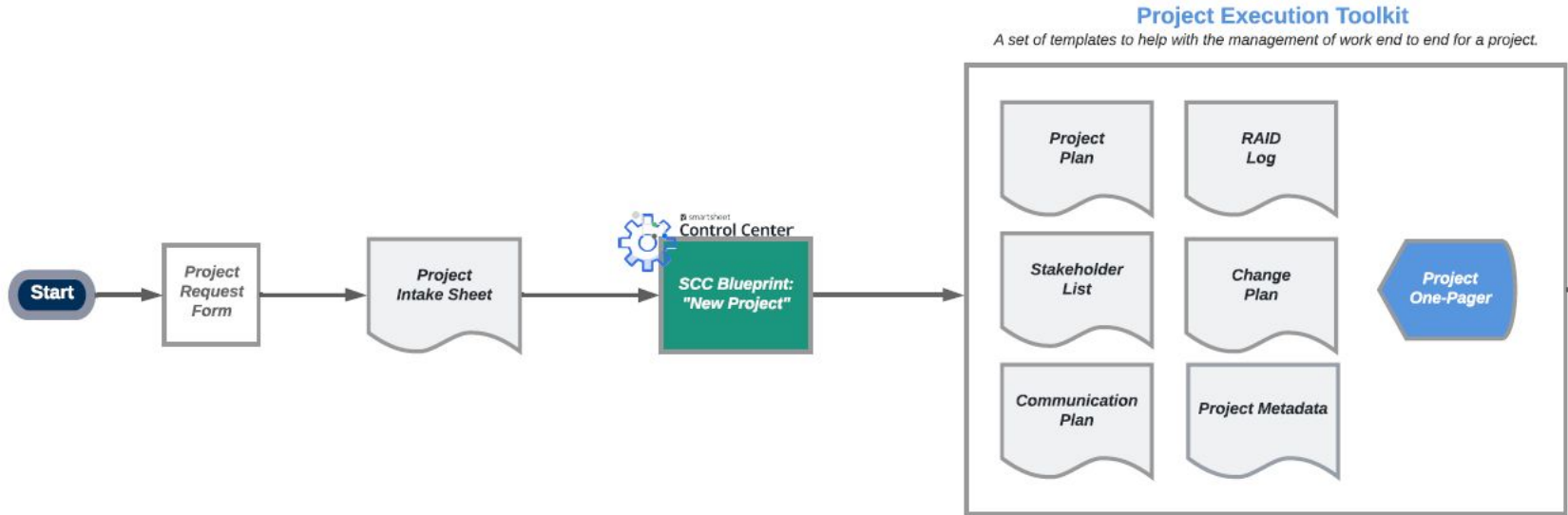
Even using Smartsheet involved manual work and lots of copying of templates and reconfiguring reporting

How is the solution structured?



Storyboard of Demo

Project Toolkit intake



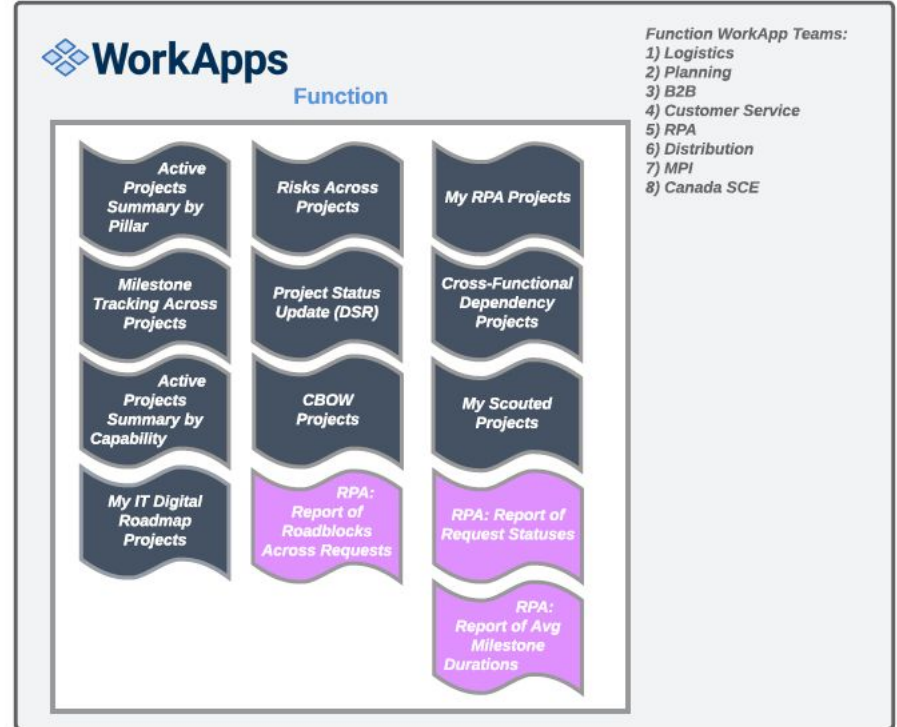
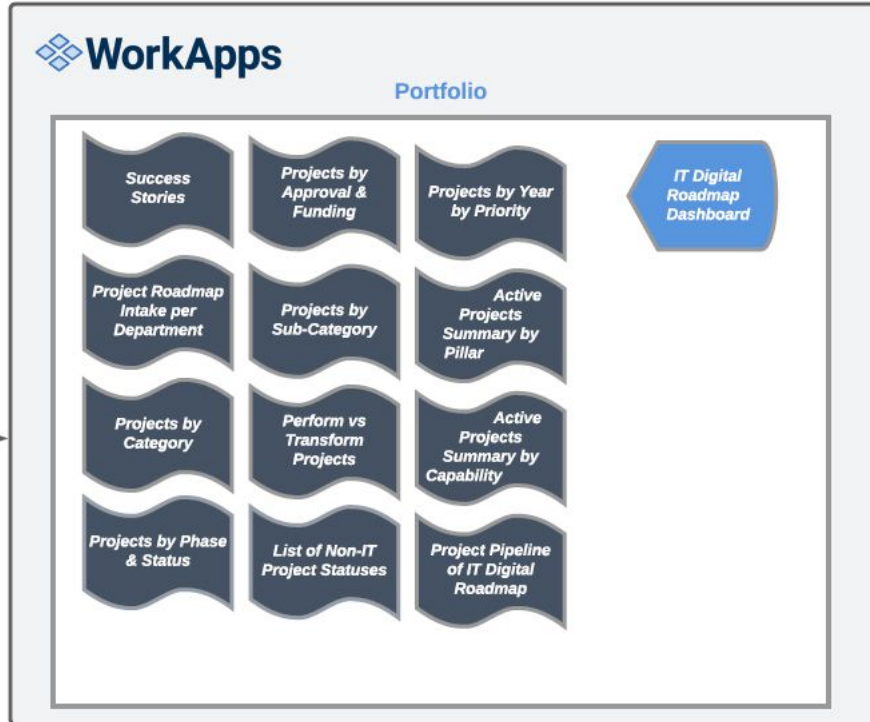
Intake for business team portfolios

Business team-portfolio can be set up in minutes



Workapps

For user experience and high-level portfolio reporting



Intake process – Flexibility

You choose if you need a project toolkit

smartsheet

File Automation Forms Connections Dynamic View

Project Intake Sheet ★

Sha

Grid View Unnamed Filter Arial 10 B I U S % A

| | Include in Report? | ID | Functional Business Team | Project Name | Approval Status | Project Toolkit Execution Option | - | Function Exists? | Ready to Create? | Provisioned? | Project Link |
|-----|-------------------------------------|------|--------------------------|---|-----------------|----------------------------------|---|-------------------------------------|-------------------------------------|-------------------------------------|---|
| | <input checked="" type="checkbox"/> | 1166 | SCE-MPI | Agent Assist ChatBot - North America Customer Service | Approved | | | | | | Agent Assist ChatBot -- Toolkit |
| 862 | <input type="checkbox"/> | 1246 | SCE-MPI | Change Management Process and Tool Alignment | Approved | I need a project toolkit | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Change Management Process Execution Toolkit |
| 899 | <input type="checkbox"/> | 1367 | SCE-MPI | CBoW Sales WKSTM: Sales Forecast Integration to IBP | Approved | I do not need a project toolkit | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 900 | <input type="checkbox"/> | 1368 | SCE-MPI | OCV NA Build – Perform Capabilities | Approved | I do not need a project toolkit | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |



**200 (12.5%)
of 1600 active projects
Control Center projects**

Reports show a business team's portfolio

View of whole portfolio

smartsheet

File Dynamic View SCE-SAI - ALL PROJECTS PORTFOLIO ☆

2 Sheets
62 Columns
2 Filters
Group
Summarize
1 Sort

| | ID | Project Name | Description of Project/Initiative | Project Link | Project Phase | 2023 | | | | 2024 | | | | 2025 | | | | | |
|----|-----|---|---|---|--------------------|------|----|----|----|------|----|----|----|------|----|----|----|--|--|
| | | | | | | Q1 | Q2 | Q3 | Q4 | Q1 | Q2 | Q3 | Q4 | Q1 | Q2 | Q3 | Q4 | | |
| 32 | 590 | Migrate Project Hopper | Product Supply Distribution migrate project hopper to NA PS Smarsheet Solution | Migrate Project Hopper | Close | | | | | | | | | | | | | | |
| 33 | 589 | Objective Scorecard | Go Live Training & Sustainment for objective scorecard | Objective Scorecard - F | Close | | | | | | | | | | | | | | |
| 34 | 503 | Basic Budget SCM NA - placeholder CY24 | Placeholder project for Strategic Digital Enablement work | | Discovery-Analysis | | | | | | | | | | | | | | |
| 35 | 448 | Test WorkApps and prepare user training | Test the functionality of various workapps reports. Trouble-shoot and correct issues with reports. Train users on the proper use of the Workapps reports. | | Close | | | | | | | | | | | | | | |

Function Dashboard is the portfolio level

The workspace is for a business group that needs to report on portfolio of projects. Projects are the child project to the function workspace.

NA Product Supply

Supplying the Future of Agriculture 



SCE-MPI

NA Supply Chain Excellence, Strategy Advancement and Innovation

| | | | | |
|---------------------------------|---|---|---|---|
| Approved/Active Projects 34 | ALL MY PROJECTS | ALL NON-TOOLKIT PROJECTS | ALL TOOLKIT PROJECTS | ALL PROJECTS PORTFOLIO |
| Projects in Intake Process 2 |  |  |  |  |

Important Hyperlinks

| | | |
|--|---|--|
| CM Assessment Dashboard | PS-onePSS (non-Mfg) Dashboard | CAPEX SCM Equipment, NA PS-SCM |
| PS Communication Dashboard | iPaP Transformation Dashboard | CAPEX IT FUNDING STATUS Hi-Level |
| | | CAPEX IT FUNDING STATUS-Detail |

FUNCTION OVERVIEW

| | |
|---|--------------------------------|
| APPROVED / ACTIVE PROJECTS BY CATEGORY | ACTIVE PROJECTS BY TYPE |
|---|--------------------------------|

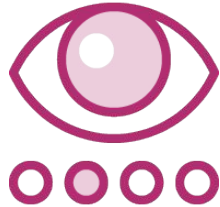
Simple, Flexible & Scalable

Impact of Control Center & an End-to-End Work management Solution



PPM one way

Single platform used to track and monitor projects and work across different groups and teams - no need to use .pptx or XL



Visibility & communication

See where company resources are being used and any cross functional dependencies

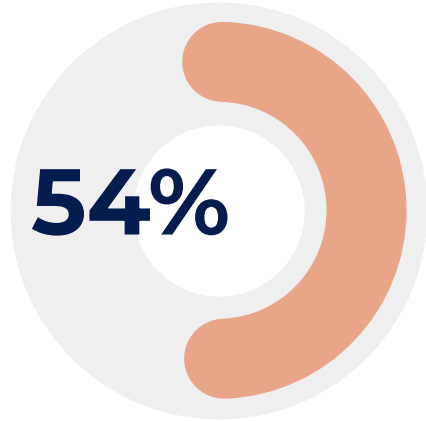


Speed of delivery

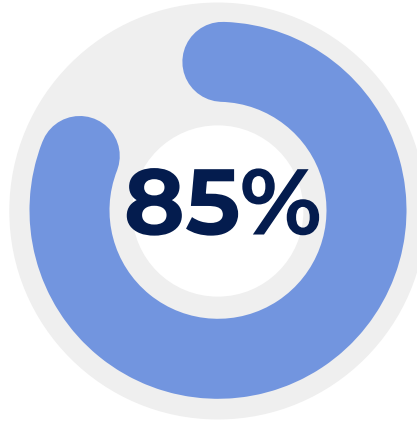
Program and departments are set up in minutes

Impact to Bayer Crop Science

A survey of 215 Smartsheet users



**Find Smartsheet a
business critical
application**



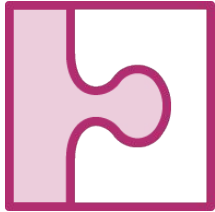
**Envision using
Smartsheet for future
workflows**



**Average time saved
per user, per year**

Where next for the Solution

Future innovations



Integration

Integrating with IT
Development Platforms



OKRs

Provide more visibility and
reporting of objectives



Resource Capacity Planning

Building prototypes and
obtaining feedback and
alignment

Learning Objectives

What are you going to learn today?

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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

Next steps...

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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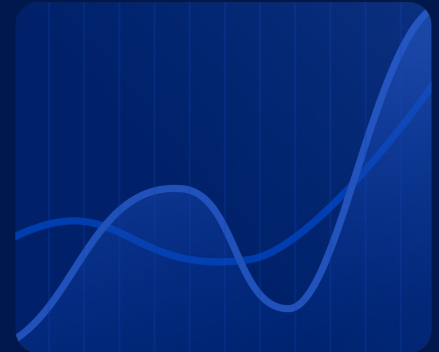
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