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# Building connected content workflows

Karin Maltrud & Randy Meyerson



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# Hello and welcome!



**Randy Meyerson**  
Sr. Director, Product Management  
*Content Experiences*



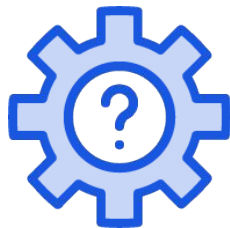
**Karin Maltrud**  
Sr. Product Marketing Manager  
*Content Experiences*



# Learning objectives



Understand the **real impacts** of having **content disconnected** from Smartsheet



Learn how you can build **connected, automated workflows** that enhance your content work in Smartsheet



Learn about how Smartsheet is **making it easier to do more** with content in your workflows

# Table of contents

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Define and explore content challenges organizations face today

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Demonstrate how to connect the dots with Smartsheet

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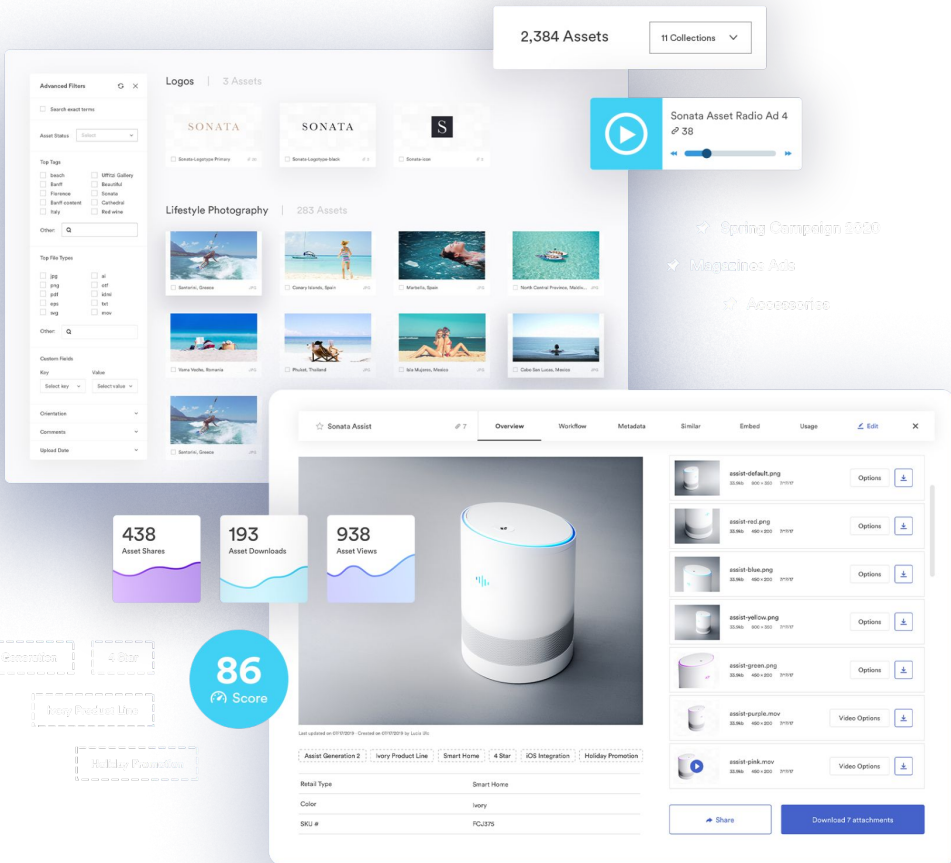
Explore the future of content experiences in Smartsheet

# The state of content

Challenges and opportunities

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# Content is the core of every business

Being able to **organize, create, review, integrate,** and **manage** content is key to success.

Content is dynamic. It's always changing – details, ownership and status.

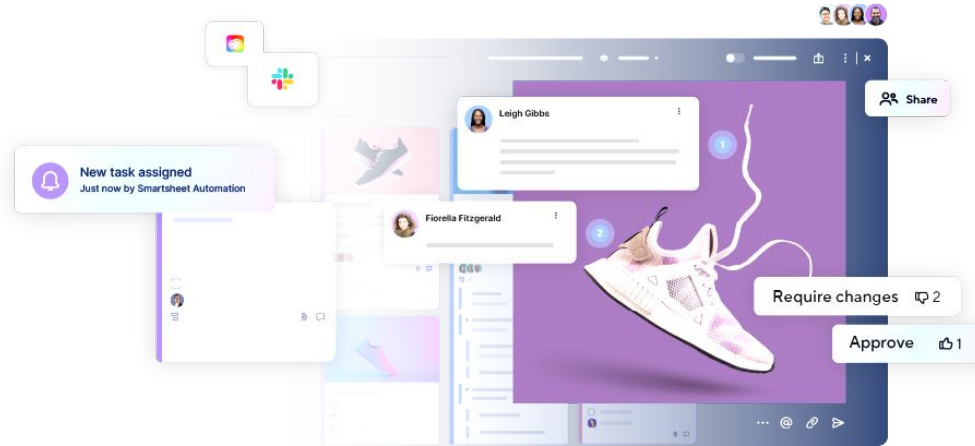


# Defining 'content'

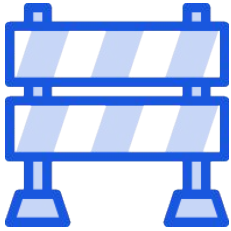
## The heartbeat of an organization

Various types of **information** and **digital assets** that are created, managed, and utilized within an organization to run smoothly and achieve objectives.

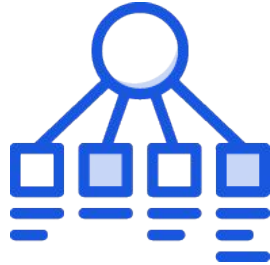
- **Documents:** reports, proposals, manuals, contracts, policies, invoices
- **Multi-media files:** images, videos, audio, presentations
- **Data files:** spreadsheets, databases
- **Project materials:** project plans, timelines, task lists, progress reports
- **Web content:** articles, blogs



# Mo' content, mo' problems



**Inefficient workflows**



**Content sprawl**



**Limiting formats and technology**



**Digital workers  
spend 4 hours  
per week  
togglng and  
reorienting  
between different  
digital tools.**

[Harvard Business Review \(2022\)](#)

## Inefficient workflows

### Real impacts



Wasted time



Poor collaboration



Data silos & integration challenges



Security risks

## Does your team sound like this?

“I can’t find the latest version of the contract for this deal!”

“The sales team is using outdated collateral that isn’t compliant anymore!”



“Is this document accomplishing what we wanted it to?”

“Can that file be shared with this customer?”

**47% of digital workers struggle to find information or content they need.**

Gartner (2023)

## Content sprawl

### Real impacts

- » Employees can't find what they need
- » Compliance issues
- » Security risks
- » Slows innovation

# Is your data trapped?



## Unstructured

Everyday information that doesn't have a specific format

*Incl. emails, PDFs, Word/Google documents, images, charts, videos, printed documents, handwritten notes etc*

## Structured

Information/data organized in a clear and set way, such as in tables with rows/columns

*Incl. Smartsheet items, sheets, reports, databases, formulas*

**Unstructured data  
represents 80 to  
90% of all new  
enterprise data.**

IDC 2023

## Limiting formats & technology

### Real impacts



Limited insights



Information is locked in silos



Integration barriers



Missed opportunities



# Connecting the dots with Smartsheet

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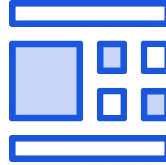
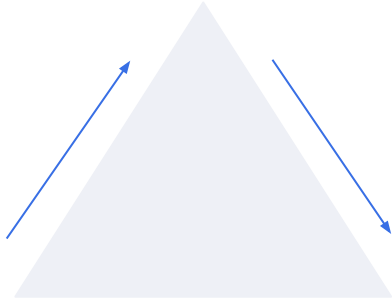
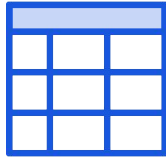
# Smartsheet solutions

## The building blocks

Forms intake data into your sheets



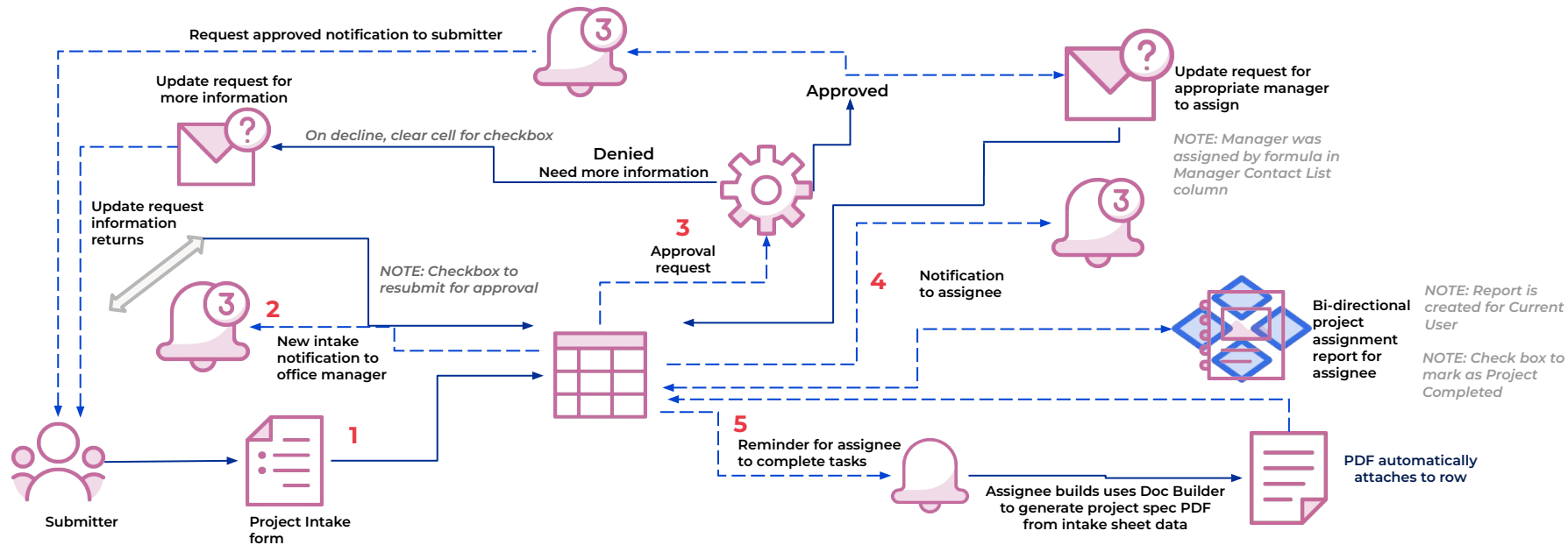
Sheets contain the data and content for your work



Dashboards surface data from your sheets and reports, giving a summary or visual representation of the information



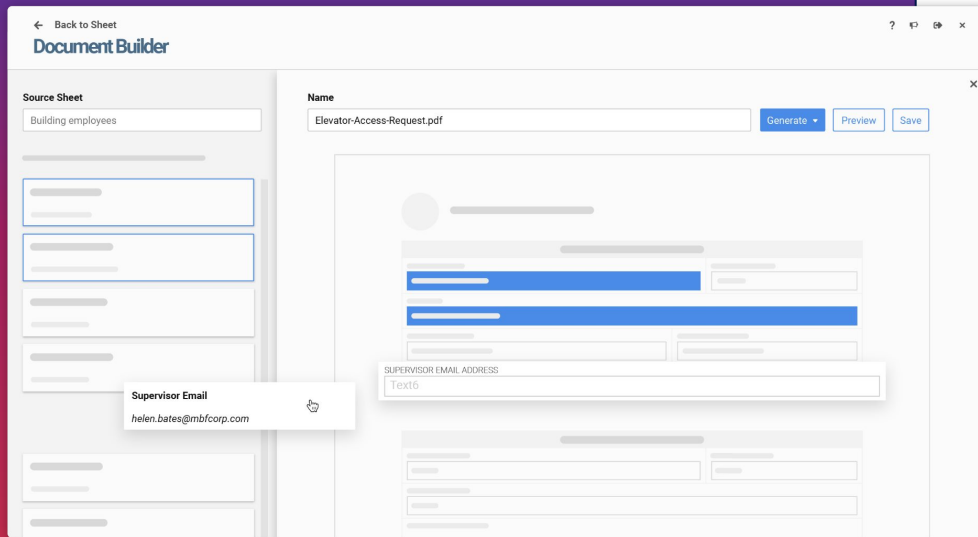
Reports can filter and break down data from more than one sheet based on specific parameters. Reports are bi-directional and can update data on a sheet.



# Document Builder

Do more with your structured data

Generate custom PDFs from sheet data and send documents for signature\* without leaving Smartsheet.



» Increase efficiency

» Improve accuracy

» Gain insights

» Immediate impact

*\*DocuSign integration available to ENT plans only*



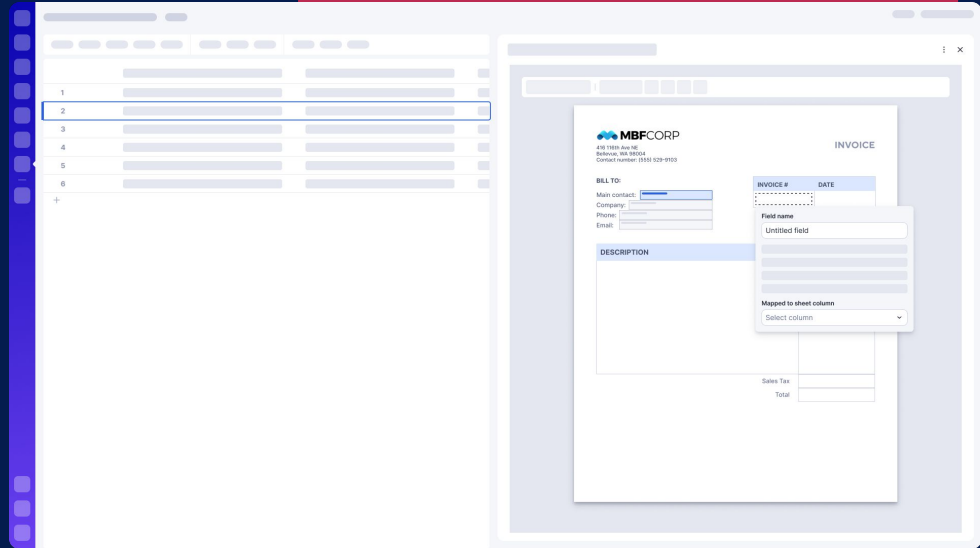
# What's next for Document Builder

## Simplifying content workflows

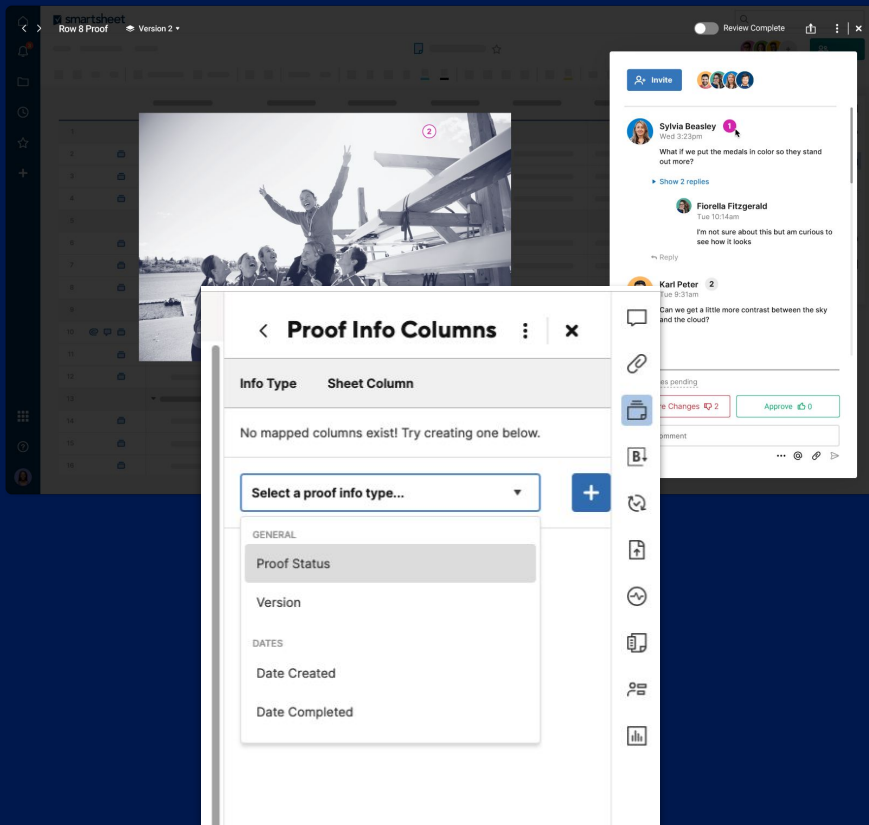
We're working to remove barriers and improve interoperability between Smartsheet and your files.

We want to help you...

- Eliminate complexity with a **fillable PDF builder**
- Build more dynamic content with **support for more file formats and content types**
- Liberate your working files - **turn your content into sheets!**







# Proofing

## Centralize collaboration

Work together seamlessly, share feedback, and track progress in real-time.



### Pro tip: Utilize proof info columns

Track information about your proofs to understand the status of your project and automate workflows.

### Automation ideas:

- Create a new proof version
- Move the proof to the next stage
- Notify stakeholders of awaiting review

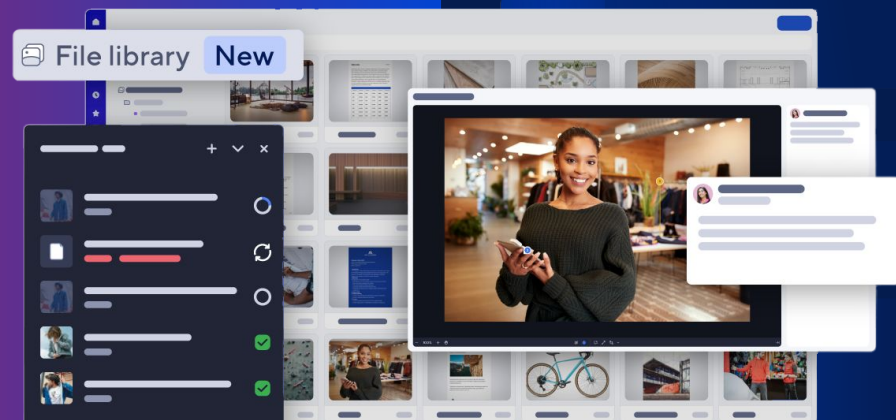


# What's next for content in Smartsheet

A vision for the future

Smartsheet is investing in capabilities that will further **connect**, **streamline**, and **enhance** your content workflows.

We're building a future where content is not just managed but **empowered**, not just organized but **brought to life**.



# Introducing: file library

Building best-in-class content experiences across Smartsheet

File library **brings files into focus** where relevant projects are planned and resourced, so your teams can **drive better outcomes, faster**.

Access files, maintain versioning, and collaborate asynchronously within the context of work, transforming content from a liability to an asset.

**Now:** Available for Workspaces

**Future:** Available for Sheets

The screenshot displays the Smartsheet File Library interface. On the left, a sidebar shows a project hierarchy for 'MBF Outdoor: Northwest Region', including sections for Budget, Marketing Campaigns, Team Documents, Marketing, Operations, Sales, Budget Breakdown, Sales Dashboard, Q3 Team Capacity, Plan Overview, and Project Plan: Seattle 1377. The main area shows a grid of files with thumbnails and names such as 'Interior1', 'Dataset\_2024', 'samples', 'siteplan', 'Hardwood', 'arch\_plan\_nwreg...', 'MBF\_sow\_interior', 'Interior2', 'gear\_topdown', 'Invoice\_21223', 'Contractor\_889383', 'gear\_topdown2', 'retail\_001.png', 'e3', 'bicycle\_001', '11\_vertical', and 'retail\_002'. A conversation thread is visible on the right, with participants Sarah Goodwin, Hilda Wilson, and Jonathan Wong. The thread includes a video player showing a woman in a retail store holding a smartphone, and a discussion about showing a mobile POS in the background of a photo.

The screenshot displays the Smartsheet File Library interface for a workspace titled "MBF Outdoor: Northwest Region". The left sidebar shows a navigation menu with categories like "Workspace Items (270)", "Budget", "Marketing Campaigns", "Team Documents", "Marketing", "Operations", and "Sales". The main area shows a grid of files, including "Interior1" (PNG), "Dataset\_2024" (PDF), "MBF\_sow\_inte", "colorswatch", and "climbingwall". A conversation overlay is visible, showing a discussion between Sarah Goodwin, Jonathon Wong, and Hilda Wilson regarding a careers page image and mobile POS.

# Connecting people, work & content

Spend less time toggling between tools

**Problem solved:** *Inefficient workflows*

File library makes it easier to find, share, and collaborate on business-critical files.

- Easy access from solutions panel
- Flexible asynchronous collaboration (i.e. annotations, conversations)
- Unlock sheetless workflows

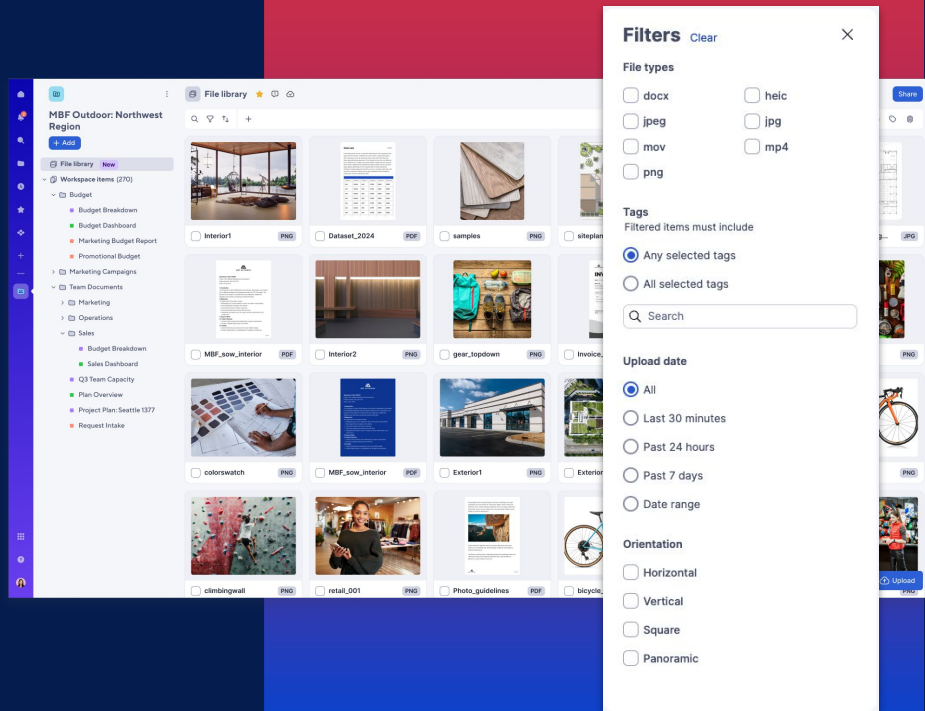
# Files at your fingertips

Spend less time searching

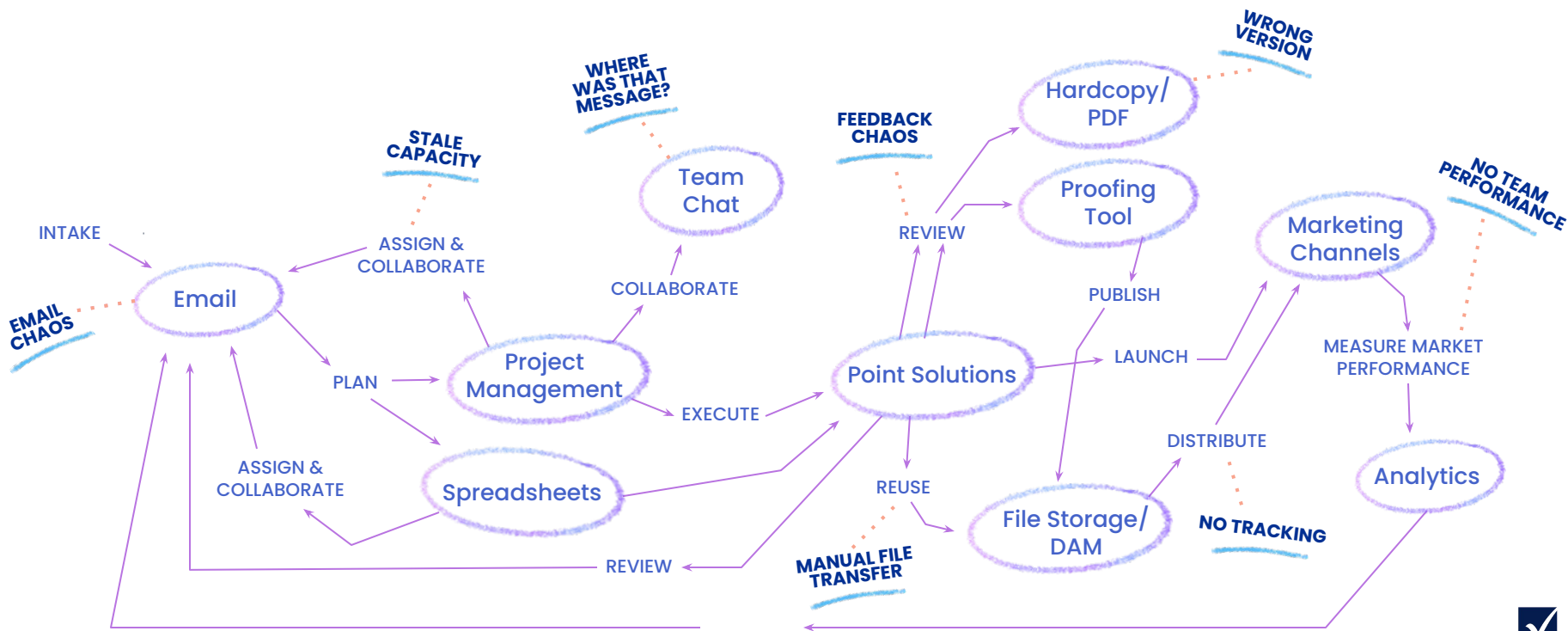
**Problem solved:** *Content sprawl*

Unlock your content's full potential by centralizing all project-critical files alongside projects.

- Single source of truth for project files, in the context of your work
- More visual, navigable way to view content
  - Intelligent search & filter
  - 80+ file types
  - Bulk upload/tagging
  - Increased file size limits
- Version control and tracking



# Before



# After

## DELIVER, MEASURE & OPTIMIZE IMPACT

Measure and Optimize

Report ROI

## CONTENT COLLABORATION

Create, Iterate, Manage, Automate

Review, Approve, Store, Share



## STAKEHOLDER ALIGNMENT & PRIORITIZATION

Roadmapping

Project Strategy

## REQUEST INTAKE & CAPACITY PLANNING

Manage Requests & Resources

Budget & Capacity Management

## WORK MANAGEMENT

Create, Plan, Automate, Execute

# Automation Ideas

Keep content moving

## Intake

- New intake notification
- New intake approval request

## Execution

- Notification to task assignee
- Task completion reminder
- Document builder
- Update request for items due that week
- Proof info columns
  - Create a new proof version
  - Move the proofing process to the next stage,
  - Notify people that they still need to review a proof)

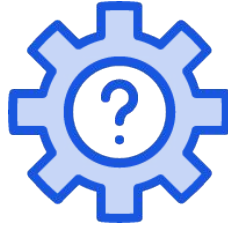
## Completion

- Task complete approval request (to original submitter)
- Notification to submitter, manager etc
- Archive row

# What we covered today



Explored the **real impacts** of having **content disconnected** from Smartsheet



Learned how you can build **connected, automated workflows** that enhance your content-adjacent work in Smartsheet



Learned about how Smartsheet is **making it easier to do more** with content in your workflows with file library and more.



Register for upcoming User Groups



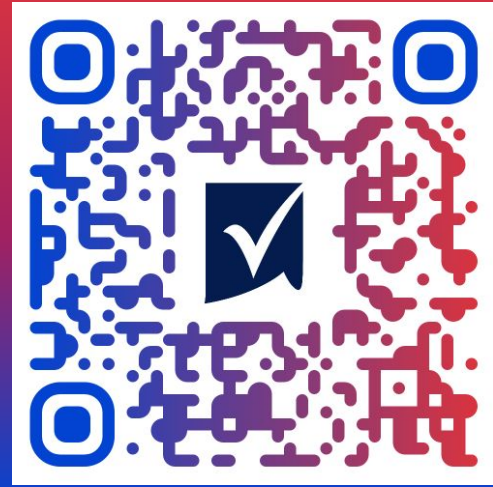
Continue to expand your Smartsheet skills and connections by attending a **User Group**.

### 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...

- Visit us at the Content booth!
- Get your session on:
  - **How we're building Smartsheet into a world-class platform**  
*Weds 4:00-5:00pm*
  - **Sneak Peek: The AI-powered evolution of Smartsheet**  
*Weds 1:00-2:00pm*
  - **How PUMA unlocked collaboration to streamline its business processes;** *Weds 4:00-5:00pm*



## 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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