



ENGAGE

# Power your marketing potential with Smartsheet

v.07/16

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# Smartsheet Speakers



**Laura Murdock**

Manager, Marketing Project  
Management



**Leya Kritz**

Senior Manager, Integrated  
Marketing



# Reaching full marketing potential

Why it's important

# Effective marketing management is more vital than ever.

## Executive visibility is low

**5%**

only a small percentage of marketing executives have a holistic view of their organization's work

*Harvard Business Review*

## Compliance is critical

**60%**

of participants report catching team members using the wrong versions of logos.

*Brandfolder State of DAM*

## Marketers need change

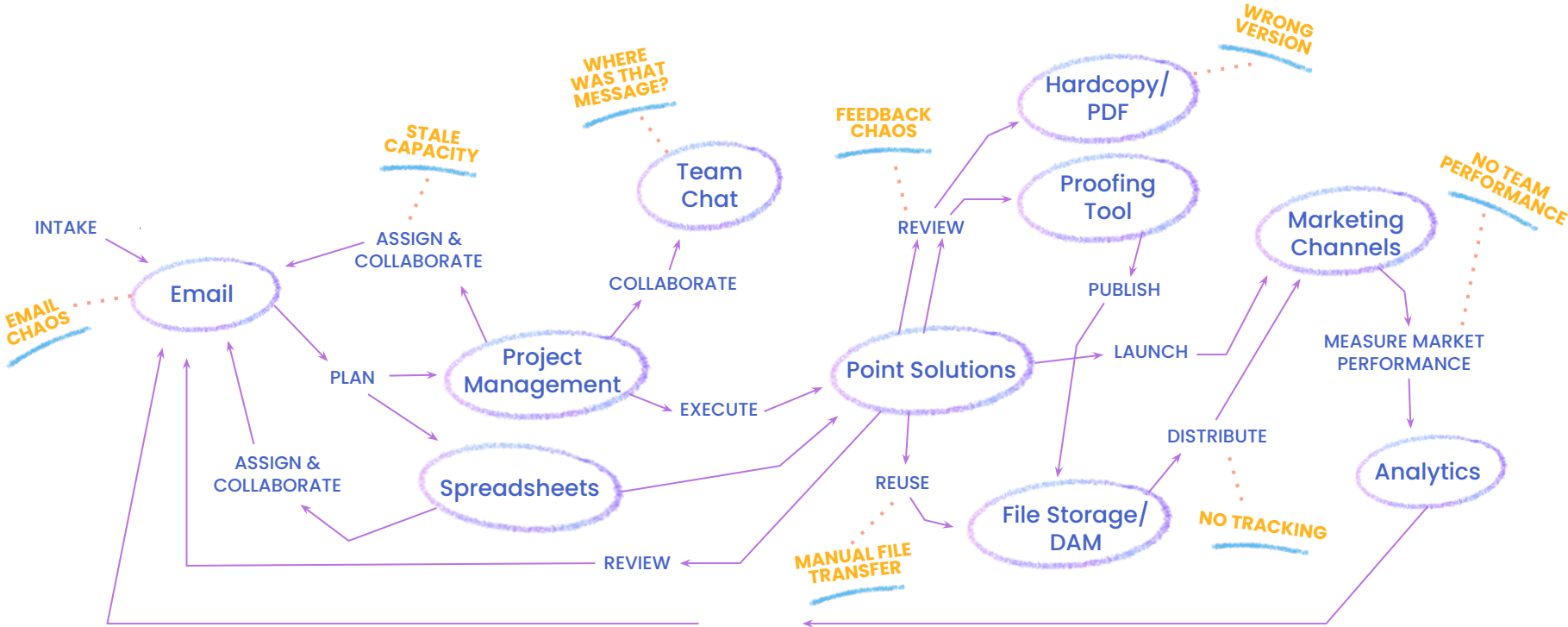
**86%**

of marketers say they must make significant changes to how the marketing function works to achieve [the] sustainable results needed to deliver profitable growth [each year].

*Gartner, 2023*



# We've all been here:



# Inside our presentation

How Smartsheet powers our Integrated Marketing team

1

## How we **PLAN** the work

Align business goals, gather stakeholder insights, and streamline planning.

2

## How we **DO** the work

Accelerate production, enhance process efficiencies, and launch faster.

3

## How we **PROVE** impact

Align leadership requirements, ensure visibility, and build impactful artifacts.

4

## Next steps you can take

Where you can go from here and a quick Q&A!



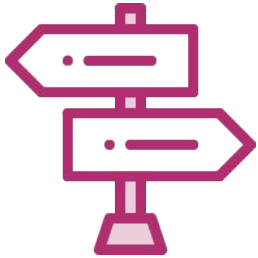
1

# Planning the work

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# Steps to planning the work

How to successfully use Smartsheet



**Strategic  
Direction**



**Stakeholder  
Inputs**



**Go-to-market  
Planning**

# Step one:

## Strategic direction

Gather inputs to shape GTM strategy

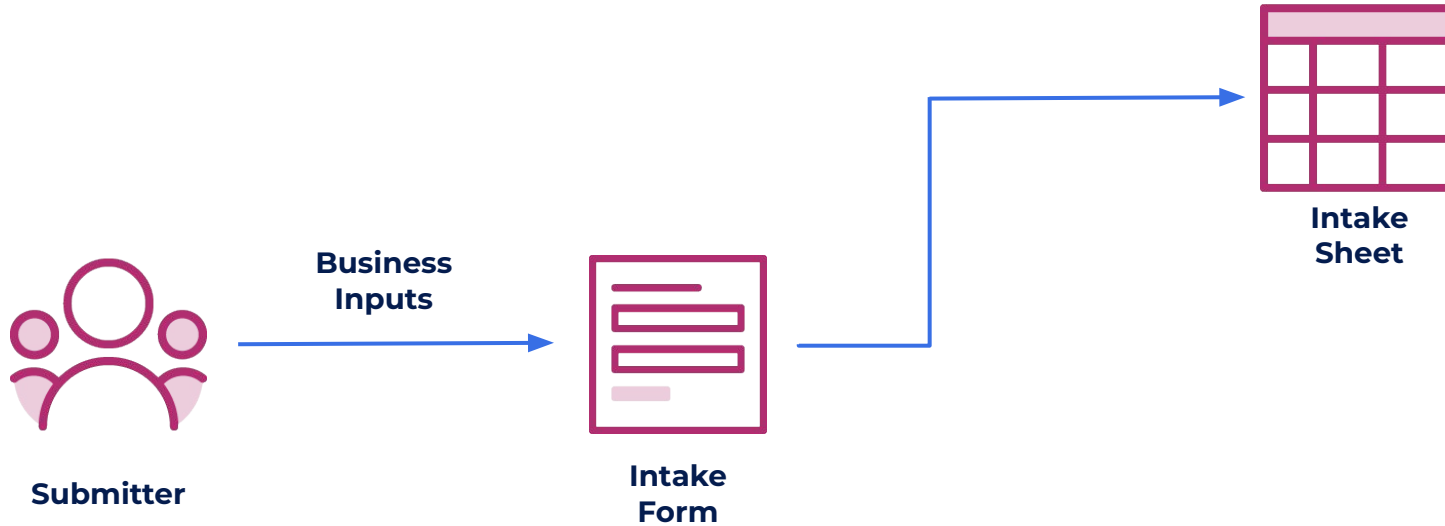
Guide audience targeting decisions

Align with market trends and business objectives early



# Strategic direction

Collecting business inputs



# Strategic direction

## Best practices

- 1 **Set expectations** for requesters directly on the form by providing context to the information you collect.
- 2 **Use conditional logic** to ensure you're asking the right questions to stakeholders.
- 3 **Align on who and what inputs** will be collected before sending the form.

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### Planning Intake Form

Before we begin the planning process, integrated marketing values your input to ensure all perspectives are considered. Please provide your feedback and business inputs based on your role to help guide our strategic decisions.

**Instructions:**

1. Select your role to display the relevant fields for your input.
2. Fill out the requested information to the best of your knowledge.
3. Submit your input by **October 31st** to ensure it is included in the planning process.
4. Thank you for your contributions to a successful and collaborative planning phase!

After completion, we will schedule 1:1 meetings (week of November 4 - 8) to review the information collected, providing context and ensuring your insights are heard and valued.

**Email \***

**Select Role \***

Select

- Product Marketing
- Demand Generation
- Brand
- Content Marketing
- Sales Outreach
- Marketing Project Manager
- Website
- Organic Social
- Lifecycle

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### Planning Intake Form

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**Email \***

**Select Role \***

Product Marketing

**Business Inputs**

Provide key business inputs to help guide our strategic planning, including objectives, metrics, initiatives, and resource considerations.

**Organization Conditions**

Any business objectives that should be kept in mind when planning our GTM?

**Market & Industry Trends**

What trends are impacting our audiences and how we sell to them?

**Key Moments**

ie. events, analyst reports, customer stories, enablement, etc.

**Use Case & Persona Insights**

Feedback from sales, customers, sub-team: What's top of mind for customers, where we are winning, where we are losing?

**Use Case Prioritization**

Utilizing things such as TAM, ability to win, ease of execution and pipeline mix.

**OKR Considerations**

Any insights or directional shifts from sub-teams should factor into marketing efforts?

**Stakeholder Inputs**

Provide your feedback to help us understand existing commitments, uncover new

# Step two:

## Stakeholder inputs

Identify core team for feedback

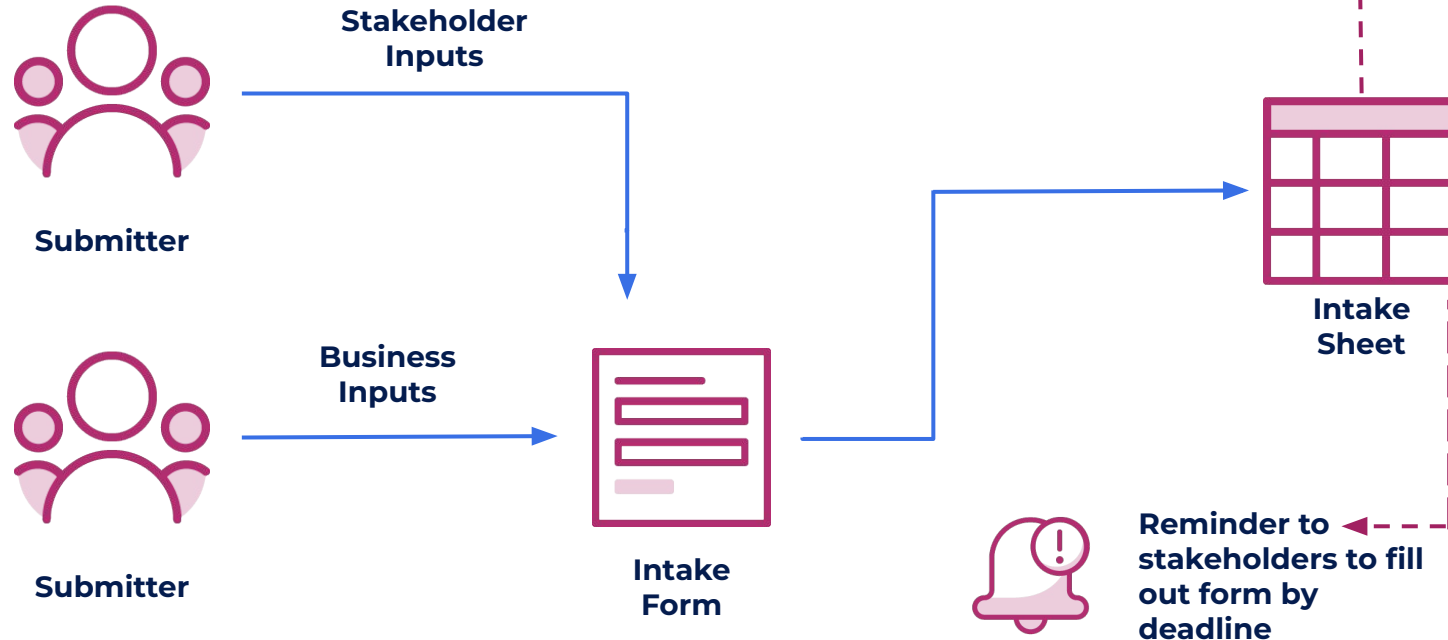
Assess commitments and find opportunities

Ensure stakeholders feel involved



# Stakeholder inputs

Notify key stakeholders for inputs



# Stakeholder inputs

## Best practices

- 1 **Use conditional logic** to ensure you're asking the right questions to stakeholders.
- 2 **Define core team members** before sending out the form.
  - Example: Product Marketing, Demand Generation, Content, PMOs, Web, Brand, Sales Outreach, Social, etc.
- 3 **Send notification reminders** to stakeholders one week before the deadline to allow time for planning.

The screenshot shows the top portion of the 'Planning Intake Form'. It includes the Smartsheet logo, the title 'Planning Intake Form', and introductory text. Below this is a list of instructions. At the bottom, there is a form section with an 'Email' field and a 'Select Role' dropdown menu. The dropdown menu is open, showing a list of roles: Product Marketing, Demand Generation, Brand, Content Marketing, Sales Outreach, Marketing Project Manager, Website, Organic Social, and Lifecycle. A red circle with the number '2' is overlaid on the right side of the dropdown menu.

1



## Stakeholder Inputs

**Provide your feedback to help us understand existing commitments, uncover new opportunities, and ensure your voice is included in the planning process.**

### Look back from previous campaign \*

Reflecting on 1H performance, what worked and what didn't? What are the corresponding recommendations based on those insights? What would you need to take action on those recommendations?

### Committed to \*

What is already planned for the upcoming time period? How should this factor into the overall integrated marketing plan?

### Gap & Opportunities \*

What are the biggest gaps or opportunities you see, and how would you prioritize them? What support is needed to act on these, and what could be deprioritized to make space?

### Overall Feedback

Additional feedback you'd like to share with the integrated marketing team.

The screenshot shows the top portion of the 'Planning Intake Form'. It includes the Smartsheet logo, the title 'Planning Intake Form', and introductory text. Below this is a list of instructions. At the bottom, there is a form section with an 'Email' field and a 'Select Role' dropdown menu. The dropdown menu is open, showing a list of roles: Product Marketing, Demand Generation, Brand, Content Marketing, Sales Outreach, Marketing Project Manager, Website, Organic Social, and Lifecycle. A red circle with the number '2' is overlaid on the right side of the dropdown menu.



### 3 Notifications

The screenshot shows a Smartsheet automation workflow. It starts with a trigger: "When a date is reached" on "10/24/24" at "12:00 PM" in the "US/Mountain (GMT-7)" time zone. The workflow branches into two paths based on conditions:

- Conditions (3):** "Where Overall Feedback is blank", "and where Committed to is blank", and "and where Gap & Opportunities is blank".
- Otherwise:** This path leads to an "Alert someone" action with recipients "Amanda Turcotte", "Gaby Arora", and "Sydney Mellides".

Both paths lead to a "Send from Smartsheet Automation" action. The message content is:

**Reminder | Please fill out planning inputs**  
In order to begin planning, please submit finalize inputs by EQD October 31st. Thank you!  
Message includes links to sheet and all fields

### Status Report

The screenshot shows a Smartsheet table titled "Intake Status Report". The table is filtered to show "Status Update" and is grouped into two sections: "Complete" and "Not started".

Primary	Sheet Name	Status Update
<b>Complete</b>		
1	Amanda Turcotte	<a href="#">Planning Inputs</a> Complete
2	Gaby Arora	<a href="#">Planning Inputs</a> Complete
3	Katie Walsh	<a href="#">Planning Inputs</a> Complete
<b>Not started</b>		
4	Sydney Mellides	<a href="#">Planning Inputs</a> Not started

The screenshot shows a "Group by" dialog box in Smartsheet. The "Group by" dropdown is set to "Status Update" and the "Sort" dropdown is set to "Sort Ascending". There is a "+ Group by another column" option and "Cancel" and "OK" buttons at the bottom.

# Step three:

## Go-to-market planning

Visualize commitments and gaps

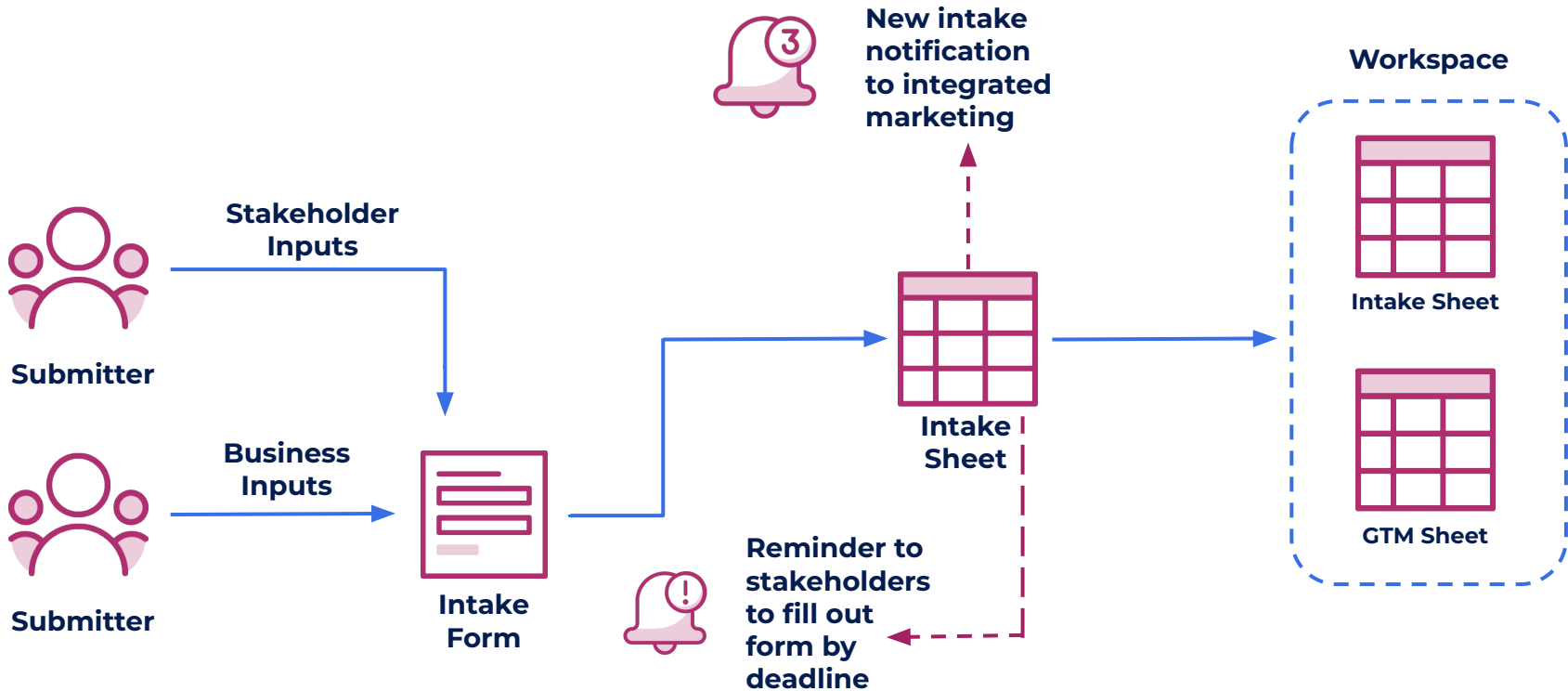
Align programs with business objectives

Ensure stakeholder and goal alignment



# Go-to-market planning

Using inputs to craft an integrated marketing plan



# Go-to-market planning

## Best practices

- 1 Organize stakeholder inputs in rows** for easy translation into programs and tactics.
  - Planning inputs:
    - Stakeholder committed inputs
    - Key moments (reports, events, etc.)
    - Product releases
    - Content drops
- 2 Map planning inputs to company initiatives** using the columns on table view.
  - Suggested columns:
    - Channel
    - Objective
    - Use case
    - Persona
    - Date range
- 3 Nest rows** to organize your go-to-market by theme and tactic. This will allow you to show different views for executive visibility.

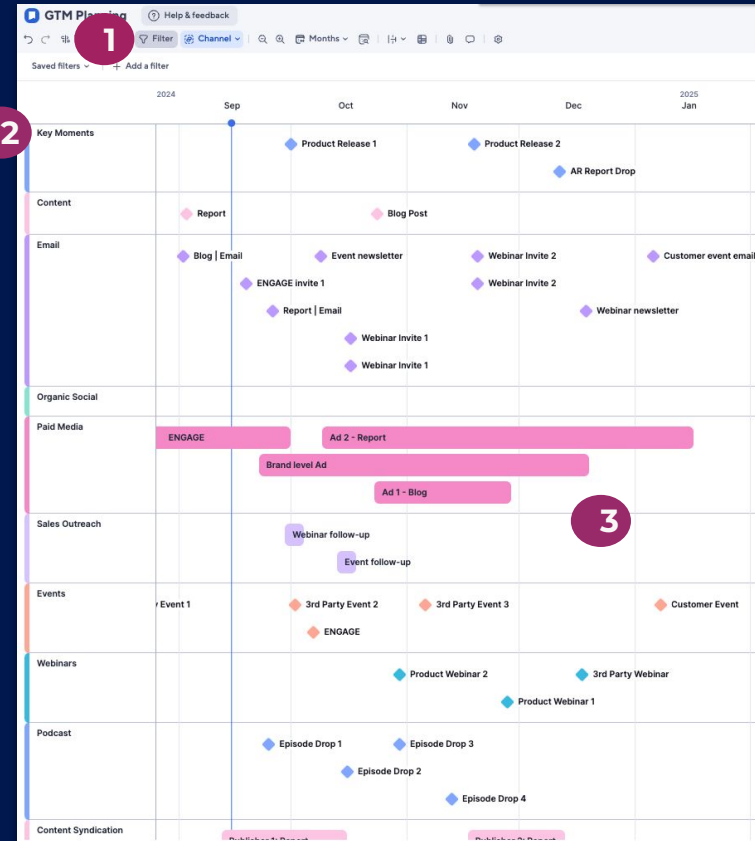
## GTM Sheet

Program / Tactic	Channel	Use Case	Objective	Persona	Launch Date	Complete date
<b>Key Moments</b>	Key Moments	Project Management			10/02/24	12/13/24
Product Release 1	Key Moments	Project Management	Conversion	Creative	10/02/24	10/02/24
Product Release 2	Key Moments	Project Management	Conversion	Marketer	11/20/24	11/20/24
AR Report Drop	Key Moments	Project Management	Conversion	Marketer Creative	12/13/24	12/13/24
<b>Content</b>	Content	Creative Operations			09/03/24	01/17/25
<b>Report</b>	Content	<b>Creative Operations</b>			09/04/24	01/17/25
Report	Content	Creative Operations	Consideration	Marketer	09/04/24	09/04/24
Report   Email	Email	Creative Operations	Consideration	Creative	09/27/24	09/27/24
Ad 2 - Report	Paid Media	Creative Operations	Consideration	Marketer	10/10/24	01/17/25
Publisher 1: Report	Content Syndication	Creative Operations	Consideration	Marketer Creative	09/13/24	10/16/24
Publisher 2: Report	Content Syndication	Creative Operations	Consideration	Marketer Creative	11/18/24	11/18/24
<b>Blog Post</b>	Content	<b>Creative Operations</b>			09/03/24	11/29/24
Blog Post	Content	Creative Operations	Awareness	Marketer	10/24/24	11/29/24
Ad 1 - Blog	Paid Media	Creative Operations		Marketer	10/24/24	11/29/24
Blog   Email	Email	Creative Operations	Awareness	Creative	09/03/24	09/03/24
<b>Webinar</b>	Webinars	Project Management			09/30/24	12/20/24
<b>Product Webinar 1</b>	Webinars	<b>Project Management</b>	<b>Conversion</b>	<b>Marketer</b>	10/18/24	11/21/24
Webinar Invite 1	Email	Project Management	Conversion	Creative	10/18/24	10/18/24
Webinar Invite 2	Email	Project Management	Conversion	Creative	11/21/24	11/21/24
<b>Product Webinar 2</b>	Webinars	<b>Project Management</b>	<b>Conversion</b>	<b>Marketer</b>	10/18/24	11/21/24
Webinar Invite 1	Email	Project Management	Conversion	Creative	10/18/24	10/18/24
Webinar Invite 2	Email	Project Management	Conversion	Creative	11/21/24	11/21/24
3rd Party Webinar	Webinars	Project Management	Consideration	Marketer	12/19/24	12/19/24
Webinar newsletter	Email	Project Management	Consideration	Marketer	12/20/24	12/20/24
Webinar follow-up	Sales Outreach	Project Management	Conversion	Creative	09/30/24	09/30/24
<b>Event</b>	Events	Project Management			08/14/24	01/09/25
3rd Party Event 1	Events	Project Management	Awareness	Marketer Creative	08/14/24	08/14/24
3rd Party Event 2	Events	Project Management	Awareness	Marketer Creative	10/03/24	10/03/24
3rd Party Event 3	Events	Project Management	Conversion	Marketer Creative	11/07/24	11/07/24
Event follow-up	Sales Outreach	Project Management	Conversion	Creative	10/14/24	10/18/24
<b>ENGAGE</b>	Events	<b>Project Management</b>	<b>Conversion</b>	<b>Marketer Creative</b>	09/20/24	09/20/24
ENGAGE invite 1	Email	Project Management	Conversion	Marketer	09/20/24	09/20/24
Customer Event	Events	Project Management	Conversion	Marketer	01/09/25	01/09/25

# Identifying opportunities

## Best practices

- 1 Use filters on the timeline view** to visualize your committed to programs.
  - Filter suggestions:
    - By audience persona
    - By use case
- 2 Organize by channel** to demonstrate your program investment areas.
- 3 Identify overlaps and gaps** by flipping between the filters to see what matches up.

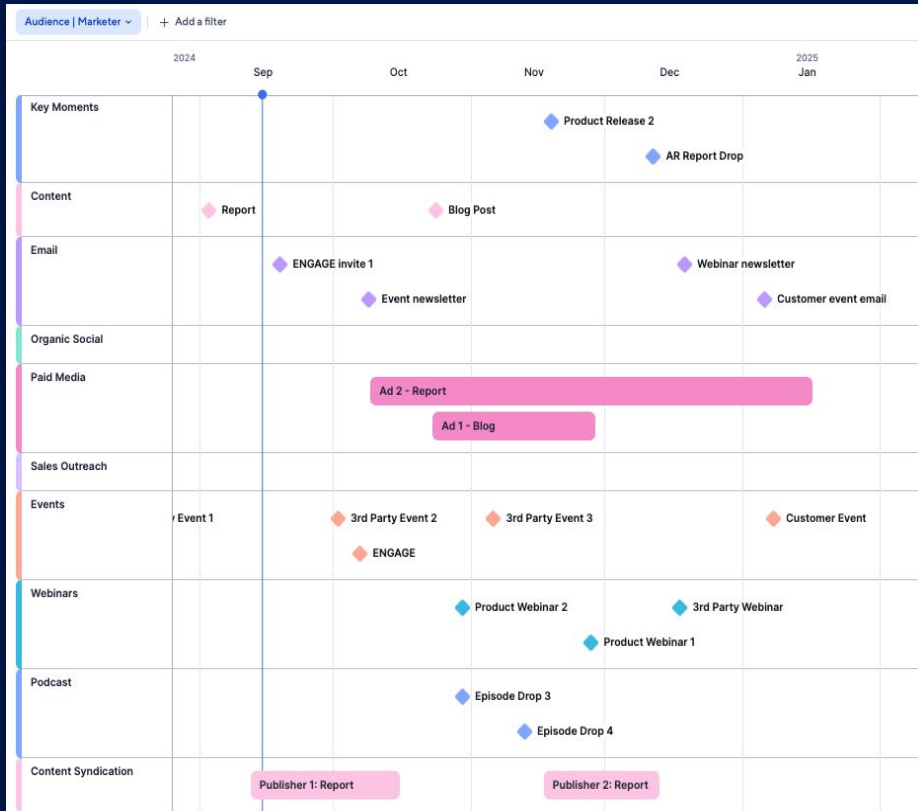


# Setting up filters

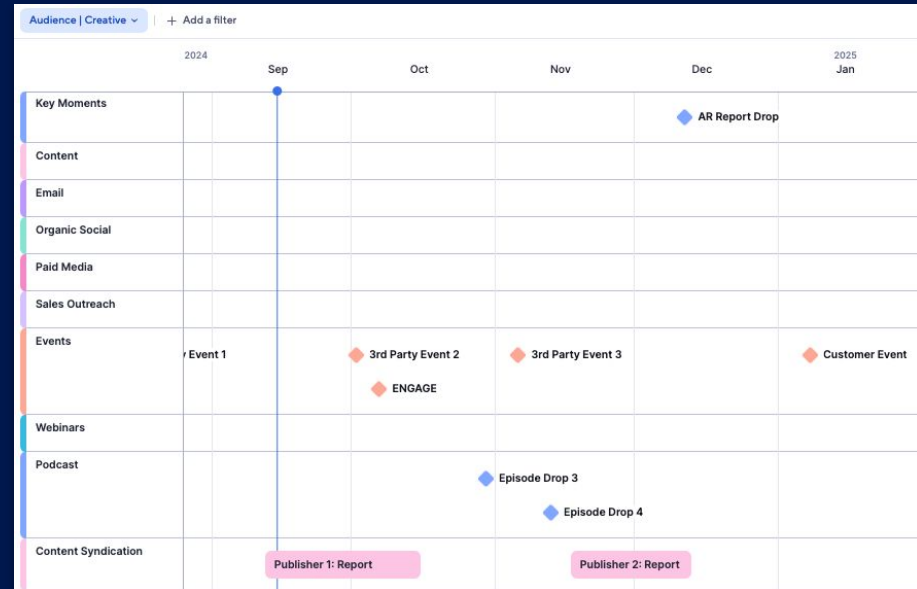
The image shows two overlapping windows from the Smartsheet interface. The left window is a filter selection menu for the 'Creative' persona. It shows a search bar, a list of options with 'Creative' selected, and a 'Remove filter' button. The right window is a 'Save filter' dialog box. It contains a text input field with 'Audience | Creative', a dropdown menu set to 'Shared', and an unchecked checkbox for 'Include parent rows'. 'Cancel' and 'Save' buttons are at the bottom.

The image shows a Smartsheet Gantt chart titled 'GTM Planning'. The top navigation bar includes 'Help & feedback', '1 Filter', and 'Channel'. A filter dropdown menu is open, showing a list of filtered items: 'Audience | Creative', 'Audience | Marketer', 'Use Case | Marketing Man...', and 'Use Case | Project Management'. The Gantt chart itself has a timeline from September to December. It displays various tasks as diamonds and bars, including 'Product Release 2', 'Event newsletter', 'Webinar Invite 2', 'Webinar Invite 1', 'Report | Email', 'ENGAGE invite 1', 'Ad 2 - Report', and 'Ad 1 - Blog'. The 'Use Case | Marketing Man...' filter is highlighted with an orange arrow.

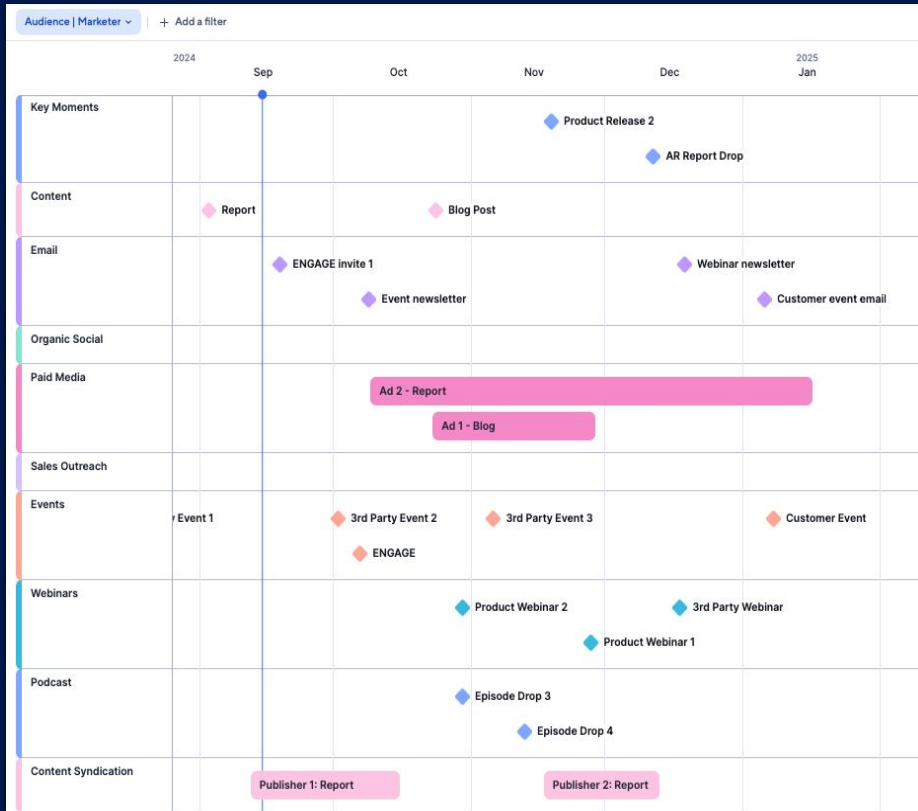
# Audience: Marketer



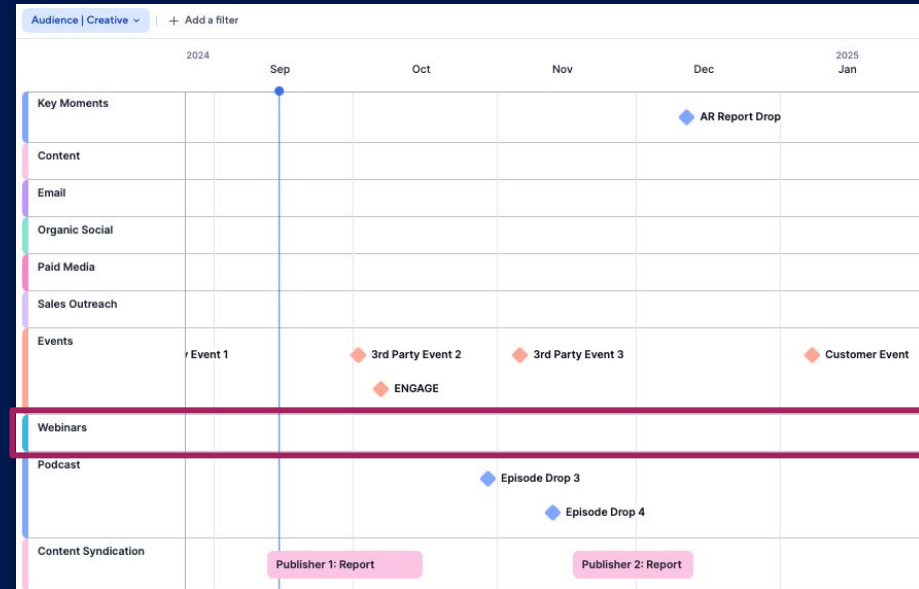
# Audience: Creative



# Audience: Marketer



# Audience: Creative

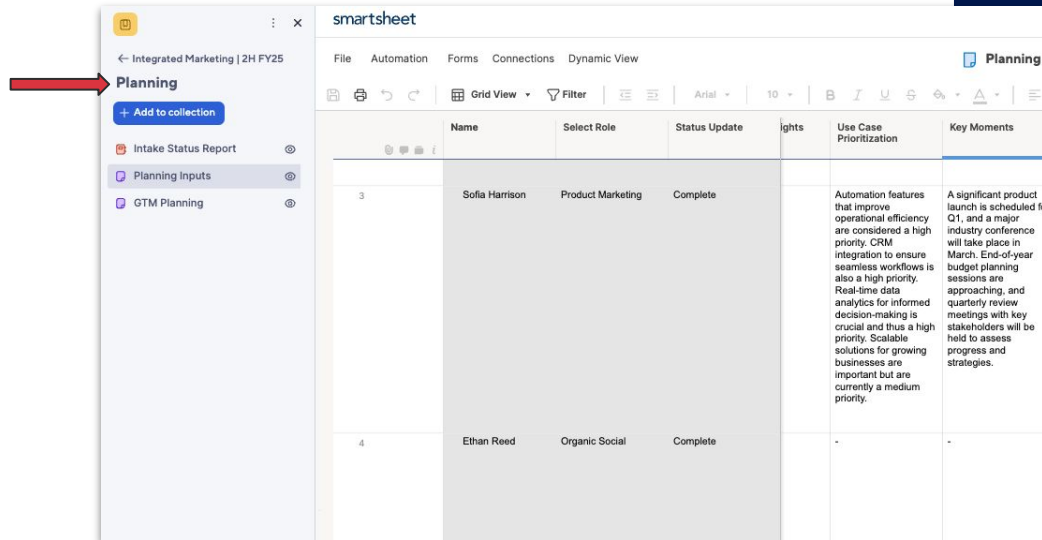




# Planning experience

## Helpful tips

- Provide a **one-stop shop for planning** for helpful resources, like the request intake forms, planning documentation, etc.
- **Benefit:** Hand-off to Project Managers is seamless for the execution of the strategy.



The screenshot shows the Smartsheet interface for the 'Integrated Marketing | 2H FY25' workspace. The left sidebar shows a collection named 'Planning' which is selected, with a red arrow pointing to it. Below the collection name are options to '+ Add to collection' and three items: 'Intake Status Report', 'Planning Inputs', and 'GTM Planning'. The main workspace displays a table with the following data:

Name	Select Role	Status Update	lights	Use Case Prioritization	Key Moments
3	Sofia Harrison	Product Marketing	Complete	Automation features that improve operational efficiency are considered a high priority. CRM integration to ensure seamless workflows is also a high priority. Real-time data analytics for informed decision-making is crucial and thus a high priority. Scalable solutions for growing businesses are important but are currently a medium priority.	A significant product launch is scheduled for Q1, and a major industry conference will take place in March. End-of-year budget planning sessions are approaching, and quarterly review meetings with key stakeholders will be held to assess progress and strategies.
4	Ethan Reed	Organic Social	Complete	-	-



## Integrated Marketing | 2H FY25

+ Add

File library

Collections (1)

Planning

Workspace items (3)

GTM Planning

Intake Status Report

Planning Inputs

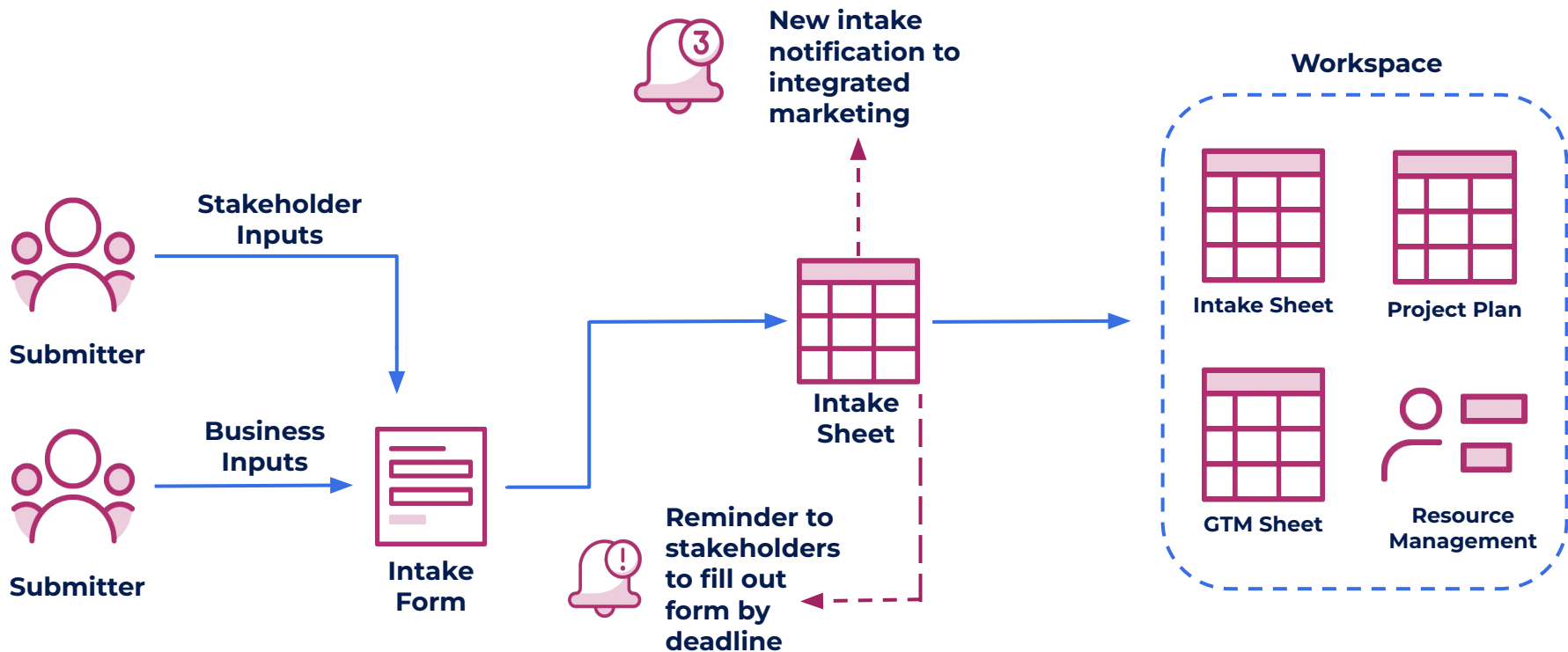
2

## Doing the work

 smartsheet  
ENGAGE

# Doing the work

Seamless hand-off from planning to doing



# Doing the work

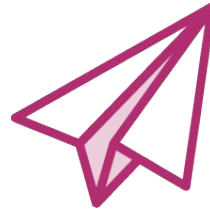
3 key things you need to do well



**Prioritizing  
the work**



**Scoping the  
work**



**Executing the  
work**

# Prioritizing the work

## The big questions

Is your org aligned on this campaign being a priority?

Have you had the conversations with stakeholders to avoid other projects competing for attention and resources?



# Prioritizing the work

How we addressed this

## Marketing Cross-Prioritization Dashboard

Single source of truth on what's priority next quarter

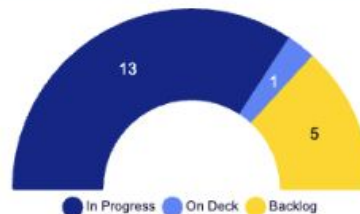
Automations kept relevant program information current

Chart widgets give visual cues to easily see where we're investing the most effort on the roadmap

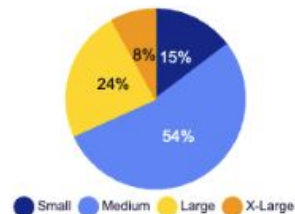
# MARKETING ROADMAP

## PRIORITIZATION DASHBOARD

Projects by Status



Projects by Size



### Welcome!

This Dashboard is intended to inform Marketing Leadership and the marketing team is focused on for the next 2-3 months.

PRO

### Prioritization Roadmap - by Priority

Cross-Prio Discussion Item	Project Groupings	Primary
<input type="checkbox"/>	Independent	Initiative 1
<input type="checkbox"/>	Events	Customer Co
<input type="checkbox"/>	Theme 1 Theme 2	FY25 Campa
<input type="checkbox"/>	Theme 4 Theme 5	FY25 Campa
<input checked="" type="checkbox"/>	Theme 1 Theme 2	Analyst Repo
<input checked="" type="checkbox"/>	Product Roadmap	Feature 3.4
<input type="checkbox"/>	Product Roadmap	Feature 3.5
<input type="checkbox"/>	Product Roadmap	Feature 3.6
<input checked="" type="checkbox"/>	Independent	Investment R
<input checked="" type="checkbox"/>	Theme 1 Theme 2	FY25 Campa
<input checked="" type="checkbox"/>	Product Roadmap	Feature 3.7
<input type="checkbox"/>	Product Roadmap	Feature 3.8

### Helpful links

- [Brand Studio FY25 Priorities](#)
- [Prioritization Meeting Notes](#)

### Due this Month

2

### Past Due

1

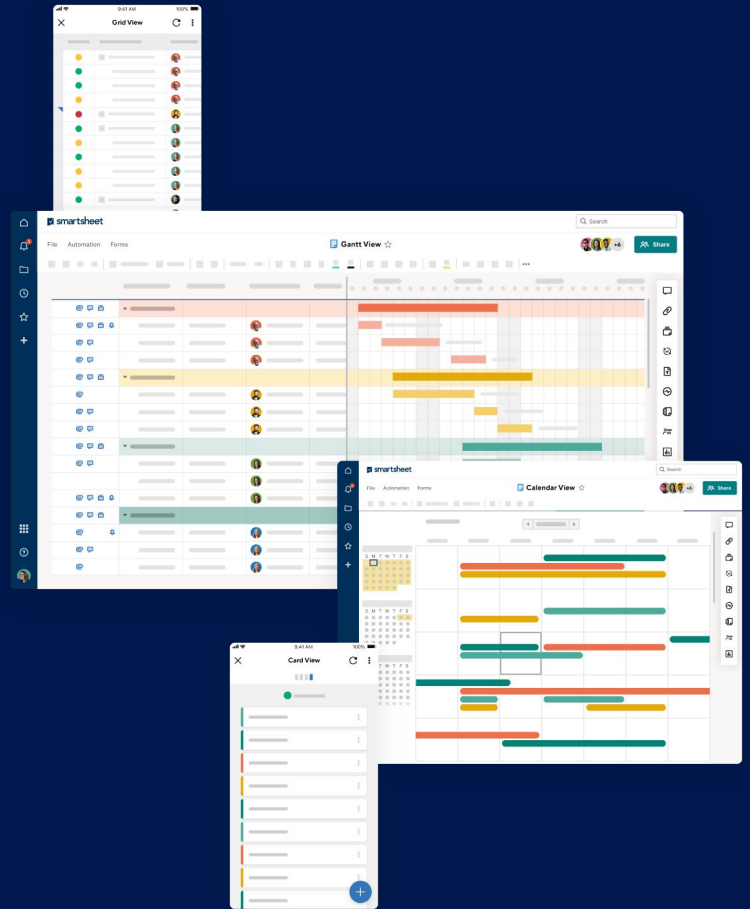
# Scoping the work

For us, this entailed 3 main things

Project Plan with clear requirements & Bill of Materials (BOM)

Forecasting the schedule (each phase of work)

Using Smartsheet Resource Management to optimize how we assess & assign resources to the work



# Project plan

smartsheet

File Automation Forms Connections Dynamic View **FY25 H2 Campaign - Example Project Plan** ☆ Share

Grid View Filter Arial 10

D...	Show Task	Task	Description	Status	Assigned	Start	Finish	Duration	Pred...	BF Share Link	BF QA'd	Copy Doc	Version	Proof Status
1	★	PROJECT SUMMARY				08/21/24	01/31/25	118d						
10	★	HELPFUL LINKS												
28	★	SCHEDULE - BY CHANNEL				07/01/24	12/02/24	111d						
29	★	CONTENT MARKETING				07/01/24	12/02/24	111d						
30	★	Blog posts and articles	Publish 3 articles outlining con	In Progress	PS Priya Singh	07/01/24	08/20/24	37d						
31	☆	Research & Planning	Conduct keyword analysis anc	In Progress	PS Priya Singh	07/01/24	07/10/24	8d						
32	☆	Outline & Drafting	Draft outlines and write first dr	In Progress	PS Priya Singh	07/11/24	07/25/24	11d	31			<a href="https://docs.google.com">https://docs.google.com</a>		
33	☆	Editing & Review	Review drafts for clarity and S	In Progress	PS Priya Singh	07/26/24	08/05/24	7d	32					
34	☆	Design & Multimedia	Source images and create cus	In Progress	PS Priya Singh	07/26/24	08/06/24	8d	32					
35	☆	Publication & Distribution	Upload to CMS and schedule i	In Progress	PS Priya Singh	08/06/24	08/08/24	3d	33					
36	☆	Promotion & Amplification	Share published posts on soci	In Progress	PS Priya Singh	08/09/24	08/20/24	8d	33, 35					
37	☆	Deliverables:				08/06/24	08/06/24	1d						
38	★	ARTICLE 1	*10 Game-Changing Strategie	Complete	NW Naomi Williams	08/06/24	08/06/24	1d		<a href="https://brandfolde.com">https://brandfolde.com</a>	✓		3	Approved
39	★	ARTICLE 2	*How Data-Driven Insights are	Complete	NW Naomi Williams	08/06/24	08/06/24	1d		<a href="https://brandfolde.com">https://brandfolde.com</a>	✓		3	Approved
40	★	ARTICLE 3	*The Ultimate Guide to Creati	Complete	NW Naomi Williams	08/06/24	08/06/24	1d		<a href="https://brandfolde.com">https://brandfolde.com</a>	✓		3	Approved
41	★	Infographics	Create 1 infographic that visus	In Progress	SJ Sarah Johnson	09/10/24	09/13/24	4d						
43	★	Ebooks and whitepapers	Develop a comprehensive whi	In Progress	AM James Miller	09/16/24	09/20/24	5d						
45	★	Case studies	Produce 2 case studies featur	In Review	AM Alex Martinez	09/16/24	09/20/24	5d						
47	★	Video content (explainer videos, product	Deliver a series of short video	In Progress	MT Megan Thompson	08/19/24	12/02/24	76d						
48	★	SOCIAL MEDIA				08/06/24	12/02/24	85d						
49	★	Social media posts	Draft 5-7 posts per platform (L	In Progress	JT Jamal Thompson	08/14/24	08/28/24	11d						
51	★	Influencer partnerships	Collaborate with 3 industry inf	In Progress	ED Emily Davis	08/06/24	08/27/24	16d						
53	★	Social media ads	Launch a paid social media ca	In Progress	KR Kiara Robinson	08/26/24	12/02/24	71d						
54	★	EMAIL MARKETING				08/15/24	09/13/24	22d						
55	★	Drip campaign sequences	Launch a 5-email sequence ai	In Review	MG Michael Green	08/15/24	09/13/24	22d						
56	★	PAID MEDIA				08/01/24	09/04/24	25d						
57	★	Ad creative (display, video, social media	Deploy visually compelling ad	In Progress	NW Naomi Williams	08/01/24	08/01/24	1d						
58	★	PPC campaign set up (keywords, ad grou	Implement targeted PPC cam	In Progress	DS David Smith	08/01/24	08/02/24	2d						
59	★	Landing pages for ad traffic	Build custom landing pages th	In Progress	HT Hiro Tanaka	09/03/24	09/04/24	2d						
60	★	Retargeting ads	Create dynamic retargeting ad	In Review	LB Lauren Brown	09/03/24	09/04/24	2d						
61	★	EVENTS & WEBINARS				08/01/24	10/11/24	52d						
62	★	Webinar/event registration page	Design a registration page for	In Progress	EW Emma Wilson	08/01/24	08/15/24	11d						



# Project plan

smartsheet

File Automation Forms Connections Dynamic View

FY25 H2 Campaign - Example Project Plan ☆ Share

Grid View Filter Arial 10

D...	Show Task	Task	Description	Status	Assigned	Start	Finish	Duration	Pred...	BF Share Link	BF QA'd	Copy Doc	Version	Proof Status
1	★	PROJECT SUMMARY				08/21/24	01/31/25	118d						
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29	★	CONTENT MARKETING												
30	★	Blog posts and articles	Publish 3 articles outlining con	In Progress	PS Priya Sing									
31	☆	Research & Planning	Conduct keyword analysis anc	In Progress	PS Priya Sing									
32	☆	Outline & Drafting	Draft outlines and write first dr	In Progress	PS Priya Sing									
33	☆	Editing & Review	Review drafts for clarity and S	In Progress	PS Priya Sing									
34	☆	Design & Multimedia	Source images and create cus	In Progress	PS Priya Sing									
35	☆	Publication & Distribution	Upload to CMS and schedule	In Progress	PS Priya Sing									
36	☆	Promotion & Amplification	Share published posts on soci	In Progress	PS Priya Sing									
37	☆	Deliverables:												
38	★	ARTICLE 1	*10 Game-Changing Strategie	Complete	NW Naomi Wil									
39	★	ARTICLE 2	*How Data-Driven Insights are	Complete	NW Naomi Wil									
40	★	ARTICLE 3	*The Ultimate Guide to Creatir	Complete	NW Naomi Wil									
41	★	Infographics	Create 1 infographic that visu	In Progress	SJ Sarah Joh									
43	★	Ebooks and whitepapers	Develop a comprehensive whi	In Progress	AM James Mil									
45	★	Case studies	Produce 2 case studies featur	In Review	AM Alex Mart									
47	★	Video content (explainer videos, product	Deliver a series of short video	In Progress	MT Megan Th									
48	★	SOCIAL MEDIA												
49	★	Social media posts	Draft 5-7 posts per platform (L	In Progress	JT Jamal Tho									
51	★	Influencer partnerships	Collaborate with 3 industry inf	In Progress	ED Emily Dav									
53	★	Social media ads	Launch a paid social media ca	In Progress	KR Kiara Rob									
54	★	EMAIL MARKETING												
55	★	Drip campaign sequences	Launch a 5-email sequence ai	In Review	MG Michael G									
56	★	PAID MEDIA												
57	★	Ad creative (display, video, social media	Deploy visually compelling ad	In Progress	NW Naomi Wil									
58	★	PPC campaign set up (keywords, ad grou	Implement targeted PPC cam	In Progress	DS David Sm									
59	★	Landing pages for ad traffic	Build custom landing pages th	In Progress	HT Hiro Tanak									
60	★	Retargeting ads	Create dynamic retargeting ad	In Review	LB Lauren Brown	09/03/24	09/04/24	2d						
61	★	EVENTS & WEBINARS				08/01/24	10/11/24	52d						
62	★	Webinar/event registration page	Design a registration page for	In Progress	EW Emma Wilson	08/01/24	08/15/24	11d						

## Project Settings

### Dependency Settings

### Gantt Timescale Settings

### Resource Management

### Date range display

Start date column

Start

End date column

Finish

### Options

% Complete column

--None--

### Dependencies

Dependencies enabled

Predecessor column

Predecessors

Duration column

Duration

### Working Days

Working days: Mo, Tu, We, Th, Fr

Length of Day (hours): 8

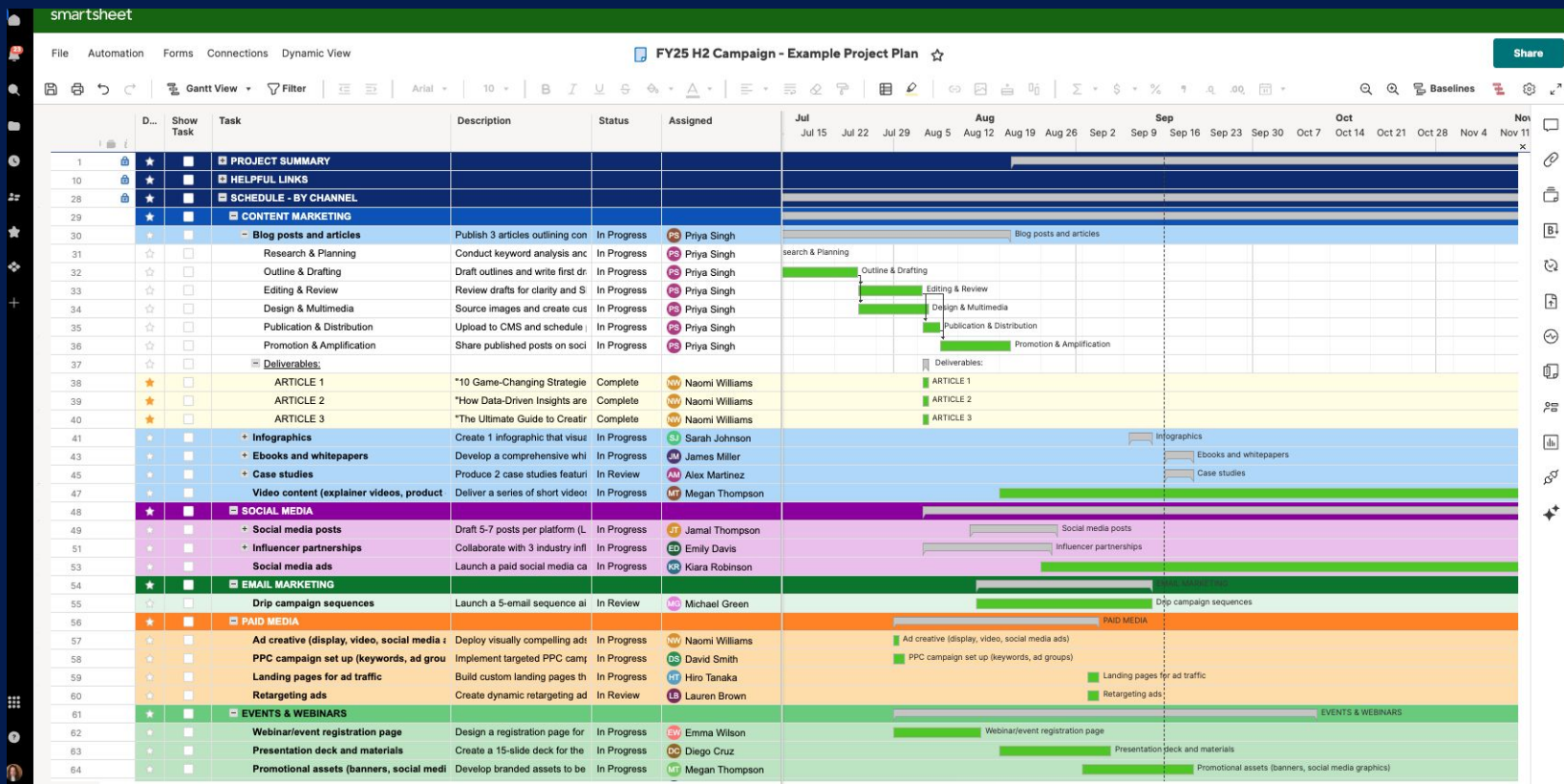
Non-working days (holidays): 8

Edit...

Cancel

OK

# Project plan

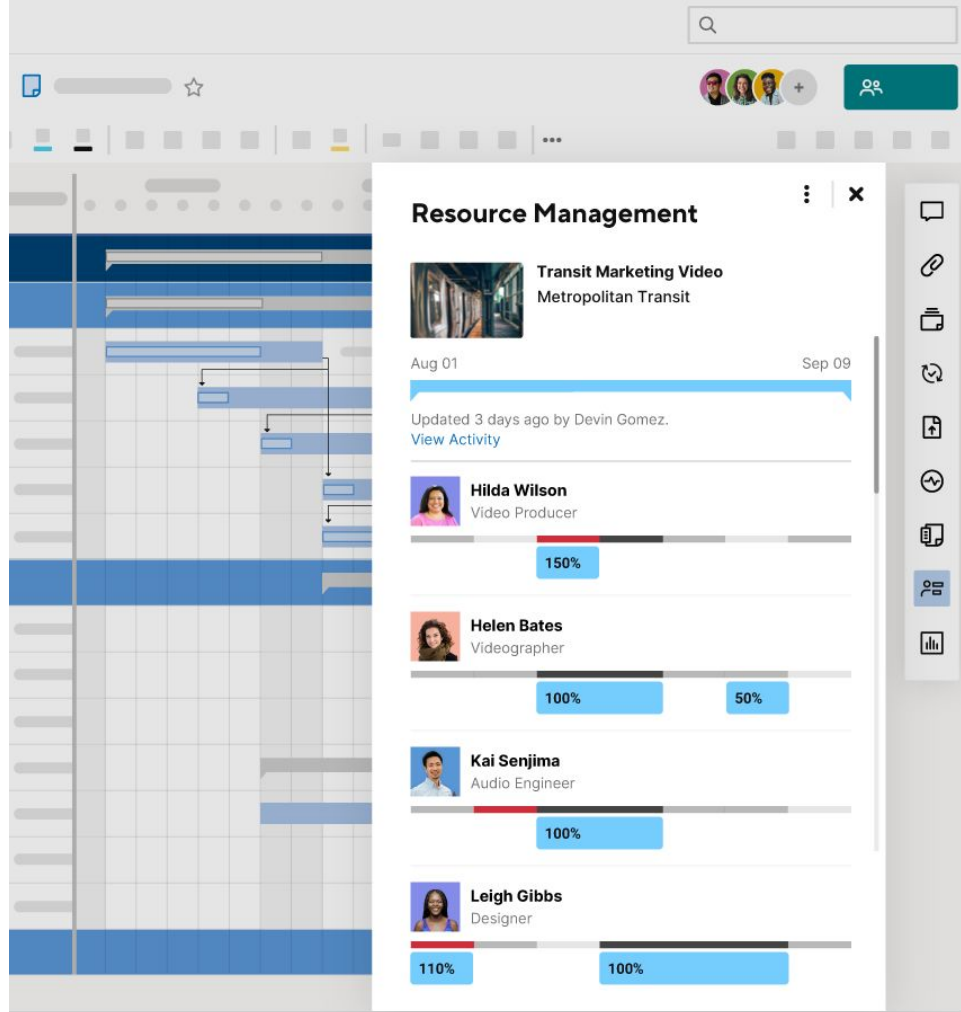


# Resource Management

## How we assessed & assigned resources to the work

Project Plan has bidirectional sync to Smartsheet Resource Management

Started small with tracking team allocations; eventually grew to tracking 5+ teams within our Marketing organization



# Resource Management

How we assessed & assigned resources to the work

Smartsheet CMO Laura M

- Capacity
- People
- Projects
- Assignment Details
- Allocation Heatmap

Sort By: **First Name**

Display: **Role, Discipline**

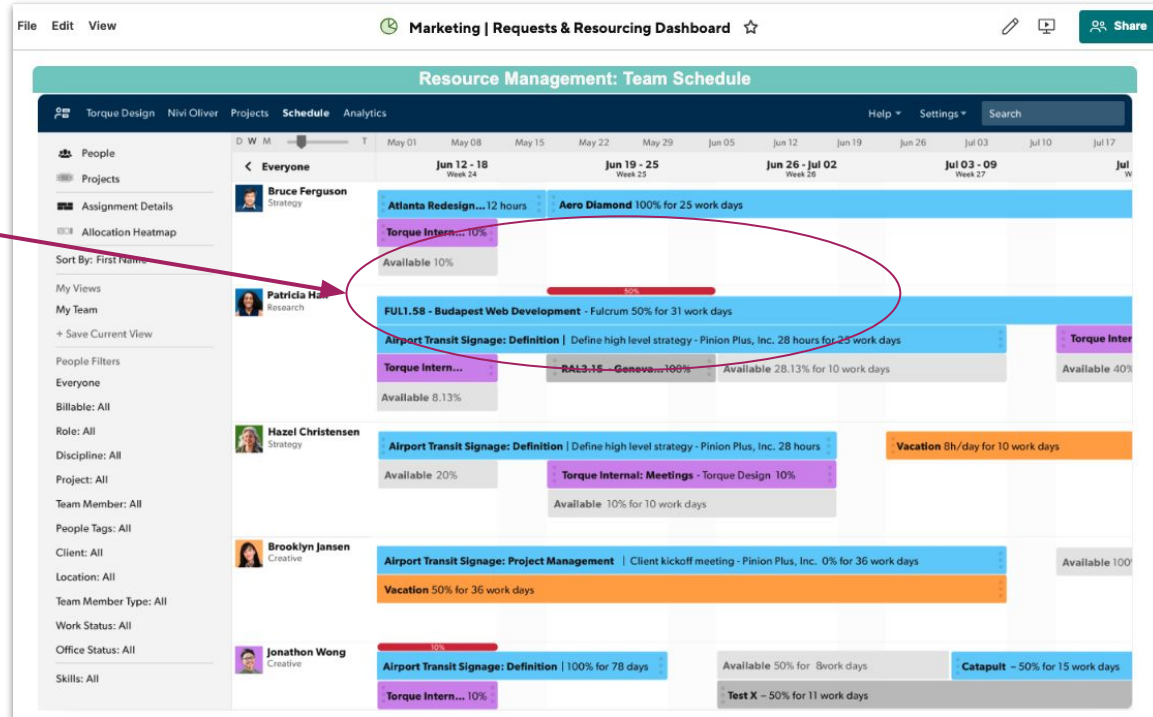
My Views

+ Save Current View

Shared Views

- CR Studio team
- Digital Marketing
- PMO
- Studio Motion/Video Team
- Studio Visual Design Team
- Studio-Video Team
- Studio-Visual Design Team
- TPM
- U.S. Field Marketing

Red = over 100% capacity



# Resource Management

How we assessed & assigned resources to the work

Smartsheet CMO Laura M

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Sort By: **First Name**

Display: **Role, Discipline**

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Shared Views

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- PMO
- Studio Motion/Video Team
- Studio Visual Design Team
- Studio-Video Team
- Studio-Visual Design Team
- TPM
- U.S. Field Marketing

Shared Views



Marketing | Requests & Resourcing Dashboard

### Resource Management: Team Schedule

Torque Design Nivi Oliver Projects Schedule Analytics

People: Bruce Ferguson, Patricia Hall, Hazel Christensen, Brooklyn Jansen, Jonathon Wong

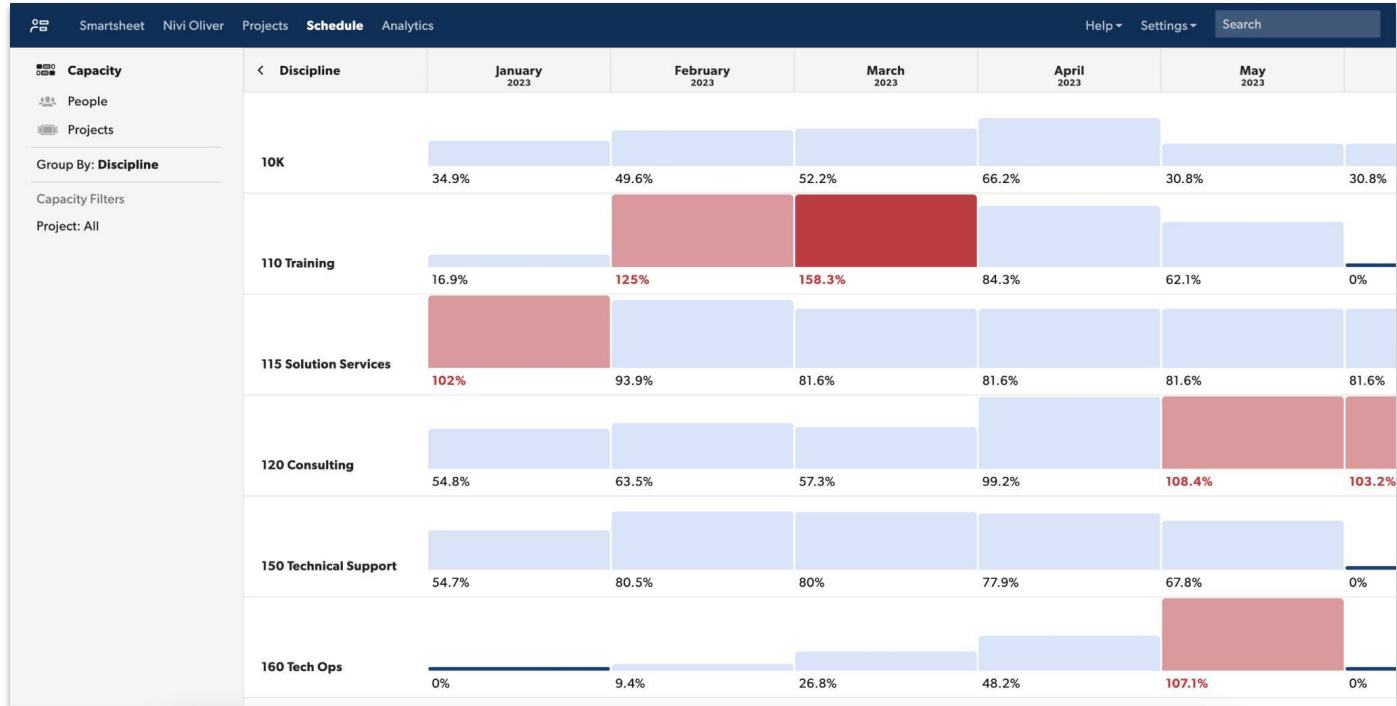
Resource	Project	Start	End	Hours/Week	Availability
Bruce Ferguson	Atlanta Redesign	Jun 12 - 18	Jun 19 - 25	12 hours	100%
Bruce Ferguson	Aero Diamond	Jun 12 - 18	Jun 19 - 25	100%	100%
Patricia Hall	FUL1.58 - Budapest Web Development	Jun 12 - 18	Jun 19 - 25	50%	50%
Patricia Hall	Airport Transit Signage: Definition	Jun 12 - 18	Jun 19 - 25	28 hours	100%
Patricia Hall	RAL3.15 - Geneva	Jun 12 - 18	Jun 19 - 25	100%	100%
Hazel Christensen	Airport Transit Signage: Definition	Jun 12 - 18	Jun 19 - 25	28 hours	100%
Hazel Christensen	Vacation	Jun 12 - 18	Jun 19 - 25	8h/day	100%
Brooklyn Jansen	Airport Transit Signage: Project Management	Jun 12 - 18	Jun 19 - 25	Client kickoff meeting	0%
Brooklyn Jansen	Vacation	Jun 12 - 18	Jun 19 - 25	50%	50%
Jonathon Wong	Airport Transit Signage: Definition	Jun 12 - 18	Jun 19 - 25	100%	100%
Jonathon Wong	Catapult	Jun 12 - 18	Jun 19 - 25	50%	50%

# Resource Management

## How we assessed & assigned resources to the work

Capacity View has helped us call out larger trends to leadership

Informs better decision-making for hiring plans and seeing seasonal trends.



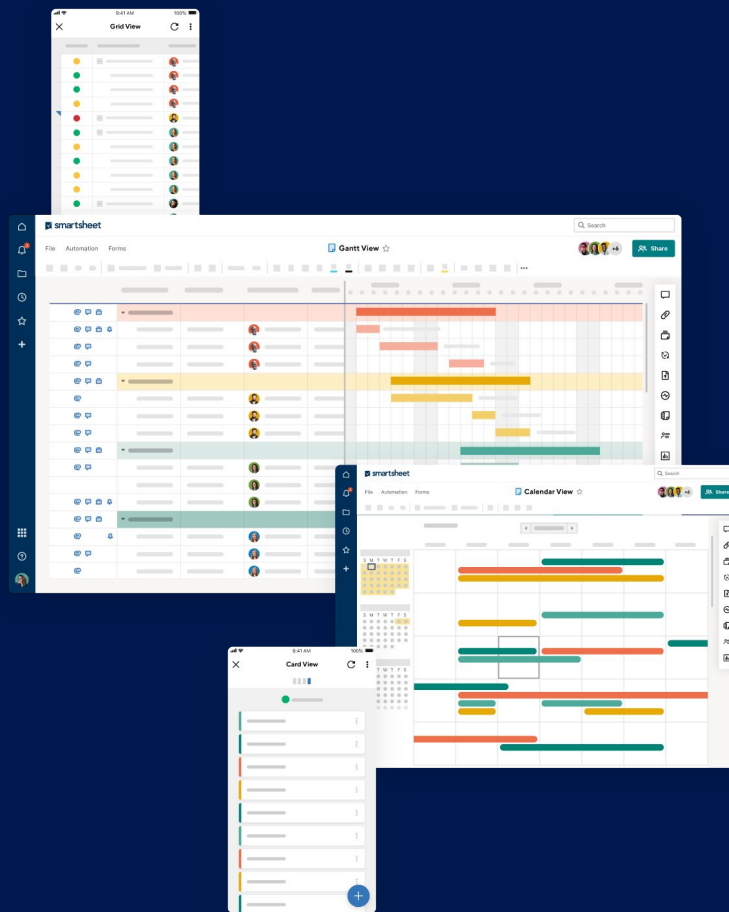
# Executing the work

**Centralized Project Plan:** One location for milestones, deadlines and daily task execution.

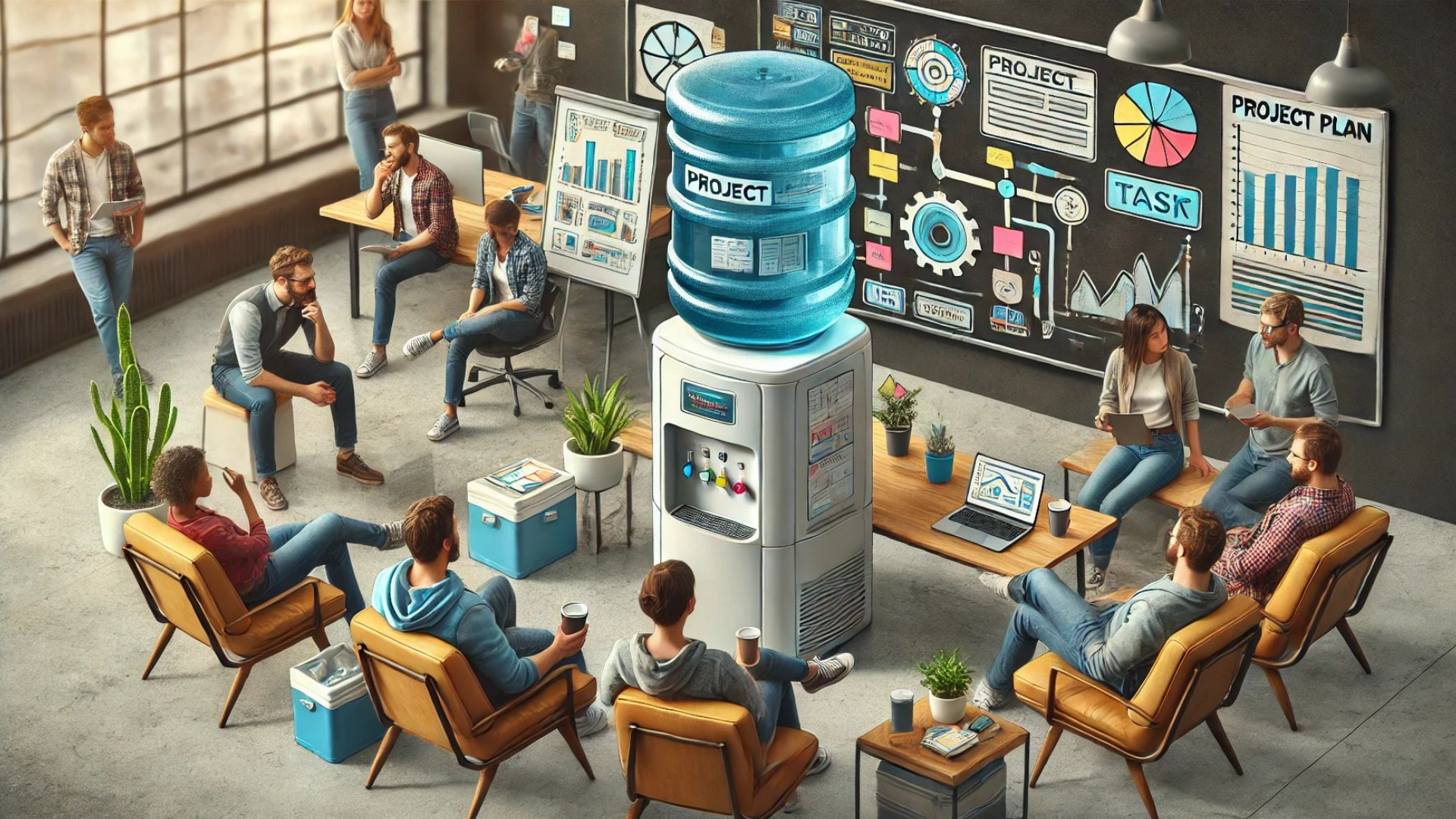
**Streamlined workflow:** Direct integration into Card View tasks for Designers.

**Unified tracking:** Managed project health, deliverables, and final handoffs within a single sheet.

**Enhanced collaboration:** Easy access to task instructions, Proofs, and feedback for seamless team communication.









# Executing the work

The Smartsheet interface shows a Kanban board with the following columns and cards:

- To Do (3):**
  - Script: Finalize (09/16/24, Luis Cancel)
  - Storyboard: Draft (09/23/24, Samuel Wolfe)
  - Storyboard: Finalize (10/03/24, Samuel Wolfe)
- In Progress (1):**
  - Script: Draft Copy (09/06/24, Luis Cancel)
- In Review (0):**
- Blocked (0):**

REPUTATION			07/01/24	11/20/24	
Brand Awareness Video Program		In Progress	Christian Austin	08/01/24	10/03/24
Script				09/02/24	09/16/24
Script: Draft Copy		In Progress	LC Luis Cancel	09/02/24	09/06/24
Script: Copy Approvals			P pmarketingteam@:	09/06/24	09/12/24
Script: Finalize		To Do	LC Luis Cancel	09/12/24	09/16/24
Script Complete				09/16/24	09/16/24
Video				09/17/24	10/03/24
Storyboard: Draft		To Do	Samuel Wolfe	09/17/24	09/23/24
Storyboard Review			P pmarketingteam@:	09/24/24	09/30/24
Storyboard: Finalize		To Do	Samuel Wolfe	10/01/24	10/03/24
Storyboard Complete				10/03/24	10/03/24

# Executing the work

	Deliverable	Show Task	Task	Description	Status	Assigned	Start	Finish	Duration	Pred...	BF Share Link	BF QA'd	Copy Doc	T... Sl...	W... AI... % f%	Version	Proof Status
34			Design & multimedia	Source image	In Progress	PS Priya Singh	07/20/24	08/06/24	3d	32							
35	☆		Publication & Distribution	Upload to CM	In Progress	PS Priya Singh	08/06/24	08/08/24	3d	33							
36	☆		Promotion & Amplification	Share publish	In Progress	PS Priya Singh	08/09/24	08/20/24	8d	33, 35							
37			Deliverables:				08/06/24	08/06/24	1d								
38	☆		ARTICLE 1	"10 Game-Ch	Complete	NW Naomi Williams	08/06/24	08/06/24	1d		<a href="https://brandfolder">https://brandfolder</a>	✓				3	Approved
39	☆		ARTICLE 2	"How Data-Dr	Complete	NW Naomi Williams	08/06/24	08/06/24	1d		<a href="https://brandfolder">https://brandfolder</a>	✓				3	Approved
40	☆		ARTICLE 3	"The Ultimate	Complete	NW Naomi Williams	08/06/24	08/06/24	1d		<a href="https://brandfolder">https://brandfolder</a>	✓				3	Approved
41	☆		Infographics	Create 1 infog	In Progress	SJ Sarah Johnson	09/10/24	09/13/24	4d								
43	☆		Ebooks and whitepapers	Develop a cor	In Progress	JM James Miller	09/16/24	09/20/24	5d								
45	☆		Case studies	Produce 2 cas	In Review	AM Alex Martinez	09/16/24	09/20/24	5d								
47	☆		Video content (explainer videos, product	Deliver a seri	In Progress	MT Megan Thompso	08/19/24	12/02/24	76d								
48	☆		SOCIAL MEDIA				08/06/24	12/02/24	85d								
49	☆		Social media posts	Draft 5-7 post	In Progress	JT Jamal Thompson	08/14/24	08/28/24	11d								
51	☆		Influencer partnerships	Collaborate w	In Progress	ED Emily Davis	08/06/24	08/27/24	16d								

Starred row =  
Proof + Final  
Deliverable

Final Brandfolder  
Link

# All in one place

## Workspaces and Collections

Project Plan lives in the same Workspace as the GTM Planning artifacts

Collections lets you share just the Sheets, Reports, and Dashboards you need to, without sharing the entire Workspace

The screenshot displays a software interface with a dark blue sidebar on the left containing navigation icons. The main content area is titled "Integrated Marketing | 2H FY25" and features a "+ Add" button. Below this, there are sections for "File library", "Collections (3)" (listing "1 - Planning", "2 - Execution", and "3 - Measurement"), and "Workspace Items (5)". The "Workspace Items" list includes "FY25 H2 Campaign - Project Plan" (highlighted with a red oval and a red arrow from the text), "GTM Planning", "Intake Status Report", "Planning Inputs", and "RACI".

On the right side of the interface, there is a table with columns "Deliverable" and "Show Task". The table contains 55 rows, each with a number in the first column and icons in the subsequent columns. The "Deliverable" column contains stars and checkmarks, and the "Show Task" column contains checkboxes. The rows are color-coded in a repeating pattern: blue, yellow, purple, pink, and green.

	Deliverable	Show Task
1	★	☐
10	★	☐
28	★	☐
29	★	☐
30	★	☐
31	☆	☐
32	☆	☐
33	☆	☐
34	☆	☐
35	☆	☐
36	☆	☐
37	☆	☐
38	★	☐
39	★	☐
40	★	☐
41	★	☐
43	★	☐
45	★	☐
47	★	☐
48	★	☐
49	★	☐
51	★	☐
53	★	☐
54	★	☐
55	☆	☐

3

## Proving marketing impact

 smartsheet  
ENGAGE

# Steps to proving marketing impact

## Alignment & Visibility

Identify leadership's visibility requirements.

Align with your target metrics and KPIs.

Create artifacts to clearly convey the narrative.





# Proving marketing impact

## Best practices

- 1 **Nest rows** to organize your go-to-market by theme and tactic. This will allow you to show different views for executive visibility.
- 2 **Add a “view” column** to easily distinguish the row objective.
- 3 **Create filters** using the “view” column drop-downs.

- o Example: Tactic vs Theme

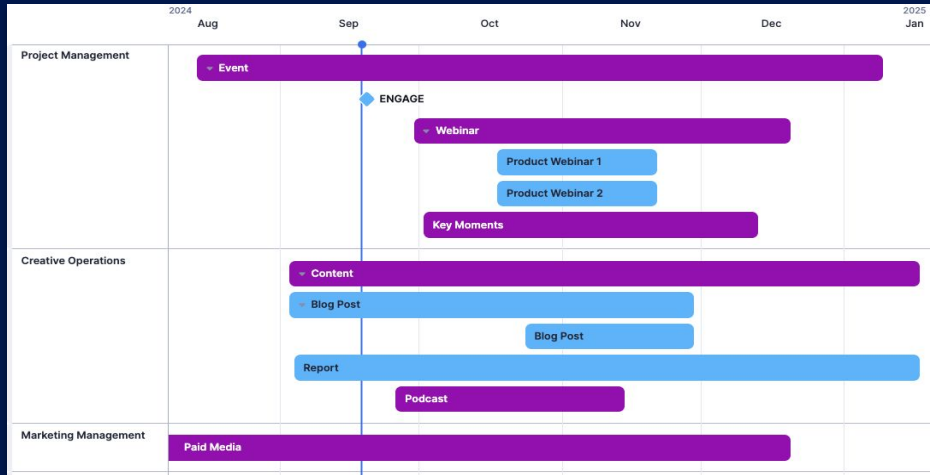
## GTM Sheet

2

Program / Tactic	Channel	Use Case	Objective	Persona	Launch Date	Complete date	View
▼ <b>Key Moments</b>	Key Moments	Project Management			10/02/24	12/13/24	Theme
Product Release 1	Key Moments	Project Management	Conversion	Creative	10/02/24	10/02/24	Tactic
Product Release 2	Key Moments	Project Management	Conversion	Marketer	11/20/24	11/20/24	Tactic
AR Report Drop	Key Moments	Project Management	Conversion	Marketer	12/13/24	12/13/24	Tactic
				Creative			
▼ <b>Content</b>	Content	Creative Operations			09/03/24	01/17/25	Theme
▼ <b>Report</b>	Content	Creative Operations			09/04/24	01/17/25	Theme
Report	Content	Creative Operations	Consideration	Marketer	09/04/24	09/04/24	Tactic
Report   Email	Email	Creative Operations	Consideration	Creative	09/27/24	09/27/24	Tactic
Ad 2 - Report	Paid Media	Creative Operations	Consideration	Marketer	10/10/24	01/17/25	Tactic
Publisher 1: Report	Content Syndication	Creative Operations	Consideration	Marketer	09/13/24	10/16/24	Tactic
				Creative			
Publisher 2: Report	Content Syndication	Creative Operations	Consideration	Marketer	11/18/24	11/18/24	Tactic
				Creative			
▼ <b>Blog Post</b>	Content	Creative Operations			09/03/24	11/29/24	Theme
▼ <b>Blog Post</b>	Content	Creative Operations	Awareness	Marketer	10/24/24	11/29/24	Tactic
Ad 1 - Blog	Paid Media	Creative Operations		Marketer	10/24/24	11/29/24	Tactic
Blog   Email	Email	Creative Operations	Awareness	Creative	09/03/24	09/03/24	Tactic
▼ <b>Webinar</b>	Webinars	Project Management			09/30/24	12/20/24	Theme
▼ <b>Product Webinar 1</b>	Webinars	Project Management	Conversion	Marketer	10/18/24	11/21/24	Theme
Webinar Invite 1	Email	Project Management	Conversion	Creative	10/18/24	10/18/24	Tactic
Webinar Invite 2	Email	Project Management	Conversion	Creative	11/21/24	11/21/24	Tactic
▼ <b>Product Webinar 2</b>	Webinars	Project Management	Conversion	Marketer	10/18/24	11/21/24	Theme
Webinar Invite 1	Email	Project Management	Conversion	Creative	10/18/24	10/18/24	Tactic
Webinar Invite 2	Email	Project Management	Conversion	Creative	11/21/24	11/21/24	Tactic
3rd Party Webinar	Webinars	Project Management	Consideration	Marketer	12/19/24	12/19/24	Tactic
Webinar newsletter	Email	Project Management	Consideration	Marketer	12/20/24	12/20/24	Tactic
Webinar follow-up	Sales Outreach	Project Management	Conversion	Creative	09/30/24	09/30/24	Tactic
▼ <b>Event</b>	Events	Project Management			08/14/24	01/09/25	Theme
3rd Party Event 1	Events	Project Management	Awareness	Marketer	08/14/24	08/14/24	Tactic
				Creative			
3rd Party Event 2	Events	Project Management	Awareness	Marketer	10/03/24	10/03/24	Tactic
				Creative			
3rd Party Event 3	Events	Project Management	Conversion	Marketer	11/07/24	11/07/24	Tactic
				Creative			
Event follow-up	Sales Outreach	Project Management	Conversion	Creative	10/14/24	10/18/24	Tactic
▼ <b>ENGAGE</b>	Events	Project Management	Conversion	Marketer	09/20/24	09/20/24	Theme
				Creative			
ENGAGE Invite 1	Email	Project Management	Conversion	Marketer	09/20/24	09/20/24	Tactic

1

### 3 Filter: Theme



#### Edit Filter 'Theme View'

Name (Optional)  
Theme View  Share filter

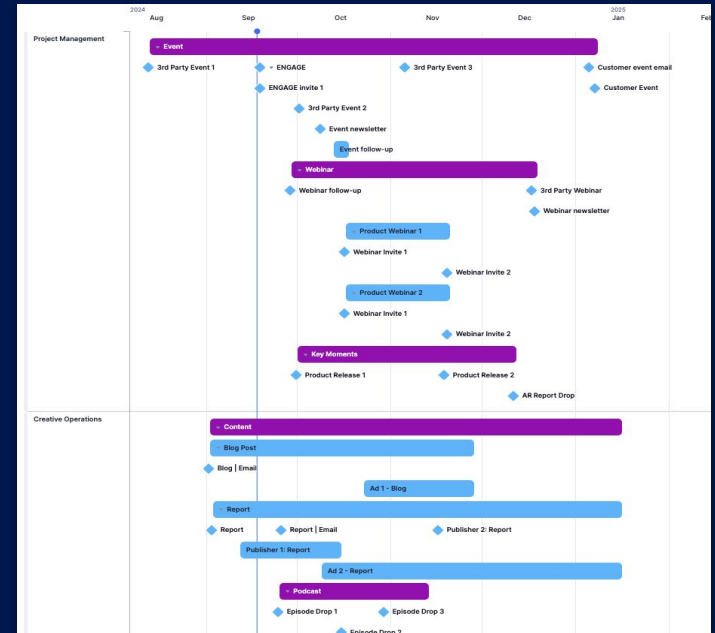
Show rows that match [all conditions](#)

View  is one of  Theme

Select Field

Include parent rows

### Filter: Tactic



#### Edit Filter 'Tactic View'

Name (Optional)  
Tactic View  Share filter

Show rows that match [all conditions](#)

View  is one of  Select values...

Select Field

Include parent rows

Select All  
 Blank  
 Tactic  
 Theme



# Stakeholder: Executives

The image displays the SmartSheet interface for the Marketing Task Tracker. The main dashboard features a pie chart and a Gantt chart. The Gantt chart shows tasks across months from August to November 2024, categorized into Project Management, Creative Operations, and Marketing Management. A 'Marketing Task Form' is overlaid on the left side.

### Marketing Task Tracker Sheet

Category	Task	Start	End
Project Management	Event	Aug	Sep
Project Management	Webinar	Sep	Oct
Project Management	Product Webinar 1	Sep	Oct
Project Management	Product Webinar 2	Sep	Oct
Project Management	Key Moments	Sep	Oct
Creative Operations	Content	Sep	Oct
Creative Operations	Blog Post	Sep	Oct
Creative Operations	Report	Sep	Oct
Creative Operations	Podcast	Sep	Oct
Marketing Management	Paid Media	Sep	Oct

# Stakeholder: Campaign Team

The image displays the SmartSheet interface for the Campaign Dashboard. It features a central Gantt chart, a pie chart, and a table of campaign details. A 'Campaign Budget' of \$350,000 is highlighted. A user profile for Bruce Ferguson is also visible.

### Campaign Dashboard

**Campaign Budget: \$350,000**

Risk	Industry	Company Size	Campaign Owner	Gep	Buying Center	Notes
High	Retail	Major	Erskine O Sulleabhain	NA	Operations	Consumer Goods

# Summary of today's discussion

How Smartsheet powers our Integrated Marketing team

## 1

### How we **PLAN** the work

Align business goals, gather stakeholder insights, and streamline planning.

## 2

### How we **DO** the work

Accelerate production, enhance process efficiencies, and launch faster.

## 3

### How we **PROVE** impact

Align leadership requirements, ensure visibility, and build impactful artifacts.

## 4

### Next steps you can take

Where you can go from here and a quick Q&A!

# Next steps...

- Attend our **upcoming webinar series** for Marketers & Creatives:
  - **From concept to complete:** mastering marketing prioritization **(10/29)**
  - **Maximize marketing impact:** enhance visibility and alignment **(11/14)**
- Talk to us about any ideas you have, or what you've found to be successful with your own team!

## 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

## From Concept to Complete



## Maximize Marketing Impact



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

### Upcoming Marketing & Creative Webinars:

- (10/29) From concept to complete: mastering marketing prioritization
- (11/14) Maximize marketing impact: enhance visibility and alignment