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SEA46: Go Beyond Workspaces & WorkApps with Collections

Ally Robertson, Gretchen Fitzgibbons



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Who You'll Hear From Today...



Ally Robertson

Large Enterprise Solutions
Engineer



Gretchen Fitzgibbons

Sr. Manager, Large Enterprise
Solutions Engineering

Agenda

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Why We're Here

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What Brought Us Here?

Customer Challenges, Need for Curated Experiences and Streamlined Sharing Across Various Audiences

The image is a collage of overlapping screenshots from a Smartsheet workspace, illustrating various collaboration and project management features. The screenshots include:

- Workspace Overview:** A main dashboard with a sidebar menu, a "Browse" section, and a central workspace area. A notification from Felix Li says, "Felix Li invited you to edit the IT PMO (WWC Engage 2024) workspace 15 hours ago • Felix Li".
- Notification:** A notification from Billy Bob says, "Billy Bob is inviting you to collaborate on Smartsheet Projects workspace a few seconds ago • Billy Bob".
- Notification:** A notification from Gretchen Fitzgibbons says, "Gretchen Fitzgibbons invited you to edit the IIT PPM: Agile Project... an hour ago • Gretchen Fitzgibbons".
- Notification:** A notification from Ally Robertson says, "Ally Robertson is inviting you to collaborate on [redacted] LESE... 16 hours ago • Ally Robertson".
- Project List:** A list of projects under the heading "DTL - A5", including items like "000 - Archive - Files", "001 - Archive - Databases", "010 - Admin", "020 - Pages - McCann", "021 - Pages - McCann", "031 - DTL - A1", "032 - DTL - A2", "033 - DTL - A3", "034 - DTL - A4", and "035 - DTL - A5".
- Dashboard:** A dashboard with sections for "BUSINESS ALIGNMENT", "KEY LINKS" (listing "FY25 OKR Results" and "Intake | Pipeline Sheet"), "PROJECTS BY INITIATIVE" (with a pie chart), and "PRIORITY" (with a bar chart showing High, Medium, and Low priority levels).
- Click Thru Demos:** A section titled "Click Thru Demos" with a notification from John Smith: "John Smith is inviting you to collaborate on Smartsheet Projects... a few seconds ago • John Smith". Below this is a section for "Accessing ClickThru Demos" with a note: "The first time you click on one of the links, you will be redirected to an Adobe sign-in page."
- Sharing List:** A list of sharing options for a workspace, including "BRM-ALP", "BRM-APA", "BRM-ARG", "BRM-BAR", "BRM-BBF", "BRM-BOS", "BRM-BOX", "BRM-BRA", "BRM-CCT", "BRM-CWG", "BRM-DEX", "BRM-EMR", "BRM-ESN", "BRM-ORE", "BRM-HAG", "BRM-HIE", and "BRM-HSB".

What Brought Us Here?

Customer Challenges, Need for Curated Experiences and Streamlined Sharing Across Various Audiences

Too Many Workspaces

The screenshot shows the 'Worksheets' section in Smartsheet. A long list of sheets is displayed, each with a name, a star icon, and a 'Shared' status. The sheets are organized into a single, long list without clear categorization or filtering options. The list includes various project-related sheets such as 'TMS Plant City - Project Leads (Report)', 'TMS Plant City - Project Metadata', 'TMS Plant City - Project Metrics', 'TMS Plant City - Project Plan', 'TMS Plant City - Project Status', 'TMS Plant City - Risk Count (Report)', 'TMS Plant City - Risk Register', 'TMS Plant City - Risks (Report)', 'TMS Plant City - Stakeholder Register', 'TMS Plant City - Status (Report)', 'TMS Plant City - Task Due Status (Report)', 'TMS Plant City - Risk Register', 'TMS Plant City - Task Status Lookup', 'TMS Plant City - Timeline', 'TMS Plant City - Timeline (Report)', 'TMS Plant City - Top Issues (Report)', 'TMS Plant City - Top Risks (Report)', 'TMS Plant City - Workstream Leads (Report)', 'WFA - Facilities Turnover Report DL', 'WFA - Graduation Rate Reports DL', 'WFA - Staffing Scenario 1 & 2 - Workstream DL', 'WFA - Staffing Scenario 2 - Summary Summary DL', and 'Windows Locks Project Plan'.

Multiple WorkApps

The screenshot shows the 'Click Thru Demos' page in Smartsheet. The page is cluttered with multiple navigation options and sections. At the top, there is a 'Home' button and a 'Try New Experience' button. Below that, there is a 'Click Thru Demos' button. The main content area is titled 'Click Thru Demos' and features a 'Click Demo' button. The page is divided into several sections, including 'WHAT IS A CLICK THRU?', 'THREE LEVELS OF PROGRESSION', 'NEW! HOW TO USE A CLICK THRU', 'SEEK AND ASSESS IMMEDIATE CONTENT', and 'ACCESSING ClickThru Demos'. The 'ACCESSING ClickThru Demos' section includes a list of steps: '1. Enter your name@smartsheet.com email address.' and '2. Select "Company Account" and log in via OIA.' Below these steps are two screenshots showing the login process. The overall layout is complex and difficult to navigate.

Unruly Favorites & Pins

The screenshot shows the 'Favorites' section in Smartsheet. A long list of pinned items is displayed, including various reports, dashboards, and documents. The list is unorganized and includes items such as 'JMO - DEMO: EPMO Demo FY25 - Admin', 'JMO - Auburn', 'JMO - Bonnie', 'ISCC: Portfolio Prioritization', 'ISCC: Strategic Planning', '[ARCHIVED] Complete Portal', '[ARCHIVED] Industry: Energy & Utilities', '[Internal] - TAM Dashboard', '***Start Here*** | Smartsheet@Life Time', '***Start Here*** | Smartsheet@Monsanto', 'x100K Jan Close Strat/Key', 'w/ 22 Engage Guide - Thermo Fisher Scientific', 'w/ 23 - Engage Guide', 'w/ 23 Engage Customer Guide', '02 - PRIORITIZATION & EXECUTION DASHBOARD', '03 - ACTIONABLE INSIGHTS DASHBOARD', and '04 - SOLUTION PURSUIT MAP Example'. The list is long and difficult to scroll through.

Disorganized Workspaces

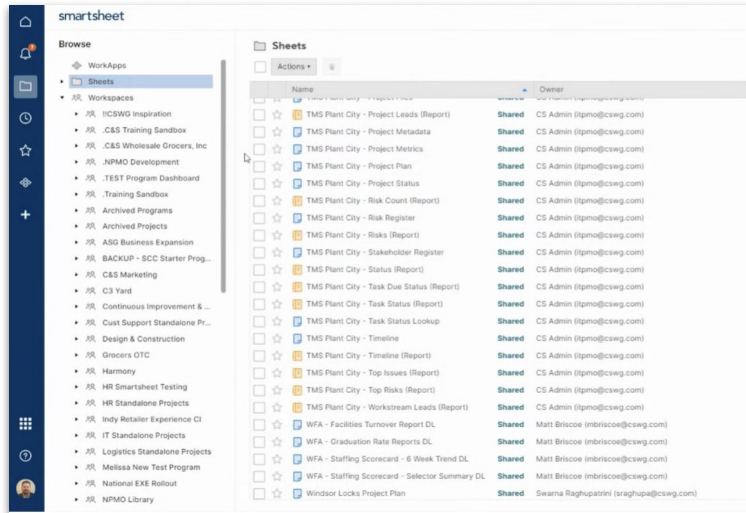
The screenshot shows the 'Worksheets' section in Smartsheet. A long list of sheets is displayed, each with a name, a star icon, and a 'Sharing' status. The sheets are organized into a single, long list without clear categorization or filtering options. The list includes various project-related sheets such as 'BIRN-ALP', 'BIRN-APA', 'BIRN-ARG', 'BIRN-BAR', 'BIRN-BIP', 'BIRN-BOS', 'BIRN-BIF', 'BIRN-BRA', 'BIRN-BRCA', 'BIRN-CCCT', 'BIRN-CWG', 'BIRN-DEX', 'BIRN-EMR', 'BIRN-ESN', 'BIRN-ORE', 'BIRN-HAG', 'BIRN-HEE', and 'BIRN-HSB'.

What Brought Us Here?

Customer Challenges, Need for Curated Experiences and Streamlined Sharing Across Various Audiences

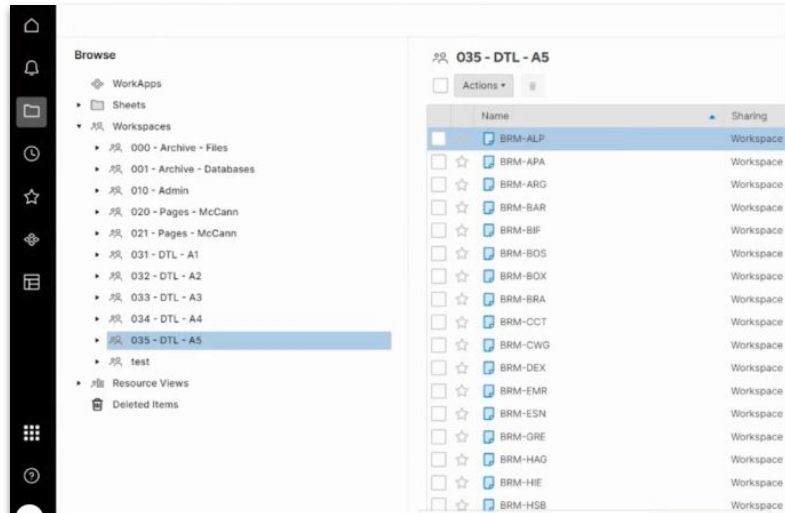
Messy on the outside

When orgs have too many separate Workspaces, see demand for folders or sub-Workspaces to group content.



Messy on the inside

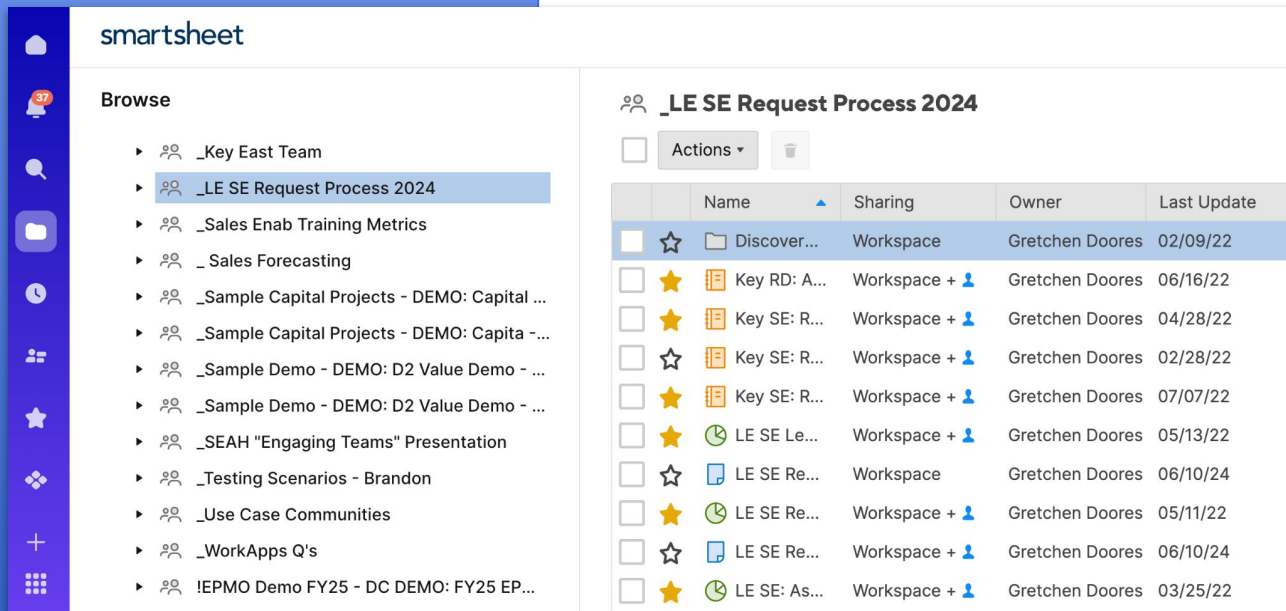
When orgs create a small number of Workspaces with deep file structures, they ask for folder-level sharing.



Messy on the outside

When customers have too many Workspaces, there's a push to clean things up and have better granular sharing, leading to workarounds like:

- Folders to organize Workspace lists
- Pinned or favorited Workspaces
- An archive folder(s)



The screenshot displays the Smartsheet interface. On the left is a navigation sidebar with icons for home, notifications (37), search, folders, clock, grid, star, diamond, and plus. The main area is titled "smartsheet" and has a "Browse" section with a list of workspaces. The workspace "_LE SE Request Process 2024" is selected and highlighted. To the right, a detailed view of this workspace is shown, including an "Actions" menu and a table of items.

	Name	Sharing	Owner	Last Update
<input type="checkbox"/>	☆ Discover...	Workspace	Gretchen Doores	02/09/22
<input type="checkbox"/>	★ 📄 Key RD: A...	Workspace + 👤	Gretchen Doores	06/16/22
<input type="checkbox"/>	★ 📄 Key SE: R...	Workspace + 👤	Gretchen Doores	04/28/22
<input type="checkbox"/>	☆ 📄 Key SE: R...	Workspace + 👤	Gretchen Doores	02/28/22
<input type="checkbox"/>	★ 📄 Key SE: R...	Workspace + 👤	Gretchen Doores	07/07/22
<input type="checkbox"/>	★ 🕒 LE SE Le...	Workspace + 👤	Gretchen Doores	05/13/22
<input type="checkbox"/>	☆ 📄 LE SE Re...	Workspace	Gretchen Doores	06/10/24
<input type="checkbox"/>	★ 🕒 LE SE Re...	Workspace + 👤	Gretchen Doores	05/11/22
<input type="checkbox"/>	☆ 📄 LE SE Re...	Workspace + 👤	Gretchen Doores	06/10/24
<input type="checkbox"/>	★ 🕒 LE SE: As...	Workspace + 👤	Gretchen Doores	03/25/22



Messy on the inside

When customers create a smaller number of Workspaces, Browse is easy to navigate, but sharing is hard.

This is where the demands for role-based sharing, elaborate dashboards or WorkApps to give collaborators easier access to all relevant shared assets.

The screenshot shows the Smartsheet Hub Dashboard. At the top, there is a navigation bar with the Smartsheet logo and the text "Smartsheet Resource Hub". Below this, there is a row of eight icons representing different resource categories: Help Articles, Webinars, Templates, Training, University, Community, Stories, and EAP. Each icon is accompanied by its respective category name. Below the icons, there are five main content sections, each with a title and a list of links:

- General Training**
 - School of Thought
 - Smartsheet University
- Resource Management**
 - Overall RM Training Deck
 - RM Training Deck | Consulting
 - RM Technical FAQ
- Control Center**
 - Control Center User Guide
 - SCC - Learning Center
 - Smartsheet Community
- Daily**
 - Lucid Board
 - Chorus
 - Tableau Dashboard
 - PS Offerings
 - Brand Guide
 - Internal Product Feedback Form
 - Smartsheet Product Feedback
- General Product**
 - Roadmap Home Page
 - What are your product resources?
 - Critical, Summary, & Driving Paths
 - Product Roadmap Workapp
- HR & Resources**
 - Fidelity - Investments
 - Premera - Health Insurance
 - Navia - FSA Card Management
 - Workday



Guiding Principles for Collections

Admins & Builders

A curated, **intuitive experience** that **drives user engagement** in one place.

Granular access and **controlled sharing** of parts of a solution.

Collaborators

Tailored **user-friendly experience** of the work they care about.

A **single destination** for accessing all the **Smartsheet** and **3rd party content**.

2

What Are Collections?

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What are Collections?

Collections is a new capability that appears in the workspace panel in the core Smartsheet app.

Workspace admins can create:

- A tailored list of content shared to specific audiences
- Offer a more flexible, intuitive solution for users
- Provide more granular, easy-to-manage sharing
- Share Smartsheet and 3rd party assets in one place
- Use WorkApps' user-specific functionality in Core App



What Will Collections Provide?

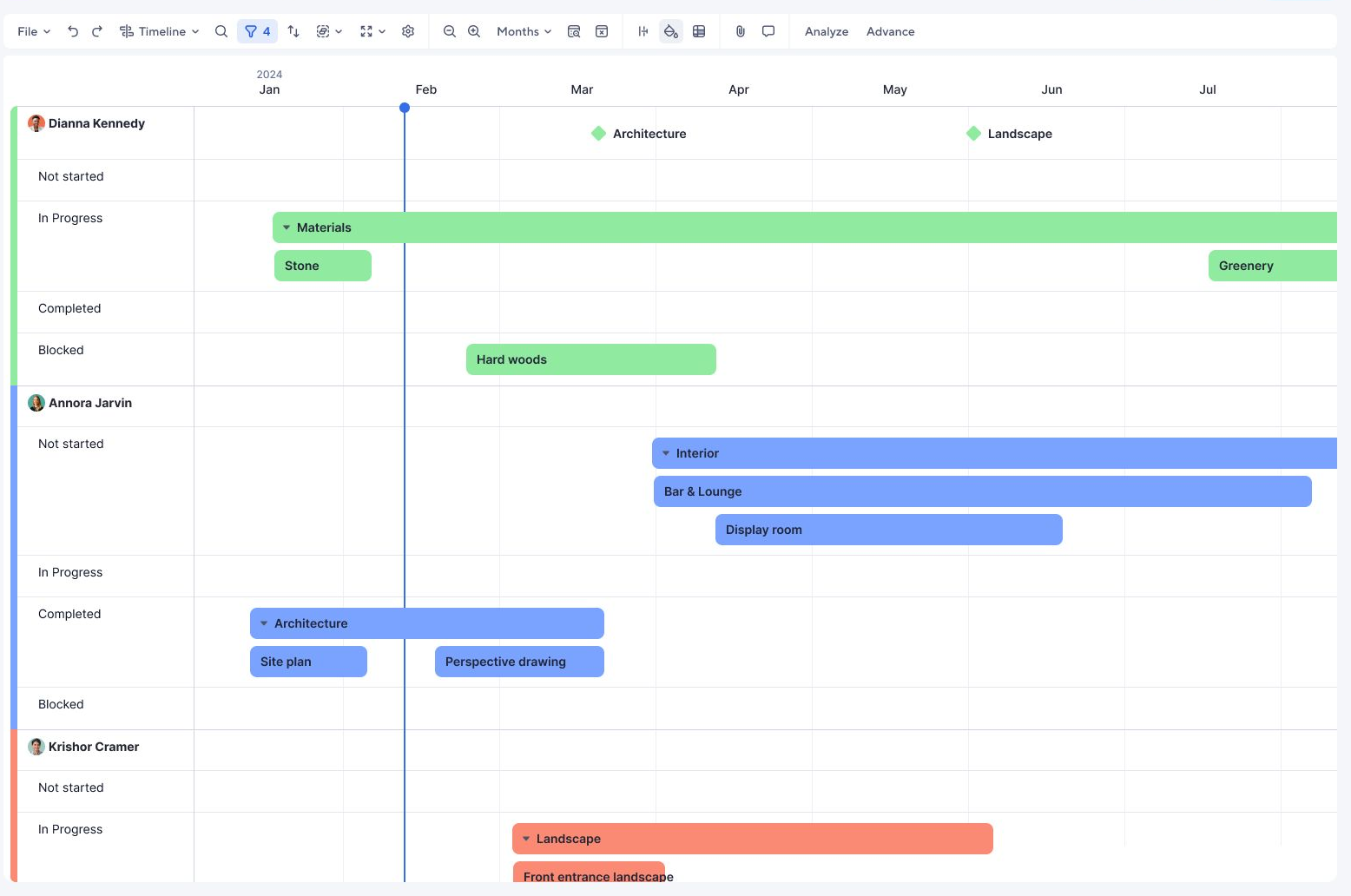
1. **A space to gather and organize any content** – sheets, reports, dashboards, Dynamic View, Smartsheet Forms from **any workspace**, as well as 3rd party content – Google Docs, Lucid charts, PowerBI dashboards – can live side-by-side.
2. **Flexible and granular access control** – unlike before, users can be given access only to a part of a solution. This is our response to the [loudly demanded](#) need for **role-based sharing**.
3. **A tailored experience** – users have a focused view of their work with the most relevant content, the right access, and in the most user-friendly manner.
4. **Multiple admins** – unlike WorkApps, Collections can be managed by **multiple admins**.

MBF Outdoor

+ Add

File library

- Collections (3)
 - Admin Resource
 - Marketing Campaign
 - Onboarding Materials
- Workspace items (270)
 - Budget
 - Budget Dashboard
 - Budget Breakdown
 - Marketing Budget Report
 - Sales Report
 - Resources
 - Shipping Metrics
 - Team Documents
 - Marketing
 - Operations
 - Sales
 - Plan Overview
 - Budget Breakdown
 - Intake Form
 - Intake Form 2
 - Intake Form 3
 - Intake Form 4
 - Dashboard
 - Budget Breakdown
 - Project Plan: Seattle 1377
 - Request Intake
 - Dashboard





MBF Outdoor

+ Add

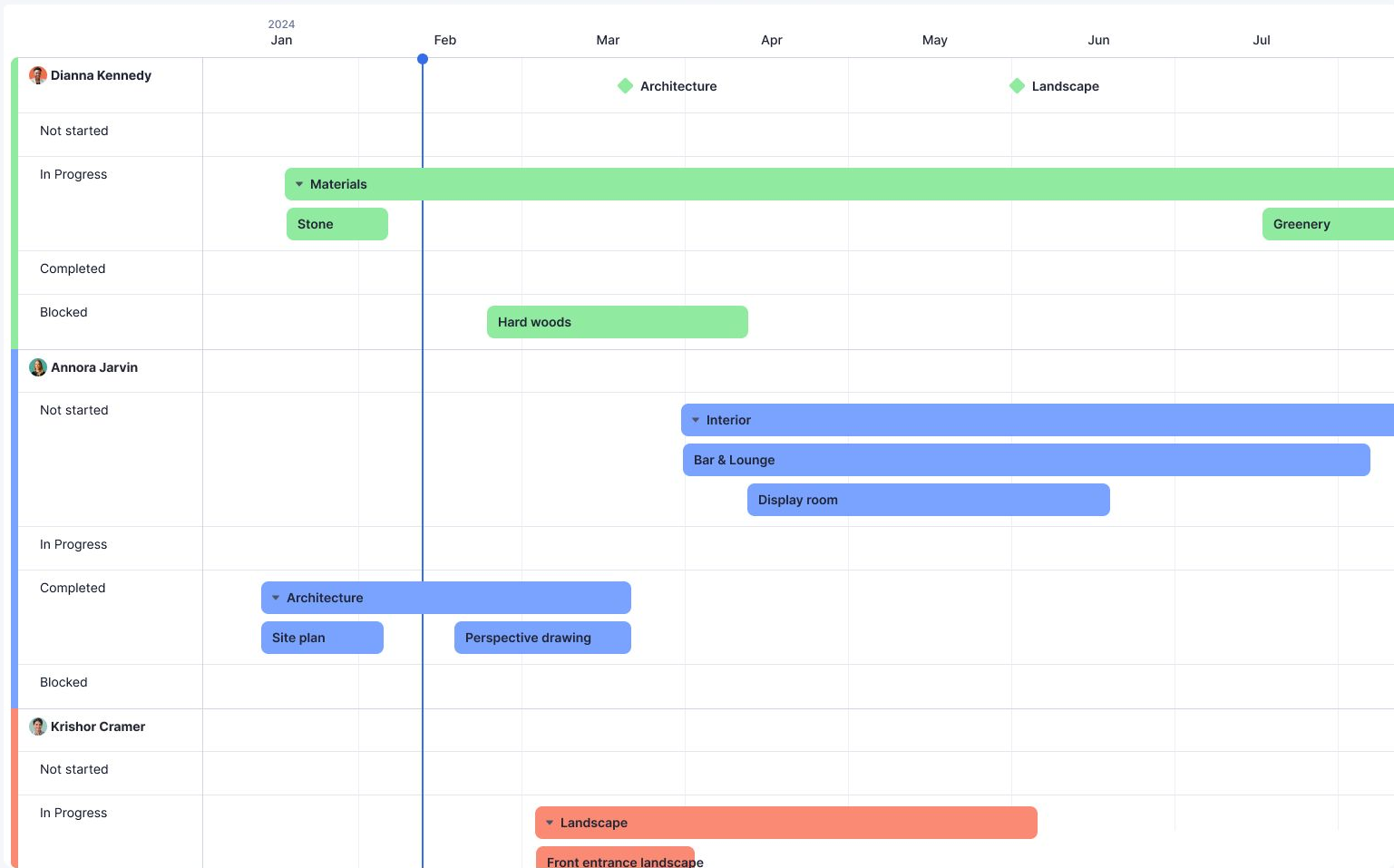
Add in this Workspace

- Sheet
- Report
- Dashboard
- Folder
- Collection**
- Import

Create more

- Workspace
- + New project or process

- Resources
- Shipping Metrics
- Team Documents
 - Marketing
 - Operations
- Sales
 - Plan Overview
- Budget Breakdown
 - Intake Form
 - Intake Form 2
 - Intake Form 3
 - Intake Form 4
- Dashboard
- Budget Breakdown
- Project Plan: Seattle 1377**
- Request Intake
- Dashboard



Navigation sidebar with icons for home, search, and other functions. A top bar shows "← MBF Outdoor" and "Executive Team" with a dropdown arrow. A button "+ Add to collection" is visible.

Add to collection



Smartsheet items (4) Links

🔍 Search by name or link

Collection content will have "Viewer" permission by default. You can change permissions later in the collection panel.

- > 📁 Admin Resources
- ▼ 📁 MBF Outdoors
 - ▼ 📁 Budget
 - 🟢 Marketing Budget Report
 - 🟡 Budget FY25
 - 📄 Marketing Budget Report
 - 📄 Sales Report
 - ▼ 📁 Resources
 - 🟢 Team Dashboard
 - 📄 Overdue Tasks
 - 🟡 Tasks
 - ▼ 📁 Shipping Metrics
 - 🟢 Shipping Dashboard
 - ▼ 📁 Shipping Data
 - 📄 Shipping Survey
 - ▼ 📁 Team Documentes
 - ▼ 📁 Marketing
 - 🟢 Marketing Team Dashboard
 - 📄 Tracker
 - 📄 Report
 - 🟡 Event Logistics
 - 🟡 Vendor List

Cancel

Add 4 Items

audience

. Share
ork.



+ Add to collection

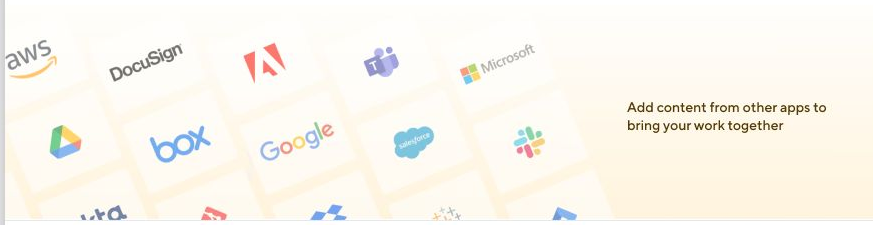
Add to collection



Smartsheet items (6) **Links (2)**

Linked content is accessed using a URL. Access can't be managed using collection permissions.

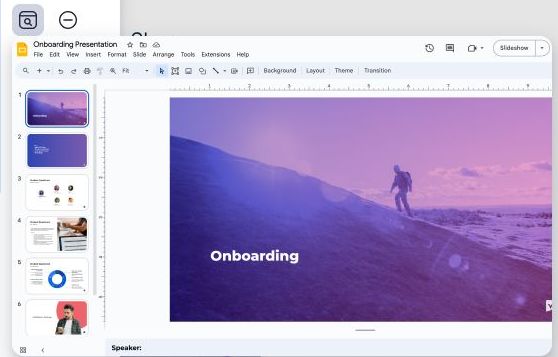
Link	Name
<input type="text" value="docs.google.com/MBF_onboarding_prezo"/>	<input type="text" value="Onboarding Presentation"/>
<input type="text" value="youtube.com/learn_about_MBF_outdoors"/>	<input type="text" value="MBF Outdoor Valoues"/>
<input type="text"/>	<input type="text"/>



Add content from other apps to bring your work together

Cancel Add 8 Items

audience



← MBF Outdoor

Executive Team

+ Add to collection

- Tasks
- Shipping Survey
- Marketing Team Dashboard
- Tracker
- Budget Audit Analysis
- Marketing Tracker DV
- MBF Outdoor Onboarding
- MBF Outdoor Values

Milestone (3) Project (18) Phase (2) Supplier (3) Task (15)

Type: Uncategorized (7)

Architecture

Create a modern, functional, and aesthetically pleasing space tha...

In progress

08/04/24

Reviewed? ★★★★★

2

Landscape

Healthy, safe, and beautiful open space to attract and engage cus...

At risk

12/30/24

Reviewed? ★★★★★

2

Interior

Create an inviting, immersive, and memorable environment that en...

Not started

03/24/25

Reviewed?

Hazel Christensen

2

Landscape

Rooftop landscape

In progress

Reviewed? ★★★★★

2

Architecture

Site plan

In progress

Reviewed? ★★★★★

05/22/24

Architecture

Perspective drawing

Completed

Materials

Concrete

Reviewed?

08/26/23

2

Hardwood

Create a modern, functional, and aesthetically pleasing space tha...

Not started

08/26/23

Reviewed?

2

Supplier

Offer a variety of options in terms of style, color, texture, and price...

In progress

Reviewed? ★★★★★

08/04/24

Alexandra Mattson

Supplier

Flooring samples

At risk

04/22/24

Reviewed? ★★★★★

Materials

Not started

08/26/23

Reviewed? ★★★★★

Firstname Lastname

Landscape

Front entrance landscape

Completed

05/07/24

Reviewed? ★★★★★

06/07/24

Annora Jarvinen

Interior

Bar & Lounge

Flesh out lounge experiences throughout store.

Blocked

08/23/24

Reviewed?



← MBF Outdoor

Executive Team

+ Add to collection

Tasks

- Shipping Survey
- Marketing Team Dashboard
- Tracker
- Budget Audit Analysis
- Marketing Tracker DV

Copy Link

Favorite

Rename

Change permissions

Remove from collection

Milestone (3)

Project (18)

Phase (2)

Supplier (3)

Task (15)

Architecture
Create a modern, functional, and aesthetically pleasing space tha...
In progress
08/04/24
Reviewed? ★★★★★
Alexandra Mattson

Landscape
Healthy, safe, and beautiful open space to attract and engage cus...
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Alexandra Mattson



Architecture
Site plan
In progress
Reviewed? ★★★★★
05/22/24



Architecture
Perspective drawing
Completed



Materials
Concrete
In progress
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08/26/23



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Reviewed?
08/04/24
Alexandra Mattson



Supplier
Flooring samples
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04/22/24

Materials
Not started
08/26/23
Reviewed?
Firstname Lastname



Landscape
Front entrance landscape
Completed
05/07/24
Reviewed? ★★★★★
Annora Jarvinen



Interior
Bar & Lounge
Fresh out lounge experiences throughout store.
Blocked
08/23/24
Reviewed?



Collection permissions

Open Dynamic View
Go to Dynamic View to set the permission. Access can't be managed using collection permissions.



Executive Team

+ Add to collection

Tasks

- Shipping Survey
- Marketing Team Dashboard
- Tracker
- Budget Audit Analysis
- Marketing Tracker DV
- MBF Outdoor Onboarding
- MBF Outdoor Values

Collections in MBF Outdoor

- Admin Resources
- Executive Team
- Marketing Campaign
- Onboarding Materials



2

Landscape

Healthy, safe, and beautiful open space to attract and engage cus...

At risk

12/30/24



2

Interior

Create an inviting, immersive, and memorable environment that en...

Not started

03/24/25

Reviewed?



2

(3) **Project**



Landscape

Rooftop landscape

In progress

Reviewed?



2



Architecture

Site plan

In progress

Reviewed?

05/22/24



2



Architecture

Perspective drawing

Completed

(18) **Phase**



Materials

Concrete

Reviewed?

08/26/23



2



Hardwood

Create a modern, functional, and aesthetically pleasing space tha...

Not started

08/26/23

Reviewed?

2

(2) **Supplier**

Supplier

Offer a variety of options in terms of style, color, texture, and price...

In progress

Reviewed?

08/04/24



1



Supplier

Flooring samples

At risk

04/22/24

Reviewed?

2

Materials

Not started

08/26/23

Reviewed?



1

(3) **Task**



Landscape

Front entrance landscape

Completed

05/07/24

Reviewed?

06/07/24



1



Interior

Bar & Lounge

Flesh out lounge experiences throughout store.

Blocked

08/23/24

Reviewed?

1



3

Live Demo

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4

Recap & Where to Learn More

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Key Takeaways

- **Collections** allow admins to share only relevant parts of a workspace with their collaborators and thus **control access granularly**.
- Provide a more **user-friendly, intuitive experience** in one place to address sharing with specific audiences and **enable multi-admin management**.
- Collections also allow admins and builders to bring in **content from Smartsheet and 3rd party sources** (e.g. Google Docs, PowerPoint, PowerBI dashboards).
- Collections will make workspaces more capable and user-friendly, building on the value provided through options like **WorkApps**.
- **Collections** will be available for our Enterprise customers on the new user subscription licensing model.

A Look Ahead At What's Coming...

- **Collections in Home:** Like Workspaces today Collections will be available in the Smartsheet Home area in Core App.
- Collections in Mobile: Ability to access Collections in Mobile, like WorkApps will be coming later in Q3 / Q4 Timeframe
- **Reordering of Collections:** Early tests showed need for reordering options, which will be coming by end of Year to streamline set up & order of assets.
- **Future State:**
 - Search and favorites options for Collections
 - Collections themes and branding options

Providing Value, Reducing Complexity

Curated Experiences

Provide one place to plan, execute, report and collaborate intuitively, while allowing multi-admin support.

Simplified Builds

More easily assemble solutions and share the right content to the right teams and audiences.

Adapt & Share Easily

Quickly adjust to streamline work and granularly share access to various users to solve business challenges.

Next steps...

- The WorkApps, Workspaces and Collections Booth (#304)
- Connect with us right after this session to ask questions!

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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in your posts all week long.



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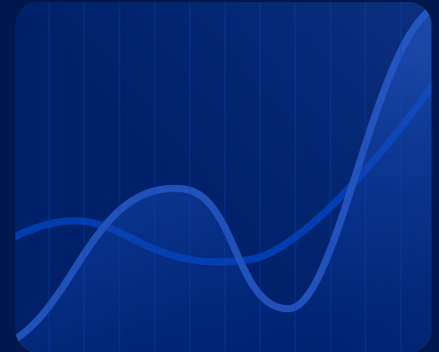
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