

 smartsheet

ENGAGE

Enhance Collaboration with Smartsheet

SEA29

Brad Powers & Matt Munson

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Today's Speakers

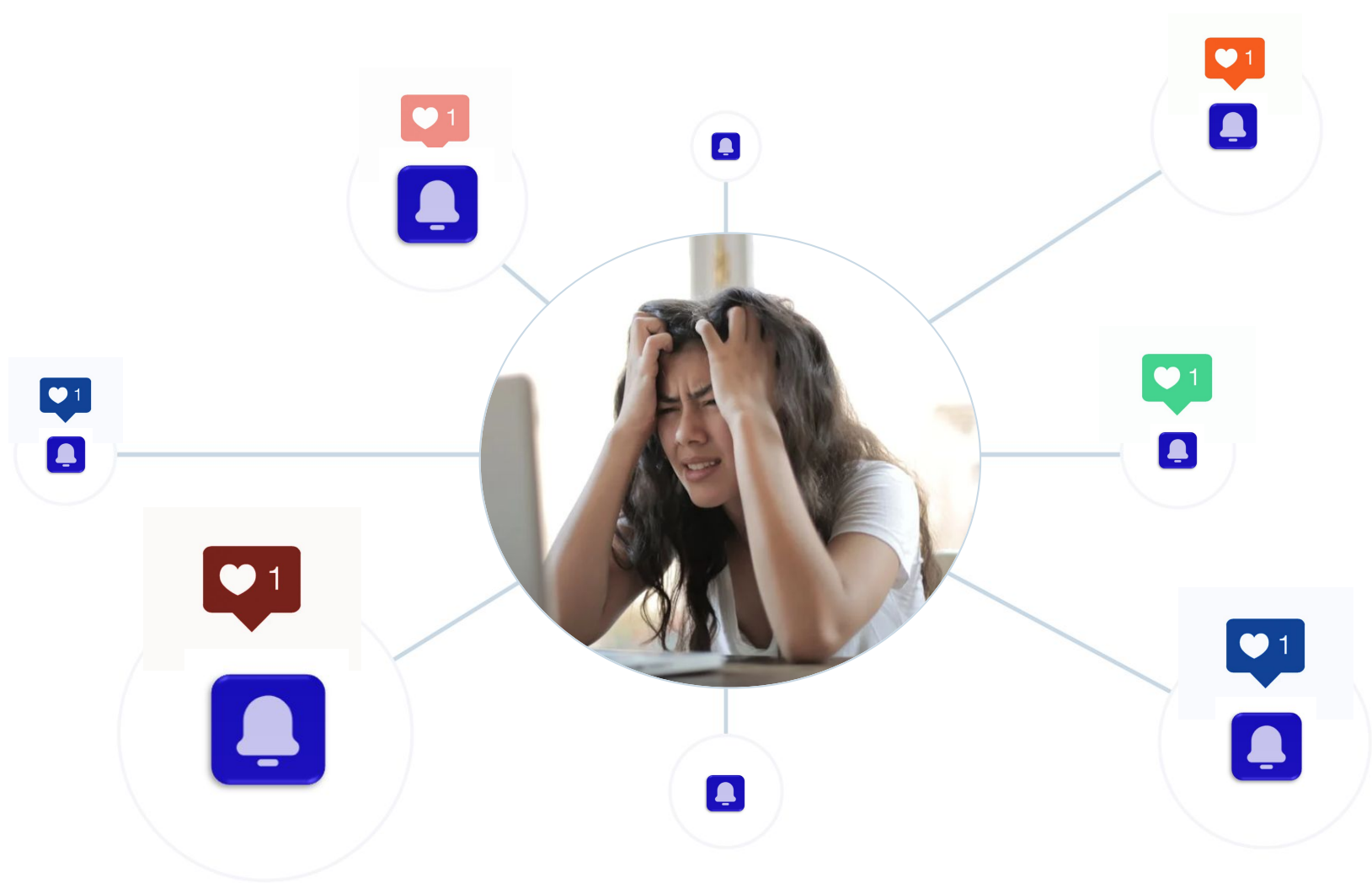


Brad Powers
Commercial Solutions Engineer



Matt Munson
Sr Product Manager





What's Ahead

1

Maximize Your
Collaboration

2

Connect Where Your
Team Lives

3

Automate to Enhance
Your Collaboration

1

Maximize Your Collaboration

 smartsheet
ENGAGE

Easily create conversations within the context of your work

Look for the conversation icon

Create threaded conversations quickly by clicking the conversation icon on any row, or by clicking the conversation icon that appears when you click on any Contact or Latest Comment column cell.

The screenshot shows the MBFCORP interface. At the top, there's a search bar and a 'Share' button. Below that, a navigation bar includes 'File', 'Automation', 'Forms', 'Connections', 'Dynamic View', and '1. MBFCorp Conference T'. A toolbar with icons for 'Grid View', 'Filter', and text formatting is visible. The main area contains a table with columns: Project Name, Owner, Start Date, End Date, and Health. Row 7 is highlighted, showing 'Review proofs' by Brent Williams. To the right, a 'Conversations' sidebar is open, displaying a message from Lenny Miln: '@lekshmi.unnithan@demo.mbfcorp.com - The design team created the proofs. Please review them by the end of August to meet our deadlines. 1 minute ago'. A red box highlights the conversation icon in the top right corner of the table area.

	Project Name	Owner	Start Date	End Date	Health
1	Campaign Brief				
2	Kick-off meeting	Brent Williams	05/02/23	05/04/23	●
3	Copy review and approval	Kai Senjima	06/04/23	06/24/23	●
4	Design elements				
5	Submit request	Alexandra Mattson	06/25/23	07/15/23	●
6	Meet with design team	Alexandra Mattson	07/16/23	07/31/23	●
7	Review proofs	Brent Williams	08/01/23	08/31/23	●
8	Publish completed asset	Lenny Miln	09/01/23	09/22/23	●
9					
10					

The screenshot shows the Smartsheet interface. At the top, there's a search bar and a 'Share' button. Below that, a navigation bar includes 'smartsheet'. A toolbar with icons for 'Grid View', 'Filter', and text formatting is visible. The main area contains a grid with columns for 'Project Name', 'Owner', 'Start Date', 'End Date', and 'Health'. Row 13 is highlighted. To the right, a 'Conversations' sidebar is open, displaying a message from Seóras Jagoda: 'We are unblocked. Great work, keep up the effort!'. Below that, a message from Fiorella Fitzgerald: 'Thanks for the update @leigh.gibbs'. Below that, a message from Leigh Gibbs: 'Heads up team - The project is running into some road blocks across multiple work items. We will be holding a meeting to unblock progress later this week.'. At the bottom, a message from Row 13: 'Comment or notify others with @'. A red box highlights the conversation icon in the top right corner of the grid area.

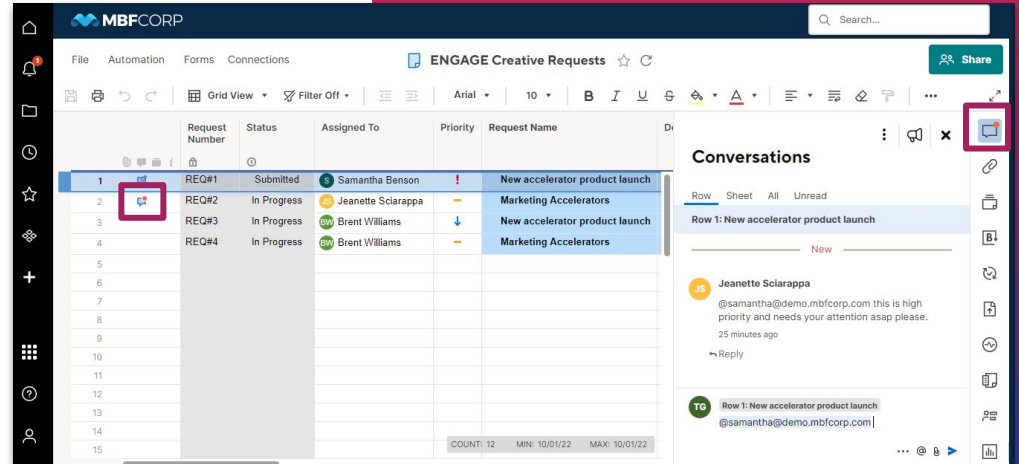
	Project Name	Owner	Start Date	End Date	Health
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					

Get alerted to new comments on your sheet or report

Look for the red dot on the conversations icon

If you see a red dot on the conversations icon in your sheet or report, it means you have new unread comments.

This visual indicator lets you stay on top of any new comments at a glance!



The screenshot displays the MBFCORP ENGAGE Creative Requests interface. The main table lists requests with columns for Request Number, Status, Assigned To, Priority, and Request Name. A red dot is visible on the conversations icon in the top right corner of the interface, indicating new unread comments. The conversations panel on the right shows a message from Jeanette Sciarappa regarding a high-priority request.

Request Number	Status	Assigned To	Priority	Request Name
1	Submitted	Samantha Benson	!	New accelerator product launch
2	In Progress	Jeanette Sciarappa	-	Marketing Accelerators
3	In Progress	Brent Williams	↓	New accelerator product launch
4	In Progress	Brent Williams	-	Marketing Accelerators

Conversations

Row 1: New accelerator product launch

New

Jeanette Sciarappa

@samantha@demo.mfcorp.com this is high priority and needs your attention asap please. 25 minutes ago

Reply

Row 1: New accelerator product launch

@samantha@demo.mfcorp.com

Set up the Latest Comment column



Initial sheet

Set up the Latest Comment column

MBFCORP

USE FOR DEMOS Task Tracker (Booth 9)

	Task	Description	Assigned To	Status	Start Date	End Date	At Risk
1	Project Alpha						<input type="checkbox"/>
2	Initiation						<input type="checkbox"/>
3	Identify problem & opportunity	What do we want to achieve?	Harley Sterling	Complete	08/10/23	08/18/23	<input type="checkbox"/>
4	Kick-off with stakeholders		Jamal King	Blocked	08/18/23	08/18/23	<input type="checkbox"/>
5	Planning						<input type="checkbox"/>
6	Calculate Budget		Harley Sterling	In Progress	08/12/23	08/13/23	<input checked="" type="checkbox"/>
7	Communication Plan		Guadalupe Garcia	In Progress	08/28/23	08/30/23	<input type="checkbox"/>
8	Risk Management Plan		Aviv Perez	Not Started	08/28/23	09/02/23	<input type="checkbox"/>
9	Launch						<input type="checkbox"/>
10	Monitor progress	Executives should view weekly	Aviv Perez	Not Started	09/16/23	10/01/23	<input type="checkbox"/>
11	Manage risks		Guadalupe Garcia	Not Started	09/16/23	10/01/23	<input type="checkbox"/>
12							
13							
14							
15							
16							
17							
18							
19							
20							
21							
22							
23							
24							

Example configuration

Select 'Latest Comment' column type

The screenshot shows the MBFCORP software interface. A 'New Column' dialog box is open, allowing the user to configure a new column. The dialog has a 'Name' field with the placeholder 'Enter a column name'. Below this is a 'Column Type' list with the following options: Text/Number, Dropdown list, Date, Contact list, Checkbox, Symbols, Auto number, Created by, Created date, Latest Comment (highlighted with a red box and a mouse cursor), Modified by, and Modified date. At the bottom of the dialog are 'Cancel' and 'Ok' buttons. The background shows a task list for 'Project Alpha' with columns for 'Task', 'Description', 'Start Date', 'End Date', and 'At Risk'.

Task	Description	Start Date	End Date	At Risk
1	Project Alpha			
2	Initiation			
3	Identify problem & opportunity			
4	Kick-off with stakeholders			
5	Planning			
6	Calculate Budget			
7	Communication Plan			
8	Risk Management Plan			
9	Launch			
10	Monitor progress			
11	Manage risks			

Example configuration

Name the column 'Latest Comment'

The screenshot shows the MBFCORP interface with a 'New Column' dialog box. The dialog has a 'Name' field with the placeholder 'Enter a column name' and a 'Column Type' dropdown menu. The dropdown is open, showing a list of options: Text/Number, Dropdown list, Date, Contact list, Checkbox, Symbols, Auto number, Created by, Created date, Latest Comment, Modified by, and Modified date. The 'Latest Comment' option is highlighted with a red box. A red arrow points from this box to a larger 'New Column' dialog on the right side of the image.

Task	Description	Start Date	End Date	At Risk
1	Project Alpha			
2	Initiation			
3	Identify problem & opportunity	08/10/23	08/18/23	
4	Kick-off with stakeholders	08/18/23	08/18/23	
5	Planning			
6	Calculate Budget	08/12/23	08/13/23	<input checked="" type="checkbox"/>
7	Communication Plan	08/28/23	08/30/23	
8	Risk Management Plan	08/10/23	09/02/23	
9	Launch			
10	Monitor progress	09/16/23	10/01/23	
11	Manage risks	09/16/23	10/01/23	

New Column [X]

Name
Latest Comment

Column Type
Latest Comment

The latest comment column displays the most recent comment in each row.

Cancel Ok

Example configuration

Latest comment now appears in column

The screenshot shows the MBFCORP Task Tracker interface. The table below represents the data shown in the grid view:

Task	Description	Assigned To	Latest Comment	Status	Start Date	End Date	At Risk
Project Alpha							
Initiation							
Identify problem & opportunity	What do we want to achieve?	Harley Sterling	Lenny Mlin - @lekshmi.unnithan@d - we need to achieve at least a 35% reduction in support tickets.	Complete	08/10/23	08/18/23	
Kick-off with stakeholders		Jamal King		Blocked	08/18/23	08/18/23	
Planning							
Calculate Budget		Harley Sterling		In Progress	08/12/23	08/13/23	
Communication Plan		Guadalupe Garcia		In Progress	08/28/23	09/10/23	
Risk Management Plan		Aviv Perez		Not Started	08/28/23	09/02/23	
Launch							
Monitor progress	Executives should view weekly	Aviv Perez		Not Started	09/16/23	10/01/23	
Manage risks		Guadalupe Garcia		Not Started	09/16/23	10/01/23	

The 'Conversations' sidebar shows a list of comments. The comment highlighted in the red box is:

Row 3: Identify problem & opportunity
@lekshmi.unnithan@demo.mbfcorp.com - we need to achieve at least a 35% reduction in support tickets.

Streamlining user interactions with notifications



Reply directly from email notifications

Reply to @mentions directly from your email inbox

Conversations

Row Sheet All Unread

Row 7: Review proofs

New

Lenny Miln
@lekshmi.unnithan@demo.mbfcorp.com - The design team created the proofs. Please review them by the end of August to meet our deadlines.
17 minutes ago

Hide replies

Lekshmi Unnithan
Will do! I will loop in our product manager to review the proofs as well.
16 minutes ago

Lenny Miln
@lekshmi.unnithan@demo.mbfcorp.com - please send me their info so that I can share them to the proof as well.
4 minutes ago

Lekshmi Unnithan
Please send the proof to John Doe at MBFCorp
1 minute ago

Lenny Miln mentioned you in 1. MBFCorp Conference Task Sheet Inbox x

Lenny Miln via Smartsheet <automation@smartsheet.mbfcorp.com>
to me 4:25 PM (2 minutes ago)

MBFCORP

Lenny Miln mentioned you
1. MBFCorp Conference Task Sheet
Row 7: Review proofs

@Lekshmi Unnithan - please send me their info so that I can share them to the proof as well.

[Reply in Smartsheet](#) Or reply to this email to post your comment

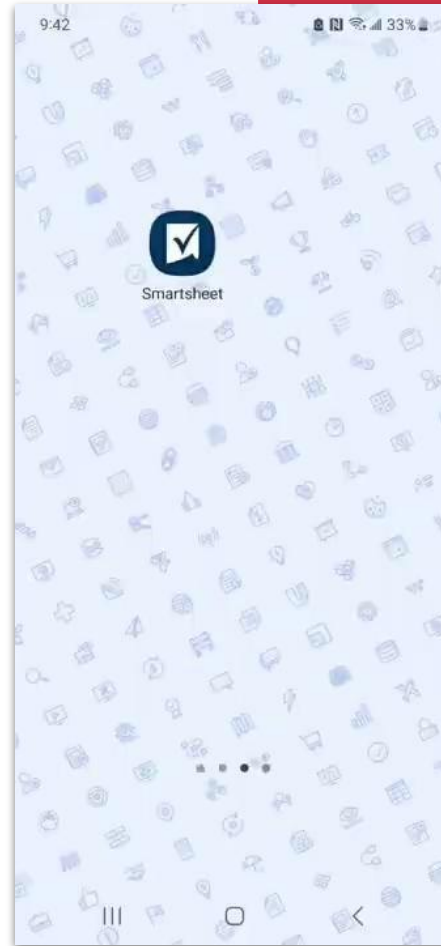
Sent by leku1995@gmail.com through the magic of Smartsheet
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Lekshmi Unnithan
to Lenny
Please send the proof to John Doe at MBFCorp
4:28 PM (0 minutes ago)

Reply Forward

Reply directly from mobile push notifications

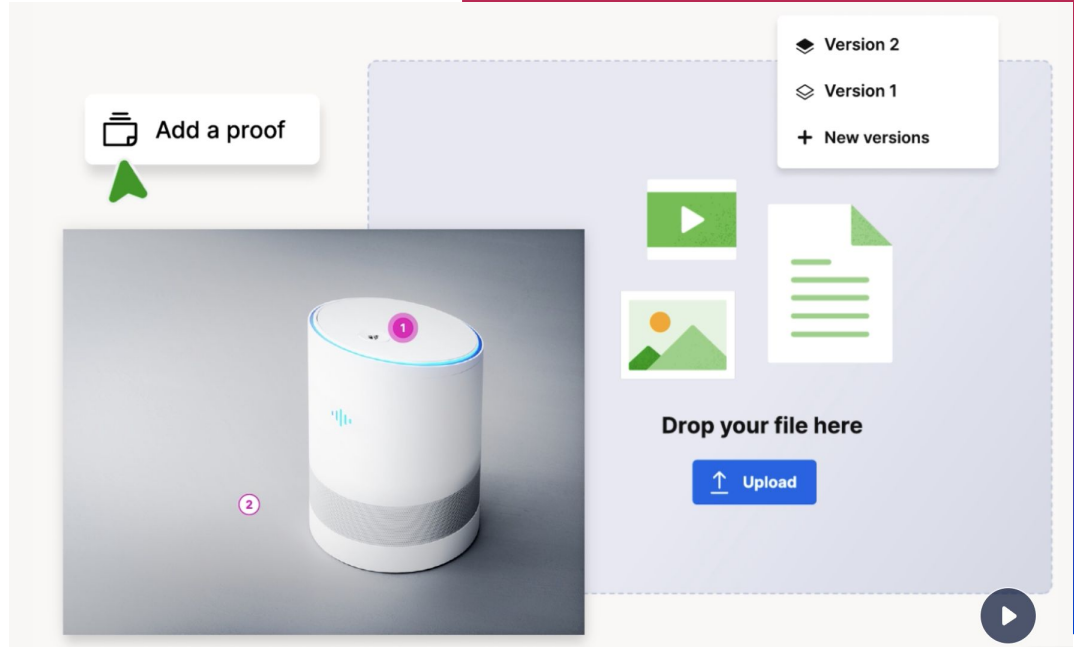
Reply directly to @mentions from your mobile push notification



Proofing

Simplify reviews and keep feedback in one place

Request input from stakeholders, let them pin comments directly on images or documents, and easily track changes and version history for clarity.



2

**Connect Where Your
Team Lives**

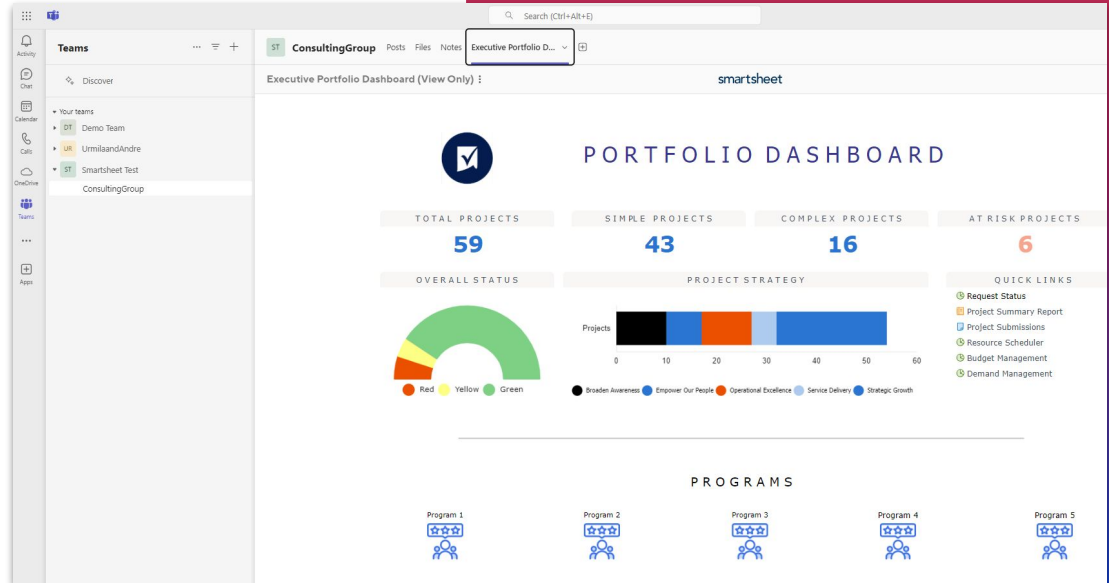
smartsheet

ENGAGE

Microsoft Teams integration

Get more work done without leaving Microsoft Teams

Add Smartsheet sheets, reports, dashboards, and forms as 'Tabs' within a Team channel in Microsoft Teams.



Microsoft Teams integration

Stay in the loop with automated DM's

Receive Smartsheet notifications as direct messages, review update and approval requests, and set these notifications to be automatically sent to DM's or Teams channels.

The screenshot displays the Microsoft Teams interface. On the left, the navigation pane includes Activity, Chat, Calendar, Calls, OneDrive, Teams, and Apps. The main area shows a Teams channel named 'ConsultingGroup'. A notification is visible in the chat area, indicating a reminder for 'Profile Update Tracker Sheet'. Below this, a direct message from Smartsheet is shown, dated 12:14 PM. The message contains a notification about changes to the 'Profile Update Tracker Sheet: Teams Notification' and includes a table with the following data:

Assigned	Due Date
Brad Powers	09/19/24
Action	Complete?
Update your profile picture before Engage.	True

How to send notifications to a Microsoft Teams channel



Initial template, fresh out of the box

Receive notifications in a Teams channel

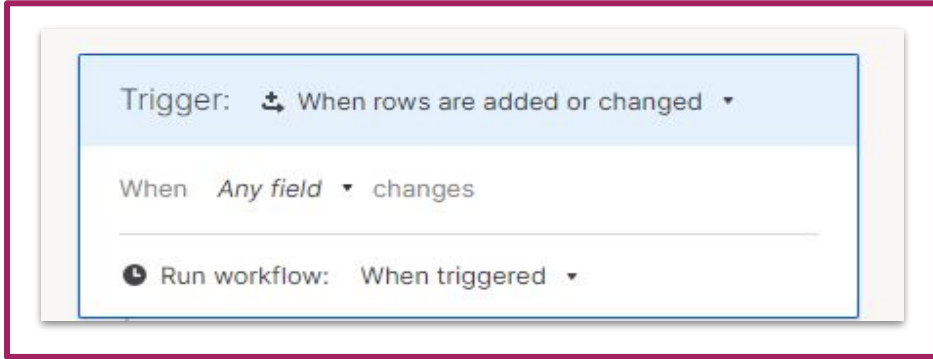
The screenshot shows a Microsoft Power Automate workflow titled "Teams Notification". The workflow is composed of several steps:


- Trigger:** "When rows are added or changed" (indicated by a red arrow labeled "Trigger").
- When:** "Any field" changes.
- Run workflow:** "When triggered".
- Condition:** "Add a condition to filter rows" (shown in a dashed box).
- Action:** "Alert someone" (indicated by a red arrow labeled "Action").
- Send to Microsoft Teams:** A dropdown menu showing "Smartsheet (Demo)", "Smartsheet Test", and "ConsultingGroup".
- Terms & Conditions:** A section with text: "By authorizing a Microsoft Teams organization, I understand that Microsoft Teams organization, team, and channel names may be visible to other Smartsheet users shared to a sheet."
- Customize message:** A link to customize the message.

A blue plus sign is visible at the bottom left of the workflow canvas.


Example configuration

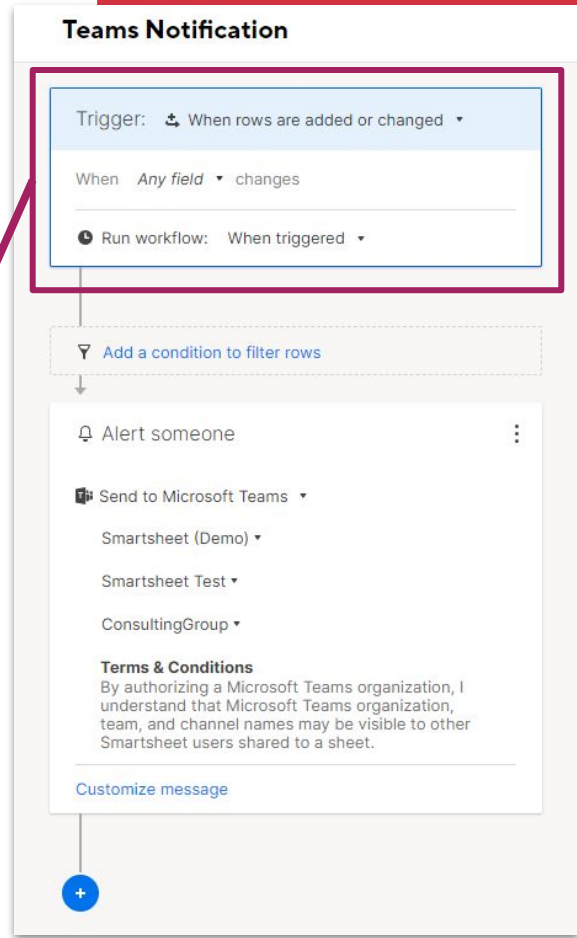
Specify trigger type




Trigger:  When rows are added or changed ▾

When *Any field* ▾ changes


Run workflow:  When triggered ▾





Teams Notification


Trigger:  When rows are added or changed ▾

When *Any field* ▾ changes

Run workflow:  When triggered ▾

[Add a condition to filter rows](#)


 Alert someone 

 Send to Microsoft Teams ▾

- Smartsheet (Demo) ▾
- Smartsheet Test ▾
- ConsultingGroup ▾

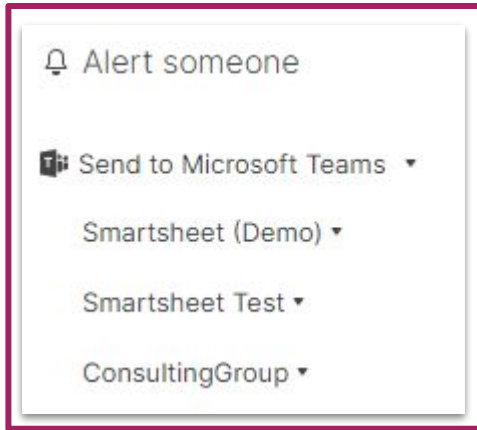
Terms & Conditions
By authorizing a Microsoft Teams organization, I understand that Microsoft Teams organization, team, and channel names may be visible to other Smartsheet users shared to a sheet.

[Customize message](#)

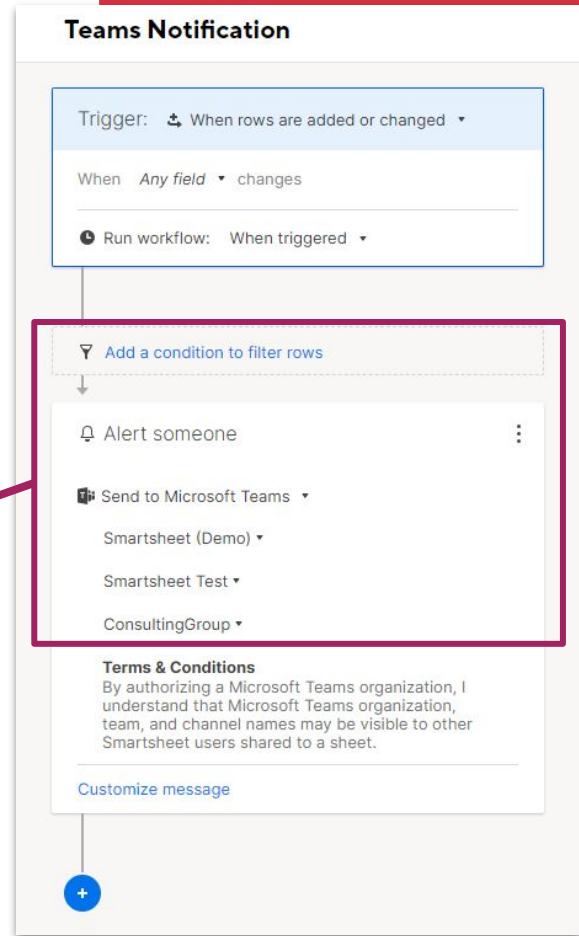


Example configuration

Select Organization, Team, and Channel



This panel shows the configuration for sending a Teams notification. It includes a bell icon for 'Alert someone', a Teams icon for 'Send to Microsoft Teams', and three dropdown menus for selecting the organization, team, and channel: 'Smartsheet (Demo)', 'Smartsheet Test', and 'ConsultingGroup'.



The screenshot shows the 'Teams Notification' configuration interface. It includes a trigger section with 'Trigger: When rows are added or changed', a 'When Any field changes' condition, and a 'Run workflow: When triggered' action. Below this is a section for 'Add a condition to filter rows' and a 'Send to Microsoft Teams' configuration panel. The 'Send to Microsoft Teams' panel is highlighted with a red box and has a red arrow pointing to the zoomed-in view on the left. The 'Send to Microsoft Teams' panel includes a Teams icon, a dropdown for 'Smartsheet (Demo)', a dropdown for 'Smartsheet Test', and a dropdown for 'ConsultingGroup'. Below the configuration panels is a 'Terms & Conditions' section and a 'Customize message' link.

Resulting Teams message

Receive notifications in a Team channel

The screenshot shows the Microsoft Teams interface. On the left is a sidebar with navigation options: Activity, Chat, Calendar, Calls, OneDrive, Teams (selected), and Apps. The main area is divided into two panes. The left pane is titled 'Teams' and shows a list of teams: 'Demo Team', 'UrmilaandAndre', 'Smartsheet Test', and 'ConsultingGroup'. The right pane is titled 'ConsultingGroup' and shows a notification from 'Smartsheet' at 12:14 PM. The notification is titled 'Brad Powers inserted a row in: Profile Update Tracker Sheet' and contains a table of changes. Below the notification is a 'Reply' button.

Search (Ctrl+Alt+E)

Teams

Discover

Your teams

- DT Demo Team
- UR UrmilaandAndre
- ST Smartsheet Test

ConsultingGroup

Reminder
Profile Update Tracker Sheet

Profile Update Tracker Sheet: Teams Notification

Preview rows

BP Reply

Smartsheet 12:14 PM

Brad Powers inserted a row in:
Profile Update Tracker Sheet

Changes to Profile Update Tracker Sheet: Teams Notification

Primary Column
(empty)

Assigned Brad Powers	Due Date 09/19/24
Action Update your profile picture before Engage	Complete? True

BP Reply

3

Automate to Enhance Your Collaboration

smartsheet

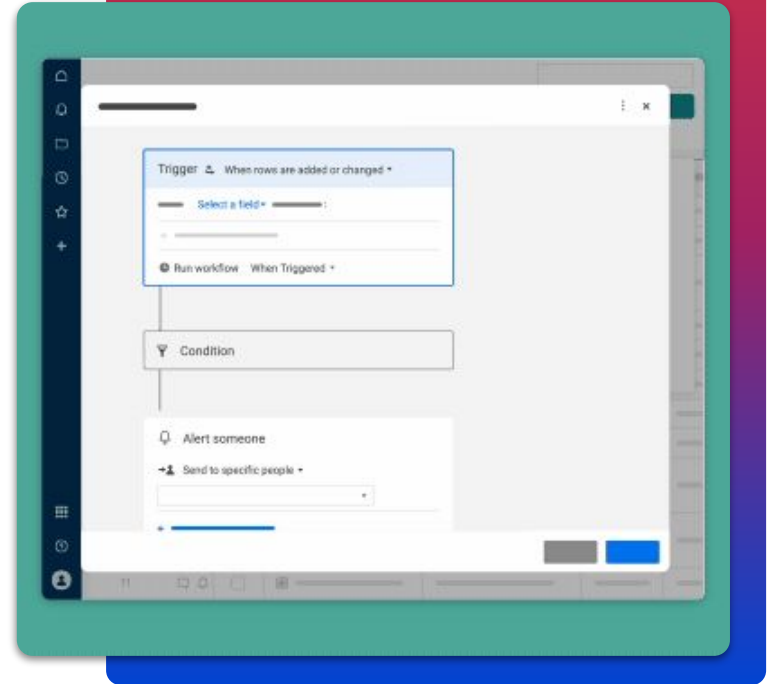
ENGAGE

Send an alert

Alert yourself or someone else when specified criteria are met

For example, send yourself a daily alert of all the rows with new comments, or set a personal alert for any tasks at risk.

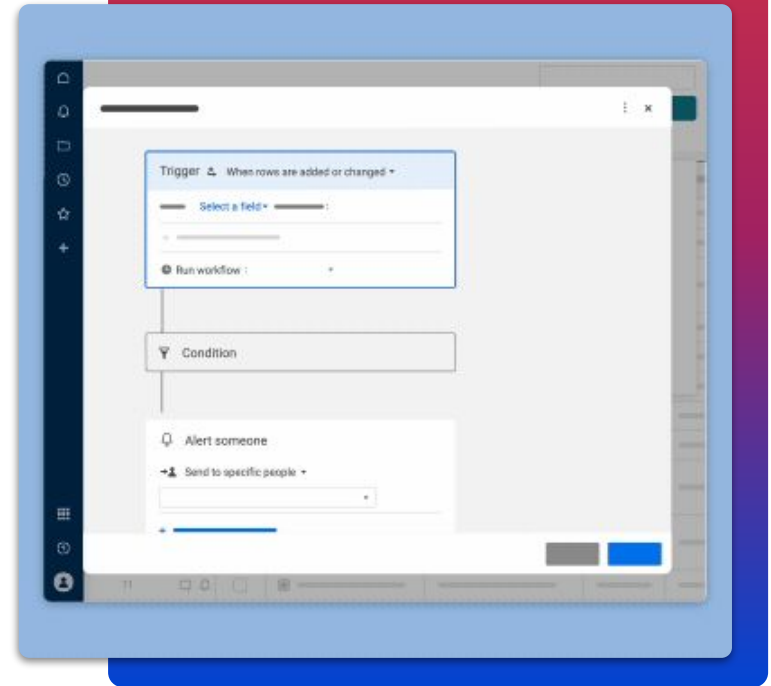
Or keep teammates in the loop when assigning them tasks or changing dates.



Assign people

Assign someone when specified criteria are met

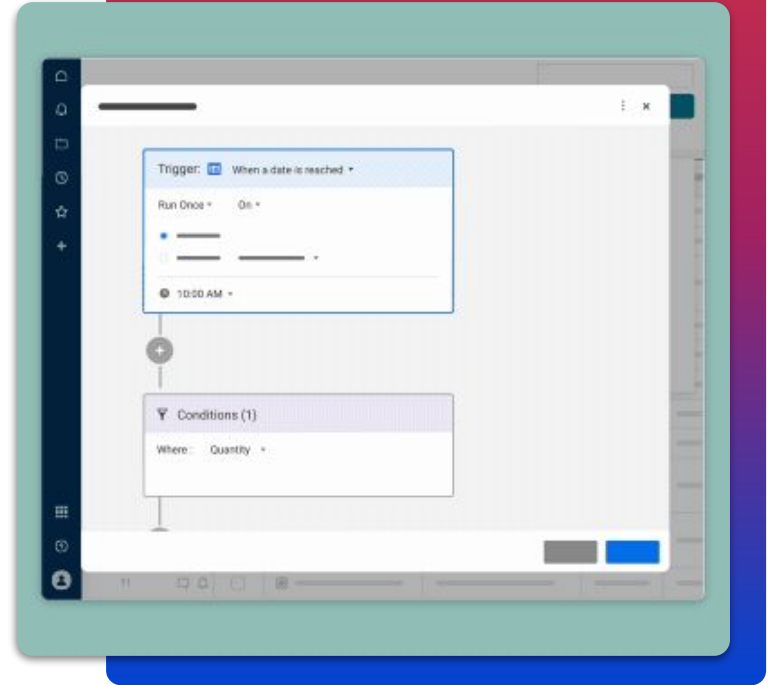
For example, automatically assign a teammate to a task based on criteria, like type of work or department.



Remind someone on a date

Remind someone when a specific date is reached

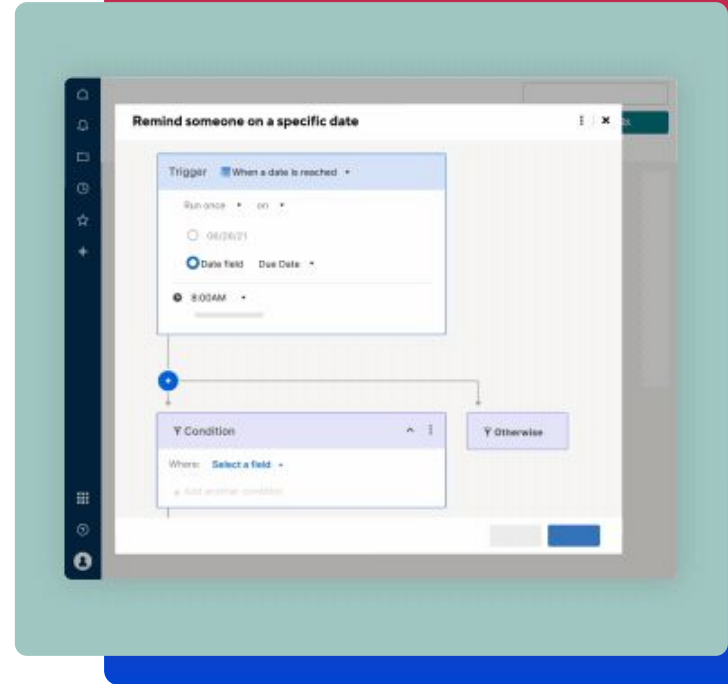
For example, notify someone to review the past year's metrics on the first day of the new year.



Set a date-based reminder

Remind someone when specified date-based criteria are met

For example, notify people when something hasn't happened by a specific date, such as a project not marked as complete by its target due date.

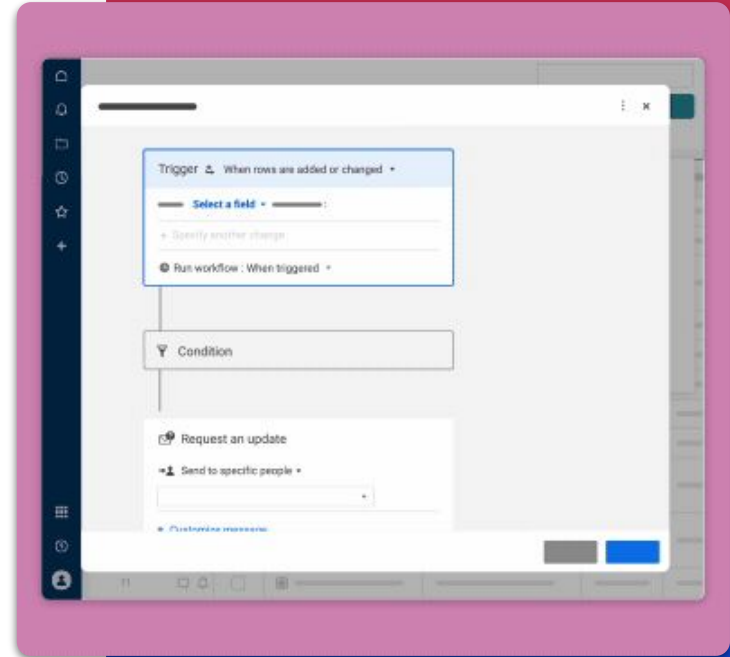


Request an update

Request an update from a contact when specified criteria are met

For example, gather information about a project or request from a stakeholder — e.g. sheet fields that weren't updated when a new row was added.

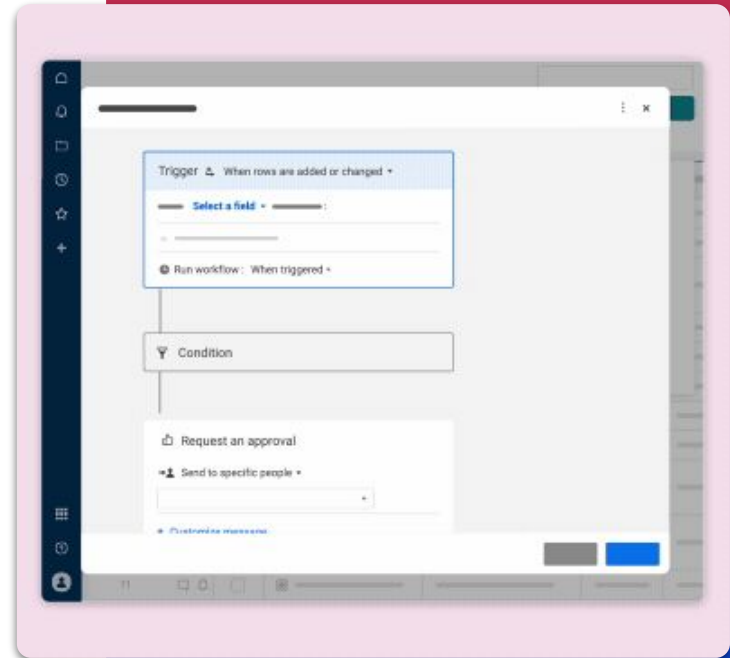
Or send recurring requests to create weekly status reports or check monthly project health.



Request an approval

Request from one or more contacts when specified criteria are met

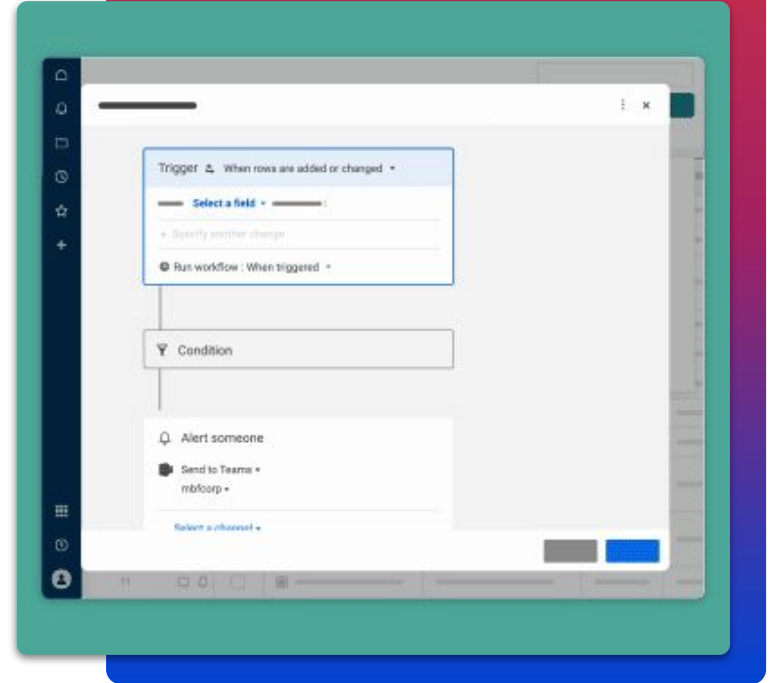
For example, have a manager approve additional resources when timelines are slipping.



Send to Microsoft Teams

Alert a Teams channel when specified criteria are met

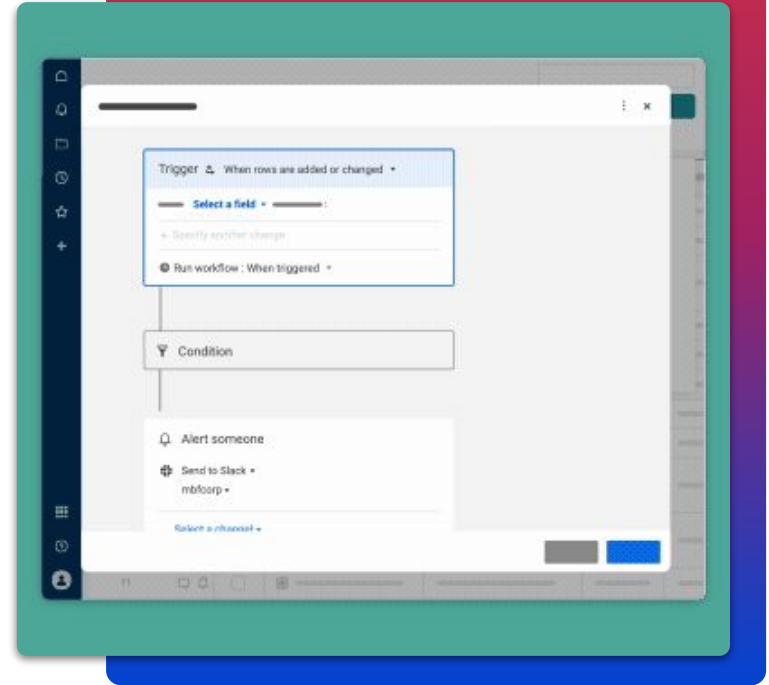
For example, let your team know when a new row is added to a project intake sheet.



Send to Slack

Alert a channel when criteria are met

For example, post in an internal Slack channel when a status changes, a comment is added, or an attachment is updated.



Manage your automated workflows

Add, view, test, and adjust

The screenshot shows a web browser window with the address bar displaying 'Task Tracker'. The page title is 'Task Tracker / Manage Workflows'. In the top right corner, there are icons for a bell, a lightbulb, a gear, and a blue button labeled '+ Create from scratch'.

The main content area is divided into two sections: 'Saved Workflows' and 'Popular Templates'. The 'Saved Workflows' section has a 'Filter by all' dropdown and a 'Sort by name' dropdown. It contains two workflow cards:

- Alert assignee when task assigned and when due date is approaching**
Trigger: When rows are added or changed AND when 'Assigned To' changes to Any Value
Actions: Alert someone
Recipients: Contacts in 'Assigned To'
Last modified by Lekshmi Unnithan on Aug 15, 2023, 2:56 PM
- Flag at risk and alert assignee**
Trigger: When rows are added or changed
Actions: Alert someone, Change a cell, Clear a cell
Recipients: Contacts in 'Assigned To'
Last modified by Lekshmi Unnithan on Aug 15, 2023, 2:56 PM

A context menu is open over the first workflow card, listing the following actions: Deactivate, Run now..., Edit, Duplicate, Unsubscribe, Delete, and Properties... The 'Popular Templates' section on the right shows three template cards with icons and titles: 'Remind someone on a specific date', 'Request an update every week', and 'sheet when specified criteria are met'. A 'See more templates' button is located at the bottom right of the templates section.

Run workflow now

Run on specific rows and choose to send the notification to yourself

- *Run workflow now* allows users to manually trigger a workflow, bypassing the trigger conditions, but honoring any conditional blocks.
- Users can choose to send notifications to the recipients specified by the workflow or to themselves instead.
- Users can run the workflow on the entire sheet or only on specific rows.

Run workflow now ✕

Manually trigger the workflow **Alert assignee when task assigned and when due date is approaching**.

Actions: Alert someone

Trigger workflow on the entire sheet

Trigger workflow on specific rows

Recipients: Contacts in 'Assigned To'

Send notifications to myself instead

i Running a workflow will ignore triggers but respect condition blocks. Scheduled workflows will continue to run as normal. This action may produce duplicate results depending on triggers in related workflows. [Learn more](#)

Close Run workflow

Customize from name

Workflow builders can set the 'from name'

- *Send from Smartsheet Automation*
- *Send from my organization**
- *Send from triggering user (for alerts) or Send from sheet owner (for requests)*

**Please note: The Send from my organization option is only available for customers on Enterprise plans and above.*

The screenshot shows the configuration for a 'Request an update' workflow. At the top, there is a title 'Request an update' with an envelope icon and a three-dot menu. Below this is a recipient selection dropdown 'Send to specific people' with a dropdown arrow, containing a chip for 'John Doe'. A horizontal separator line follows. Below the line is a 'Customize message' section with a close button 'X'. Inside this section, there is a dropdown menu for 'Send from sheet owner' with a dropdown arrow. A dropdown menu is open below it, showing three options: 'Send from Smartsheet Automation' (checked with a checkmark), 'Send from my organization' (with a calendar icon), and 'Send from sheet owner' (with a person icon). Below the dropdown is a text area containing the message: 'Here is an excellent example of a custom message. It goes on for at least two lines.' At the bottom of the configuration panel, there is a 'Message Includes' section with two radio button options: 'All fields' (selected) and 'Specific fields'.

Recap

1

Maximize Your
Collaboration

2

Connect Where Your
Team Lives

3

Automate to Enhance
Your Collaboration

Next steps...

- Stop by the Collaboration booth with any last minute questions or feedback
- Automate and manage your multi-step processes with Dynamic View 4:00 - 5:00 PM
- Attendee Party 5:00 - 7:00 PM
- Implement something new you learned today when you return home!

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

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



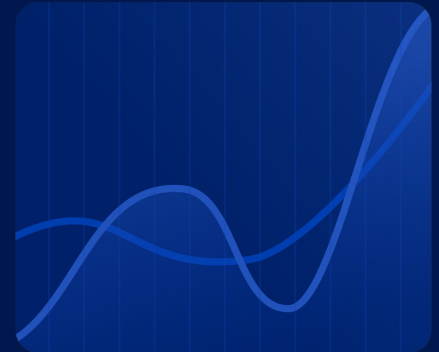
@smartsheet



@smartsheet



@smartsheet



 smartsheet

ENGAGE

**Thank you for
attending!**





Have product feedback?

Let us know!



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