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# Leading Change: A PMO Leader's Smartsheet Journey at Simpson Strong-Tie

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Smartsheet  
Simpson Strong-Tie



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v.07/16

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# Introduction

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# By A Show of Hands!





# Learning Objectives

We will explore strategies you can use to:

- Scale out manual project management solutions using Control Center, Data Shuttle, and Smartsheet Bridge
- Tackle change management head-on by involving stakeholders across the organization, including detractors
- Learn collaboratively with your team to enhance and scale your Smartsheet solutions

# Your Presenters



Alexander Ford  
Customer Success Account Manager



Mallory Pirogovsky  
Director, Project Management Office





# Your Presenters



**Alexander Ford**  
Customer Success Account  
Manager



**Mallory Pirogovsky**  
Director, Project  
Management Office

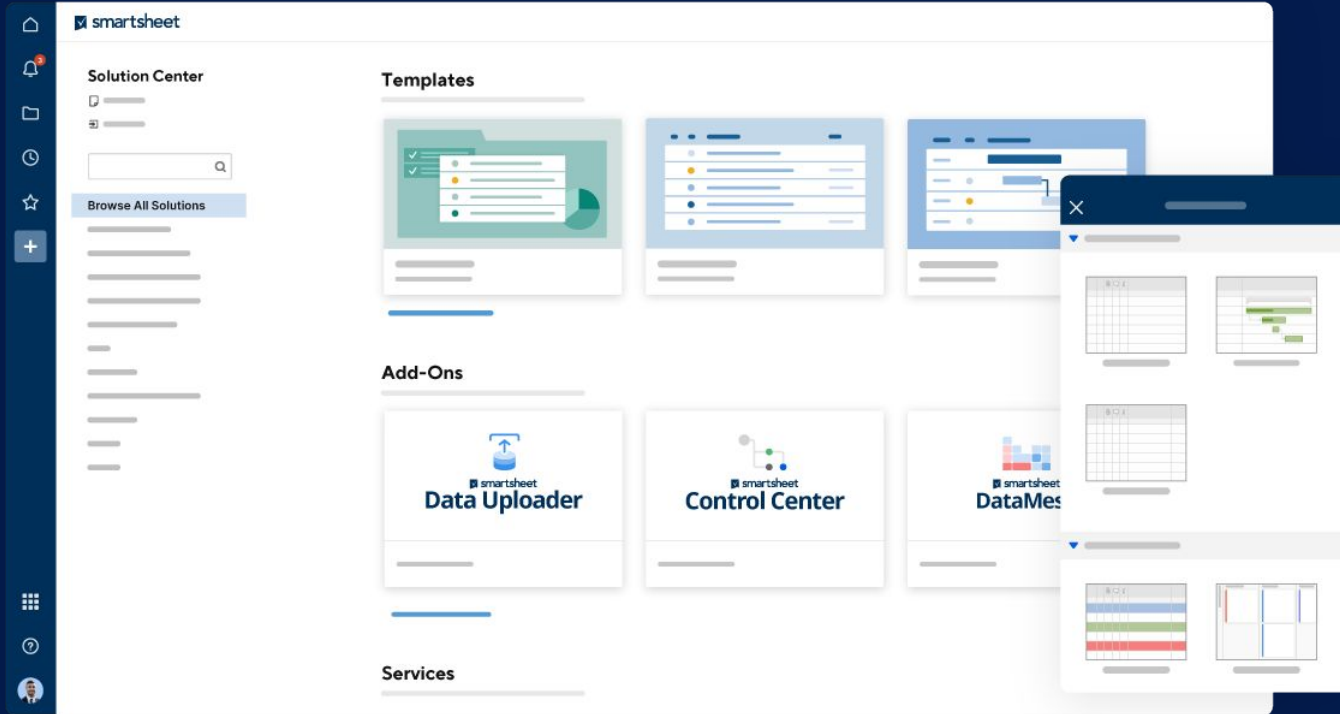


2

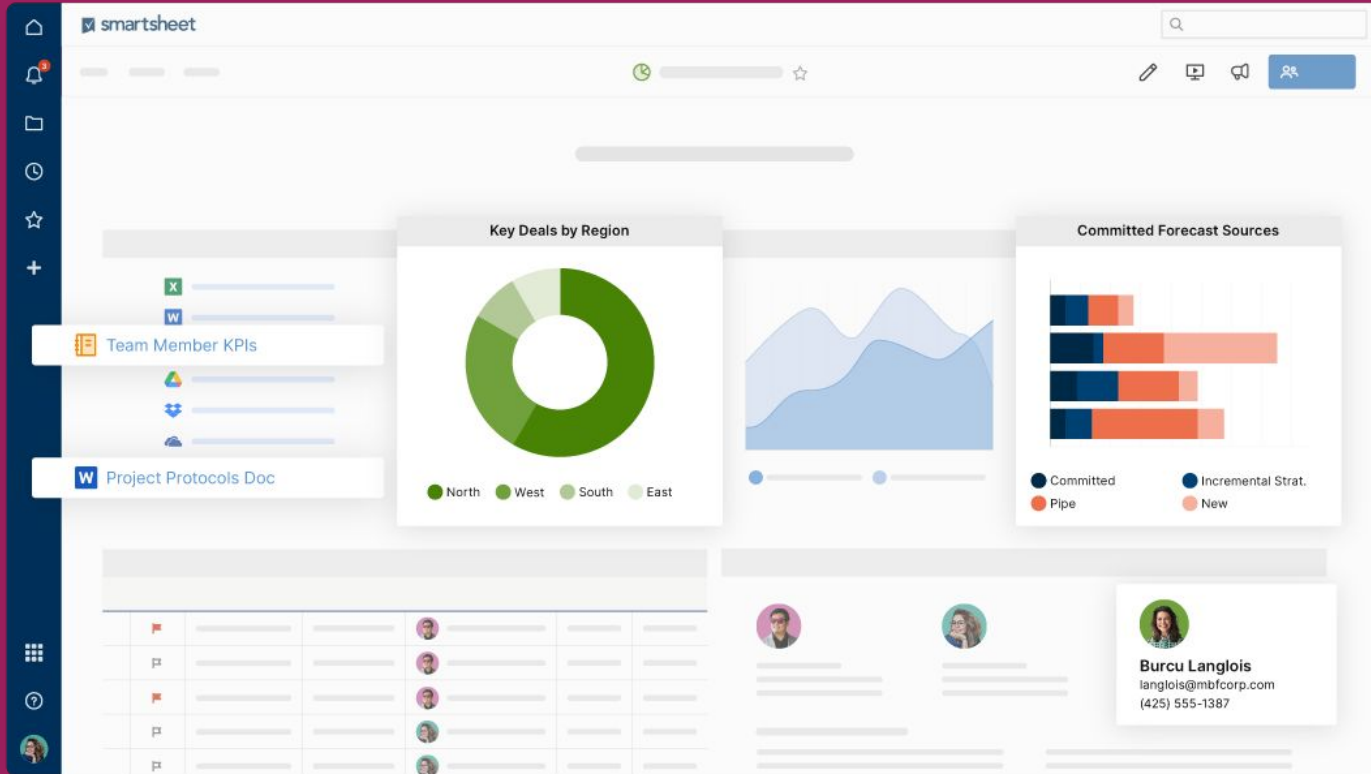
**Just Getting Started...**

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# Getting Started with a Template



# Governance, Automation and Scale



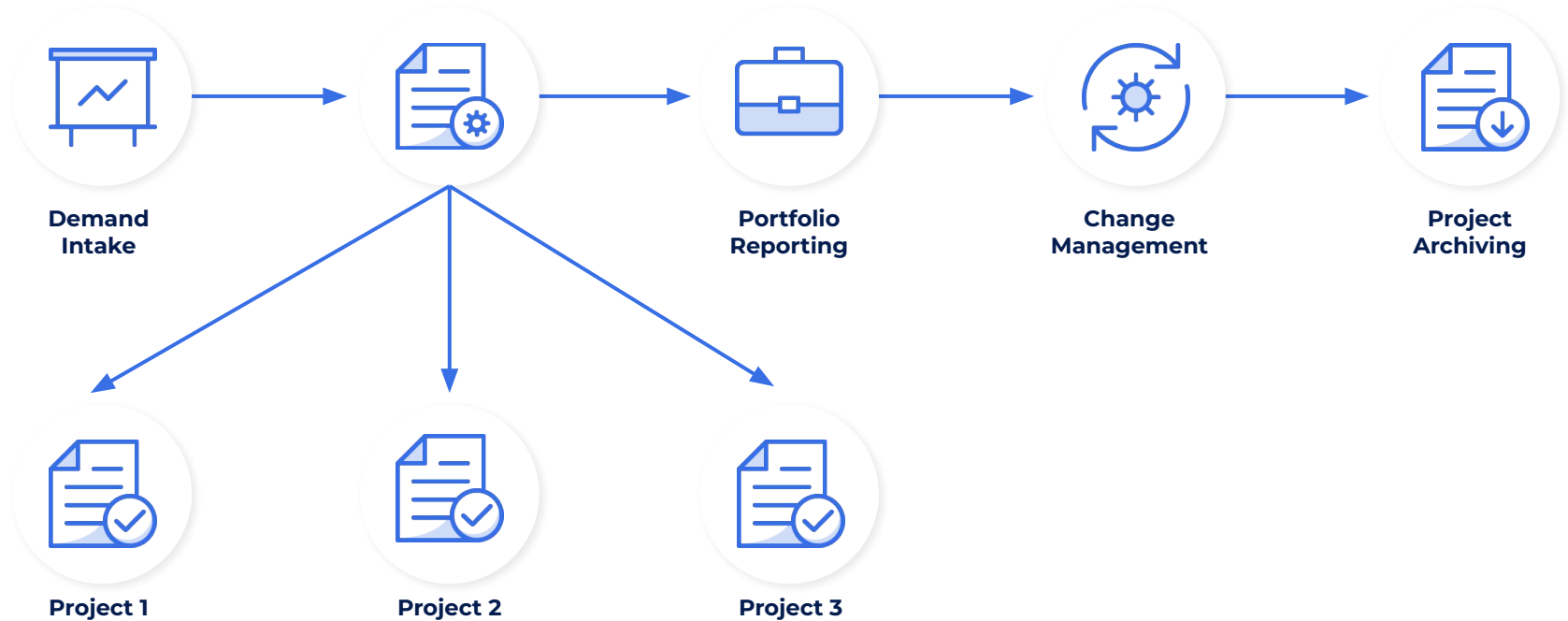
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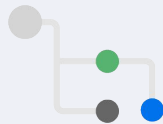
## Scaling the PMO with Control Center & Integrations

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# Portfolio Management with Control Center






# smartsheet Control Center

- Programs
- National Retail Program
- Manufacturing Portfolio
- Innovation - SCC Starter Program
- M&A Portfolio
- Simpson Projects
- Default
- Innovation (2) - SCC Starter Program**
- Northwest Portfolio
- New Program

← Projects Innovation (2) - SCC Starter Program

Blueprints (22) Global Updates (0) Automations (21) Archiving (0) Integrations

<b>INACTIVE NPD</b> Last Modified by Zoe Hurtado - 2/6 7 projects	<b>Software Blueprint</b> Last Modified by Zoe Hurtado - 8/1/2024 13 projects	<b>Other Blueprint</b> Used for projects in innovation that do not fit the other categories. Last Modified by Zoe Hurtado - 7/2/2024 103 projects	<b>Truss Software Implementation</b> Blueprint for the truss software implementation projects. This will be split out for each branch to have their own project plans. Modified by Zoe Hurtado 4/16/2024 3 projects	<b>3D Printing Blueprint</b> Modified by Zoe Hurtado - 7/31/2024 28 projects	<b>CAD File Request Blueprint</b> Modified by Zoe Hurtado - 7/31/2024 18 projects	<b>Code Report Change Blueprint</b> Modified by Zoe Hurtado - 7/31/2024 14 projects	<b>Digitization Blueprint</b> Modified by Zoe Hurtado - 7/31/2024 4 projects
<b>Lab Testing Program Blueprint</b> Modified by Zoe Hurtado - 7/31/2024 102 projects	<b>Material Lab Request Blueprint</b> Modified by Zoe Hurtado - 7/31/2024 14 projects	<b>Obsolescence Blueprint</b> Modified by Zoe Hurtado - 7/31/2024 2 projects	<b>Process Improvement Blueprint</b> Modified by Zoe Hurtado - 7/31/2024 24 projects	<b>Product Modification Blueprint</b> Modified by Zoe Hurtado - 8/1/2024 73 projects	<b>Production Drawing Correction</b> Modified by Zoe Hurtado - 8/1/2024 38 projects	<b>Specification Sheet Blueprint</b> Modified by Zoe Hurtado - 7/31/2024 19 projects	<b>Vendor Qualification Blueprint</b> Modified by Zoe Hurtado - 7/31/2024 5 projects
<b>Product Maintenance Blueprint</b> Modified by Zoe Hurtado - 7/31/2024 31 projects	<b>Mfg QC Issues Blueprint</b> Modified by Zoe Hurtado - 7/31/2024 9 projects	<b>Competitor Code/Compliance</b> Modified by Zoe Hurtado - 7/31/2024 6 projects	<b>ENG NPD/Line Extension Blueprint</b> Modified by Zoe Hurtado - 8/1/2024 73 projects	<b>EU NPD Connector Blueprint</b> Modified by Zoe Hurtado - 9/3/2024 20 projects	<b>EU NPD Anchor/Fastener</b> Modified by Zoe Hurtado - 9/3/2024 9 projects	 <b>+ New Blueprint</b>	

# Portfolio Intake

Forms Connections Dynamic View Official Innovation Intake ☆ Share

Grid View Filter Off

Provisioned	Ready to Provision NPD	Ready to Provision EU NPD Anchor/Fastener	Ready to Provision EU NPD Connector	Ready to Provision 3D Printing	Ready to Provision CAD File	Ready to Provision Code Report	Ready to Provision Competitor/Com...	Ready to Provision Digitization	Ready to Provision Lab Testing	Ready to Provision Material Lab	Ready to Provision Obsolescen...	Ready to Provision Product Modification	Ready to Provision Product Drawing	Ready to Provision Spec Sheet	Ready to Provision Vendor Qual	Ready to Provision Mfg/QC Issue	Ready to Provision Process Improvement	Ready to Provision Product Maintenance	Ready to Provision Product Revenology	Ready to Provision Software	Ready to Provision Other
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# Automation and Conditional Paths

**Approved Checkbox/Status - Reviewer 1**

Trigger: When rows are added or changed

When Review 1 changes to: **Approved**

- Specify another change
- Run workflow: When triggered

Workflow steps:

- Conditions (1)**: Where Engineering Evaluation / Testing - US is one of 3D Printing, 3D Scanning
- Change cell value**: Change cell value in: Approval Status (Approved), Change cell value in: Ready to Provis... (Checked)
- Conditions (1)**: Where Engineering Evaluation / Testing - US is one of CAD File Request
- Change cell value**: Change cell value in: Approval Status (Approved), Change cell value in: Ready to Provis... (Checked)
- Conditions (1)**: Where Engineering Evaluation / Testing - US is one of Code Report Change
- Change cell value**: Change cell value in: Approval Status (Approved), Change cell value in: Ready to Provis... (Checked)
- Conditions (1)**: Where Engineering Evaluation / Testing - US is one of Material Lab Request
- Change cell value**: Change cell value in: Approval Status (Approved), Change cell value in: Ready to Provis... (Checked)
- Conditions (1)**: Where Engineering Evaluation / Testing - US is one of Obsolescence
- Change cell value**: Change cell value in: Approval Status (Approved), Change cell value in: Ready to Provis... (Checked)
- Conditions (1)**: Where Type of Submission (US/Asia) is one of Other
- Change cell value**: Change cell value in: Approval Status (Approved), Change cell value in: Ready to Provis... (Checked)
- Conditions (1)**: Where Engineering Evaluation / Testing - US is one of Process Improvement
- Change cell value**: Change cell value in: Approval Status (Approved), Change cell value in: Ready to Provis... (Checked)

Buttons: Cancel, Save

The screenshot displays the Smartsheet Data Shuttle interface. A modal dialog titled "Choose a workflow type" is open, offering two options: "Upload Grid Data" and "Offload Grid Data". Below the dialog, a table lists existing workflows.

Workflow Name	Source	Action	Target	Last Run ↓	Workflow Type
Accounts payable reporting	Accounting Excel mast...	Update & Add	Quarterly reporting sheet	25 Sep 2020 21:00	Upload On Attachment

# What is Data Shuttle?

**Data Shuttle** provides an automated way to bring data into and out of Smartsheet.

**Upload and offload data to your critical enterprise systems so you can collaborate and have better visibility in a common location**



# Data Shuttle

The screenshot displays the Smartsheet Data Shuttle interface. At the top, there's a search bar for workflows and a notification icon. Below the search bar, there are tabs for 'All', 'Upload workflows', and 'Offload workflows'. A modal window titled 'Create a workflow Data Shuttle' is open, prompting the user to 'Choose a workflow type'. Two options are visible: 'Upload Grid Data' and 'Offload Grid Data'. Below the modal, a table lists existing workflows.

Workflow Name	Source	Action	Target	Last Run ↓	Workflow Type
Accounts payable reporting	Accounting Excel maste...	Update & Add	Quarterly reporting sheet	✓ 25 Sep 2020 21:00	Upload On Attachment



# Bridge



## Flexible, customizable workflows

- Event & Schedule-Based Triggers
- Branching Logic
- HTTP calls, API calls, and JavaScript



## Scale with automation

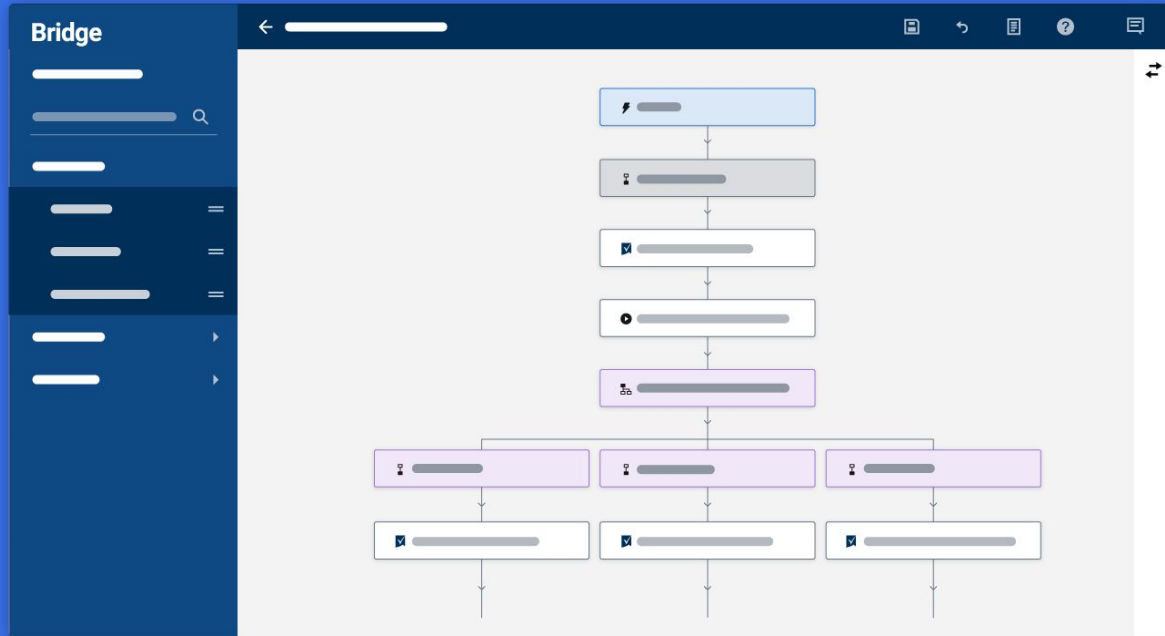
- Cross-Sheet Automations
- Process Confidence
- Automated Ecosystem Administration



## Intuitive user interface

- Drag-and-Drop Interface
- Workflow Templates
- Cross-Platform Automations

# Bridge



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# Change Management and Adversity

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# Change Management (and Aversion)



# Vocal and Silent Detractors





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## Continuous Learning and Growth

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# Teamwork Makes the Dream Work



# Partnership Strategy with Consulting

File Dynamic View PMO Managed Projects ☆

7 Sheets 11 Columns 3 Filters

Unassigned (0)	BC Bobby Carricaburu (8)	GV Gilbert Velasquez (3)	JR Jennifer Rodrigu... (10)	JU Jeremy Jaramillo (16)	JV Juan Vaca (10)	MP Mallory Pirogovsky (3)	ZH Zoe Hurtado (13)
	<b>Market Reporting Deck</b> Business Strategy On Track In Progress 12/18/23 05/13/24 <a href="#">BST-072 - Market Reportin...</a>	<b>Bayou</b> M&A Integration On Track In Progress 05/10/24 11/28/25 <a href="#">Bayou</a>	<b>New Tooling Optimization</b> Bigfoot At Risk In Progress 06/10/23 09/15/28 <a href="#">BF-005 - NT Project Dashb...</a>	<b>Centralized Warehouse Playbook</b> Business Strategy Not Started Not Started 03/12/24 11/18/24 <a href="#">BST-066 - Centralized War...</a>	<b>2024 XLT Leadership Sum...</b> Business Strategy On Track In Progress 03/12/24 08/30/24 11/18/24 <a href="#">BST-078 - 2024 XLT Lead...</a>	<b>Align Bridges to 2030</b> Business Strategy On Track In Progress 03/13/24 08/30/24 <a href="#">BST-063 - Align Bridges to...</a>	<b>Launching Projama</b> Innovation On Track In Progress 05/20/24 09/13/24 <a href="#">INN-0493 - Launching Proj...</a>
	<b>CZ Consolidation</b> Manufacturing Operations On Track In Progress 02/24/23 12/31/24 <a href="#">MO-006 Project Tracking &amp;...</a>	<b>Structura</b> M&A Integration On Track In Progress 05/11/24 04/30/25 <a href="#">Structura</a>	<b>Project Bear Claw</b> Bigfoot Delayed In Progress 06/22/23 04/30/25 03/27/25 <a href="#">BF-004 - Project Bear Claw...</a>	<b>Builder Rebates</b> Business Strategy On Track In Progress 04/29/24 08/28/24 <a href="#">BST-066 - Builder Rebates</a>	<b>Company Fact Resource</b> Business Strategy On Track In Progress 03/18/24 06/30/24 <a href="#">Company Fact Resource</a>	<b>Market Penetration</b> Phoenix In Progress	<b>R&amp;D Transition to PROJIA...</b> Innovation On Track In Progress 07/25/24 08/15/24 <a href="#">INN-1020 - R&amp;D Transition t...</a>
	<b>F&amp;T Cost Allocation</b> Bigfoot On Track In Progress 05/01/23 01/01/25 <a href="#">BF-006 - F&amp;T Cost Allocat...</a>	<b>M&amp;A Portfolio / Process Documentation</b> PMO In Progress 05/01/24 12/31/24 <a href="#">PMO-134 - M&amp;A Portfolio /...</a>	<b>DFW Home Office 2</b> Business Strategy On Track In Progress 03/22/24 01/15/26 12/31/24 <a href="#">BST-087 - DFW Home Offic...</a>	<b>Mega Truss 2x6 Growth Pl... v2</b> Business Strategy On Track In Progress 05/07/24 06/28/24 <a href="#">BST-088 - Mega Truss 2x6...</a>	<b>Issuing Components with Text Traceability</b> Manufacturing Operations On Track In Progress 03/02/23 10/01/24 <a href="#">MO-152 - Issuing Compon...</a>	<b>Portfolio Build Test</b> PMO 09/04/24 <a href="#">PMO-174 - Portfolio Build T...</a>	<b>Product Bootcamp</b> Business Strategy On Track In Progress 08/12/24 10/01/24 <a href="#">BST-098 - Product Bootca...</a>
	<b>S&amp;OP Rebrand</b> Bigfoot On Track In Progress 04/29/23 12/10/24 <a href="#">BF-007 S&amp;OP Rebrand Proj...</a>		<b>Truss Optimization</b> Manufacturing Operations On Track Not Started 03/27/24 03/30/24 <a href="#">MO-028 - Truss Optimization</a>	<b>Roles and Responsibilities (MT-088)</b> Business Strategy On Track In Progress 05/07/24 09/30/24 <a href="#">BST-091 - Roles and Respo...</a>	<b>Capacity Dashboards and Capex Planning</b> On Track In Progress 05/15/23 04/25/24 <a href="#">BF-011 - Project Tracking &amp;...</a>		<b>EU Project (1a, 1b, 1c)</b> Innovation On Track In Progress 07/17/24 09/27/24 <a href="#">INN-1018 - EU Project (1a, 1...</a>
	<b>Inventory Re-Balancing</b> Manufacturing Operations		<b>Truss Packaging Project</b> Manufacturing Operations On Track Not Started #INVALID DATA TYPE #INVALID DATA TYPE 05/07/24 <a href="#">MO-161_MO-173 - Truss Pa...</a>	<b>Handover (MT-088)</b> Business Strategy On Track In Progress 05/07/24 09/30/24	<b>Canadian Labeling</b> PMO On Track In Progress 09/26/24		<b>EU Project (1d) - Rationalization</b> Innovation On Track

# Learning Resources



## [Smartsheet University](#)

Self guided online training through our e-learning site.



## [Help and Learning Center](#)

Learning tracks, help articles, webinars, and instructions for licensed and non licensed users.



## [Smartsheet Community](#)

Get help from other Smartsheet users across the globe.



## [Pro Desk](#)

Each licensed user on Pro and Premium support has access to 10, 30 minute 1:1 sessions with a Smartsheet Consultant per year.



## [Tech Support](#)

Submit a support ticket [here](#). Or, contact support by phone from 6am-6pm (PST) at (844) 498-5364.



## [Other Resources](#)

6

## Winning Buy In and Seeing Results

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# Finally, Winning Over The Detractors!



# Where do we go from here?



7

Q&A

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8

## Conclusion

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# Next steps...

- Considering Mallory's example for scaling her PMO solution and other examples you've seen this week at Engage, consider automation and integration solutions available with Smartsheet to enhance your business processes.
- Develop an action plan for addressing change management at your organization, with a focus on enlisting your stakeholders and the detractors (especially the silent ones!)
- Take steps to further educate yourself on maximizing your use of Smartsheet. Consider finishing a learning track on Smartsheet University, becoming Smartsheet certified, or learning more about the powerful capabilities that will help you take your solution to the next level (i.e. Control Center, Data Shuttle and Bridge).

## 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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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

# 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



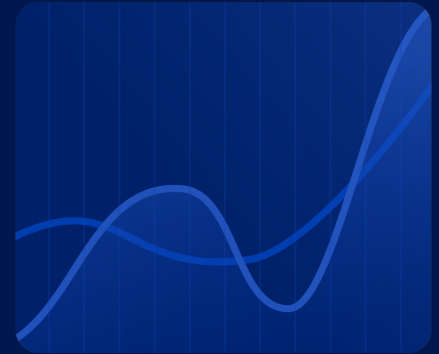
@smartsheet



@smartsheet



@smartsheet



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**Thank You!**