

 smartsheet

ENGAGE

Automate and Manage Your Multi-step Processes

with Dynamic View

Christopher Brown, Anchal Kumar, Josh Reilly



smartsheet

ENGAGE

v.07/16

Legal

Certain information set forth in this presentation may be “forward-looking information.” Except for statements of historical fact, information contained herein may constitute forward-looking statements. Forward-looking statements are not guarantees of future performance and undue reliance should not be placed on them.

Such forward-looking statements necessarily involve known and unknown risks and uncertainties, many of which are and will be described in Smartsheet’s filings with the US Securities and Exchange Commission, and these risks and uncertainties may cause actual performance and financial results in future periods to differ materially from any projections of future performance or results expressed or implied by such forward-looking statements. Although forward-looking statements contained herein are based upon what Smartsheet management believes are reasonable assumptions, there can be no assurance that forward-looking statements will prove to be accurate, as actual results and future events could differ materially from those anticipated in such statements. Smartsheet undertakes no obligation to update forward-looking statements except as required by law.

This presentation is proprietary to Smartsheet and the content herein is confidential and intended for permitted internal use only. This content shall not be disclosed to any third party that is not under an obligation of confidentiality to Smartsheet.

Smartsheet is a registered trademark of Smartsheet Inc. The names and logos of actual companies and products used in this presentation are the trademarks of their respective owners and no endorsement or affiliation is implied by their use.

Poor collaboration, lack of visibility, and time-consuming reporting contribute to project failure.

26%

poor cross-team
collaboration¹

15%

outdated processes¹

12%

lack of project
visibility¹

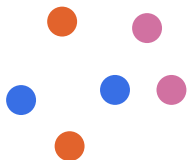
8%

time consuming
reporting¹



How Work Gets Done is Evolving

Disjointed Workflows



Unstructured, disorganized activities make it difficult to track requests, find relevant information, and collaborate effectively with stakeholders.

Structured Process



Scalable processes accelerate work, making it simpler to intake data, collaborate and execute, and report on the information that matters.



Meet Our Speakers



Christopher Brown
Sr. Sales Engineer
Smartsheet



Anchal Kumar
Sr. Product Manager
Smartsheet



Josh Reilly
Sr. Solution Architect
Power Engineers



A Look Forward

What we will cover

1

How to Identify Your
Multi-Step Processes

2

Transforming Work With
the Power of Dynamic
View - Power Engineers

3

It's Demo Time!

4

Next Steps + Resources

Learning Objectives

What should you walk away with

IDENTIFY

Learn how to identify your tangible multi-step processes.

BUILD

Learn how to build a successful process to streamline collaboration and approvals.

APPLY

Learn how to create a Dynamic View that leverages automation and integrates with your work in Smartsheet.

1

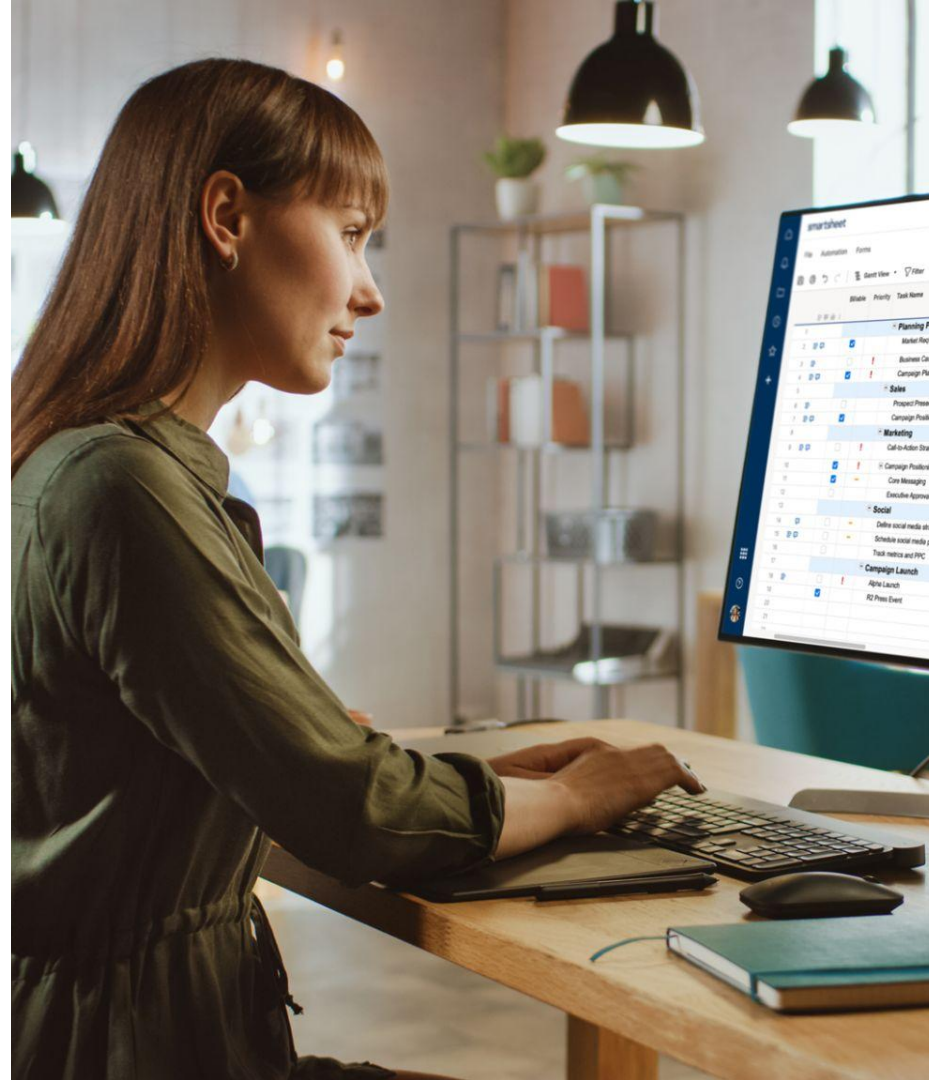
Patterns of Work

Common Multi-Step Processes

 smartsheet
ENGAGE

Recognizing Your Patterns of Work

- Multiple stakeholders
- Sensitive information
- Asynchronous work
- Repeatable work
- Need for a defined process
- Reporting requirements



Identifying Common Multi-Step Processes



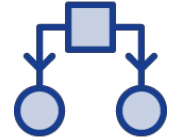
**External
collaboration**



**Work requests
and ticketing**



Approvals



**Grant and
facilities
management**



**Order and
contract
management**



**Service and
invoice
tracking**



**Employee
evaluations and
onboarding**



**Project budget
tracking**

Meet Dynamic View

Collaborate with confidence

Restrict view

Apply sheet filters to designate what data appears in the view and for which users.

Field logic

Show or hide fields based on conditions in the underlying sheet or Dynamic View.

Focus on what matters

Details panel

Provide and gather information by configuring the details panel to show specific fields when a user selects a row.

Embed and interact

Centralize work by integrating Dynamic View directly into a dashboard or WorkApp.

Provide in-context guidance

New item submission

Allow users to create new entries.

Custom labels

Provide additional context for users with custom field labels.



2

The Power of Dynamic View with POWER Engineers

Changing the Way Work Gets Done

 smartsheet

ENGAGE

Who We Are

Power Engineers

Industry

Utility Engineering

Organization size

4000+ Employees

Region

North America

Provider of utility engineering services for most major IOU utilities in the US and Canada across all lines of business.



 smartsheet

ENGAGE

What's the Problem?

Large utility client for Substation business unit, engineering 100+ substations using internal resources and 4 subcontractors.

All scheduling done internally at the client using Primavera P6. Minimal resources available to make updates in the client system.

1

Client requires schedule updates on all projects - **4500-5000 schedule data points** at any one time

2

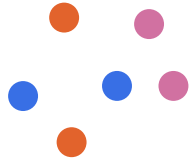
Export data, run multiple macros in Excel, remove irrelevant lines, and collate comments across all engineers both internal and external

3

Process took **weeks out of each month** just for it to start all over again.

Transforming the Work

Disjointed Workflows



- Slow, inaccurate reporting
- Manual, irregular review process leading to missed data
- Emailing 5 different Excel spreadsheets across 80+ internal and external collaborations
- Collaborators having to scroll through thousands of records to find what they need
- Liability around confidential contractor data

Transforming the Work

Disjointed Workflows



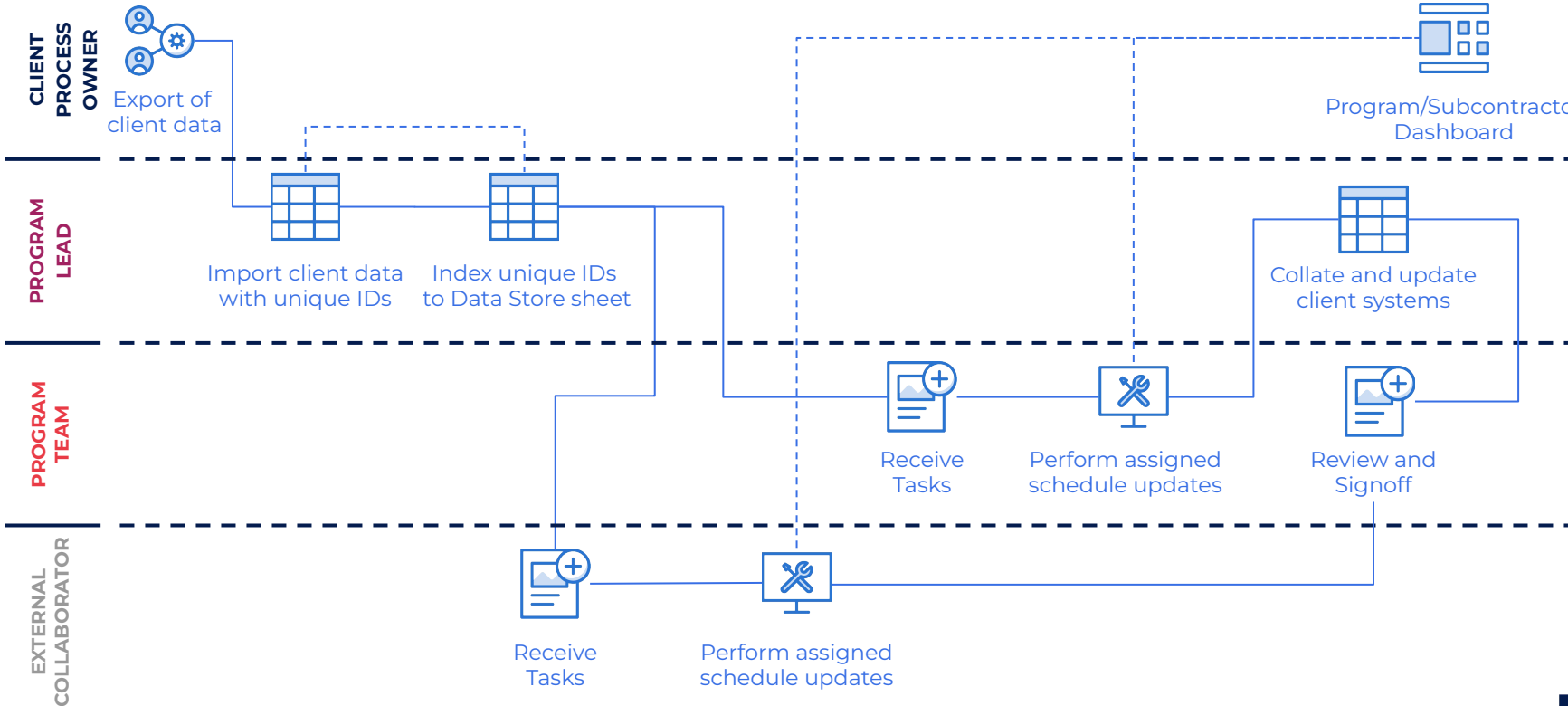
- Slow, inaccurate reporting
- Manual, irregular review process leading to missed data
- Emailing 5 different Excel spreadsheets across 80+ internal and external collaborations
- Collaborators having to scroll through thousands of records to find what they need
- Liability around confidential contractor data

Structured Process

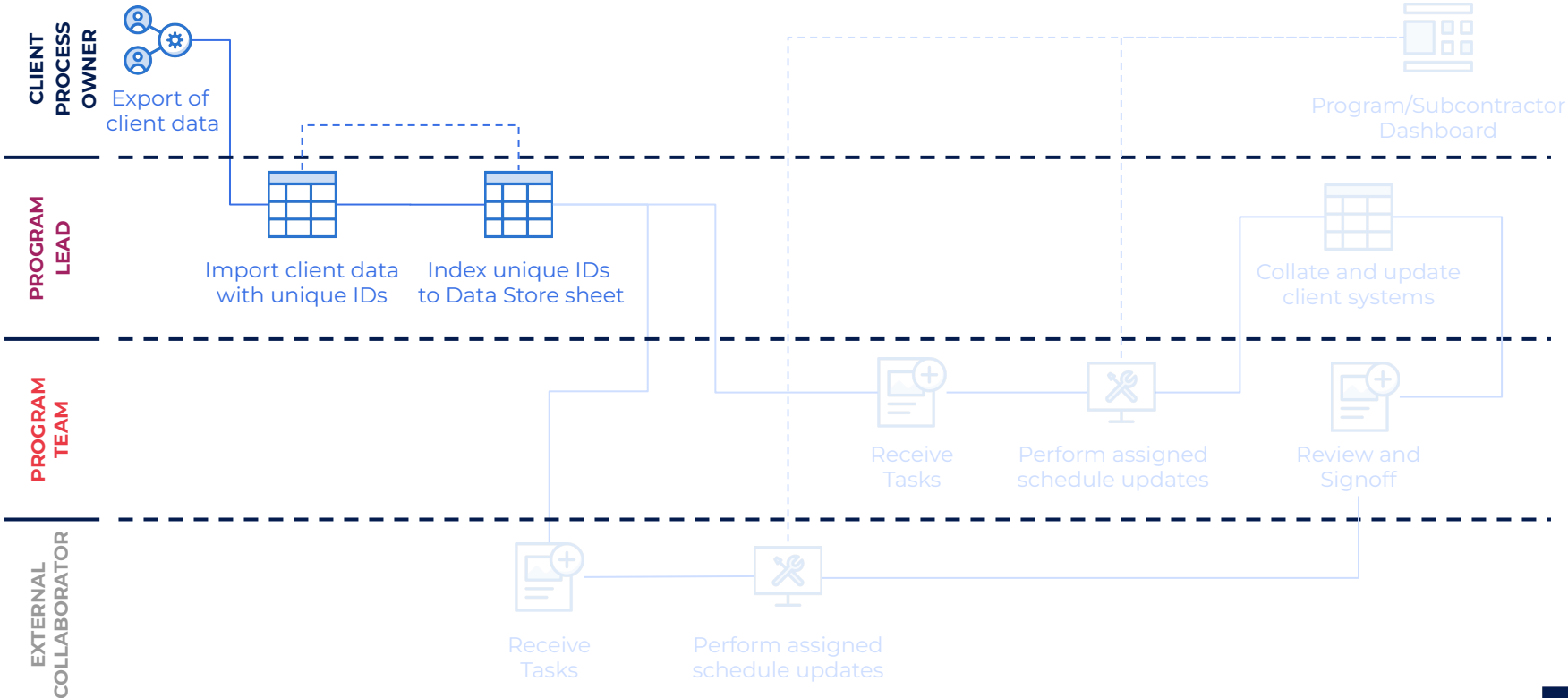


- Real time metrics, increasing reporting accuracy
- Standardized review cycles
- Defragment data collection process
- Collaborators see only relevant data they need to view and action on
- Granular control over sensitive contractor data

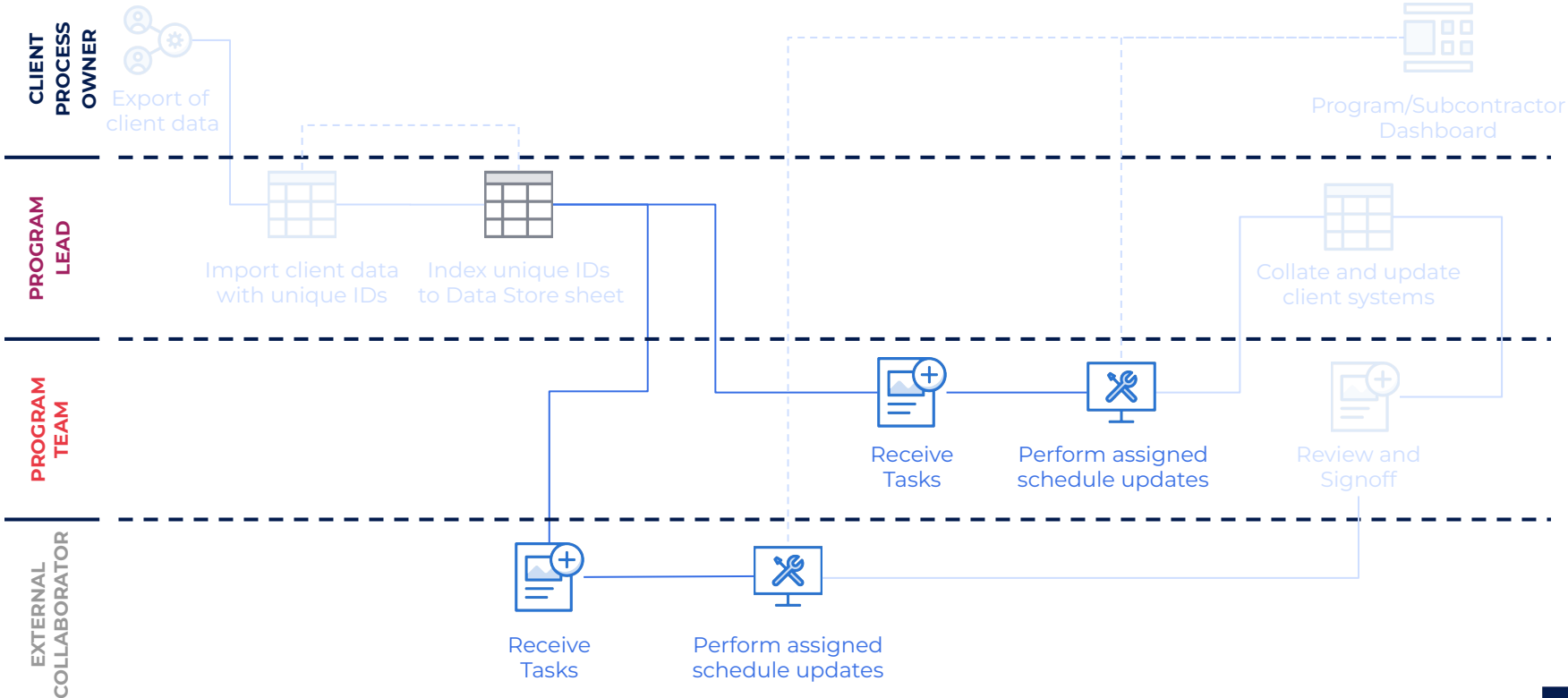
Building the Process



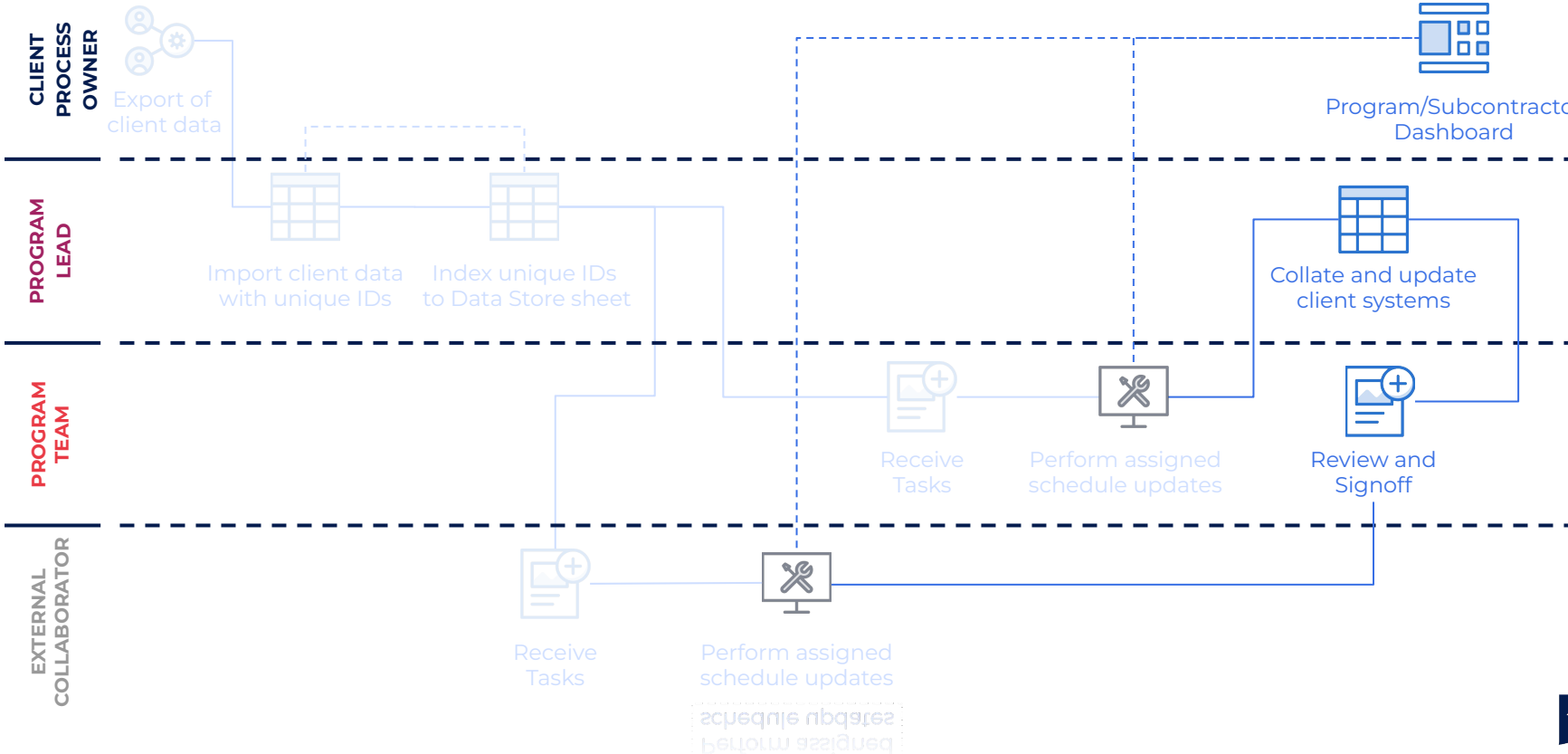
Building the Process



Building the Process



Building the Process



Realizing the Impact

150%
Increase in
Productivity

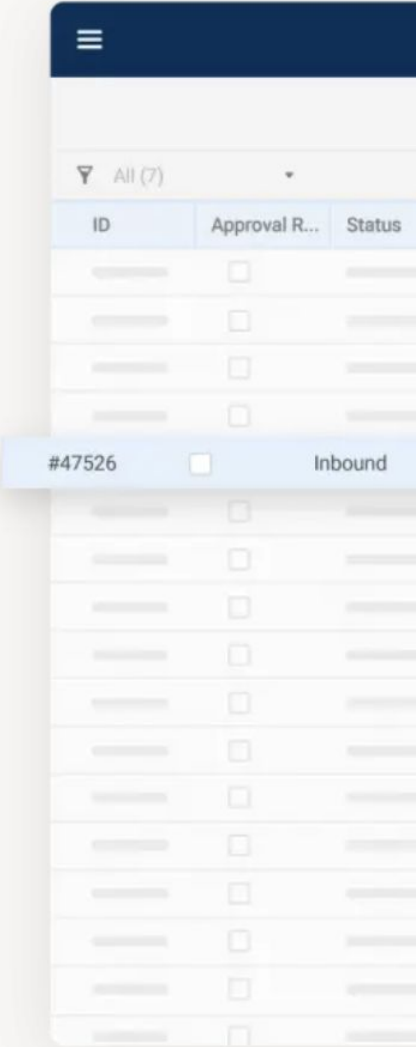
Automated two weeks worth of work each month.

4x
Added Process
Visibility

Increased reporting frequency from once a month to once a week.

50%
Increase in
Reporting

96% of schedule lines are now reported on each week, up from 64%.



3

Demo

Build a Dynamic View with Anchal Kumar

smartsheet

ENGAGE

Tips + Tricks

for building your first Dynamic View

- Draw your process
- Start with a sheet
- Use logic after the initial submission
- Built automations into the underlying sheet
- Embed Dynamic View in a WorkApp or Dashboard
- Use Smartsheet groups or domains for sharing
- Set up filters for your end users

The top screenshot shows a Smartsheet Dynamic View titled "Dynamic View" with a filter set to "In Progress". It displays a table with the following data:

RYG	ID	Prio	Targeted Co...	Assignee	Request Details	Request Title	Department	Days Since...	Requested...	Status	Requester
●	#8325	—	2020-02-13	Kirk Caskey	Pull a margin report for last quarter o...	Margin Report	Marketing	32	2020-01-06	Inbound	Alex Mattson
●	#8328	—	2020-02-28	Kirk Caskey	Need to check the current Black Friday...	Inventory Check	Sales	22	2020-01-16	Inbound	Brent Williams
●	#8330	—	2020-03-18	Kirk Caskey	Please pull a merchandising report for...	Merch Report	Sales	11	2020-01-27	Inbound	Brent Williams
●	#8333	—	2020-05-12	Kirk Caskey	I would like to determine if a vendor s...	Vendor Data	Marketing	7	2020-01-31	Inbound	Henry McNeal
●	#8336	—	2020-03-04	Kirk Caskey	We need an analysis pulled for the ho...	Sales Report	Sales	4	2020-02-03	Inbound	Elza Warren

The bottom screenshot shows a Smartsheet sheet titled "Detailed Venue Plan" with a similar table of request items. The table structure is identical to the one above, showing various request details, titles, departments, and requesters.

Identifying Common Multi-Step Processes



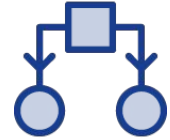
**External
collaboration**



**Work requests
and ticketing**



Approvals



**Vendor
management**



**Order and
contract
management**



**Service
delivery**



**Performance
reviews**



**Revenue
forecasting**

Learning Objectives

What should you walk away with

IDENTIFY

Learn how to identify your tangible multi-step processes.

BUILD

Learn how to build a successful process to streamline collaboration and approvals.

APPLY

Learn how to create Dynamic View that leverages automation and integrates with your work in Smartsheet.

The screenshot shows the Smartsheet interface for MBFCORP. The top navigation bar includes 'File', 'Automation', 'Forms', 'Connections', and 'Dynamic View'. Below this is a toolbar with icons for save, print, undo, redo, and a 'Grid View' dropdown. A 'Dynamic View' menu is open, showing options to '+ Create Dynamic View' and 'Manage Dynamic Views'. A tooltip for 'Create Dynamic View' is displayed, containing the text 'Streamline processes by sharing only the right information at the right time.' and a 'Learn More' link. The background shows a table with a 'Category' column containing 'Status', 'Not Started', 'In Progress', and 'Closed'.

	Category
1	Status
2	Not Started
3	In Progress
4	Closed

Easy Entry Points

Access Dynamic View directly from your sheet or report

Create and manage your views

Want to Try Dynamic View?


Start an Evaluation to explore!

Evaluate Dynamic View ✕

Share only what you need at the right time

- ✓ Share without giving access to the whole sheet
- ✓ Simplify sheets and reports for different audiences
- ✓ Automate multi-step processes

Learn more about the [Dynamic View evaluation](#)



[Continue to Dynamic View](#)

Next steps...

- Start a Dynamic View evaluation
- Visit Smartsheet.com/webinars

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



ENGAGE