



Smartsheet at WSU: User Group

Tyson Dickman
Customer Success Manager



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Topics

WSU HEP User Group

- Account Team Introduction
- How can Smartsheet be used?
- Enterprise Plan + Premium Apps
- Resources for Success
- Product Updates



Smartsheet Account Team

David Gerbino, Account Executive

- Defining & Enabling the Vision
- Product & Service Pricing
- Contract Management

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Tyson Dickman, Customer Success Manager

- Sustaining & Enabling the Vision
- Strategy Partner
- General Smartsheet Questions

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Customer Success Manager

What We Do:

- Help your organization leverage Smartsheet to achieve your business goals
- Identify your strategic vision and partner with you to put it into action

How We Do It:

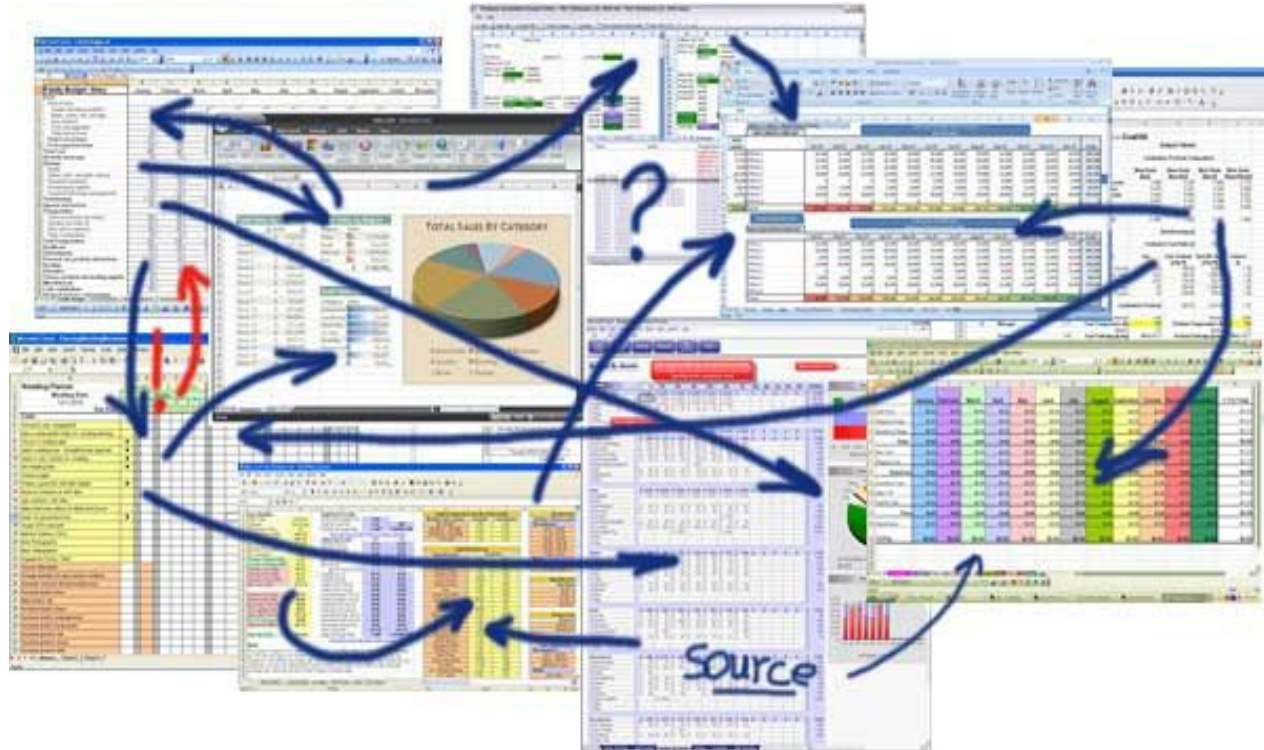
- Assistance in building out Smartsheet workflows that align with your business initiatives
- Offer Smartsheet methodology & best practices
- Drive user adoption and knowledge

How You Benefit (from working with us):

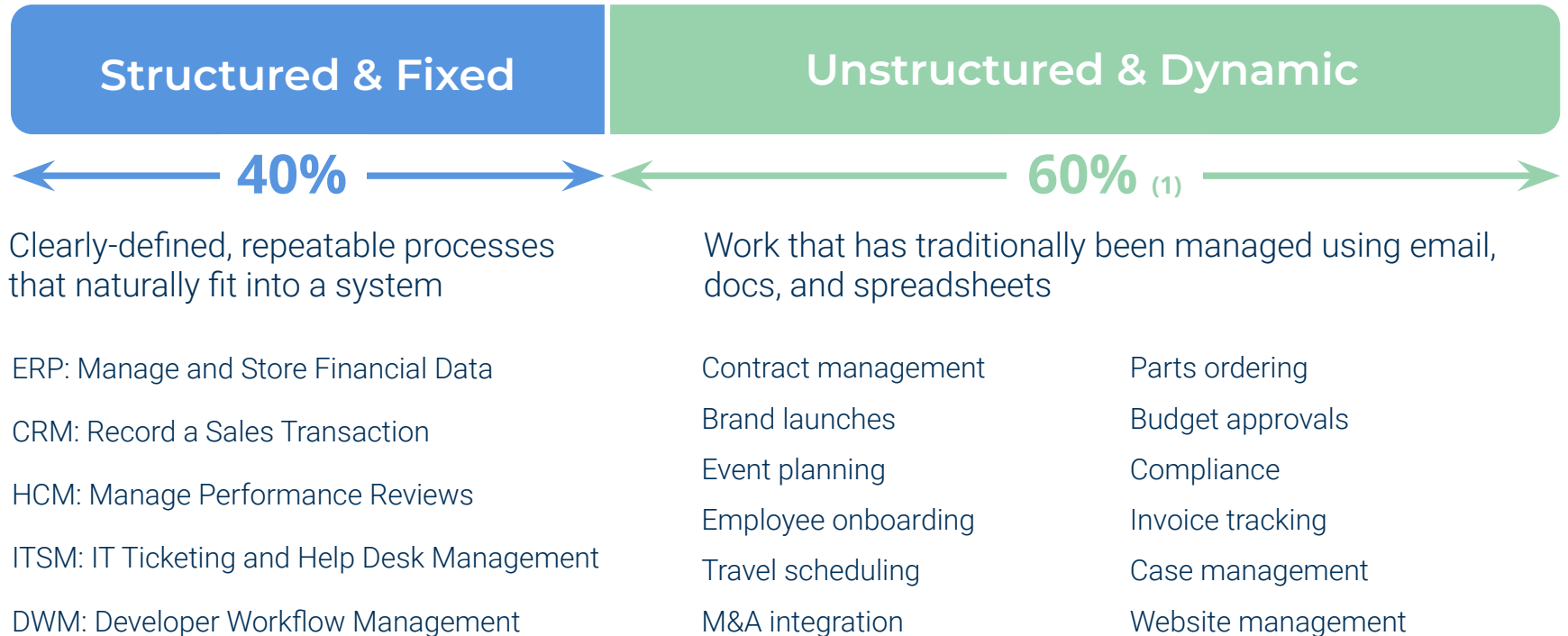
- Time to value: working with me will help you understand your path to success, get the proper guidance to get you there, and avoid common pitfalls
- I am your liaisons to other internal teams (Support, Product, Training, etc)
- Helping you realize your Smartsheet potential and protecting your investment



We are solving for this ...



How Work Gets Done



Notes

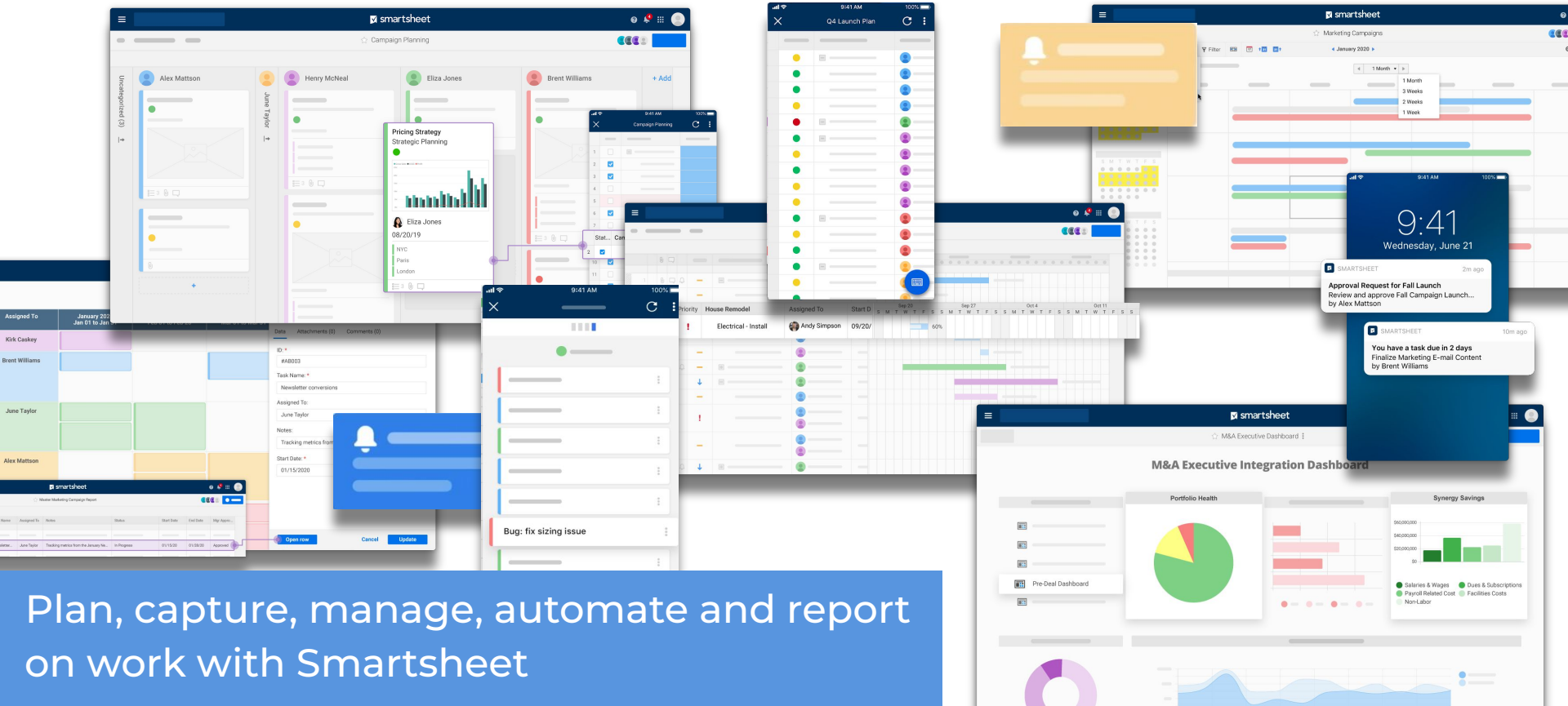
1. Gartner, Inc., Effortless Visibility Is Key to Managing Empowered Workers Without Losing Control, March 30, 2017

The Dynamic Layer *unifies* the enterprise tech stack

Empowering more effective work by connecting people, information and systems.



Collaborative Work Management Platform



Plan, capture, manage, automate and report on work with Smartsheet

Over 2,000+ documented use cases

[Smartsheet Higher Education Solution Catalog](#)

<p>Sales</p> <ul style="list-style-type: none">Lead assignmentSales enablementPipeline managementContract management 	<p>IT</p> <ul style="list-style-type: none">Software migration planningHelp deskIT ticketingManaging development 	<p>Operations</p> <ul style="list-style-type: none">Schedule deliveriesTrack invoicesSales operationsVendor requests 	<p>Marketing</p> <ul style="list-style-type: none">Manage brand launchesInvestor relations trackingEvent planningWebsite management 	<p>Engineering</p> <ul style="list-style-type: none">Feature developmentBug trackingCase management 	<p>Legal</p> <ul style="list-style-type: none">Patent app processingCase managementClient onboardingDue diligence review 
<p>Project Management</p> <ul style="list-style-type: none">Product initiationCommissions calculationM&A integration 	<p>Administrative</p> <ul style="list-style-type: none">Travel schedulingMeeting schedulingCompliance 	<p>Human Resources</p> <ul style="list-style-type: none">Employee onboardingOff-boarding processingTalent acquisitionBenefit tracking 	<p>Finance</p> <ul style="list-style-type: none">Audit preparationPurchase order managementExpense approvalsBudget approvals 	<p>Customer Service</p> <ul style="list-style-type: none">Issue escalationAssign ticketsSchedule employeesReturns processing 	<p>Industry Verticals</p> <ul style="list-style-type: none">Claims adjustingClinical trial trackingParts orderingContractor schedulingProperty management 

Higher Education Use Case Examples

Campus maintenance & Capital construction

- Quickly capture facilities issues
- Connect field staff with call centers
- Import financial data from any source without scripting, coding or manual copy/paste
- Track spend vs approved budgets in real time
- Initiate, track and close RFI's and submittals in real time

Grant management

Pre-Award: Manage grant application requests, automate approval reviews, instantly launch approved tracking sheet for approved grant applications.

Post-Award: Automatically create Grant fulfillment tracking sheets, reports and dashboards, provide appropriate visibility to the P.I., Import Financial Data from any source without scripting.

IT infrastructure management

- Improve project tracking and program reporting
- Increase visibility to critical issues early
- Import data from your enterprise systems into Smartsheet: ERP, CRM, database, and more

Clinical trial intake

- Track expenses for patient trial visits and understand summary costs by patient
- Define and set cost by trial week to understand full program expenditures
- Summarize and analyze data and create meaningful comparisons, patterns, and trends

Fundraising

- Plan fundraising events by tracking all tasks in one place
- Reduce post-event administration by seamlessly tracking budget spend
- Reference student information to validate student ID, major, school, email address or advisor and driving workflow and automation from the data

Marketing and events

- Coordinate, plan, execute, and report on campaigns
- Enable borderless collaboration, quickly pivot event details and plans, and provide end-to-end visibility of your programs
- Manage and share engaging, interactive calendars

Contracts management & procurement

- Manage your contracts for different departments
- Track contract status, get alerted when new contracts are submitted or about to expire
- Automate approval processes
- Share information to the right people at the right time for viewing or editing

Strategic planning

- Review project details that align with each of your overall strategic objectives
- Monitor projects by risk, category, or person
- Use a form to capture new project requests

Enterprise Plan



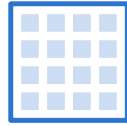
Enterprise Extras

Everything in the Business Plan, plus:

- Workapps
- DocuSign Integration



Unlimited Sheets



Customized user experience



Access to our online education library



Phone-based technical support



Center of Excellence and Certification Exam



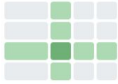
Enable access to Event Reporting*

* For-fee premium add-on.



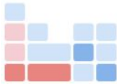
Premium Applications

Pivot App:



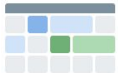
Summarize and analyze large data stored in sheets or reports and create meaningful comparisons, patterns, and trends.

DataMesh:



Eliminate typos, duplicative data entry, and unnecessary work by mapping data between large sheets and reports. (VLOOKUP)

Calendar App:



An interactive and flexible calendar view that allows you to build shareable calendars with custom details.

Dynamic View:



Enables business owners to share information to the right people at the right time for viewing or editing.

Connectors & Uploaders



Salesforce Connector:

Enable teams to easily update and share information between platforms with the Salesforce Connector, and ensure that all stakeholders are viewing the most up-to-date information.



Jira Connector:

Provide visibility into IT and software development projects being tracked in Jira by automatically synchronizing issues – whether edited in Smartsheet or Jira – ensuring every record is up to date.



Data Uploader:

Centralize disparate data, drive collaboration, provide real-time visibility into multiple business systems, and empower your team to be more efficient through effective work execution.

Resources for Success



Solution Center

Solution Sets + Add-Ons

Explore more about what you can accomplish in Smartsheet. Featuring free solution template sets and information regarding add-ons to enhance your Smartsheet capabilities.

<http://app.smartsheet.com/new>

The screenshot displays the Smartsheet Solution Center interface, which is organized into several sections:

- Browse All Solutions:** A header section with the subtitle "Featured templates, add-ons, and services". It contains a row of six items:
 - Template Project Launch Plan:** A Gantt chart template.
 - Add-On Accelerator for IT PMO:** An add-on for IT Project Management Office.
 - Template Team Portal:** A template for team collaboration.
 - Add-On Control Center:** An add-on for project control.
 - Template Project Tracking and Rollup:** A template for tracking and reporting.
 - Template Project with Gantt Timeline:** A template for project scheduling.
- Templates:** A section titled "Jump-start your work with pre-built sheets you can modify". It features a grid of six templates:
 - Meeting Management:** A template for organizing meetings.
 - Inventory Management:** A template for tracking stock levels.
 - Agile Project with Gantt:** A template for agile project management.
 - Sales Pipeline Tracking and Reporting:** A template for sales performance.
 - Bug Tracker Board:** A template for tracking software issues.
 - Project with Gantt & Dependencies:** A template for project planning.
- Add-Ons:** A section titled "Work seamlessly with other apps, integrations, and connectors". It features a grid of six add-ons:
 - Smartsheet Dynamic View:** An add-on for data visualization.
 - Data Uploader:** An add-on for importing data from other sources.
 - Smartsheet for Tableau:** An add-on for data analysis.
 - Customer Engagements:** An add-on for managing customer relationships.
 - Calendar:** An add-on for scheduling.
 - Workplace by Facebook:** An add-on for social media integration.

Help and Support

Online Help Center

Help Articles, Community & Training

<https://help.smartsheet.com>

Support Team

Support is available 24 hours a day, 7 days a week through the Support web contact form.

<https://help.smartsheet.com/contact>

Phone: 1-(844) 498-5364

[WSU Higher Education Plan](#)



Smartsheet University

Training Videos & Instructor Led Webinars

- Training Tracks
- Core Foundation Badge
- Webinar Calendar

* Instructor Led Training can be added with All Access Pass

Learn how Smartsheet can help you improve how you work. From Help Articles to Best Practice Webinars, you'll find the resources you need to be successful

<https://smartu.smartsheet.com/>

Learning Center Help Articles Community

Filter Search Search Search

What's New:
Navigating the New Smartsheet UX
New Column Descriptions
Direct Messages in Microsoft Teams

Get Started
Basics of building a sheet

Smartsheet Intermediate
Track and Automate

Shared Users
Capabilities as a shared user

System Admin
Manage your multi-user account

Best Practice Webinars
New functionality and tips & tricks

Welcome to the Smartsheet Learning Center

The Smartsheet Learning Center provides centralized self-service resources to learn how to use Smartsheet.

ProDesk

Schedule time with a ProDesk Expert

<https://www.smartsheet.com/pro-desk>

Pro Desk delivers practical one-on-one coaching sessions with a Smartsheet expert to accelerate your setup time and help you optimize your projects, programs, and processes.

10 sessions per licensed user

During a 30 minute session, customers get assistance with any of these topics:

- Sheet Management
- Account Management, Login or Signup
- Automation and Formulas
- Collaborative Features



One Team, one mission.

Professional Services

Solution Services

Partners with customers during all phases of their SMAR journey to build, configure, & launch solutions.



Consulting

Partners with customers to build & deploy custom solutions that provide a strategic impact to their business.



Training

Delivers customized training via ILT, on-site workshops, or self-paced learning through CoE.



Ongoing & recurring programs

- Advisory Councils
- Business Reviews
- [Early Adopter Program](#)
- End User Apps & Tools dash*
- End User Onboarding*
- Joint Enablement Plan
- [Mobilizer Program](#)

- Overachievers Program
- Power Hours
- Renewal Reviews
- [Smartsheet Community](#)
- Smartsheet Council
- [Smartsheet Webinars](#)
- [Virtual User Groups](#)

*These programs can be used for one-time, group onboarding, ongoing onboarding for new users, or both.

Stand alone events/activities

- Account Map
- Business Impact Survey
- Custom Resource Portal
- Custom Screens
- Customer Story

- End User Onboarding*
- Feature Implementation Plan
- Joint Scorecard
- Smartsheet Day
- Use Case Survey

*This can be a one-time, group onboarding program, an ongoing program for new users, or both.

Product Update

[Product Release News](#) - sign-up for updates!

[Product Feedback Form](#) - we want to hear from you!

Recent Releases:

- New Support Center
- Mobile Improvements
- Dashboards - clickable title widgets
- Automations: run / test workflows



Q & A



