Smartsheet at WSU: User Group

Tyson Dickman
Customer Success Manager

1/11/23
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
david.gerbino@smartsheet.com

Tyson Dickman, Customer Success Manager
- Sustaining & Enabling the Vision
- Strategy Partner
- General Smartsheet Questions
tyson.dickman@smartsheet.com
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

Structured & Fixed

- Clearly-defined, repeatable processes that naturally fit into a system
- ERP: Manage and Store Financial Data
- CRM: Record a Sales Transaction
- HCM: Manage Performance Reviews
- ITSM: IT Ticketing and Help Desk Management
- DWM: Developer Workflow Management

Unstructured & Dynamic

- Work that has traditionally been managed using email, docs, and spreadsheets
- Contract management
- Brand launches
- Event planning
- Employee onboarding
- Travel scheduling
- M&A integration
- Parts ordering
- Budget approvals
- Compliance
- Invoice tracking
- Case management
- Website management

Notes
The Dynamic Layer *unifies* the enterprise tech stack

Empowering more effective work by connecting people, information and systems.
Plan, capture, manage, automate and report on work with Smartsheet
# Over 2,000+ Documented Use Cases

**Smartsheet Higher Education Solution Catalog**

<table>
<thead>
<tr>
<th>Sales</th>
<th>IT</th>
<th>Operations</th>
<th>Marketing</th>
<th>Engineering</th>
<th>Legal</th>
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<tr>
<td>Lead assignment</td>
<td>Software migration planning</td>
<td>Schedule deliveries</td>
<td>Manage brand launches</td>
<td>Feature development</td>
<td>Patent app processing</td>
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<td>Sales enablement</td>
<td>Help desk</td>
<td>Track invoices</td>
<td>Investor relations tracking</td>
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<td>Pipeline management</td>
<td>IT ticketing</td>
<td>Sales operations</td>
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<td>Contract management</td>
<td>Managing development</td>
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<td>Project Management</td>
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<td>Product initiation</td>
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<td>Commissions calculation</td>
<td>Meeting scheduling</td>
<td>Off-boarding processing</td>
<td>Purchase order management</td>
<td>Assign tickets</td>
<td>Clinical trial tracking</td>
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<td>M&amp;A integration</td>
<td>Compliance</td>
<td>Talent acquisition</td>
<td>Expense approvals</td>
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<td>Budget approvals</td>
<td>Returns processing</td>
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### Higher Education Use Case Examples

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<th>Campus maintenance &amp; Capital construction</th>
<th>Grant management</th>
<th>IT infrastructure management</th>
<th>Clinical trial intake</th>
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<td>- Quickly capture facilities issues</td>
<td>- Pre-Award: Manage grant application requests, automate approval reviews, instantly launch approved tracking sheet for approved grant applications.</td>
<td>- Import Financial Data from any source without scripting.</td>
<td>- Track expenses for patient trial visits and understand summary costs by patient</td>
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<td>- Connect field staff with call centers</td>
<td>- Post-Award: Automatically create Grant fulfillment tracking sheets, reports and dashboards, provide appropriate visibility to the P.I.</td>
<td>- Import data from your enterprise systems into Smartsheet: ERP, CRM, database, and more</td>
<td>- Define and set cost by trial week to understand full program expenditures</td>
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<td>- Import financial data from any source without scripting, coding or manual copy/paste</td>
<td>- Track spend vs approved budgets in real time</td>
<td>- Summarize and analyze data and create meaningful comparisons, patterns, and trends</td>
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<th>Fundraising</th>
<th>Marketing and events</th>
<th>Contracts management &amp; procurement</th>
<th>Strategic planning</th>
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<td>- Plan fundraising events by tracking all tasks in one place</td>
<td>- Coordinate, plan, execute, and report on campaigns</td>
<td>- Manage your contracts for different departments</td>
<td>- Review project details that align with each of your overall strategic objectives</td>
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<td>- Reduce post-event administration by seamlessly tracking budget spend</td>
<td>- Enable borderless collaboration, quickly pivot event details and plans, and provide end-to-end visibility of your programs</td>
<td>- Track contract status, get alerted when new contracts are submitted or about to expire</td>
<td>- Monitor projects by risk, category, or person</td>
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<td>- Reference student information to validate student ID, major, school, email address or advisor and driving workflow and automation from the data</td>
<td>- Manage and share engaging, interactive calendars</td>
<td>- Automate approval processes</td>
<td>- Use a form to capture new project requests</td>
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*Higher Education Use Case Examples*
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.
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.

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.
Resources for Success
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
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/
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