USING SMARTSHEET FOR WORK MANAGEMENT

PROJECT MANAGEMENT... AND SO MUCH MORE.

ZANE EVERITT, PMP
SENIOR PROJECT MANAGER, OIT
A LITTLE ABOUT ME

• STARTED AT AUBURN IN DECEMBER 2017
• WORK IN PMO REPORTING TO TIMOTHY JONES
• PREVIOUSLY AT COLUMBUS STATE UNIVERSITY, SHAW INDUSTRIES, AT&T, MILLIKEN
• GRADUATED FROM AUBURN WITH BUSINESS ADMINISTRATION DEGREE
• OTHER PROJECT TOOLS USED – MS PROJECT, CHANGEPONT, POWERSTEERING, EXCEL, BASECAMP, GOOGLE SHEETS
IMAGINE IF…..

SMARTSHEET WON’T DO ANY OF THAT…. BUT
"In which of the following areas has your organization benefited or do you expect to benefit from Smartsheet?" (Select all that apply.)

- Fewer emails due to time saved searching for data/status updates: 64%
- Time saved by collecting/processing consistent format of data: 63%
- Time saved creating status reports by providing real-time view into work: 60%
- Project/task cycle time decrease (less time required to complete project/tasks from start to finish): 43%
- Fewer meetings due to time saved searching for data/status updates: 37%

Base: 281 Smartsheet enterprise customers
Source: A commissioned study conducted by Forrester Consulting on behalf of Smartsheet, March 2016
WAYS TO USE SMARTSHEET

- Project Plans/Schedules
- Dashboards/Portals
- Project Intake Form
- Process Approvals – simple workflows
- Manage budgets – lots of formula options
- Track and manage software
Powerful Productivity

Businesses of all sizes see big time savings after implementing Smartsheet. Not only do business leaders realize improved productivity, but their entire organization — including both internal and external stakeholders — saves time due to improved collaboration.

300 hours per year the average business leader saves due to improved productivity

26 hours per year the average user saves due to increased collaboration

60,658 hours per year saved across the average organization
“Essentially, what I’m really encouraged by is that the adoption rate is so fast. The uptake is just so good that you just can’t beat it. We went almost overnight from having nothing to having a lot of something.”

Senior director, apparel organization

“We spend less time every day, every week to manage our projects, and this allows me to have more projects be tackled by my team, using the same timeframe.”

Manager of global advanced technologies, software organization

“We work with IT and information security to know that this solution is secure and is abiding by our security measures. And the built-in regulations and compliance measures and all these things make my life easy because I know Smartsheet meets our standards.”

Manager of global advanced technologies, software organization
HIGHER ED SOLUTIONS

Grant Application & Fulfillment Tracking
Track each application component and expense record, increase transparency around spending, and ensure that no deadline is missed or fund unused.

Events Management
Boost efficiency and streamline planning, increase stakeholder confidence, and get teams out of emails and spreadsheets with an intuitive platform adopted by all.

Student Success
Streamline campus tour intake and scheduling, seamlessly track attendance, and eliminate paper processes and redundant rework.

Course Production
Create visibility into production progress, streamline collaboration with instructional designers, and accelerate output.

Campus Maintenance
Quickly capture facilities issues, connect field staff with call centers, and improve campus safety and cleanliness.

IT Infrastructure Management
Improve project tracking and program reporting, increase visibility to critical issues early, and streamline cross-departmental collaboration.
INTEGRATIONS
A FEW OF MY FAVORITE THINGS

- DIFFERENT VIEWS
- ACTIVITY LOG
- ALERTS AND ACTIONS
- FORMS RITE FORM
- CONDITIONAL FORMATTING
- HIGHLIGHT CHANGES OPTION
- FILTERS

- REPORTS
- DASHBOARDS
- TEMPLATES
- HELP FEATURE
- RESOURCE VIEWS
- LICENSE MODEL
WHAT’S NEXT?

• Looking at integrations with other apps
• Moving from a Business to an Enterprise license model
QUESTIONS ??

I'd better make a list of all the things I need to do today.

Eight hours later

I have 347 urgent tasks, and I add about seven new ones each day.

I'll cross "make a to-do list" off my to-do list and call it a day.
# User Types vs. Sharing Permissions

## User Types

**System Admins**
- Manages security, billing, and users

**Licensed Users**
- Part of multi-user plan
- Able to create new items
- Able to manage their items

**Non-licensed Users**
- Part of multi-user plan
- Unable to create new items
- Limited features

**Free Collaborators**
- Not part of multi-user plan
- Unable to create new items
- Limited features

## Sharing Permissions

Invited users are given permissions by the Owner, Admin, or Editor.

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<th>Owner (Bam Creator)</th>
<th>Admin</th>
<th>Editor</th>
<th>Viewer</th>
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For more details on sharing permissions, visit: [help.smartsheet.com/articles/1155182](http://help.smartsheet.com/articles/1155182)
Shared Items vs. Workspaces

You can create your own sheets, reports, or dashboards, but the real magic happens when you share them and collaborate with other people.

**You create an item**

**Share Individually**
Invite people to view or edit your sheet, report, or dashboard.

**Share in a Workspace**
Place items in a workspace to give people easy access to multiple items.

**Sheet**
Data lives in your sheets. This is where you enter, edit, and format your information.

**Report**
Bring in data from more than one sheet. Use reports, for example, to display tasks assigned to you from multiple sheets.

**Dashboard**
Visually display data from your sheets and reports. For example, you can give Executives a high-level view of a project's health and timeline.
BEFORE I GIVE MY PROJECT STATUS REPORT, HAS ANYONE QUIT OR BEEN FIRED RECENTLY?

I FIRED TED LAST WEEK.

NOW TELL ME WHY YOUR PROJECT IS LATE.

IT WAS TED'S FAULT.

OUR PROJECT CAN ONLY SUCCEED IF EACH OF US GIVES 110%.

I'M OFF NEXT WEEK. I HAVE SURGERY ON MONDAY.

I GAVE MY TWO-WEEK NOTICE A WEEK AGO.

OKAY, CAN I GET 50% EFFORT FROM ANY OF YOU?

I CAN ONLY GIVE YOU THE EXTRA 10% YOU BELIEVE EXISTS.