

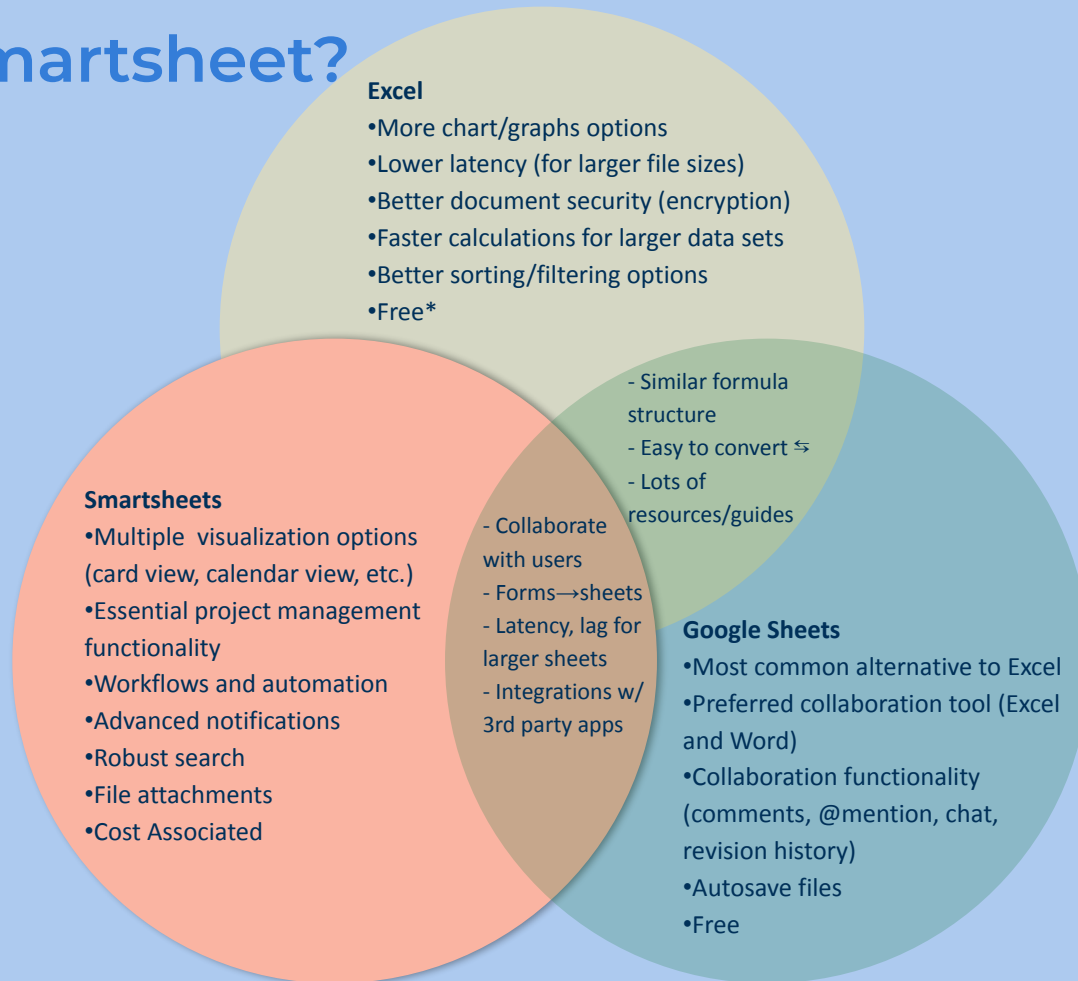


*Basics*

# Agenda

- 1. What is Smartsheet?**
- 2. Why Smartsheet?**
  - a. Pricing
- 3. Features**
  - a. Views
  - b. Dashboards and Portals
  - c. Forms, Reports, Collaboration, Workflows
- 4. Demo**
- 5. Questions**

# What is Smartsheet?



## Why Smartsheet?

- Looking for more than spreadsheet functionality
- Collaboration
- Project Management
- Forms
- Workflows

## Teams Using Smartsheet

- OEM
- OCI
- Academic Affairs
- HR
- AIS

# Pricing

## Business Plan - \$337/user/year (plus Pro Support)

- **Automation and Reporting**
- **Dashboards and portals**
- View real-time data with live charts
- Customize colors and logos on sheets, forms, and workspaces
- **Report and filter data across multiple sheets**
- **View, share, and receive attachments**
- User and System Administration
- **Track changes with Activity Log**
- Manage users
- Manage groups
- Manage project resources
- Add-ons and Integrations
- Connect live Smartsheet data to analytics tools like Tableau, Excel, Qlik, and Spotfire using an industry-standard ODBC connector.
- **Pro-desk coaching sessions.**

## Team Plan - \$149/user/year

- **Unlimited sheets, reports, and dashboards (1 sheet per report, 10 widgets per dashboard)**
- 10 viewers allowed per object
- Private sheets and reports
- **Forms**
- **Grid, Gantt, Card, Calendar views**
- **Pre-built automation rules (250 automations per month)**
- 20 GB attachment storage
- Cell and column formulas
- Dependencies
- Support for Microsoft 365, Google Workspace, and Apple ID login

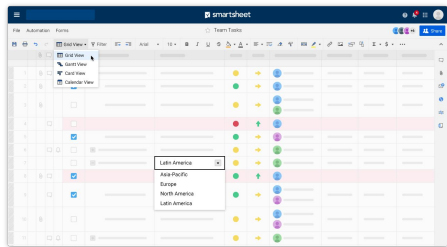
# Features

# Multiple Views

Visualize work how you want by easily switching between views with the same data.

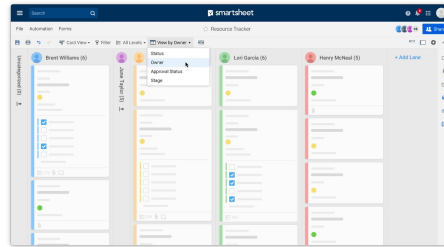
## Grid

A unified, customized view of work



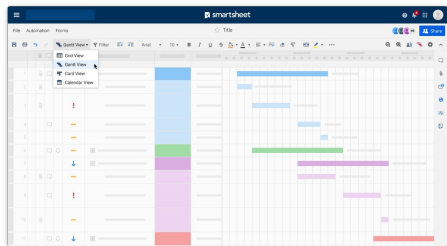
## Card view

A more visual way to see, share, and manage projects



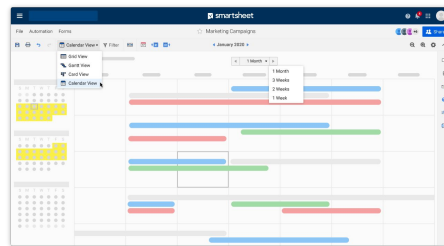
## Gantt

Easily visualize your projects



## Calendar

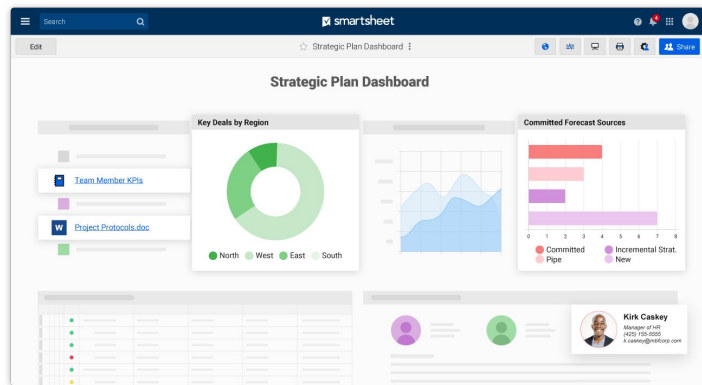
An interactive, date driven view of activities



# Dashboards and Portals

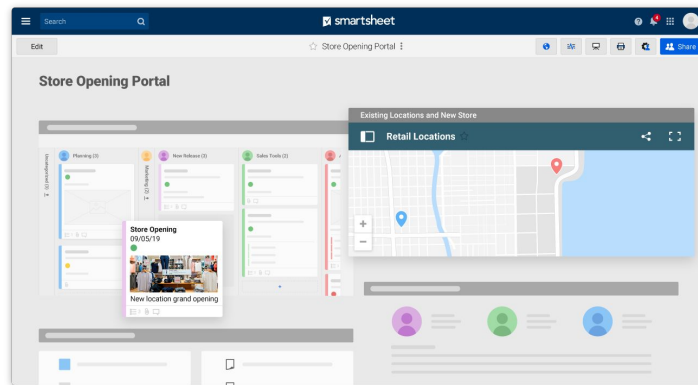
## Dashboards

Give project owners, stakeholders, and leadership a robust, real-time view into the status of top KPIs, critical trends, and summary reports.



## Portals

Bring your teams together and keep them on the same page by centralizing information in an easy-to-create and maintain portal.





# Forms

Easily create and customize forms to collect data from anyone on any device, and save data in a structured format.

The image displays the Smartsheet Forms interface. At the top, the 'Forms' tab is active, showing a menu with 'Manage Forms...' (1 Form), '+ Create Form...', and 'Learn about Forms'. The main editor area is titled '<form title>' and includes a 'Form Title and Description' section with a 'Title' field and a 'Hide title and description in form' checkbox. Below this is an 'Order of Execution' section with five input fields. The interface also features 'Add Field' and 'Form Options' buttons, and a 'Save and Preview' button at the bottom. A mobile preview of a 'Request Form' is shown on the right, featuring fields for 'Your Name', 'Request Type', 'Department', 'Request Description', and 'Date Needed By', along with a checkbox for 'Send me a copy of my responses'.

# Reports

Reports are a powerful way to consolidate key information from multiple sheets into a single overview.

The top screenshot shows a Smartsheet titled "At Risk Task Report for Kirk C.". It displays a grid with columns for ID, Priority, Due Date, Assignee, Task Description, Report Type, and Owner. Three rows are highlighted with purple boxes:

ID	Priority	Due Date	Assignee	Task Description	Report Type	Owner
#8325	High	2020-02-13	Kirk Caskey	Pull a margin report for last quarter o...	Margin Report	Alex Mattson
#8328	High	2020-02-28	Kirk Caskey	Need to check the current Black Friday...	Inventory Check	Brent Williams
#8333	High	2020-05-12	Kirk Caskey	I would like to determine if a vendor s...	Vendor Data	Henry McNeal

The bottom screenshot shows a Smartsheet titled "Detailed Venue Plan". It displays a grid with columns for RYG, ID, Priority, Targeted Co., Assignee, Request Details, Request Title, Department, Days Since..., and Requested... Three rows are highlighted with purple boxes, corresponding to the rows in the top screenshot:

RYG	ID	Priority	Targeted Co.	Assignee	Request Details	Request Title	Department	Days Since...	Requested...
High	#8325	High	2020-02-13	Kirk Caskey	Pull a margin report for last quarter o...	Margin Report	Marketing	32	2020-01-06
High	#8328	High	2020-02-28	Kirk Caskey	Need to check the current Black Friday...	Inventory Check	Sales	22	2020-01-16
High	#8333	High	2020-05-12	Kirk Caskey	I would like to determine if a vendor s...	Vendor Data	Marketing	7	2020-01-31


# Content collaboration

Plan, manage, and review content production in Smartsheet to finalize more assets faster.

smartsheet  
Proof Review

Team Hero Image  
Proof Review Request from [Website Assets Production](#)

Version 1



JS James Sherman 1

What if we put the medals in color so they stand out more?

9/23/2019

DS Dora Smith

I'm not sure about this but am curious to see how it looks

9/23/2019

Reply

JS James Sherman 2

Can we get a little more contrast between sky and cloud?

9/23/2019

Reply

1 response pending

Reject 2

Approve 0

DS

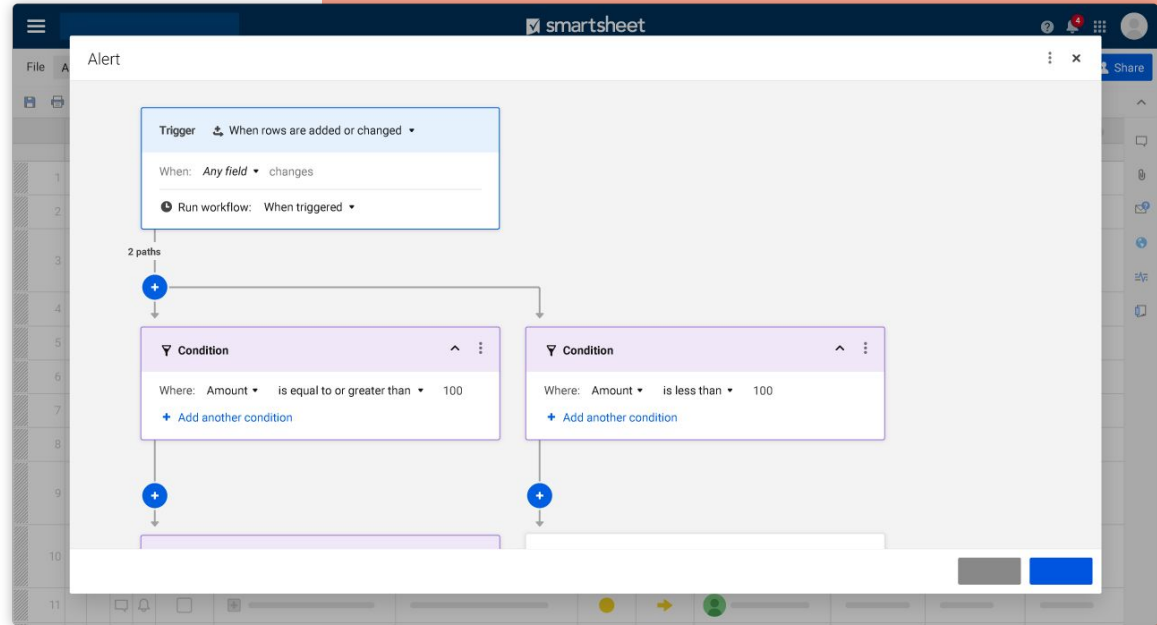
Add a comment. Shift + Enter for new line.

Powered by [Smartsheet](#) | [Privacy Policy](#) | [Report Abuse](#)

# Automated Workflows

Save time and reduce repetitive, manual work with automated workflows.

- Deadline notifications
- Status updates
- Approval requests
- Time based workflows
- Multi-step workflows
- Recurring workflows
- Conditional reminders



# Appendix

# Security and Compliance



## Security

Keeping your data secure is our most important job. Smartsheet was built from the ground up with strict security requirements and protocols to secure your data, give you control of user access, and provide you with methods to safely share information inside and outside of your organization.



## Privacy

When you use Smartsheet, you own and control your data. At Smartsheet, we understand that you are entrusting us with your most valuable asset: your data. That's why we protect customer data with a rigorous combination of infrastructure and procedures, and we are committed to delivering a secure platform that adheres to stringent privacy standards.



## Compliance

Spend less time worrying about compliance and more time running your business. Smartsheet has customers across many industries. Learn how Smartsheet's underlying security, features and tools can support your compliance with various regulatory and industry standards.



## Availability

A platform designed and tested for resiliency. Smartsheet delivers a secure and resilient service at scale to more than 83,000 brands and millions of information workers.



## Governance

Gain access to extensive user controls and visibility into how your organization is using Smartsheet. Easily manage Smartsheet in your organization with robust enterprise account and data administration tools. Take advantage of global security controls to manage and audit access, ownership, and usage, set permissions, dig into audit trails, and configure your plan and users on a global scale.



## Core Capabilities

Connectors and integrations

Accelerators

Control Center

Dynamic View

Professional services

More premium add-ons

# Connectors, integrations, and APIs

Built in data synchronization across critical business platforms. Seamless, secure integrations with your favorite cloud tools

## Connectors



## Integrations



## APIs





## Core Capabilities

Connectors and  
integrations

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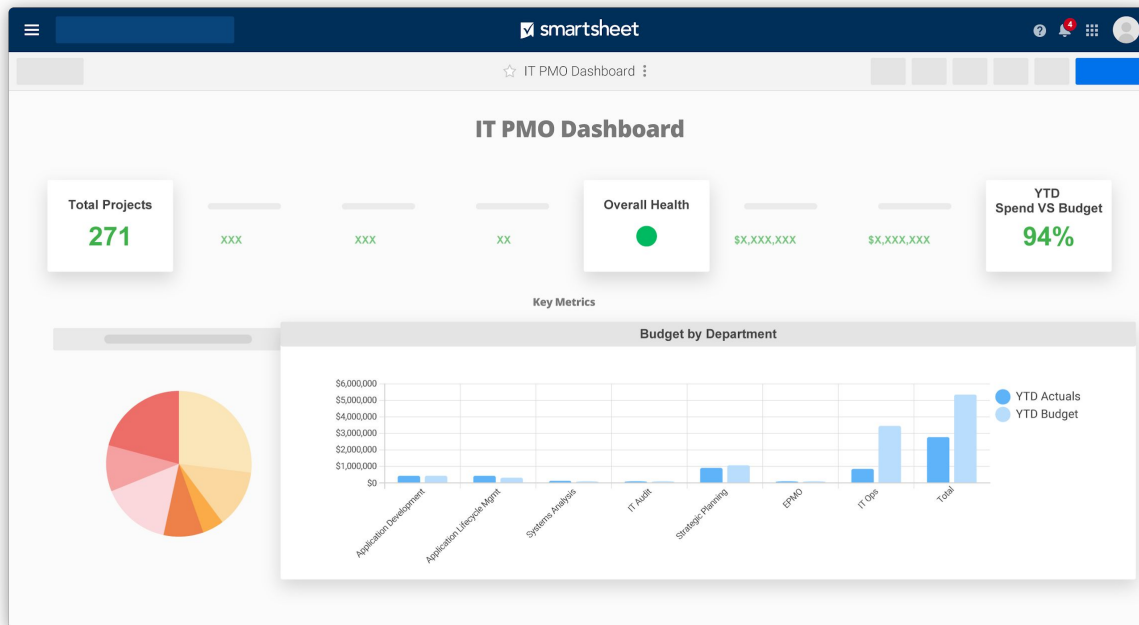
Dynamic View

Professional services

More premium  
add-ons

# Accelerators

Realize near-instant business value and real-time visibility with Accelerators, our powerful, pre-built solutions based on actual customer insights and best practices.







## Core Capabilities

Connectors and integrations

Accelerators

Control Center

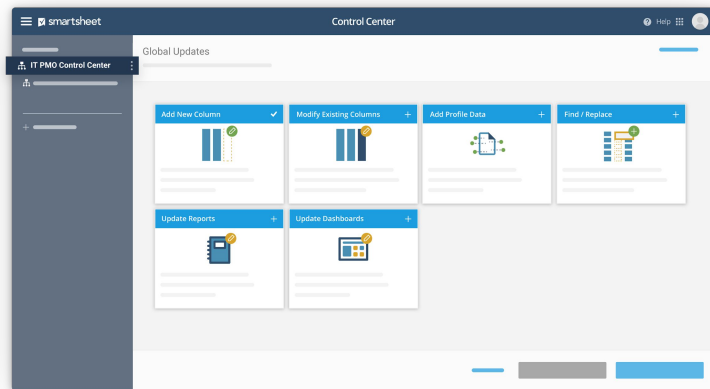
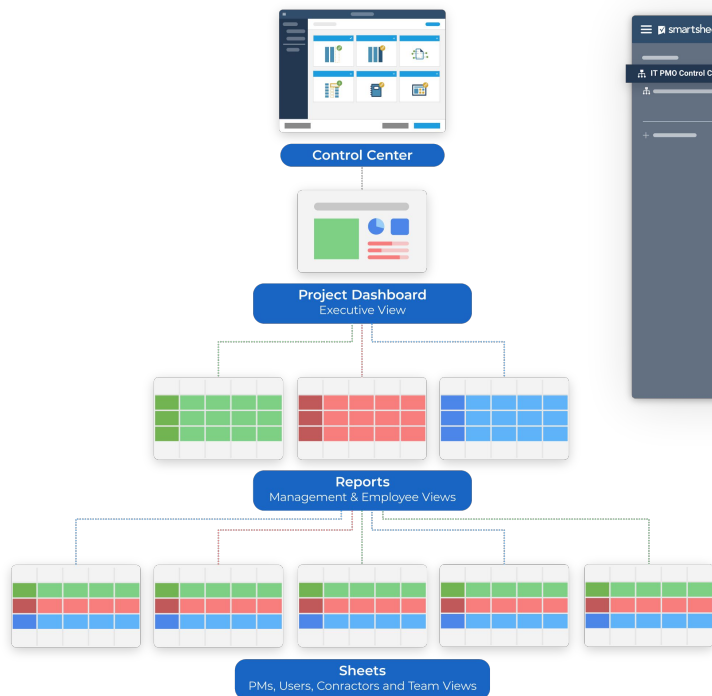
Dynamic View

Professional services

More premium add-ons

# Control Center

Roll out business strategy with consistency by setting up new projects and processes automatically with a standard set of components



Create a standard set of components and use powerful automation to ensure consistency across all processes and projects. Set up, manage, and archive projects with minimized risk and at scale.

Available as a premium add-on to customers with Business and Enterprise plans



## Core Capabilities

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# Dynamic View

Provide granular accessibility at scale with Dynamic View.

The screenshot displays the SmartSheet Dynamic View interface for a 'Data Request Tracker'. The table has the following columns: ID, Approval R..., Status, Analyst, Urgency, Priority, Outcome/Result, and Created By. The row with ID #47526 is selected, showing it is 'Inbound', assigned to 'June Taylor', with a 'Today' urgency, and a 'Yellow' priority. The 'Created By' field shows 'Alex Mattson'. A details panel on the right provides more context for this request, including the 'Request Type' as 'Email Campaign List' and the specific question being asked: 'How many customers click on the primary CTA in the spring email campaign?'. The panel also shows the 'Details' section with a note to 'Re-run data query to get updated data.' and potential actions to 'Update future email campaigns depending on this response.' The 'Urgency' is set to 'Today'.



## Core Capabilities

Connectors and  
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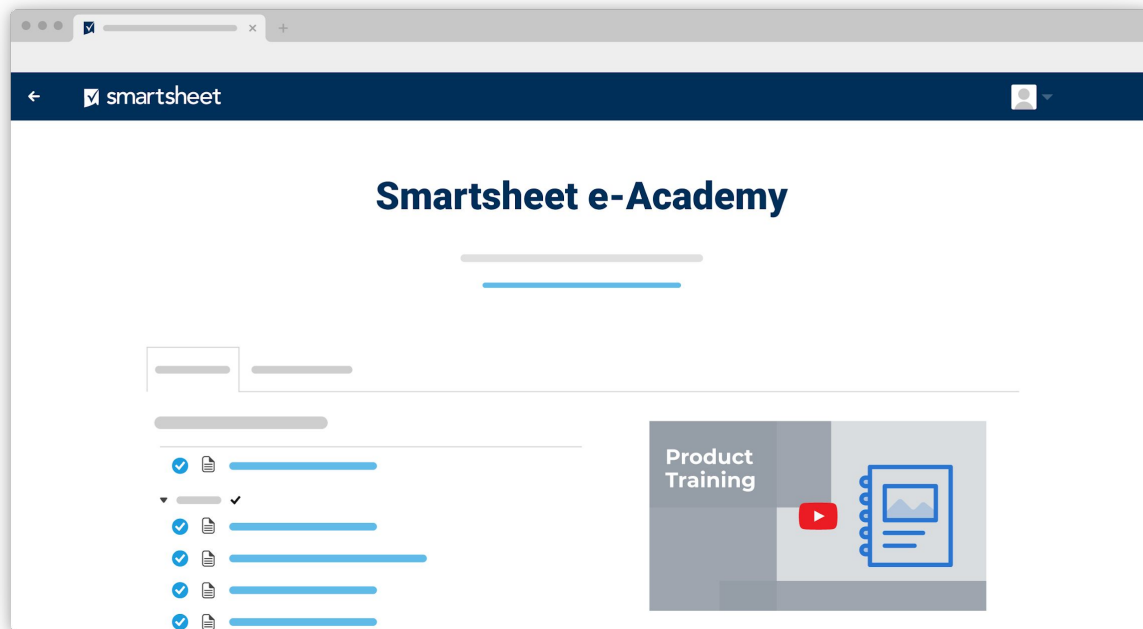
Dynamic View

Professional services

More premium  
add-ons

# Professional Services

Transform your organization with the help of our world-class consulting and training teams. We're here to help you with custom implementation, product training and certification, and change management — so your organization realizes the full and lasting value of Smartsheet.





Core Capabilities

Connectors and  
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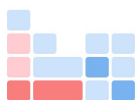
Dynamic View

Professional services

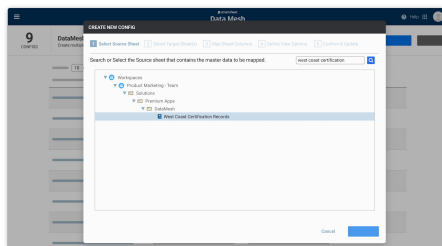
More premium  
add-ons

# More Premium Add-Ons

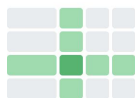
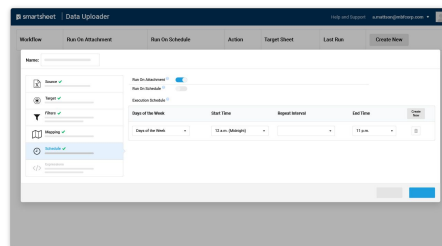
Supercharge your Smartsheet solution with premium add-ons that help drive value across your organization.



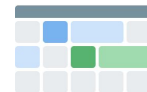
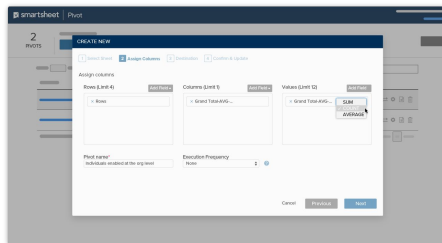
smartsheet  
**DataMesh**



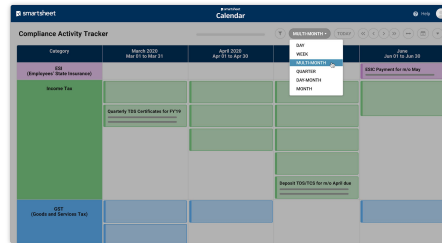
smartsheet  
**Data Uploader**



smartsheet  
**Pivot**



smartsheet  
**Calendar**



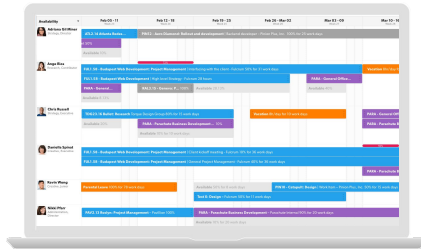
# Resource management with



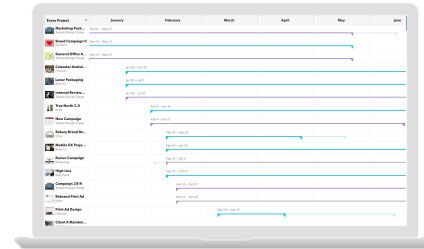
# 10,000ft

by  smartsheet

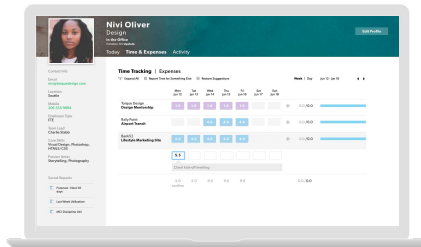
Schedule projects based on team member skills & capacity



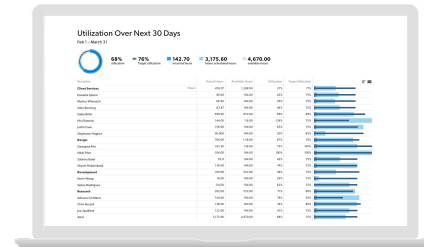
See status across projects and forecast the pipeline



Pre-filled timesheets for easy and accurate time tracking



Reporting to visualize key data across the organization



 smartsheet