



# ENGAGE

## PMI Professional Development Credits

Session name	Abstract	Learning objectives	Claim code	Session code	PDU credits
Discovering DAM: Asset Management Mastery	Dive into the world of Digital Asset Management with Brandfolder by Smartsheet, the world's #1 DAM platform. This session will unveil the untapped potential of DAM, showcasing its pivotal role beyond just marketing and creative spheres. Discover the strategic insights that led Smartsheet to choose Brandfolder as the cornerstone of content management excellence. Tailored for Europe's forward-thinking professionals, this presentation is your gateway to DAM expertise new efficiencies in your organisation.	<ul style="list-style-type: none"><li>Learner will be able to define what a digital asset management platform is and highlight key features found in an industry leading DAM.</li><li>Learner will be able to identify use cases and industries beyond marketing and creative where DAMs can add value.</li><li>Learner will develop an understanding of the power of a connected solution that combines collaborative work management and digital asset management.</li></ul>	4741I59VVS	LB1	1
Formula fundamentals: Building blocks for data analysis	Formulas have the power to take your solutions from good to great by saving you time and helping make more informed decisions. Together we'll review essential formulas for automating and analysing sheet data and the best practices required to write them yourself or with the support of AI.	<ul style="list-style-type: none"><li>Demonstrate writing cross-sheet formulas to summarize sheet data</li><li>Apply formula writing best practices</li><li>Articulate how to write formulas to accommodate various criterion</li></ul>	4741LQVR34	LB2	1
The transformative impact of generative AI	Learn how the artificial intelligence that's being incorporated into Smartsheet will help you eliminate many of the time-consuming manual tasks typically involved in collaborative work.	<ul style="list-style-type: none"><li>Learner will be able to explain the Smartsheet philosophy and approach to AI.</li><li>Learner will be able to provide examples of where Smartsheet will incorporate AI into its product line.</li></ul>	4741FH3ORF	LB3	1



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Learn how to build, organise, and collaborate with workspaces and WorkApps	In this session, you'll learn how to organise, navigate, and share your Smartsheet assets with workspaces and WorkApps for better collaboration and outcomes.	<ul style="list-style-type: none"><li>Learner will be able to use best practices to build, manage and collaborate on solutions with Workspaces.</li><li>Learner will be able to leverage WorkApps to provide role-based access to appropriate assets.</li></ul>	474121XIYG	LB4	1
The Smartsheet product vision: A look ahead	Discover our vision for the future of the Smartsheet product. You'll get a preview of upcoming innovations and enhancements, and learn how you can get involved to help shape our product roadmap.	<ul style="list-style-type: none"><li>Learner will be able to explain the Smartsheet philosophy and approach in future feature development.</li><li>Learner will be able to provide examples of upcoming features Smartsheet will incorporate to meet specific customer needs.</li></ul>	4741P9K36T	LB5	1
If you build it, will they come? Tips to boost engagement	Get tips on how to get colleagues, stakeholders, and customers to view or update your sheet. Learn how to share assets, schedule reminders, set up automatic approval and update requests, view change history, publish dashboards, and have in-product conversations about work to power effective team collaboration.	<ul style="list-style-type: none"><li>Learner will be able to share Smartsheet assets with appropriate permissions.</li><li>Learner will be able to collaborate using Smartsheet automations.</li><li>Learner will be able to publish and embed assets within their everyday tools for easy collaboration (Sharepoint, MS Teams, and Slack Integration).</li></ul>	4741Z6MO2B	LB6	1

Session name	Abstract	Learning objectives	Claim code	Session code	PDU credits
Automate and scale your project portfolio with Smartsheet	Unlock the full potential of Control Center. This session is perfect for both Control Center users and those considering it for the first time. We'll demo the product and explore best practices and strategies to optimise project consistency, visibility, and scale. By the end of this session, you'll be equipped with the knowledge and tools to drive successful portfolio outcomes.	<ul style="list-style-type: none"> <li>Learner will understand how to centralise and manage the approval process for all new project requests in Control Center (PPM discipline: Demand Intake).</li> <li>Learner will be able to understand how to drive consistency in project execution and scale their work in Control Center with blueprints that automatically replicate project assets, common metrics and workflows (PPM discipline: Project &amp; Work Execution).</li> <li>Learner will understand how to monitor the health of their projects and provide visibility at scale by aggregating portfolio reporting in Control Center (PPM discipline: Portfolio Reporting).</li> </ul>	47416NOXH1	LI1	1
Resource Management for everyone: Level up and unlock your team's potential	Wondering how to set up Resource Management successfully? In this session we will cover how to gain greater visibility into your people, align the right skillset to your projects, and boost team productivity to drive successful project outcomes.	<ul style="list-style-type: none"> <li>The learner will be able to understand how to view their teams resources &amp; capacity.</li> <li>The learner will be able to understand how to build &amp; allocate a team for a new project.</li> <li>The learner will understand how to build utilisation reports and how they can be used to forecast resource needs.</li> </ul>	4741YL9FKJ	LI2	1



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Smartsheet Administration: Creating an efficient experience for everyone	For every Smartsheet plan there is a Smartsheet Administrator (or two). There are many paths that lead Smartsheet users to explore optimising and organising their account administration, and we're here to help you on that journey. Whatever your admin adventure looks like, join us to equip yourself with the right skills and knowledge to manage users and licenses, establish global account controls, apply customisations that are unique to your brand, and more!	<ul style="list-style-type: none"><li>Learner will be able to complete initial administration setup for security &amp; compliance purposes.</li><li>Learner will be able to leverage customisation features for an enhanced end-user experience.</li><li>Learner will be able to implement scalability features which enable them to manage users and permissions efficiently.</li></ul>	4741EBAGK2	LI3	1
It's time to stop copying and pasting: Learn how to work efficiently and securely with your data	In this session, you'll learn how to bring data from external sources into Smartsheet. Additionally, you'll learn efficient methods for moving and referencing data within the platform. We'll demonstrate an end-to-end flow, referencing a customer use case, so you can visualize how these tools can help you when you return to work next week!	<ul style="list-style-type: none"><li>Learner will be able to discuss the differences Data Shuttle and DataMesh.</li><li>Learner will be able to describe the situations these tools should be used.</li><li>Learner will be able to state several use case examples, including an in depth customer example.</li></ul>	47410TW3LY	LI4	1



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Automate and manage your multi-step processes with Dynamic View	Streamline and automate your multi-step processes like ticketing, approval requests, and stakeholder management with Dynamic View. In this session, we'll review hands-on best practices for building your process, optimising it for your unique business needs, and enabling dynamic security.	<ul style="list-style-type: none"><li>• Learners will learn the basics of process mapping with Dynamic View to provide a clear foundation of a solution, and set it up for success.</li><li>• Learners will be able to understand when Dynamic View is appropriate for their use case or solution.</li><li>• Learners will be able to get started using Dynamic View for multi-step processes, approvals, external stakeholder management and beyond.</li></ul>	4741IG3KQ7	LI5	1
Smartsheet charts unpacked: Elevate your dashboard game	Explore the art of transforming data into clear and impactful charts with Smartsheet dashboards. Learn to choose the most effective chart types based on data characteristics, category numbers, and most importantly, the specific business question you aim to address. You'll even learn some techniques to create 'bonus charts.' Suitable for beginner and intermediate dashboard creators.	<ul style="list-style-type: none"><li>• Learner will be able to create the major chart types.</li><li>• Learner will be able to determine which charts are best for certain types of data.</li><li>• Learner will be able to apply best practice when chart building.</li><li>• Learner will understand and be able to apply semantic colors.</li></ul>	4741J3V43C	LI6	1

Session name	Abstract	Learning objectives	Claim code	Session code	PDU credits
Design stunning and insightful dashboards	Learn how to weave together your charts, summaries, and key information in a way that's visually pleasing and optimised for your use case. We'll dive deeply into layout design and how color can be used to take your dashboards to the next level. Together we'll transform your Smartsheet dashboard into an informative, stunning visual masterpiece.	<ul style="list-style-type: none"> <li>Learner will be able to effectively apply color to a dashboard.</li> <li>Learner will be able to optimise their dashboard for their use case.</li> <li>Learner will be able to organise the information on their dashboard so that it can be consumed and understood at a glance.</li> </ul>	47418CL3IQ	LI7	1
Intake to archive: The anatomy of a complete solution	In this session, we will guide you through each step of a common project intake process, demonstrating how to create a complete workflow in Smartsheet: From diagramming your solution to creating forms, automating the various steps to visualising data with reports and dashboards.	<ul style="list-style-type: none"> <li>Learners will be able to summarise the various Smartsheet components typically used in Smartsheet projects, how these components work together, and how they might use them for their own projects.</li> </ul>	47419XM5UD	LI8	1
Unleash the power of precision locating using INDEX/MATCH/COLLECT	Do you need to bring data together from one or multiple sheets to another based on specific criteria? This session shows you how with a combination of INDEX/MATCH/COLLECT functions so you can say goodbye to VLOOKUP for good.	<ul style="list-style-type: none"> <li>Learner will be able to explain why, how, and when to use the INDEX/MATCH/COLLECT functions to identify specific information.</li> <li>Learner will be able to provide specific use case examples of using the INDEX/MATCH/COLLECT functions.</li> <li>Learner will be able to explain best practices when using INDEX/MATCH or COLLECT.</li> </ul>	4741LA6Y6E	LI9	1



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Smartsheet on Smartsheet: ENGAGE London registration tracking	Updating senior leadership on the progress of a customer conference — including attendee numbers, revenue, attendee demographics, and more — can be a laborious and time-intensive task. Discover how Smartsheet streamlines this process, requiring less than five minutes of manual work per week.	<ul style="list-style-type: none"><li>Learner will be able to plan/diagram a complex solution.</li><li>Learner will be able to explain how to download and upload files with Data Shuttle.</li><li>Learner will be able to create a quick and trackable way for data to enter a solution using forms.</li></ul>	4741MSZ6M	LA1	1
Getting started with Bridge: Take your automation to the next level	Are you an automation fanatic ready to take your love of process efficiency to the next level? Join us as we cover advanced automation essentials and help you tackle building your first Bridge workflow.	<ul style="list-style-type: none"><li>Learner will be able to describe what Bridge is and what it's for.</li><li>Learner will be able to describe elements of a Bridge workflow.</li><li>Learner will know how to create a new workflow that triggers on a Smartsheet condition and takes at least one action.</li></ul>	4741EXATZ4	LA2	1
Creative solution ideas with Data Shuttle and DataTable	In this session, you'll learn how to bring data from external sources into Smartsheet. Additionally, you'll learn efficient methods for moving and referencing data within the platform. We'll demonstrate an end-to-end flow, referencing a customer use case, so you can visualize how these tools can help you when you return to work next week!	<ul style="list-style-type: none"><li>Learner will be able to build a scheduled upload workflow from multiple sources using Data Shuttle.</li><li>Learner will be able to use DataTable Connections to distribute data from their single source of truth across multiple projects using lookup mode.</li><li>Learner will understand key differences in use cases for both Data Shuttle and DataTable</li></ul>	4741PG9EGM	LA3	1



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Navigating change together: A real-world example of successful business transformation	Dive into the journey of the Swedish company Pricer, leveraging Smartsheet to reshape their business. Together with our platinum partner AMX Consulting, Pricer transformed its organisation — from HR to operations, all the way to executive reporting. Go behind the scenes of the challenges faced, solutions implemented, and outcomes achieved. Check out the comprehensive case study that showcases not just the adaptability and scalability of Smartsheet, but also the innovative ways Pricer harnessed its potential to drive efficiency, foster collaboration, and enable informed decision-making.	<ul style="list-style-type: none"><li>• Discover the Transformational Power of Smartsheet: Learn how the flexible Smartsheet platform can be adapted across various business functions, from HR to operations to management reporting, to drive efficiency and innovation.</li><li>• Gain Insights from Real-World Application: Understand the specific challenges Pricer faced in their business, the strategies employed to overcome them using Smartsheet, and the impactful outcomes of these efforts.</li><li>• Learn Practical Applications and Best Practices: Take away actionable Smartsheet strategies and best practices that Pricer utilised for business transformation, which can be applied to your own organisational challenges.</li></ul>	4741XVUNQR	LP1AMX	1



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Connecting the dots with Smartsheet Bridge	<p>Most companies have the challenge to deal with a complex, heterogenous tool landscape and environment. In this breakout session, we'll demonstrate how you can connect and integrate your enterprise tools and business logic including data flows with Smartsheet Bridge. Connect Microsoft Teams and channels with your Smartsheet workspaces, get data from Smartsheet and other tools, and avoid error-prone manual data copies. Leverage the powerful integration capabilities of Smartsheet combined with the expertise of Nanga Systems to connect the dots for your future.</p>	<ul style="list-style-type: none"><li>• Get an overview about Smartsheet Bridge capabilities.</li><li>• Learn how to use and configure Smartsheet Bridge.</li><li>• Demonstration of 3 example use cases for integration of your enterprise applications (e.g. Microsoft, Sharepoint, and others).</li><li>• Learn about the added value, advantages, and benefits of an integrated, cross-system platform.</li><li>• Connecting the dots: Other Smartsheet integration options and customer success stories.</li></ul>	4741IGRSOG	LP2 Nanga	1
Driving change and collaboration in sport: A discussion with the IOC, ECB, and Invoka Consulting	<p>Join the International Olympic Committee (IOC), the England and Wales Cricket Board (ECB), and Invoka Consulting in a discussion about strategic business transformation, powered by Smartsheet.</p> <p>Learn about Smartsheet as a vehicle for transformation with real-world examples, and get a pragmatic take on enterprise-wide change.</p>	<ul style="list-style-type: none"><li>• A better understanding of Smartsheet through the lens of strategic transformation</li><li>• Real-world solution examples across finance, strategy, HR, and governance</li><li>• Insight into good practices in relation to Smartsheet organisational change</li><li>• Tangible takeaways to better define/execute your transformation journey</li></ul>	474156NU1R	LP3 Invoka	1



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Intro to Collaborative Work Management	New to Smartsheet? This workshop is for you! Jumpstart your time at ENGAGE by learning the essentials of collaborative work management. Designed by experts, this session will ground you in all the key terms you might hear throughout the conference, and provide an introduction to automations, forms, reports, and dashboards, and more!	<ul style="list-style-type: none"><li>• Discover the essentials of collaborative work management</li><li>• Introduction to sheets, automations, forms, reports, and dashboards</li><li>• Search for, download, and customise pre-made solutions</li><li>• Generate formulas, analyse data, and generate text/summaries</li></ul>	4741TBBO1C	Precon	2.5
Unlocking Control Center	This workshop is designed for Smartsheet users who are exploring whether Smartsheet Control Center (SCC) is right for their organisation, and those who want to understand the fundamentals of how this project and portfolio management tool builds on Smartsheet's core capabilities. We will cover all the key terminology and functionality that will be highlighted throughout the rest of ENGAGE.	<ul style="list-style-type: none"><li>• Define the purpose of Smartsheet Control Center.</li><li>• Identify Smartsheet Control Center use cases.</li><li>• Identify the skills needed to use Smartsheet Control Center.</li><li>• Define the required components for a Smartsheet Control Center solution.</li><li>• Examine the Smartsheet Control Center data flow.</li><li>• Discuss the process for configuring a Control Center blueprint and provisioning projects.</li><li>• Identify Smartsheet Control Center features.</li></ul>	4741BJQUCC	Precon	2.5