smartsheet ENGAGE '18

Smartsheet for Salesforce

Transform Customer Lifecycle Management, End-to-End

Joe Stanfill
Sr. Manager, Marketing
Smartsheet

Jenann Self
Director, Customer Program Mgmt, SeaChange International

Shannon Burke
Director, Professional Services
Motus, LLC

Certain information set forth in this presentation may be “forward-looking information.” Except for statements of historical fact, information contained herein may constitute forward-looking statements. Forward-looking statements are not guarantees of future performance and undue reliance should not be placed on them. Such forward-looking statements necessarily involve known and unknown risks and uncertainties, many of which are and will be described in Smartsheet’s filings with the US Securities and Exchange Commission, and these risks and uncertainties may cause actual performance and financial results in future periods to differ materially from any projections of future performance or results expressed or implied by such forward-looking statements. Although forward-looking statements contained herein are based upon what Smartsheet management believes are reasonable assumptions, there can be no assurance that forward-looking statements will prove to be accurate, as actual results and future events could differ materially from those anticipated in such statements. Smartsheet undertakes no obligation to update forward-looking statements except as required by law.

Smartsheet is a registered trademark of Smartsheet Inc. The names and logos of actual companies and products used in this presentation are the trademarks of their respective owners and no endorsement or affiliation is implied by their use.

Purpose of Today's Session

- Understand the **Smartsheet for Salesforce Connector**
- Learn how Connector workflows unlock SF visibility
- Learn how **SeaChange** and **Motus** use the SF Connector

FRONTLINE SALES TEAMS

PROFESSIONAL SERVICES

FINANCE & SALES OPS

What is the Salesforce Connector?

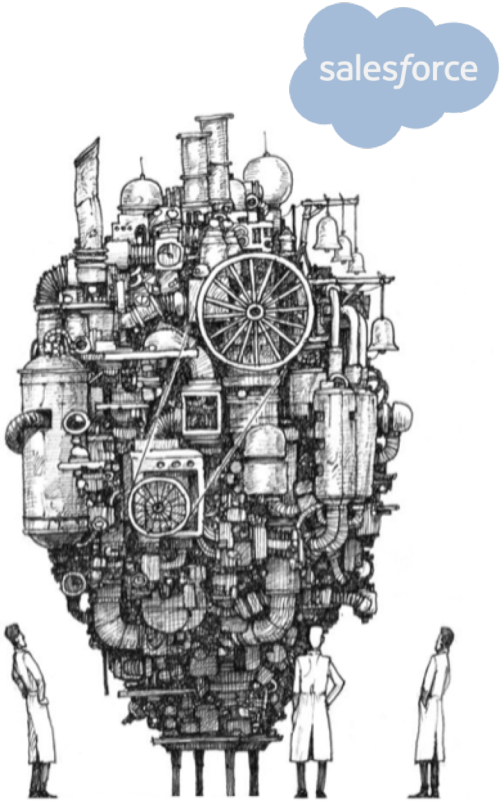
Sales
Leaders

Consulting & Services
Leaders

Sales Ops & Finance
Leaders

Salesforce
Connector

- Intuitive to build
- No code required
- Built to sync data across systems



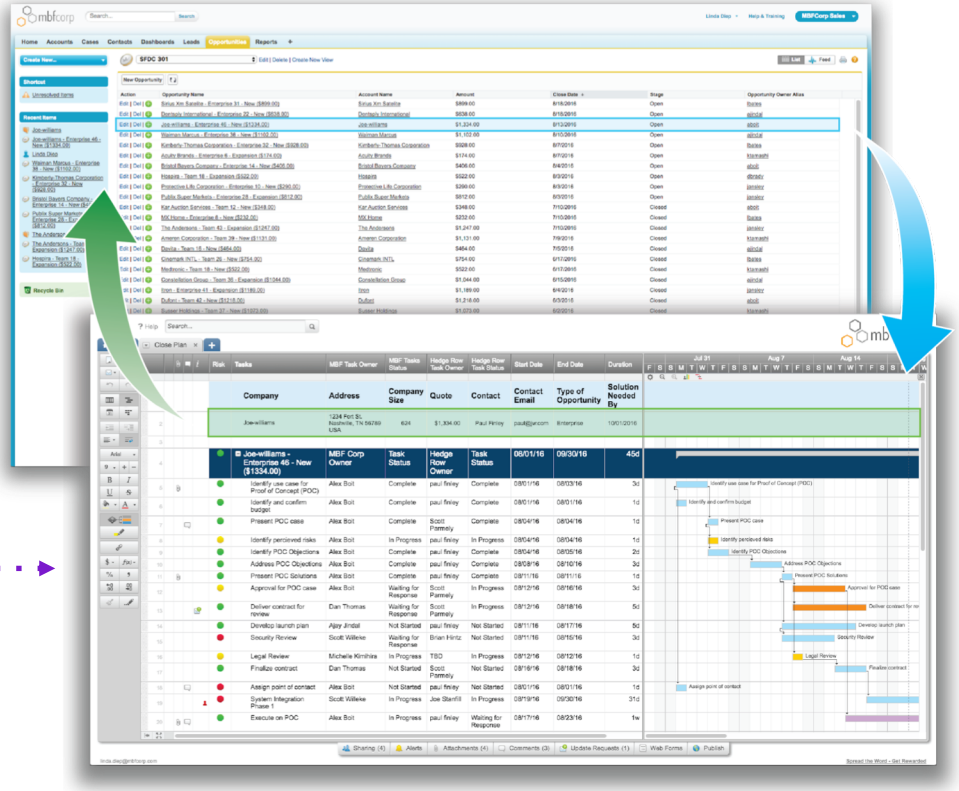
What the Salesforce Connector **Unlocks**

Key Business Benefits

1 : **Unlock Critical Data** lying captive in SFDC for internal stakeholder or customers

2 : **Enhanced Reporting**, giving decision makers critical business insights in real-time

3 : **Better Collaboration** against SFDC data to drive greater productivity and output

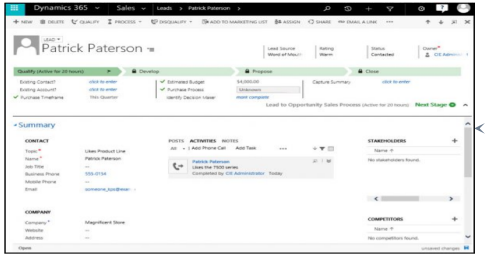


Smartsheet for Salesforce : The Universal Use Case

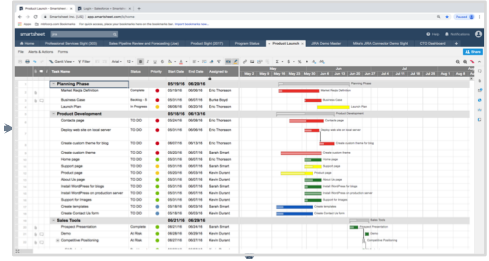
salesforce

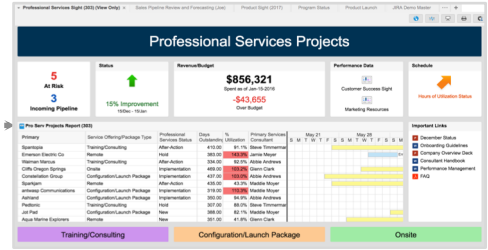
smartsheet

smartsheet



Salesforce
Connector





Give visibility to Sales or Service Leaders w/ dynamic **Dashboards**

Use **Reports** to roll-up and summarize territory sales

Run team reviews of opps or accounts in **Card View**

Use **Gantt** view to track, manage, and report on customer onboarding projects

SeaChange™

Jenann Self
Director, Customer Program Mgmt
SeaChange International

Professional Services PMO

Pain Points and Why We Needed a Solution

Fragmented Process

- No consistent global methodology
- Visibility provided only by email
  - Email Overload!
- No metrics outside of financials
- Manual input to create multiple PowerPoints

Data Disarray

- Information hard to locate
  - Where is that email?
- Duplicate effort and incorrect data
- Duplicate data in multiple places not staying in sync
- No central location to maintain project information

The Smartsheet Solution

Smartsheet, Control Center, and the Salesforce Connector

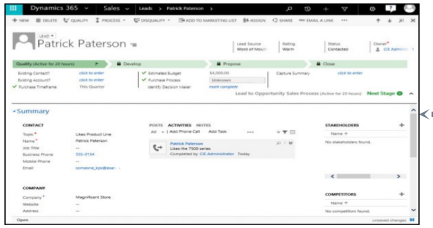
Goal : Enable scalable processes to deliver operational efficiency, throughput, increased visibility, and **better customer satisfaction**

How We Got There :

- Used automation to drive consistency, reduce overhead
- Standardized Professional Services PMO projects
- Reduced data sources by integrating with SalesForce
- Used single data source for multiple types of reporting
- Provided collaborative process for sharing information

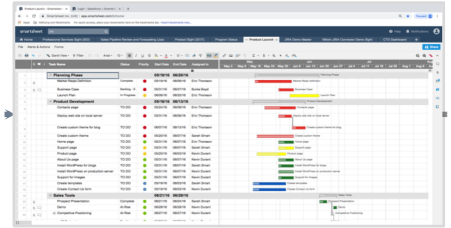
Smartsheet for Salesforce at SeaChange

salesforce



Salesforce
Connector

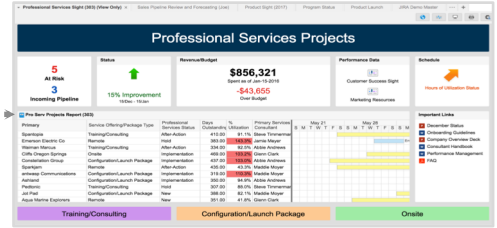
smartsheet



Use **Reports** to roll-up and summarize Opportunity status

Control Center

smartsheet



Automate & give visibility to dynamic **Dashboards**

Customers: real time updates on Opportunities & Projects

Sales: real time updates on Internal Project Updates

Engineering: real time updates & prioritization on Project Issues

PS & Finance: details on Project Profitability and Health

Key Benefits to Smartsheet Automation

Smartsheet, Control Center, and the Salesforce Connector

Salesforce Connector

- Reduces redundancy - source emails, data is centralized
- Quick view to potential opportunities and status
- Immediate project initiation for closed opportunities

Alerts & Actions

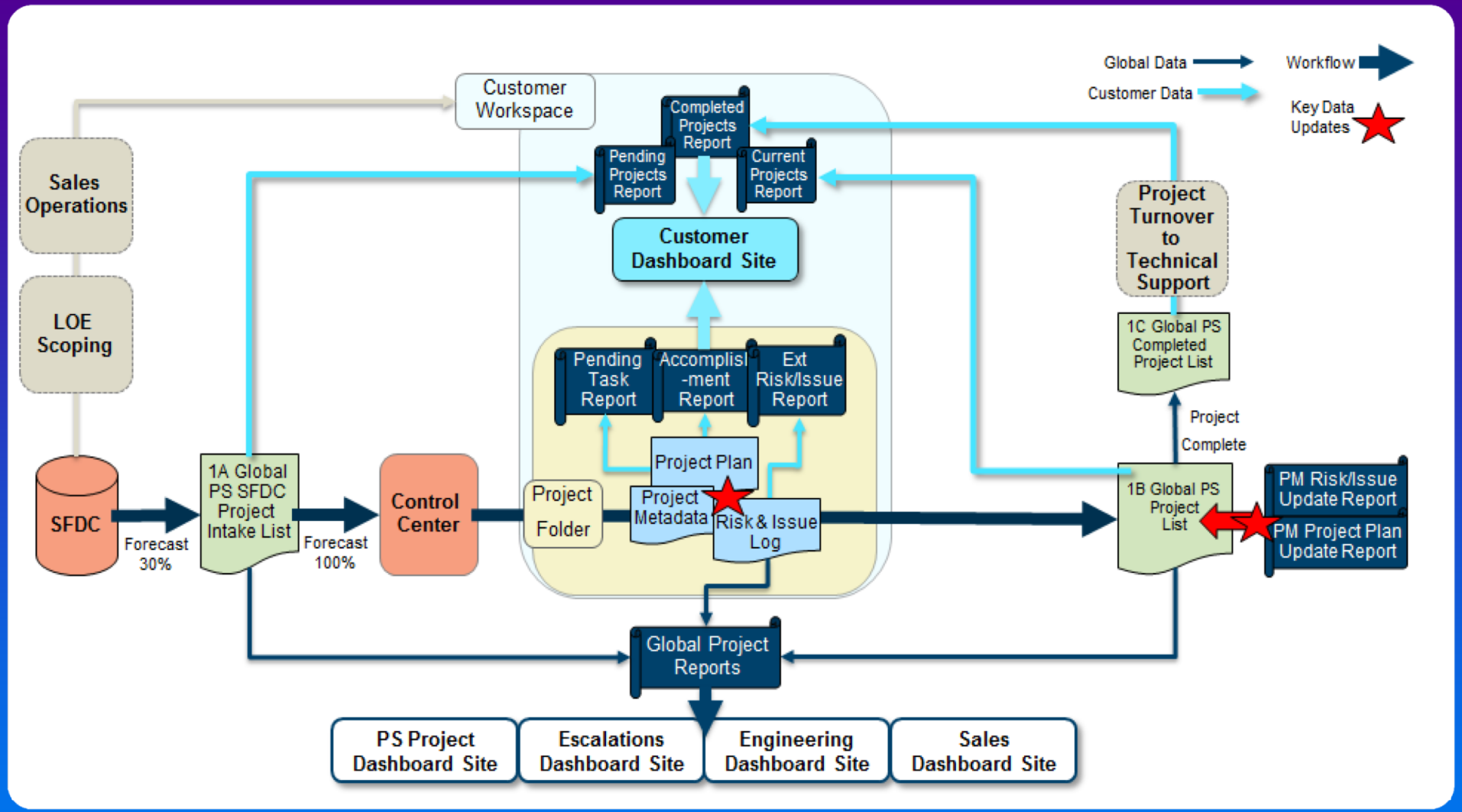
- **Who needs email?!** Substantially reduces the volume and distraction of emails between teams
- The right resources are provided the right information, in real-time
- Helps automate PMO workflows

Control Center

- Standardizes process, reporting, and follow-up across teams
- Dashboards automate tracking of project metrics

Outlook Add-on

- Where email is used, brings it to central location
- Allows for email and document tracking for later retrieval


Global Data
Workflow
Customer Data
Key Data Updates
Customer Workspace
Completed Projects Report
Pending Projects Report
Current Projects Report
Customer Dashboard Site
Sales Operations
LOE Scoping
Project Turnover to Technical Support
1C Global PS Completed Project List
Pending Task Report
Accomplisl -ment Report
Ext Risk/Issue Report
Project Plan
Project Complete
SFDC
Forecast 30%
1A Global PS SFDC Project Intake List
Forecast 100%
Control Center
Project Folder
Project Metadata
Risk & Issue Log
1B Global PS Project List
PM Risk/Issue Update Report
PM Project Plan Update Report
Global Project Reports
PS Project Dashboard Site
Escalations Dashboard Site
Engineering Dashboard Site
Sales Dashboard Site

SeaChange PMO Customer Dashboards

A Standardized, Real-time Overview of Customer Projects

SeaChange

XYZ Program Dashboard

Overview of Current Projects

Current Projects	Project Scope
AdFlow Next Generation	Current AdFlow system is a hardware based bare metal installation and operates on Linux CentOS 5.3 that has been end-lifed. This project will bring the OS up to date to current version.
AssetFlow Next Generation	SAN based virtualization deployment model for scaling. AssetFlow server Operating System upgrades, Infusion CIS for DAI virtualization to the SAN deployment model, 3rd party integration upgrades.

Overview of Pending Projects

Pending Projects	Project Scope
Expansion for Adds	Add 15 new Ad Processors into AdFlow.

Overview of Completed Projects

Actual End	Completed Projects	Project Scope
10/06/17	HD Variants	Insert new 720p ad variant instead of SD 16:9.
03/24/17	MPEG4	CSV data to Envivio transcoder when MPEG2 content is transcoded in the workflow to MPEG4.

Product Overview

Product Updates

SeaChange will use a new version naming convention starting with; AssetFlow 6.4.19 and AdFlow 6.2.21

Pending Release Activity

Task	Location	Task Status	Start	End	Notes
AssetFlow					
XYZ Lab Test SEAC release ASF 6.4.19HF1	Lab	In Process	06/14/18	07/25/18	
SEAC release ASF 6.4.21	SEAC	In Process	08/31/18	08/31/18	
AdFlow					
Prod upgrade to AdFlow 6.2.0.20	Production	Pending	TBD	TBD	
SEAC Release 6.2.21	SEAC	Pending	TBD	TBD	

Completed

Accomplishments	Location	End
AssetFlow		
SEAC release ASF 6.4.21	*SEAC*	*08/31/18*
SEAC release ASF 6.4.20HF1	*SEAC*	*08/24/18*
XYZ Prod upgrade ASF 6.4.19HF1	*Production*	*08/22/18*
XYZ Lab Test SEAC release ASF 6.4.19HF1	*Lab*	*08/10/18*
XYZ Lab Test SEAC release ASF 6.4.19HF1	*Lab*	*08/10/18*
XYZ Lab Test SEAC release ASF 6.4.19	*Lab*	*07/20/18*

SeaChange PMO Customer Project View

A Standardized, Tactical Hub for Customer Projects

AdFlow Next Generation

Scope: Current AdFlow system is a hardware based bare metal installation and operates on Linux CentOS 5.3 that has been end-lifed. This project will bring the OS up to date to current version.

Team: Program Manager Jenann Self; PSE Paul Smith

Tasks & Milestones In Process/Pending

Actual Start	Actual End	Status	%	Type	Task	Notes
07/02/18	08/15/18	In Process	63%	Lab	Lab	
07/02/18	07/27/18	In Process	57%	Lab	LEC Delivered	
07/03/18	07/27/18	In Process	75%	Lab	- Network Work Book	
07/03/18	07/27/18	In Process	75%	Lab	- Installation/Configuration MOP	
07/13/18	07/27/18	In Process	75%	Lab	- Migration MOP	

Tasks Completed

Type	Accomplishments	Actual End
Lab	*Validation tests & switching between the 2 ASF systems*	07/25/18
Lab	*Restore backed up data to new virtualized AdFlow platform & Validate*	07/24/18
Lab	*Migrate baseline configuration settings to the new virtualized AdFlow platform*	07/23/18
Lab	*Install/Configuration Waltham - Deploy side-by-side AdFlow VMware environment solution*	07/20/18

Action Items

Actual Start	Actual End	Status	%	Task	Notes
10/01/18	10/01/18	In Process	25%	Names of primary ICIS recourse from SEAC & XZY	
10/22/18	10/22/18	Pending	0%	Update the CIS App LB VIP with new backend servers as we approach Prod implementation. Check with lab if any other LB changes are to be done.	Must be complete before we can move to Prod

Risk/Issue Report

*Alert	*Priority	*Open Date	*Status	*Ticket ID	*Description	*Next Action
●	Critical	10/02/18	In Process	12234	VMnic4 isnt working correctly for management - This could be related to the XYZ switch.	XZY Troubleshooting
●	Major	09/27/18	In Process	56678	Need correct SFPs to setup Switches in XYZ Lab.	Order SFPs

AssetFlow Next Generation

Scope: SAN based virtualization deployment model for scaling. AssetFlow server Operating System upgrades, Infusion CIS for DAI virtualization to the SAN deployment model, 3rd party integration upgrades with Arris OLES for pre-encryption and Ericsson Envivo for transcoding.

Team: Program Manager Jenann Self; PSE Paul Smith

Tasks & Milestones In Process/Pending

Actual Start	Actual End	Status	%	Type	Task	Notes
07/02/18	08/15/18	In Process	63%	Lab	Lab	
07/02/18	07/27/18	In Process	57%	Lab	LEC Delivered	

Tasks & Milestones Completed

Type	Accomplishments	Actual End
Lab	*Validation tests & switching between the 2 ASF systems*	07/25/18
Lab	*Restore backed up data to new virtualized AdFlow*	07/24/18

Measuring Success

What We Accomplished

A Global, End-to-End PMO Process

- Consistent communication internally and externally with Dashboards
- Dashboards display current information in the cloud - email not required

Lowered Redundancy, Resource Costs

- Single data source reduces accuracy risk
- Automation and report-linking greatly reduces manual processes to duplicated effort

Quantified Impacts

- Reduced admin time **25%**
- Reduced searching time **25%**
- Reduced data sources for process, executive reporting
- More metrics: **>75** data points
- Increased external visibility: **80** Customer/Vendor/Partner sites
- Increased internal visibility: **6** global departments
  - PS, Sales, Engineering, Finance, Legal, Tech Support

motus™

Shannon Burke
Director, Professional Services
Motus, LLC

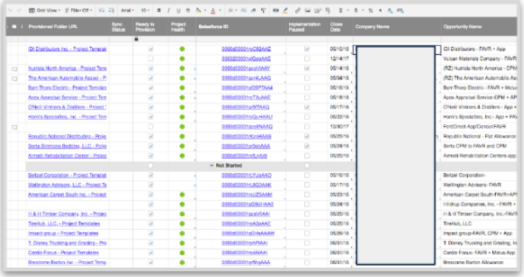
Professional Services : The Key Challenges

Source : *The Hidden Costs of Onboarding* [Smartsheet survey, 2018, 1,000r]

Lack of Process Structure	**70%** of onboarding projects are not completed on time
Poor Communication	**1** in **4** new client onboardings negatively impacted by poor comms
Manual Processes	**80%** of respondents report being “concerned” when customers raise questions on project status
Disconnected Tools	**25%** of every week is spent manually updating various project tools

How Motus **Avoids These Hidden Costs**

Demand Management



Automated CRM Approval for Work Processes

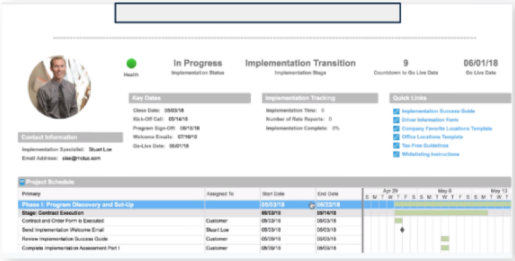
Onboarding Project Provisioning

Deploy with Confidence

Portfolio Reporting & Updates

Make Better Decisions, Faster

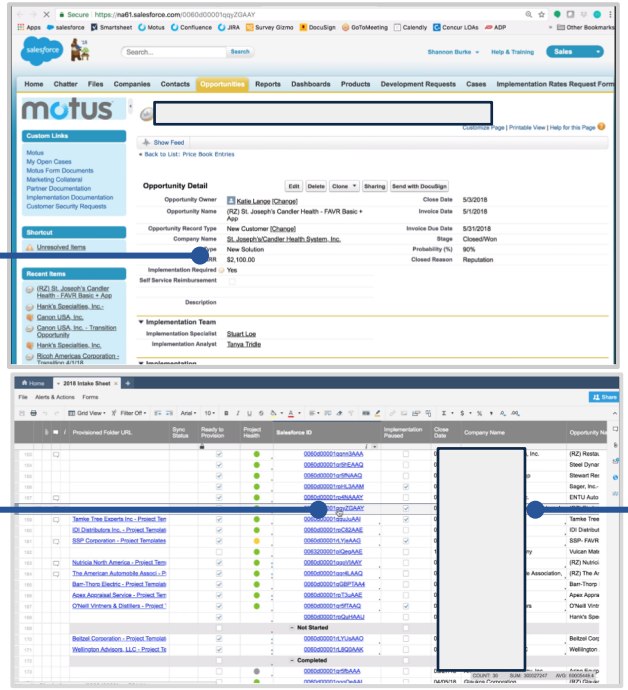
Customer Onboarding Project Collaboration



Make Collaboration Work

Motus Demand Management

Automated : Salesforce Approval → Onboarding Project Demand Management



Smartsheet Two-way Connector Sync

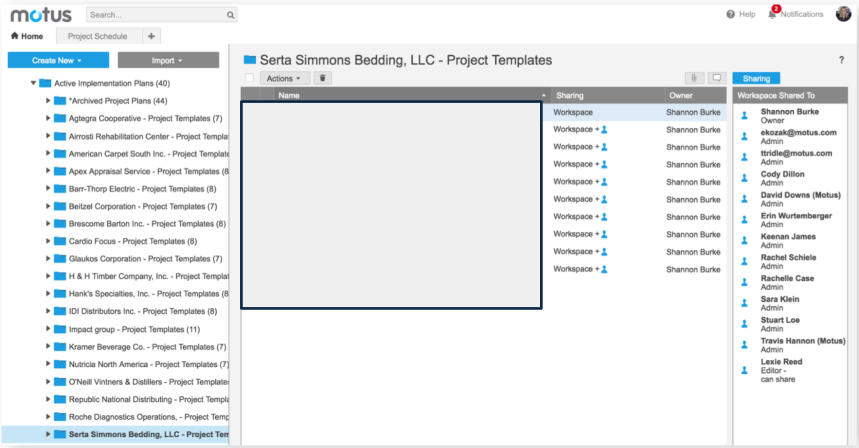
Multi-step Approval Processes

Single Data Entry - Reduced Errors

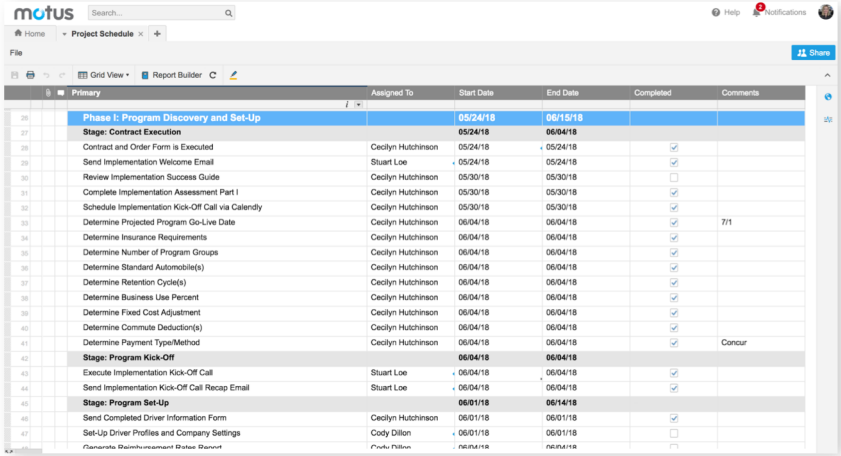
Motus Onboarding Project Provisioning

Automated : Salesforce → Salesforce Connector → Smartsheet Control Center

Assign access and generate full onboarding project … in seconds



Instant Workspace with all sheets, reports, dashboards created PLUS updated connections to portfolio dashboards and reports



Customer onboarding project plan - fully populated with tasks, sub-tasks, etc. used to instantiate dates and track this project

Implementation Managers **save up to 8 hours** for *each* project setup!

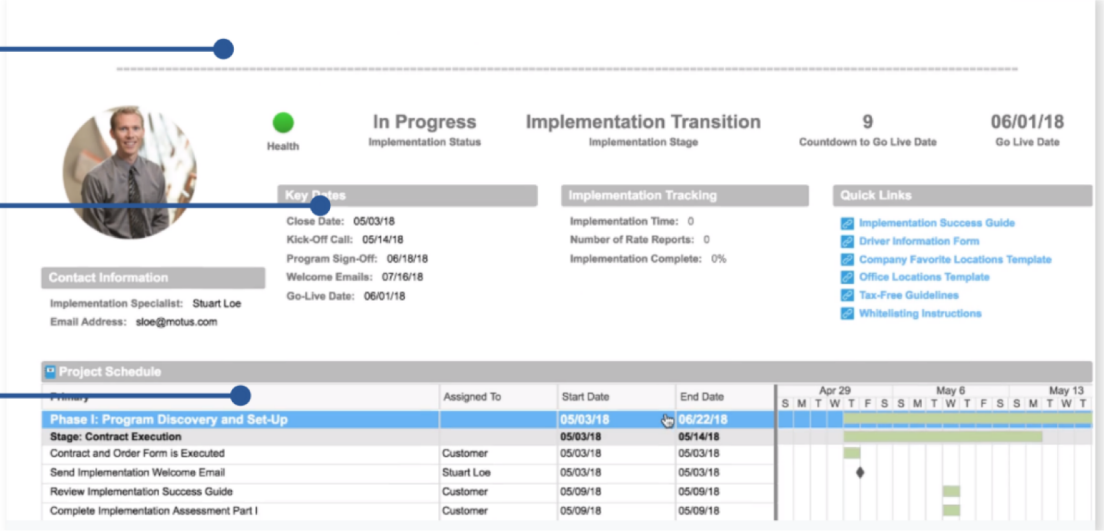
Motus Onboarding Project Status Dashboard

Automated : Standardized reporting provides visibility to stakeholders *and* customers

Individual & Customer Project Dashboards

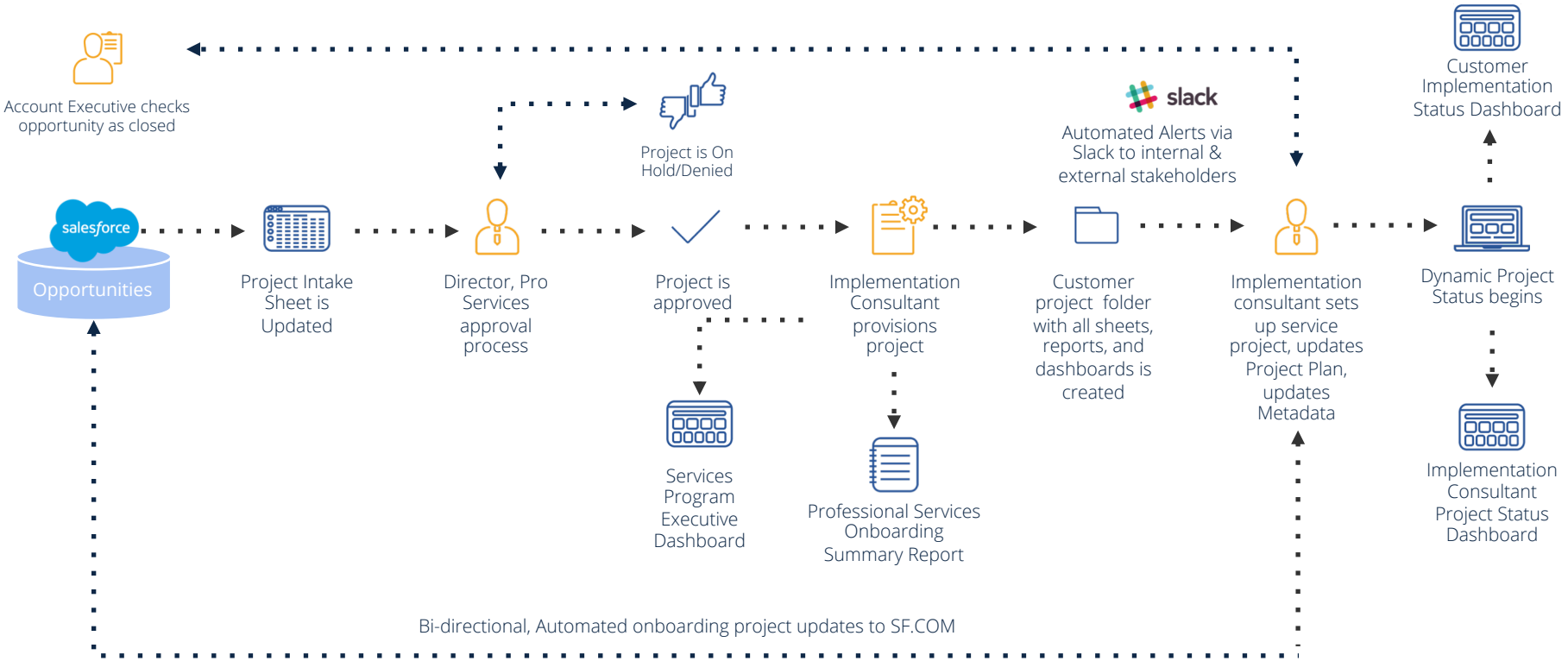
Project visibility by Implementation for internal & external stakeholders

Vast reduction in ongoing status meetings



Motus Customer Onboarding

Automation of Professional Services Work Management Flow



smartsheet ENGAGE '18

Measuring Success

What We Accomplished

- Process automation for tracking, launching and managing onboarding project information
- Improved consistency across projects and efficiency for the entire team
- Greater transparency for all key stakeholders at the right level of detail and the right time
  - Project managers and executive Team
  - **Customers *love* this!**

ROI / Value Return

- 25 onboarding projects in-flight at any given moment, 200+ per year
- 5 new Implementation Managers with add'l team of 20 managing overall merger with this process
- Time savings for program review, approval & setup - 4 hours/week (**$65k annual savings**)
- Time savings for reporting and status updates, meeting prep--4 hours/service manager/week (**$80k annual savings**)
- **Est. value = $145k per year**
  - less cost of license

To **keep** a customer demands as much skill as to win one.

- Anonymous

What Can The **Salesforce Connector** Do For *Your* Customers?

FRONTLINE SALES

PROFESSIONAL SERVICES

FINANCE & SALES OPS

Don’t forget to :

- Share your **feedback** in our survey in the ENGAGE app

- Stop by the Smartsheet **Connectors Booth**, first floor

smartsheet

ENGAGE '18 / Q&A