smartsheet
ENGAGE /

When Chat Meets Work: The Newest Smartsheet Messaging Integrations

Scott Tewel
Technical Product Manager

Kuleen Mehta
Principal Product Manager

#SmartsheetENGAGE

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.

Agenda

- Why is this relevant?
- Current state
- How do messaging app integrations work?
- Customer insights: Lindbergh Matillano, Tableau
- Customer insights: Capri Jensen, Zillow
- What’s next?
- Q&A

COMPOSE
Inbox (6,763)
Important
Inbox (6,763)

How Does This Benefit Me and My Team?

Direct messages

- Get alerts and requests how you want them
- Take action in Smartsheet without switching context
- Keep in sync
- Less email!

Channel alerts

- Keep teams in the loop, regardless of who uses Smartsheet
- Stay in context
- Discoverable vs. email thread

In-app

- See if coworkers are online, real-time collaborate
- Chats automatically added to comments
- Stay in context of Smartsheet

Current State

	Direct Messages	Channel Alerts	In-app chat/video	Publish
Slack	✓	✓		
Workplace by Facebook	✓			
Google Hangouts classic			✓	
Google Hangouts Chat	✓			
Skype for Business			✓	
Microsoft Teams				✓
WebEx Teams		✓ (by Cisco)		
Quip				✓

How Do They Work?

Channel Alerts

Direct Message Alerts & Actions

Insights from Tableau

Lindbergh Matillano
Sr. Business Manager, Technical Operations

525,600

Minutes in a year

smartsheet
ENGAGE

8,760

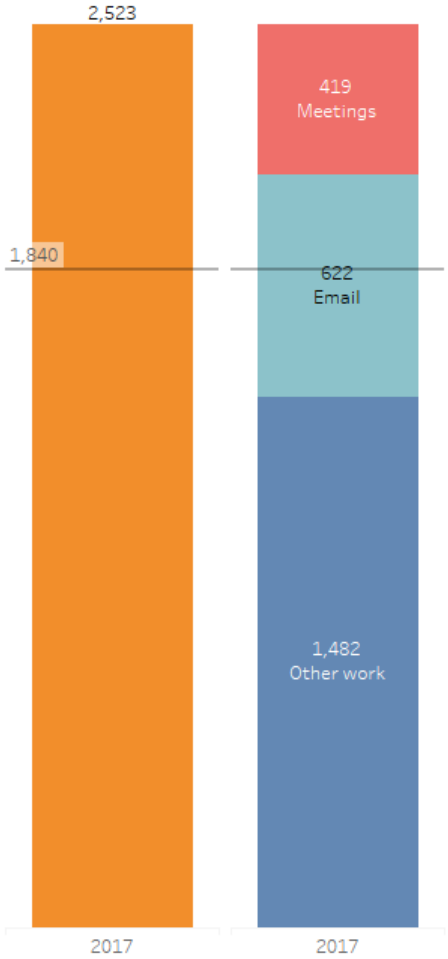
Hours in a year

1,840

Working hours in a year

smartsheet
ENGAGE

smartsheet
ENGAGE



Hours

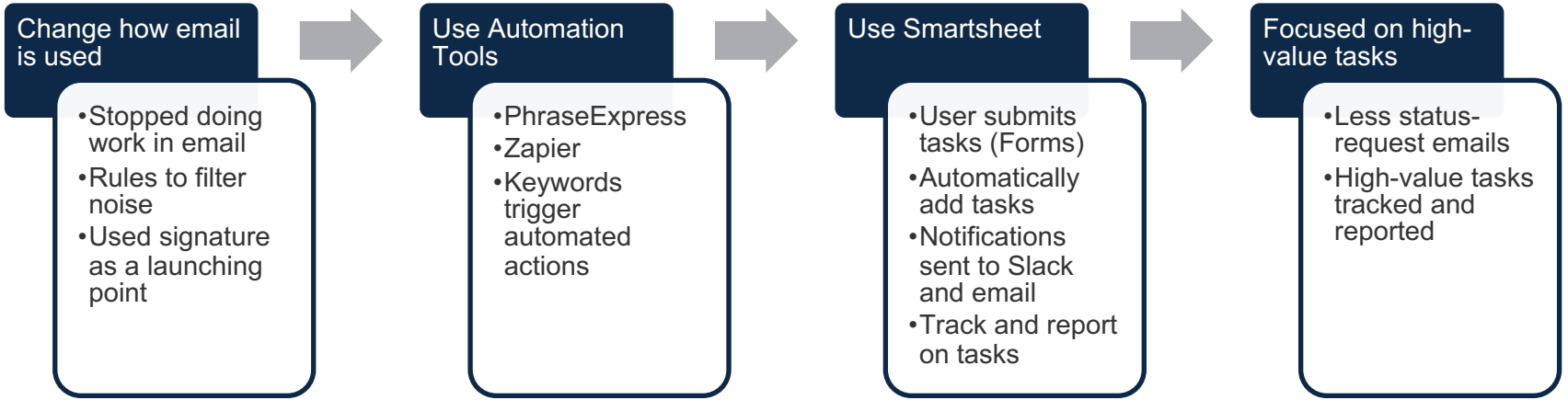
- Status updates
- Relationship building
- Informational
- Decision Required/Actionable

- Average users send/receive >30,000 emails a year
- Notifications
- Information requests (e.g. How do I?)
- Task requests (e.g. Create a PO?)
- Status requests (e.g. What is the status of _____?)

Challenges

- Working an average of 49 hours a week
- Spending a lot of time in e-mail
- A lot of meetings were status and informational meetings

Automate and Encourage Self-Service



Effective Use of an Email Signature

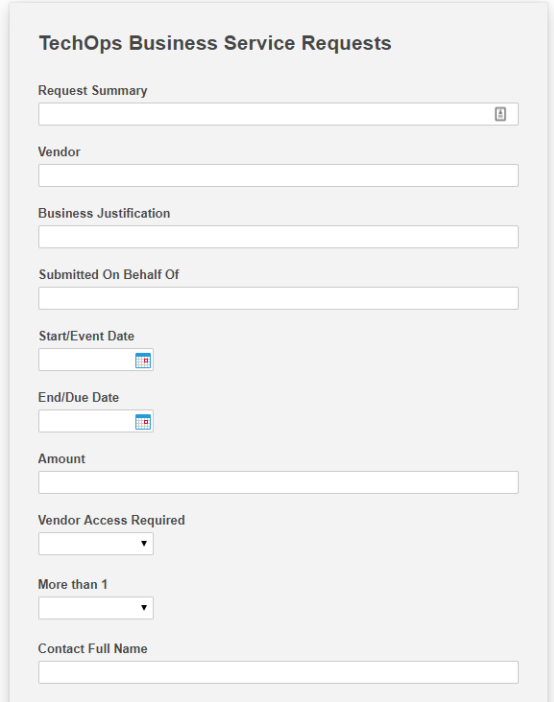
Have a great day,

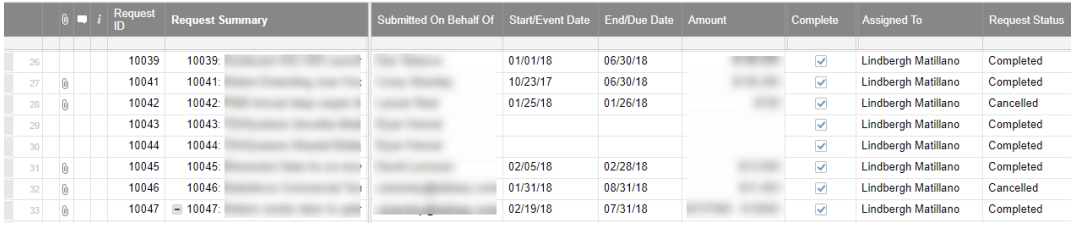
Lindbergh O. Matillano
Senior Business Manager, Technical Operations

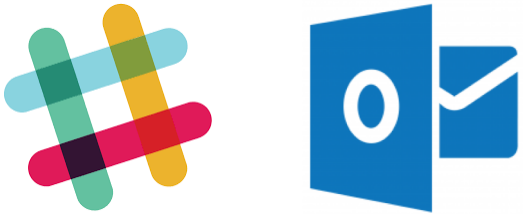
View Monthly Report | Purchase Request/Orders | Contracts | Meeting Notes & Tasks | Other
Request a Software License | Project Resource | Vendor Agreement Review | To Add an Agenda Item
Read recent TechOps Blog entry

There is only one corner of the universe you can be certain of improving, and that's your own self.
~Aldous Huxley

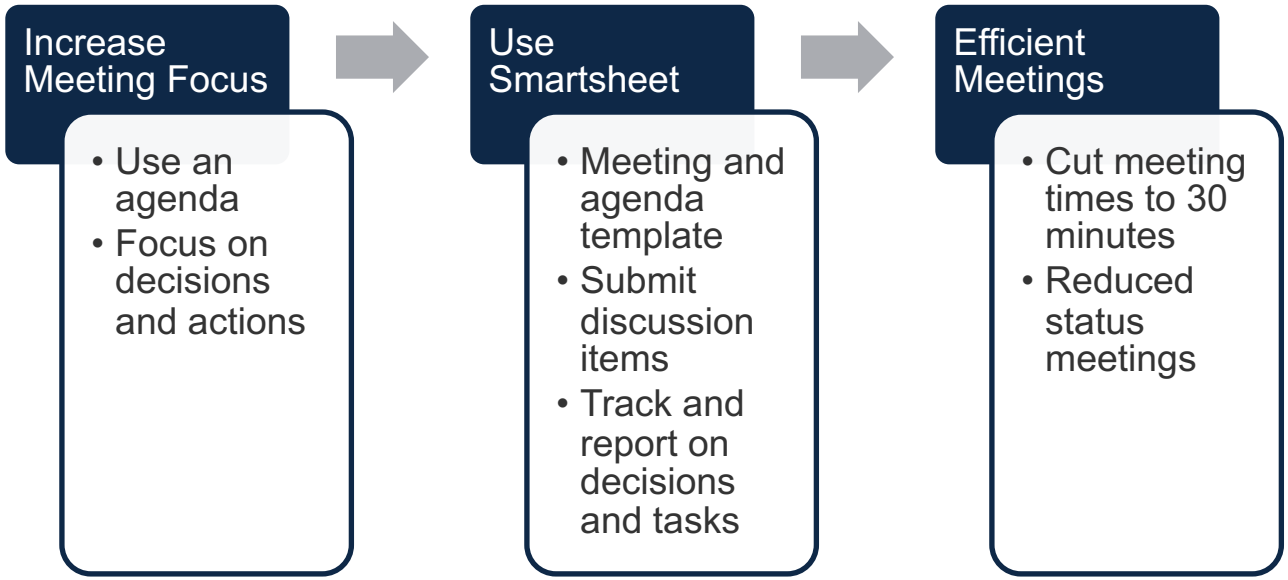
Requesting Project Resources







Make Meetings More Efficient



Effective Use of an Email Signature

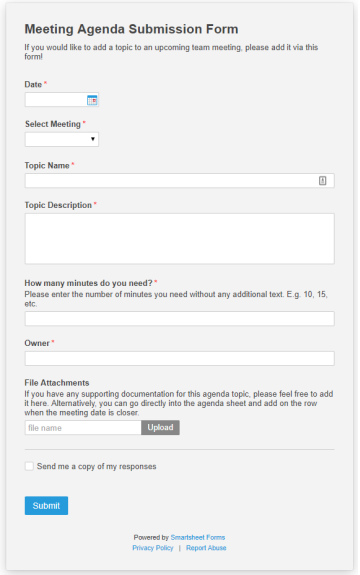
Have a great day,

Lindbergh O. Matillano
Senior Business Manager, Technical Operations

View Monthly Report | Purchase Request/Orders | Contracts | Meeting Notes & Tasks | Other
Request a Software License | Project Resource | Vendor Agreement Review | To Add an Agenda Item
Read recent TechOps Blog entry

There is only one corner of the universe you can be certain of improving, and that's your own self.
~Aldous Huxley

Adding an Agenda Item



Meeting Agenda Submission Form

If you would like to add a topic to an upcoming team meeting, please add it via this form!

Date *

Select Meeting *

Topic Name *

Topic Description *

How many minutes do you need? *
Please enter the number of minutes you need without any additional text. E.g. 10, 15, etc.

Owner *

File Attachments
If you have any supporting documentation for this agenda topic, please feel free to add it here. Alternatively, you can go directly into the agenda sheet and add on the row when the meeting date is closer.

file name | Upload

Send me a copy of my responses

Submit

Powered by Smartsheet Forms
Privacy Policy | Report Abuse

[Company Name] • [Team Name]
Meeting Agenda

smartsheet

Welcome!

Welcome to the [team name] meeting agenda portal. This is your one-stop shop for anything related to our weekly team meeting.

If you have any questions, please feel free to reach out to me at first.last@company.com. Thank you!

Add New Meeting Agenda Items

{replace with agenda submission form}

View Past & Upcoming Agendas

Meeting Agendas

Report - Action Items for Follow-Up

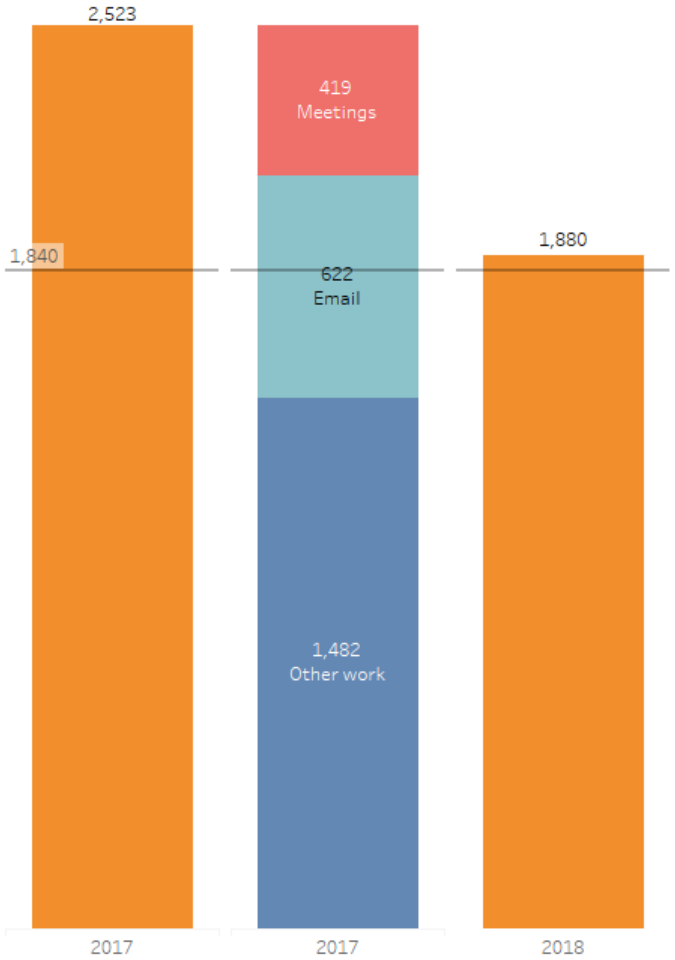
Follow-Up Action Items	Status	Assigned To	Priority	Next Step	Due Date
Research Smartsheet Automated Actions for automatic notifications on sheet changes	Not Started	Chris	!		07/09/18
Get partner approved copy	In Progress	[Insert name]	↓		[due date]

Report - Future Agenda Topics

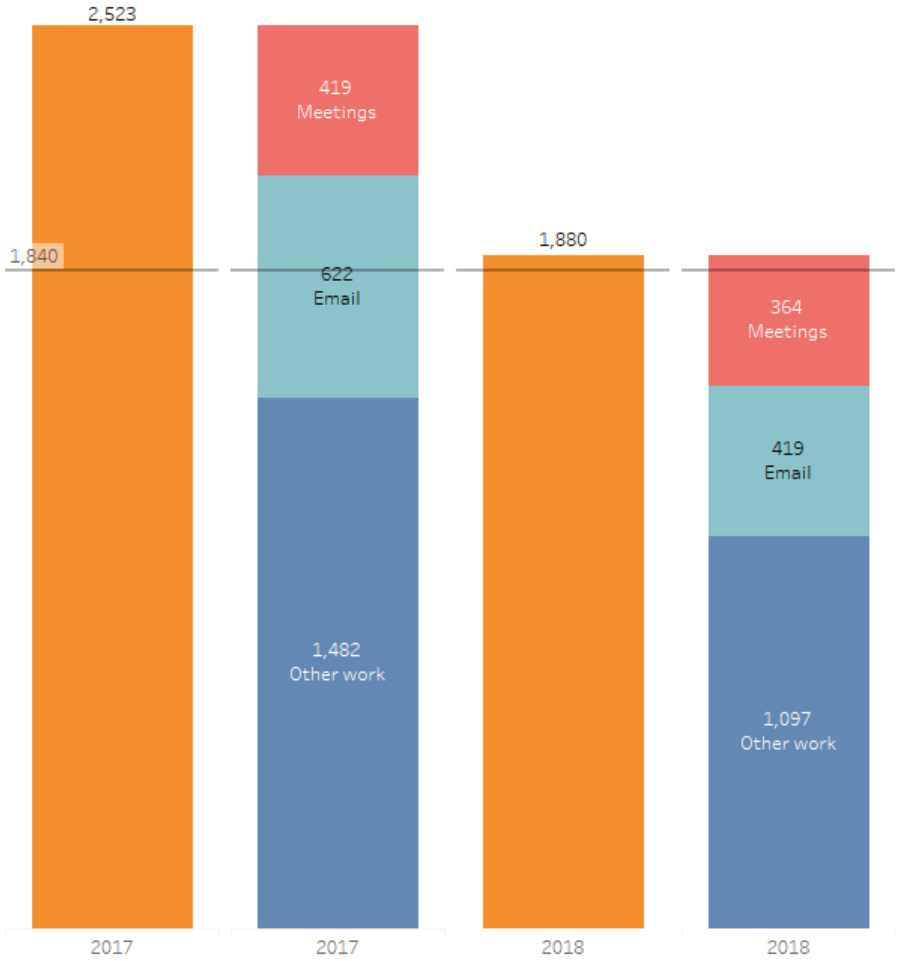
Date	Topic	Time	Owner	Description
Weekly	[Insert weekly recurring topic]			
Weekly	[Insert weekly recurring topic]			

Report - Past Agenda Topics

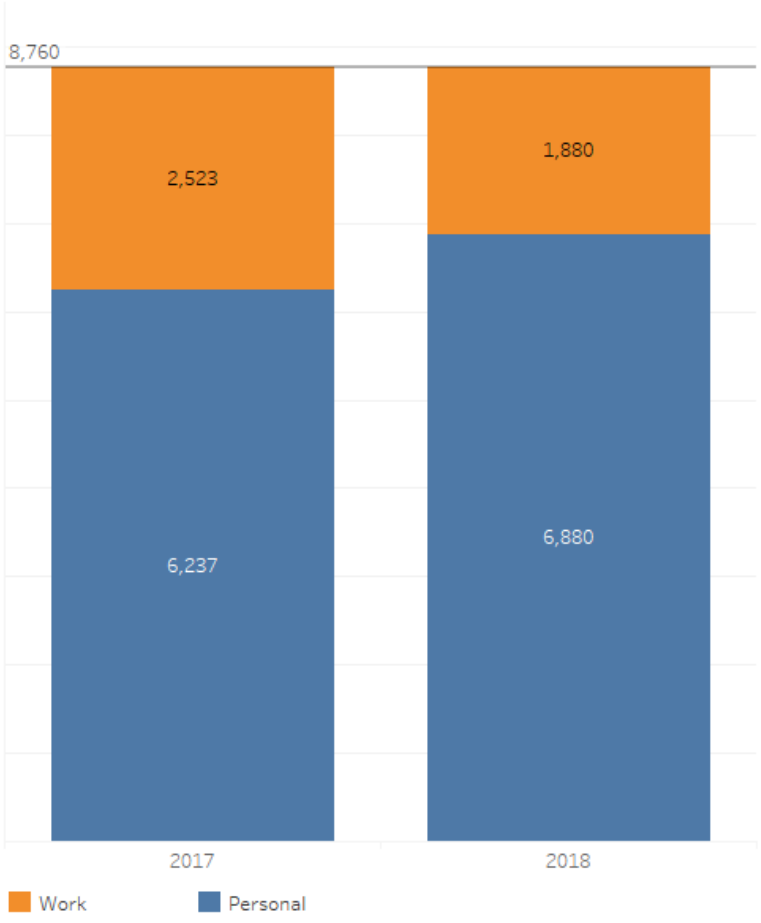
Date	Topic	Time	Owner	Description



smartsheet
ENGAGE



smartsheet
ENGAGE



smartsheet
ENGAGE

Insights from Zillow
Capri Jensen
Project Manager
smartsheet
ENGAGE

Zillow GROUP

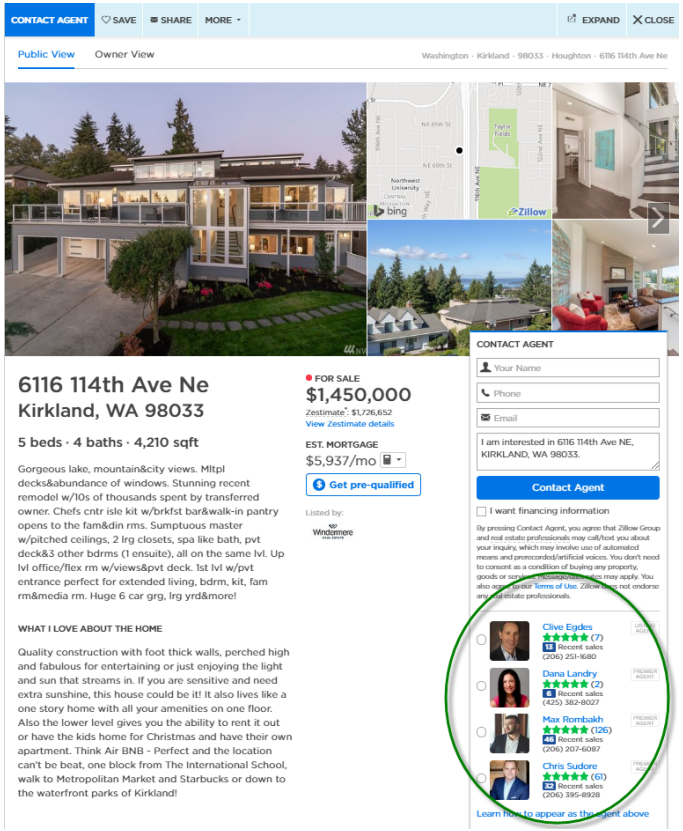
Information Traffic Jam

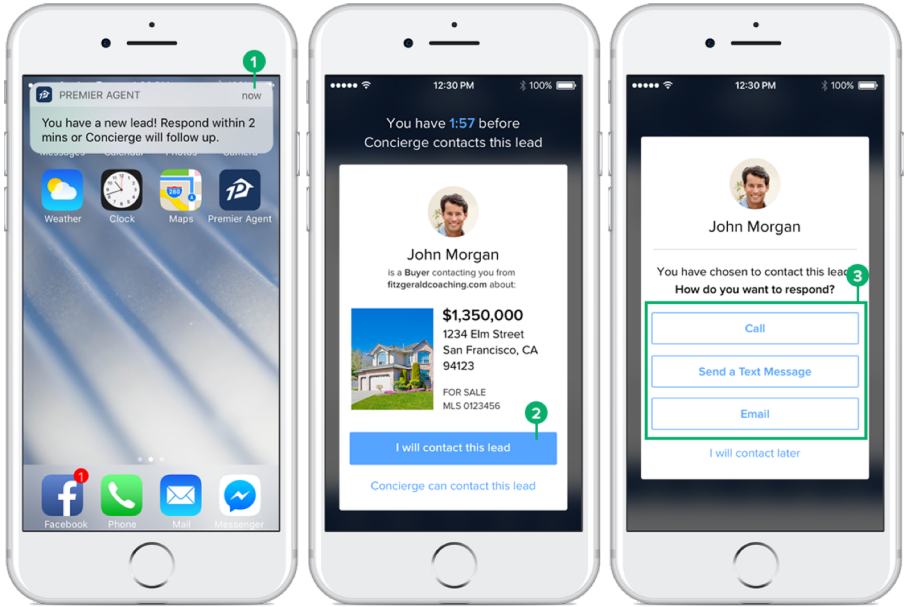
- E-mails
- Meetings
- Project Tasks
- Impromptu Work

Zillow GROUP

Smartsheet
Software that Catalyzed Innovation

Connect with Premier Agents



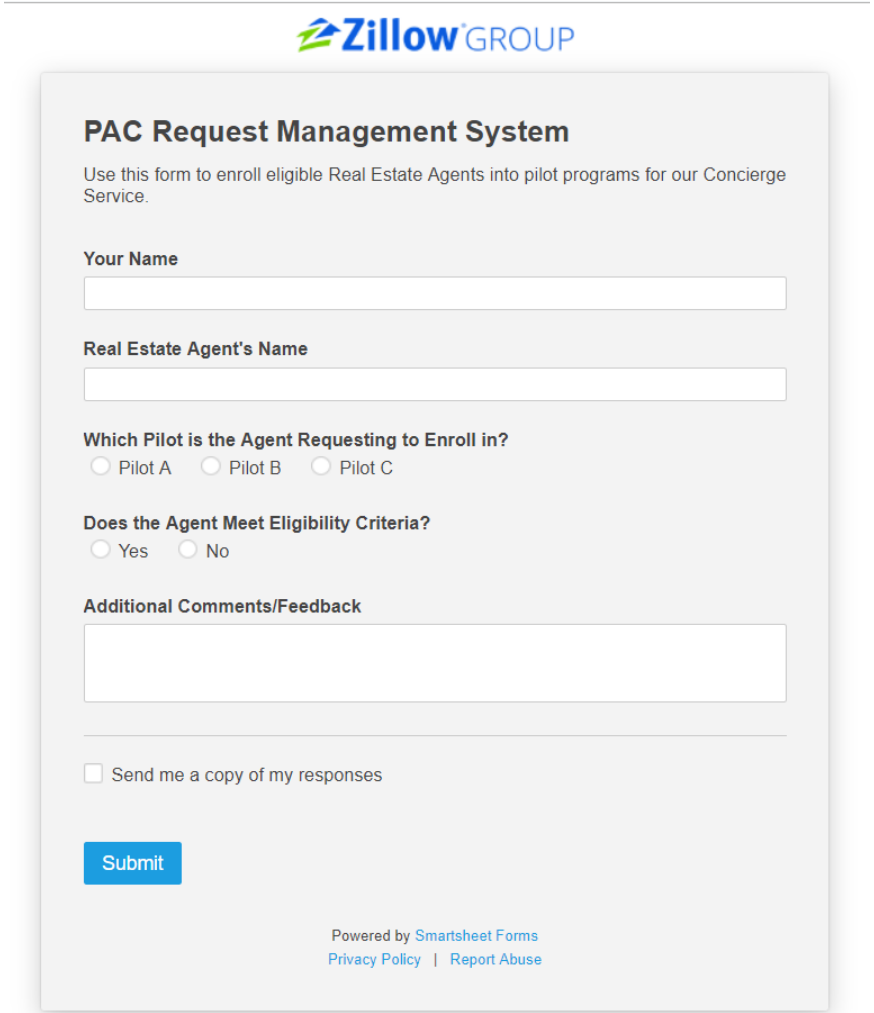


Zillow®

5-STAR AGENT

Helping our Agent's Do their Best Work

Zillow's Concierge Service



PAC Request Management System

Use this form to enroll eligible Real Estate Agents into pilot programs for our Concierge Service.

Your Name

Real Estate Agent's Name

Which Pilot is the Agent Requesting to Enroll in?

○ Pilot A ○ Pilot B ○ Pilot C

Does the Agent Meet Eligibility Criteria?

○ Yes ○ No

Additional Comments/Feedback

☐ Send me a copy of my responses

Submit

Powered by Smartsheet Forms

Privacy Policy | Report Abuse

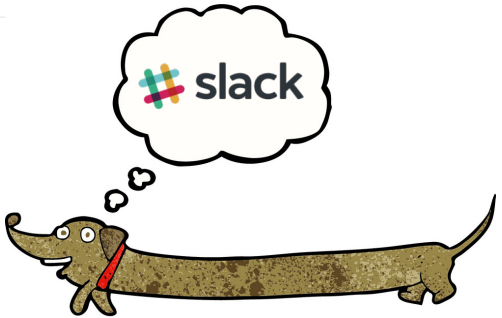
Zillow GROUP Search...

Home | Consierge Pilot Request System

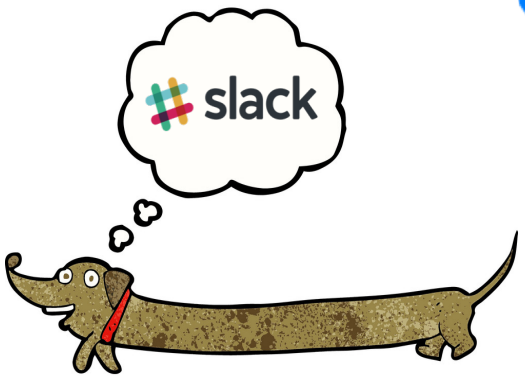
File | Alerts & Actions | Forms

Grid View | Filter | Arial | 10

	Your Name	Real Estate Agent	Which Pilot is the Agent Requesting to Enroll in?	Does the Agent Meet Eligibility Criteria?	Notes	Program Enrollment Completed	Enrollment Completed By
1	John Doe	Alan	Pilot A	Yes		Yes	Capri Jensen
2	John Doe	Alan	Pilot B	Yes	He is very excited to be in this program!	Yes	Capri Jensen
3	John Doe	Alan	Pilot C	Yes		Yes	Capri Jensen
4	John Doe	Bruce	Pilot B	Yes	Is it possible for Bruce's whole team to becom	Yes	Capri Jensen
5	John Doe	Bruce	Pilot A	Yes			
6	John Doe	Alan	Pilot B	Yes			
7							
8							
9							



Zillow GROUP



Smartsheet APP 12:08 AM

Changes to Consierge Pilot Request System: John Doe

caprig@zillowgroup.com **updated** a row in:

Consierge Pilot Request System

Your Name

John Doe

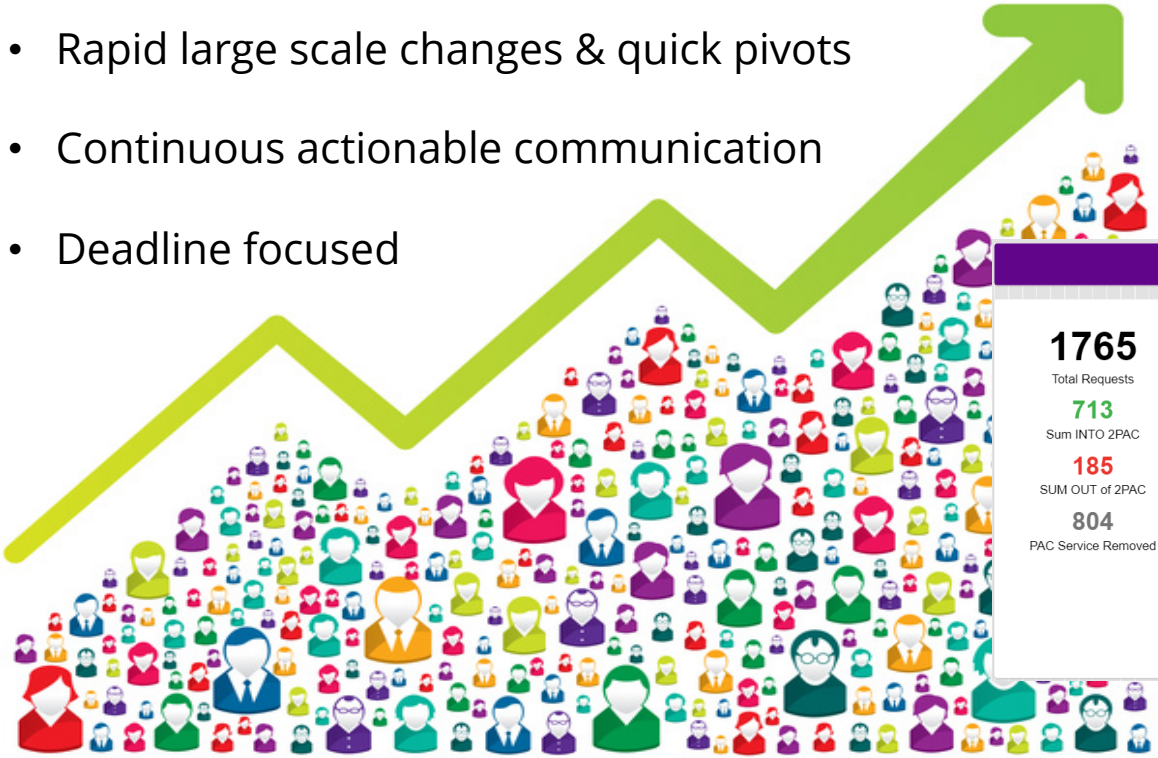
Enrollment Completed By

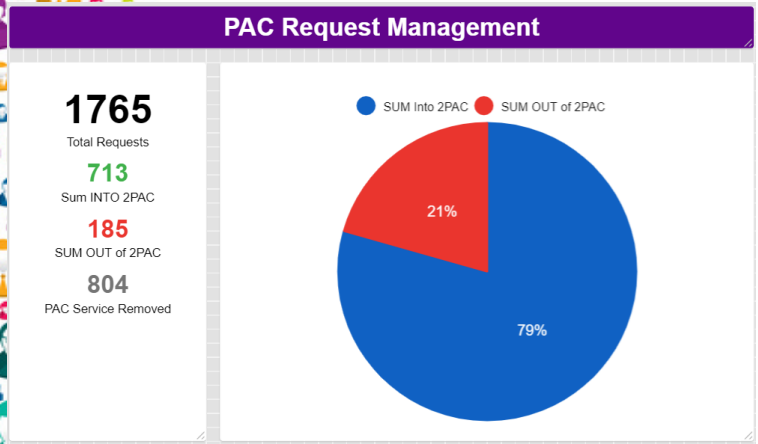
Capri Jensen

As of 09/27/18 | Sent by caprig@zillowgroup.com

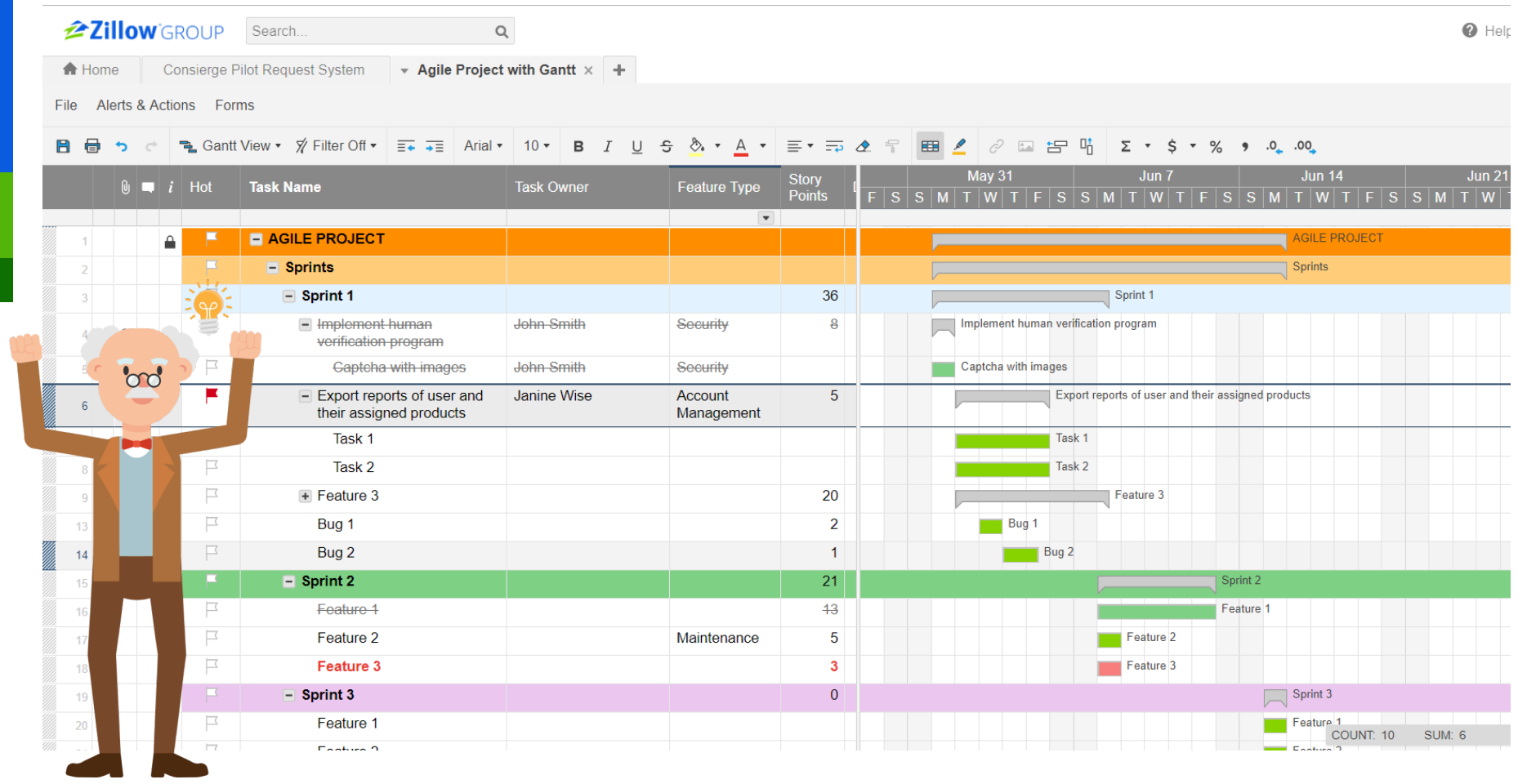
Rapid Growth of our Concierge Pilot

- Next evolution of the Concierge program
- Rapid large scale changes & quick pivots
- Continuous actionable communication
- Deadline focused





Zillow GROUP



Zillow GROUP

Neural Network

- Connecting the right people at the right time
- Action prompting alerts
- Intuitive road mapping & data capture
- Full transparency & access to those who need it

Zillow GROUP

Zillow GROUP

What's Next?

	Direct Messages	Channel Alerts	In-app chat/video	Publish
Slack	✓	✓		
Workplace by Facebook	✓			
Google Hangouts classic			✓	
Google Hangouts Chat	✓			
Skype for Business			✓	
Microsoft Teams	✓			✓
WebEx Teams		✓ (by Cisco)		
Quip				✓

What's Next?

- Now:
  - @mentions in messaging apps
  - Date-based workflow notifications in messaging apps
- Next: Microsoft Teams – direct messages
- Future consideration:
  - Tie conversations in messaging apps to work items in Smartsheet
  - Richer bot interactions

smartsheet
ENGAGE / Q&A
#SmartsheetENGAGE

Messaging App Integrations

Automate Work, Make Better Decisions Faster

How do I get started?

https://www.smartsheet.com/apps/slack

https://www.smartsheet.com/apps/hangoutschat

https://www.smartsheet.com/apps/workplace

Don’t forget to:

- Share your feedback in our survey in the ENGAGE app
- Stop by the Smartsheet Chat and Messaging booth on the first floor
- Visit the Innovation Center for hands-on learning, support, services, swag, and more

smartsheet
#SmartsheetENGAGE