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Session Objectives

- Office 365 and Smartsheet

- Integrations strategy

- Office 365 Integrations

  - What

  - Why

  - How

- Customer perspective

- Q&A and audience feedback

Where Smartsheet & O365 Each Shine

Office 365

Market Leading Traditional Collaboration Suite

Content Creation

Communication

Collaboration

Analysis

Features:

- **Sharing Content**
- **Co-authoring**
- **Customizable Workflows & Dashboards**
  - **Often a Power User or Developer**

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World-Class Next Generation Work Execution Platform

Plan & Manage: Align teams - connect deadlines to workflows

Multiple views including grid, card, Gantt and calendar

Capture

Smart forms, integrations, connectors

Automate

Smart automations, notifications, workflow

Report: Real-time visibility

Dashboards, portals

Features:

- **Integrated Workflow**
- **Collaboration: Automation & visibility**
- **Customizable Workflows & Dashboards**
  - **No code required**

Why Partner With Office 365?

- Market leader

- Shared customers

- Cloud-enabled

- Complimentary

Office 365

Office 365 Integrations Strategy

- Widely applicable use cases

- Value

- Ease of install and use

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Strong Microsoft Relationship

- Executive engagement

- Launch partner for integrations

- Partner Advisory Councils

- Engineering collaboration

Microsoft Partner | Silver Cloud Productivity

2015 Office 365 BEST APP **WINNER**

2016 Office 365 BEST INTEGRATED OFFICE ADD-IN **FINALIST**

2017 Office 365 BEST BUSINESS VALUE **FINALIST**

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Smartsheet's Office365 Investments

Add a Smartsheet "tab" in Teams

Save files to OneDrive

Create a Smartsheet task from Outlook

Skype presence and chat inside Smartsheet

Create Logic Apps workflows to/from Smartsheet

Azure AD single sign-on

Create Flow workflows to/from Smartsheet

Import/Export to and from Project

Smartsheet connector for PowerApps

Import/Export to and from Excel

Visualization and analytics with PowerBI

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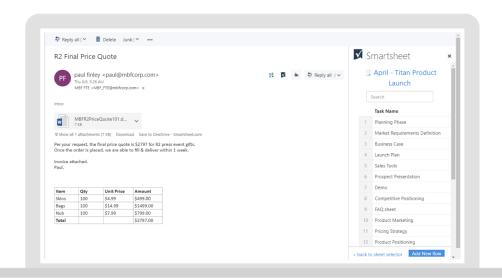
Outlook

Copy text and attachments to Smartsheet

- Free data from your Inbox

- Collect information in one place

- No more cutting and pasting

- Outlook desktop, mobile, and web
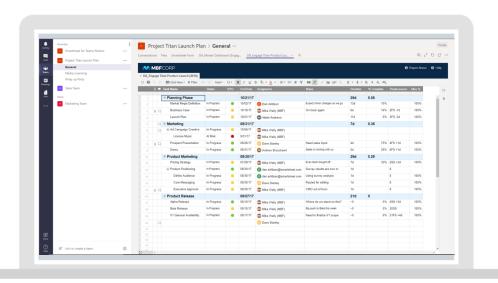
smartsheet.com/apps/microsoft-outlook

Teams

Add Smartsheet to a Teams tab

- Collaborate via group chat

- All project artifacts in one place

- Turn chat into action

- Facilitate visibility and
  communication
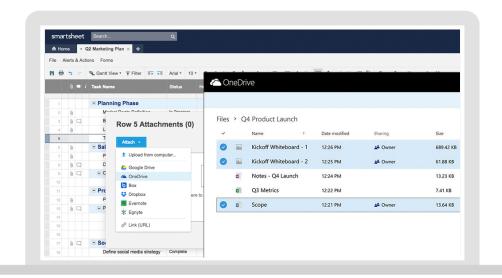
smartsheet.com/apps/microsoft-teams

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OneDrive

OneDrive attachments in Smartsheet

- Keep files in one place

- Avoid file version conflicts

- Choose your storage provider
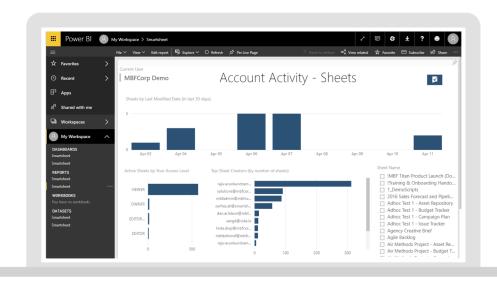
smartsheet.com/apps/onedrive

PowerBI

Bring Smartsheet data into PowerBI

- Gain insight through visualization

- Summarize data from multiple sheets

- Enrich data using other sources
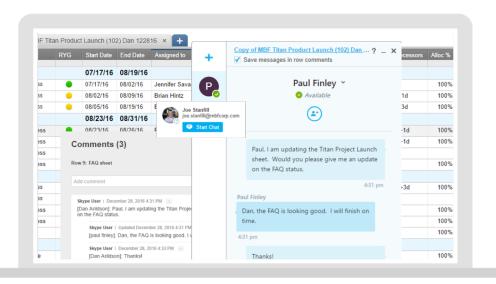
smartsheet.com/apps/microsoft-power-bi

Skype for Business Online

Presence and chat within Smartsheet

- Get updates in real-time

- Conversations archived

- Communicate in context

- More efficient communication
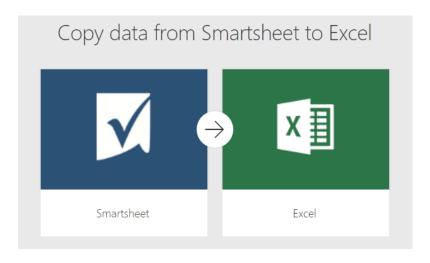
smartsheet.com/apps/skype-business-online

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Flow
Create workflows without code

- **Connect systems**

- **Stay in sync**

- **Increase accuracy**

- **Reduce errors**

Copy data from Smartsheet to Excel

Smartsheet → Excel

smartsheet.com/microsoft-flow

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Excel
Export to Excel

- **Analyze**

- **Pivot**

- **Enrich**
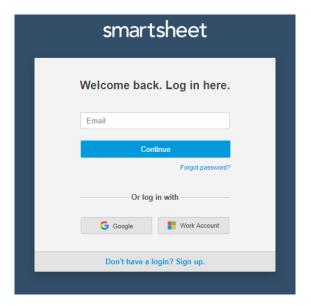
smartsheet.com/apps/microsoft-excel

Azure AD Single Sign On

Login with Microsoft work credentials

- Reduce password overload

- Simplifies collaboration

- Less administrative overhead

- Added security

smartsheet.com/apps/microsoft-azure-active-directory

Smartsheet & O365 = Even Better Together

- Integrations complement each other to drive efficiency

- Allow you to stay in your workflow without switching applications

- Reduce time and errors due to less copy/paste or data re-entry

- Use the right tool for right job - flexibility for office workers to use what is best for their needs

Call to Action
Get Started!

- **Go to https://smartsheet.com/microsoft**

- **Talk to your administrator about enabling:**

  - **Azure AD Single Sign On**

  - **Skype for Business Online**

- **Sign in and start getting value today!**

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Don't forget to:

- Share your feedback in our survey in the ENGAGE app
- Visit the Innovation Center for hands-on learning, support, services, swag, and more

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OUTLOOK

File   Home   Send / Receive   Folder   View   Help   Dictation   Tell me what you want to do

Reply
Reply All
Forward

New Email   New Items

Delete   Archive

Move to: ?
To Manager

New Group
Browse Groups

Search People

Address Book
Filter Email

Move   Tags

Speech   Get Add-ins   The Smartsheet for Outlook Add-in

New | Delete | Respond | Quick Steps | Groups | Find | Add-ins | The Smartsheet for Outl...

Favorites

Search Current Mailbox   Current Mailbox

Focused   Other   By Date

Smartsheet for Outlook

dan.arildson@mbfcorp.com

Inbox   53
Drafts
Sent Items
Deleted Items   26
approve
Archive   1
Conversation History
Junk Email
New
Outbox
RSS Feeds
Scheduled
Search Folders
Groups

Other: New messages (35)
Microsoft Flow, Sling TV, paul finley, Azuqua

Last Week
paul finley
R2 Final Price Quote   Thu 9/27
Per your request, the final price

Two Weeks Ago
paul finley
R2 Final Price Quote   9/20/2018
Per your request, the final price

Three Weeks Ago
paul finley
R2 Final Price Quote   9/13/2018
Per your request, the final price

Dan Arildson
Test for Engage   9/10/2018

Dan Arildson
Fwd: Engage is coming!   9/10/2018
-- Dan Arildson | Smartsheet

Older
Skype for Business
Office 365 Audio Conferencing ...   7/3/2018
-- Office 365 Audio

paul finley
R2 Final Price Quote   6/28/2018
Per your request, the final price

Thu 9/27/2018 9:26 AM

PF

paul finley <paul@mbfcorp.co

R2 Final Price Quote

To   MBF FTE

MBFR2PriceQuote101.docx
7 KB

Per your request, the final price quote is $2797 for R2
press event gifts.
Once the order is placed, we are able to fill & deliver
within 1 week.

Invoice attached.
Paul.

Item	Qty	Unit Price	Amount
Skins	100	$4.99	$499.00
Bags	100	$14.99	$1499.00
Nub	100	$7.99	$799.00
Total			$2797.00

Smartsheet for Outlook

Less **Talk**,
More **Action**

Turn emails into action - fast

Add emails and attachments
directly to an existing sheet

Add and update rows without
leaving Outlook

Log in

Create an Account

Items: 114   Unread: 53   All folders are up to date.   Connected to: Microsoft Exchange   Display Settings   100%

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This app requires you to log in to Smartsheet

Smartsheet Outlook Addin
Turn emails into action by connecting Outlook to Smartsheet. Add emails...
Learn More

Email

Password

Forgot password?

Log In

Or log in with

G Google

Work Account

Don't have a login? Sign up.

Download on the App Store

GET IT ON Google Play

Privacy Policy

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This app is requesting access to your Smartsheet account

Smartsheet Outlook Addin
Turn emails into action by connecting Outlook to Smartsheet. Add emails...
Learn more...

smartsheet

Allow Access?

The Smartsheet Outlook Addin App will be able to:

- View basic user info, including name and email
- Read sheets, including attachments and comments
- Update sheets, including attachments and comments
- Create sheets
- Modify sheet columns and settings
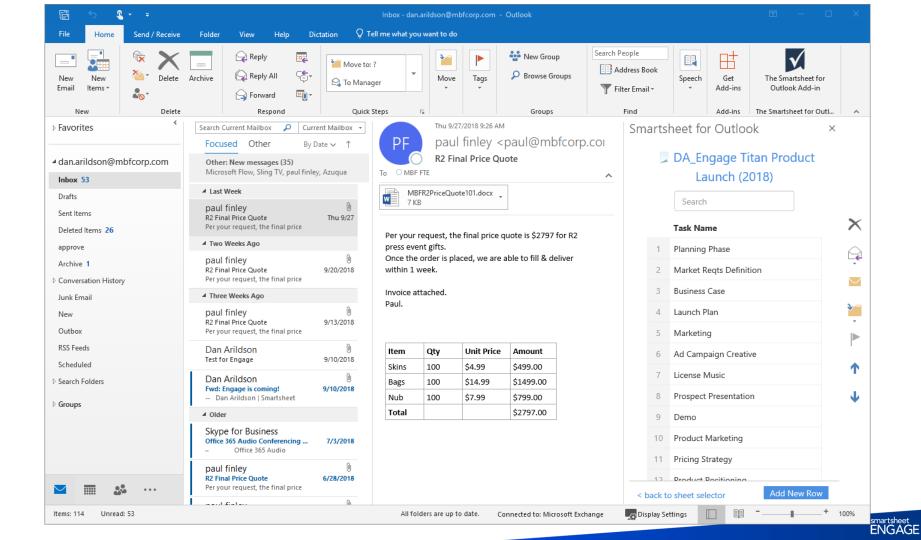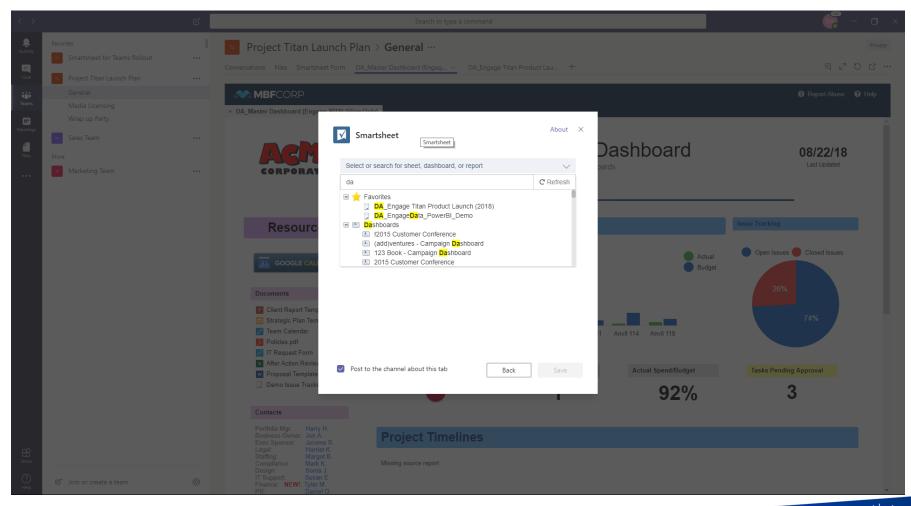
By clicking the **Allow** button, I agree to the Smartsheet User Agreement.
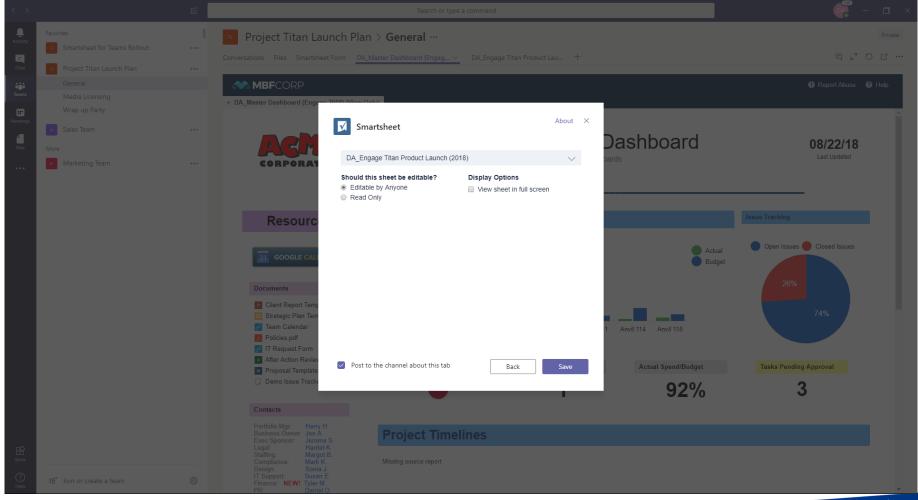
Deny   Allow
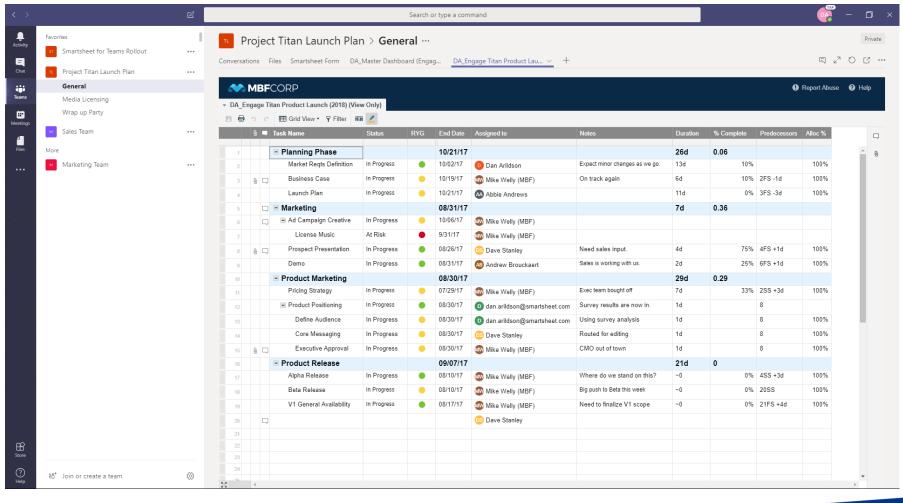
Dan Arildson, dan.arildson@mbfcorp.com   Sign Out

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TEAMS

ONE DRIVE

POWER BI

SKYPE FOR BUSINESS

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Account Admin...

Personal Settings...

Apps & Integrations...

Personal Colors & Logo...

My Smartsheet Contacts...

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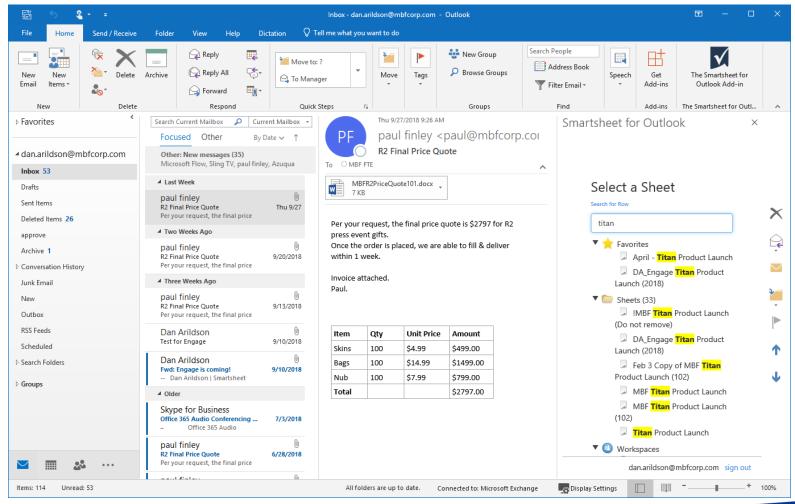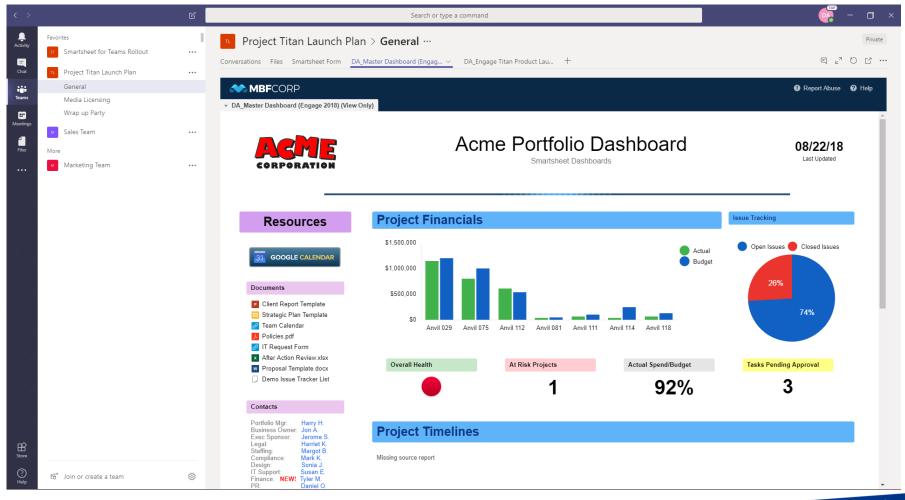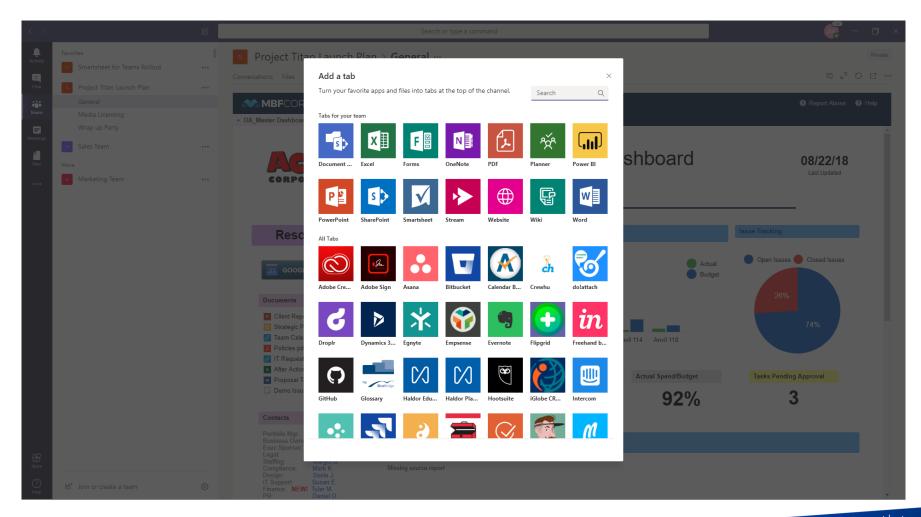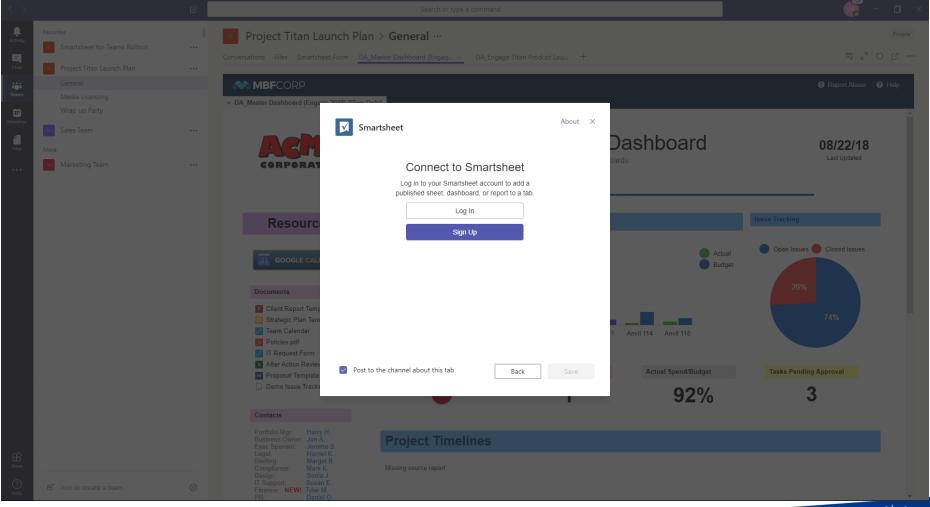|			Task Name	Status	RYG	End Date	Assigned to	Notes	Duration	% Complete	Predecessors	Alloc %
1			**Planning Phase**			10/21/17			26d	0.06		
2			Market Reqts Definition	In Progress	🟢	10/02/17	Dan Arildson	Expect minor changes as we go.	13d	10%		100%
3	📎	💬	Business Case	In Progress	🟡	10/19/17	Mike Welly (MBF)	On track again	6d	10%	2FS -1d	100%
4			Launch Plan	In Progress	🟡	10/21/17	Abbie Andrews		11d	0%	3FS -3d	100%
5		💬	**Marketing**			08/31/17			7d	0.36		
6		💬	Ad Campaign Creative	In Progress	🟡	10/06/17	Mike Welly (MBF)					
7			License Music	At Risk	🔴	9/31/17	Mike Welly (MBF)					
8	📎	💬	Prospect Presentation	In Progress	🟢	08/26/17	Dave Stanley	Need sales input.	4d	75%	4FS +1d	100%
9			Demo	In Progress	🟢	08/31/17	Andrew Brouckaert	Sales is working with us.	2d	25%	6FS +1d	100%
10			**Product Marketing**			08/30/17			29d	0.29		
11			Pricing Strategy	In Progress	🟡	07/29/17	Mike Welly (MBF)	Exec team bought off	7d	33%	2SS +3d	100%
12			Product Positioning	In Progress	🟢	08/30/17	dan.arildson@smartsheet.com	Survey results are now in.	1d		8	
13			Define Audience	In Progress	🟡	08/30/17	dan.arildson@smartsheet.com	Using survey analysis	1d		8	100%
14			Core Messaging	In Progress	🟡	08/30/17	Dave Stanley	Routed for editing	1d		8	100%
15	📎	💬	Executive Approval	In Progress	🟡	08/30/17	Mike Welly (MBF)	CMO out of town	1d		8	100%
16			**Product Release**			09/07/17			21d	0		
17			Alpha Release	In Progress	🟢	08/10/17	Mike Welly (MBF)	Where do we stand on this?	~0	0%	4SS +3d	100%
18			Beta Release	In Progress	🟡	08/10/17	Mike Welly (MBF)	Big push to Beta this week	~0	0%	20SS	100%
19			V1 General Availability	In Progress	🟢	08/17/17	Mike Welly (MBF)	Need to finalize V1 scope	~0	0%	21FS +4d	100%
20		💬					Dave Stanley					
21												
22												
23												
24												
25												
26												

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			Task Name	Status	RYG	End Date	Assigned to	Notes	Duration	% Complete	Predecessors	Alloc %
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2			Market Reqts Definition	In Progress	🟢	10/02/17	D Dan Arildson ✓	Expect minor changes as we go.	13d	10%		100%
3	📎	💬	Business Case	In Progress	🟡	10/19/17	Mike Welly (MBF) ✓	On track again	6d	10%	2FS -1d	100%
4	📎		Launch Plan	In Progress	🟡	10/21/17	Abbie Andrews ?		11d	0%	3FS -3d	100%
5		💬	**Marketing**			08/31/17			7d	0.36		
6		💬	Ad Campaign Creative	In Progress	🟡	10/06/17	Mike Welly (MBF) ✓					
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