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Accelerate Your Smartsheet Solutions

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Chris Marsh

Research Director

451 Research

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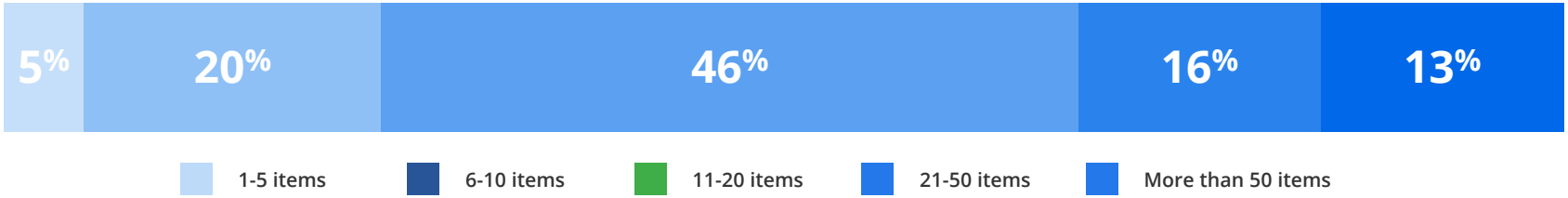
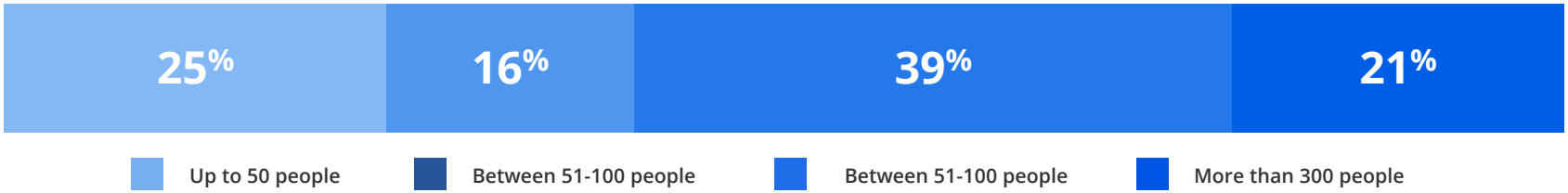
Management of High Value Work is Decentralizing

Typical number of items tracked over the course of a project



Typical number of people involved over the course of a project



Everyone is a “Project” Leader

Operations	Legal	Marketing	Sales
• Operations Manager • VP Operations • Regional Operations Manager • Director of Client Services • VP Technical Operations	• General Counsel • Chief Legal Officer • Director of Legal Affairs • Compliance Officer • Director of Legal Project Management Office	• Director of Global Product Marketing • VP Marketing and Product Management • VP Sales and Marketing • Creative Director • Director Online Marketing	• Director of Teaching and Sales • VP Sales • Group Account Director • Senior Director Customer Sales and Service • Director Sales and Real Estate

Source: 451 Research, anonymized list of work management tools’ customer job titles.

Everyone is a “Project” Leader

Finance	Product Development	Human Resources	Information Technology
• CFO • VP Finance and Business Services • Manager or Tax Accounting and Compliance • VP Head of Tax and Accounting Assets • Director of Finance	• Director of Product Development and Engineering • Director of Engineering • Director of Eloquence Services • Director of Purchasing • Senior Director Research and Development	• Director of HR • Manager of Recruiting Operations • VP Operations • HR Business Partner • Senior Director of HR Operations and Recruiting	• IT Director • Director of Technology • VP Software Engineering • Chief Technologist and Area Lead • Director IT Products

Source: 451 Research, anonymized list of work management tools’ customer job titles.

Preparing the PMO for the Shakeout

Rethinking “projects” and “portfolios”

A new role and skills for the PMO

New tools for business leaders

A new vision for work execution

Thank You

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Team Introductions - Challenges

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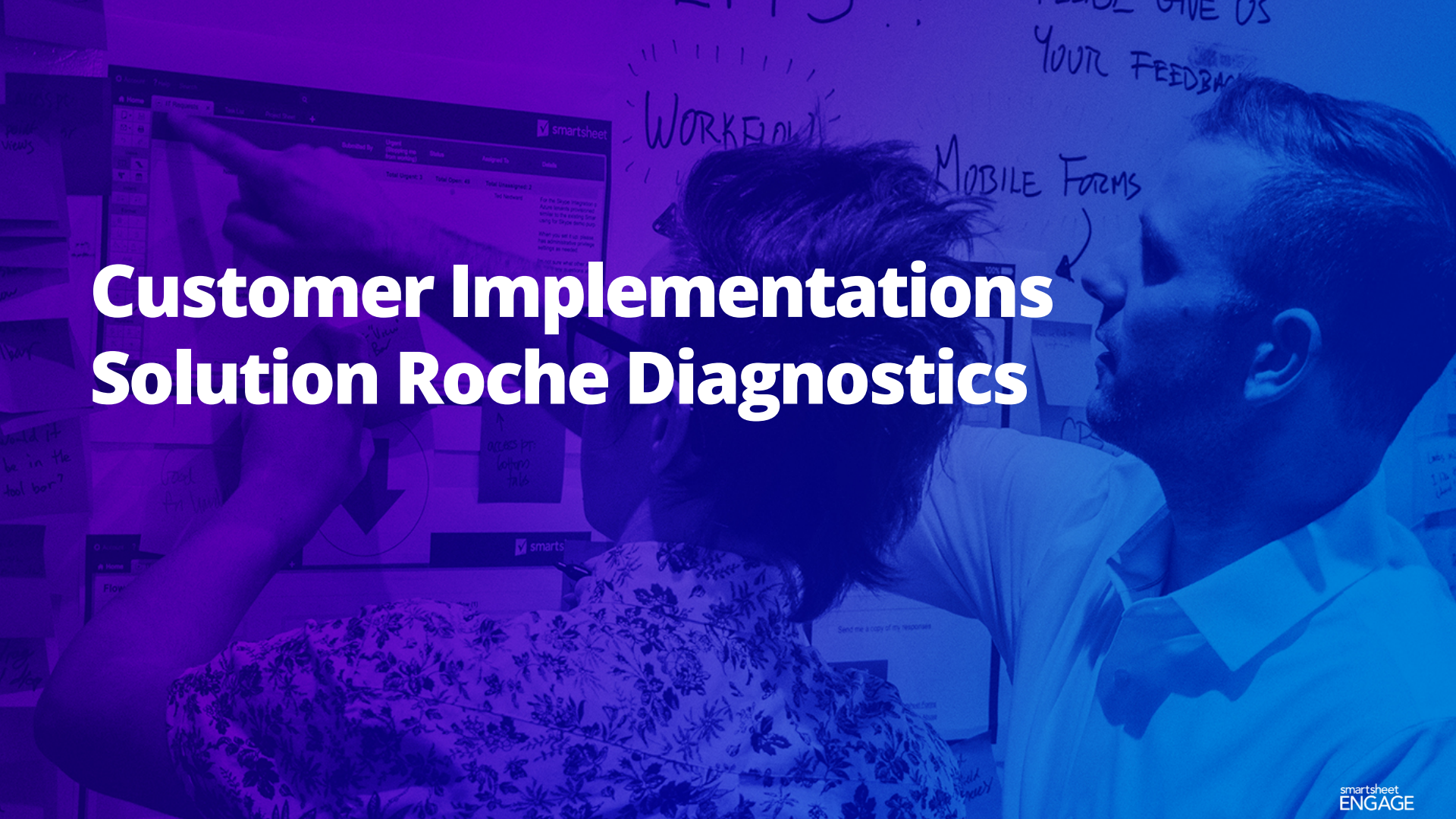

Customer Implementations Solution Roche Diagnostics

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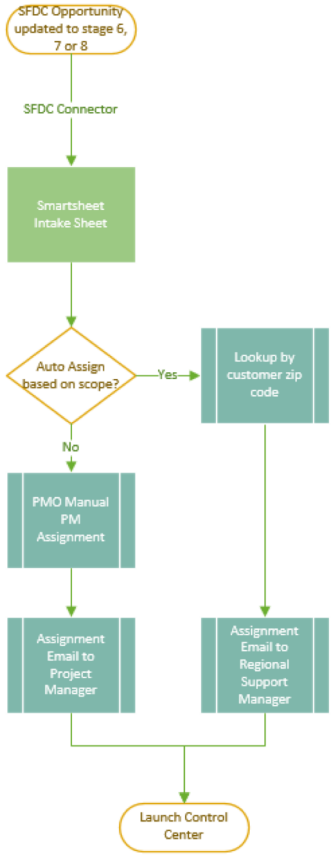
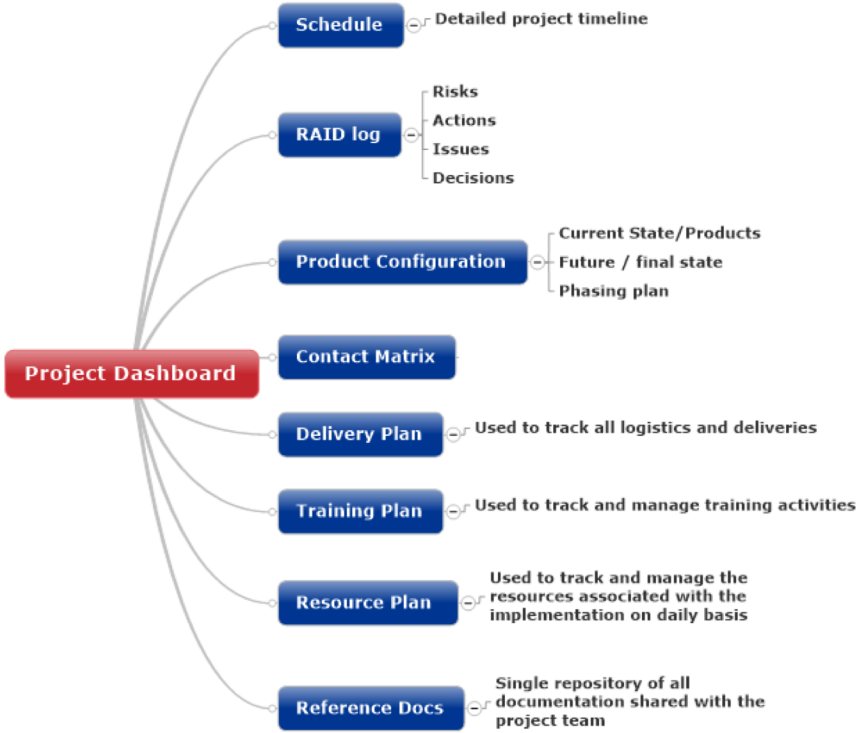
Project Assignment

> Provision



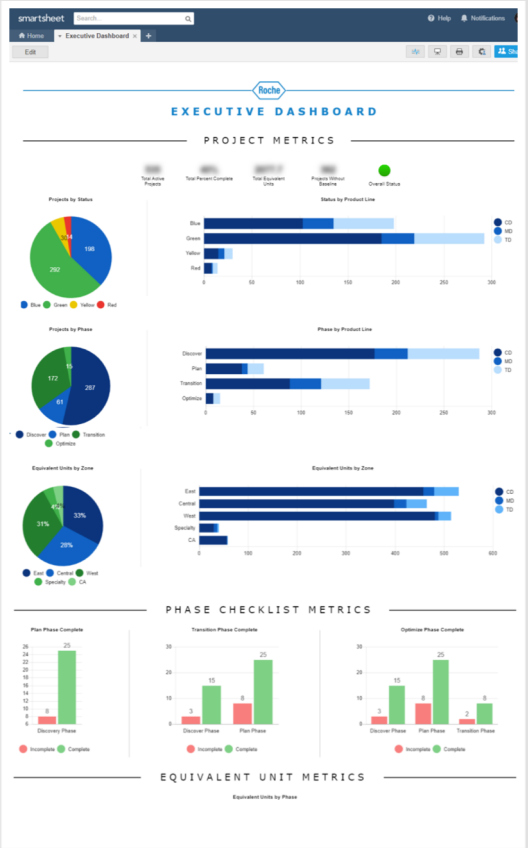
Project Workspace

(Built per customer / site)



Executive Dashboard

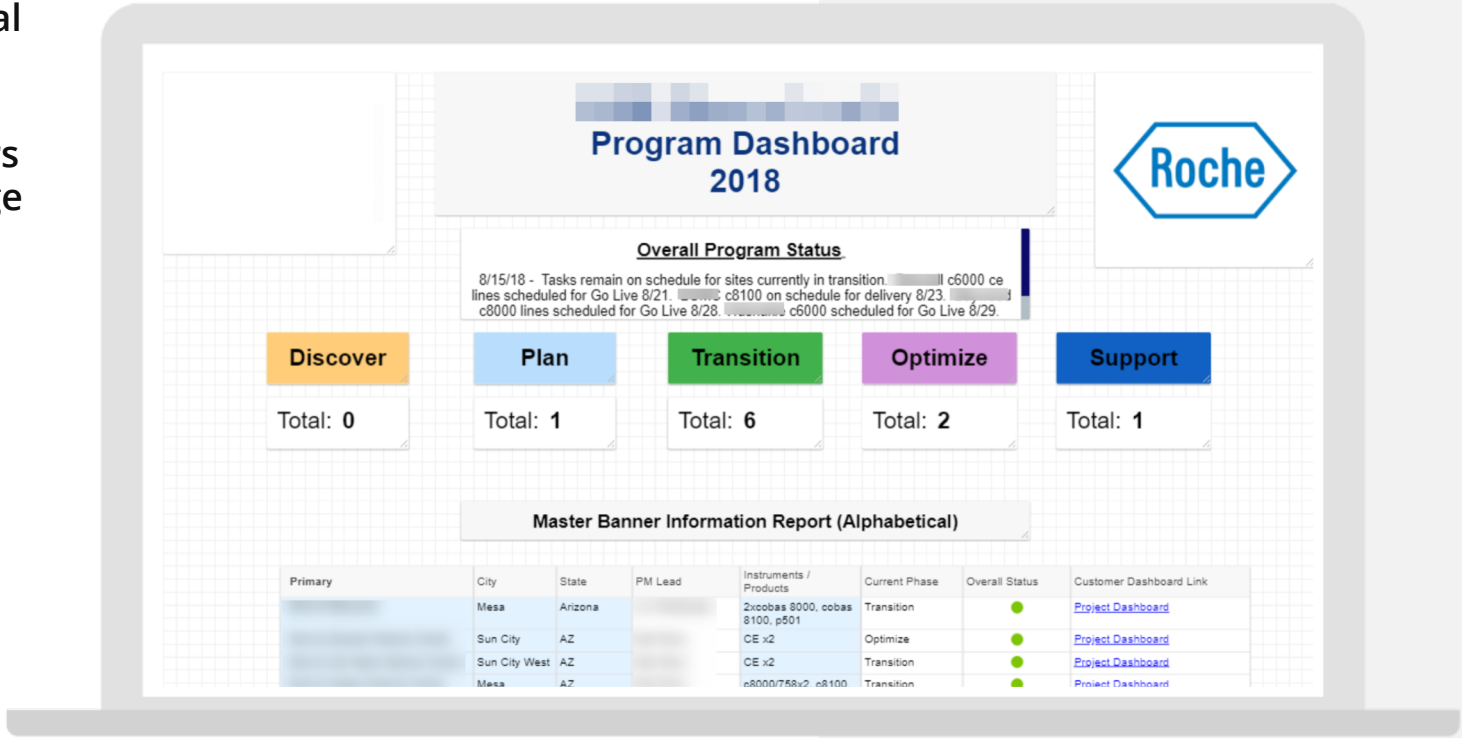
- Always current, updated as new projects added to portfolio.
- Drill down in to key business areas and roll up metrics across portfolio



Program Dashboards

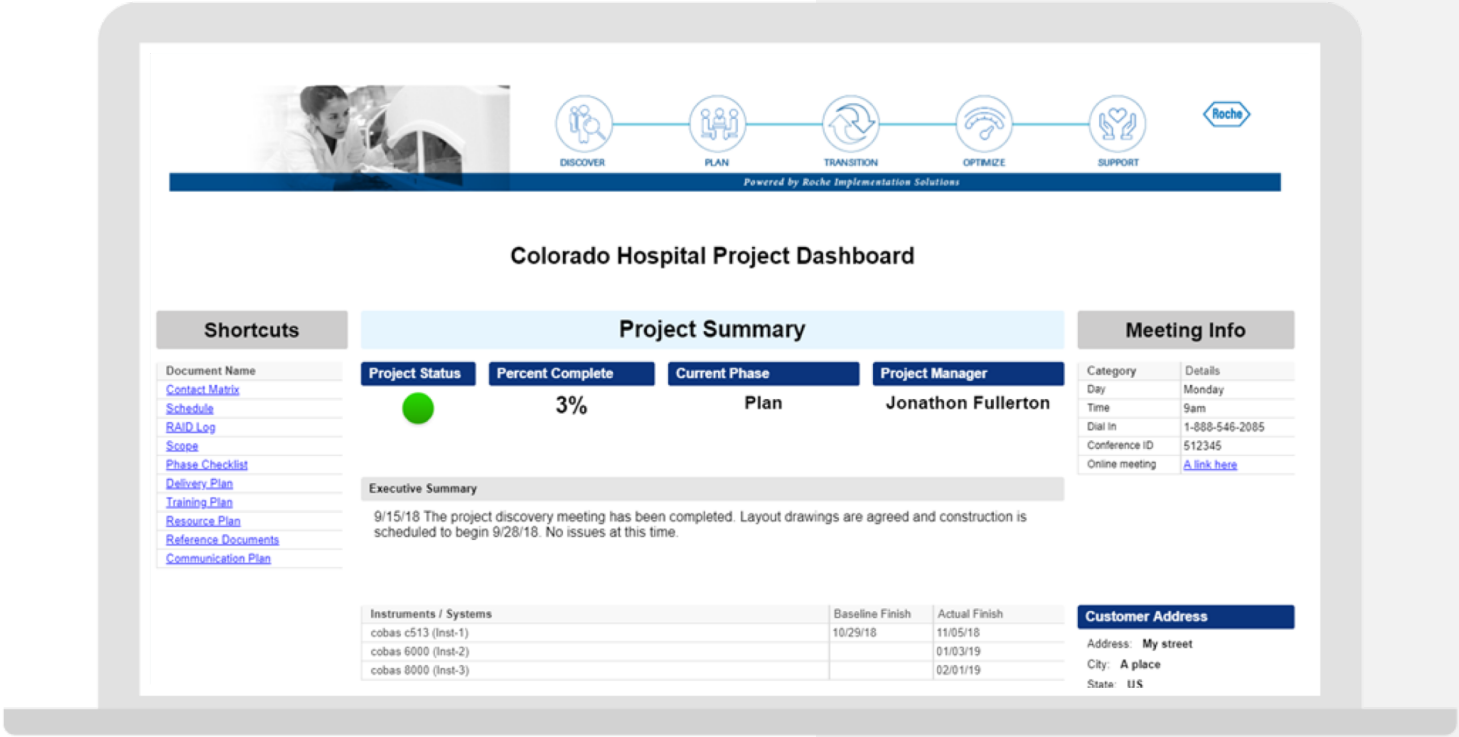
Roll up of individual project sites (workspaces) enabling customers to portfolio manage

Example: Multi-site IHN (Integrated Health Network)

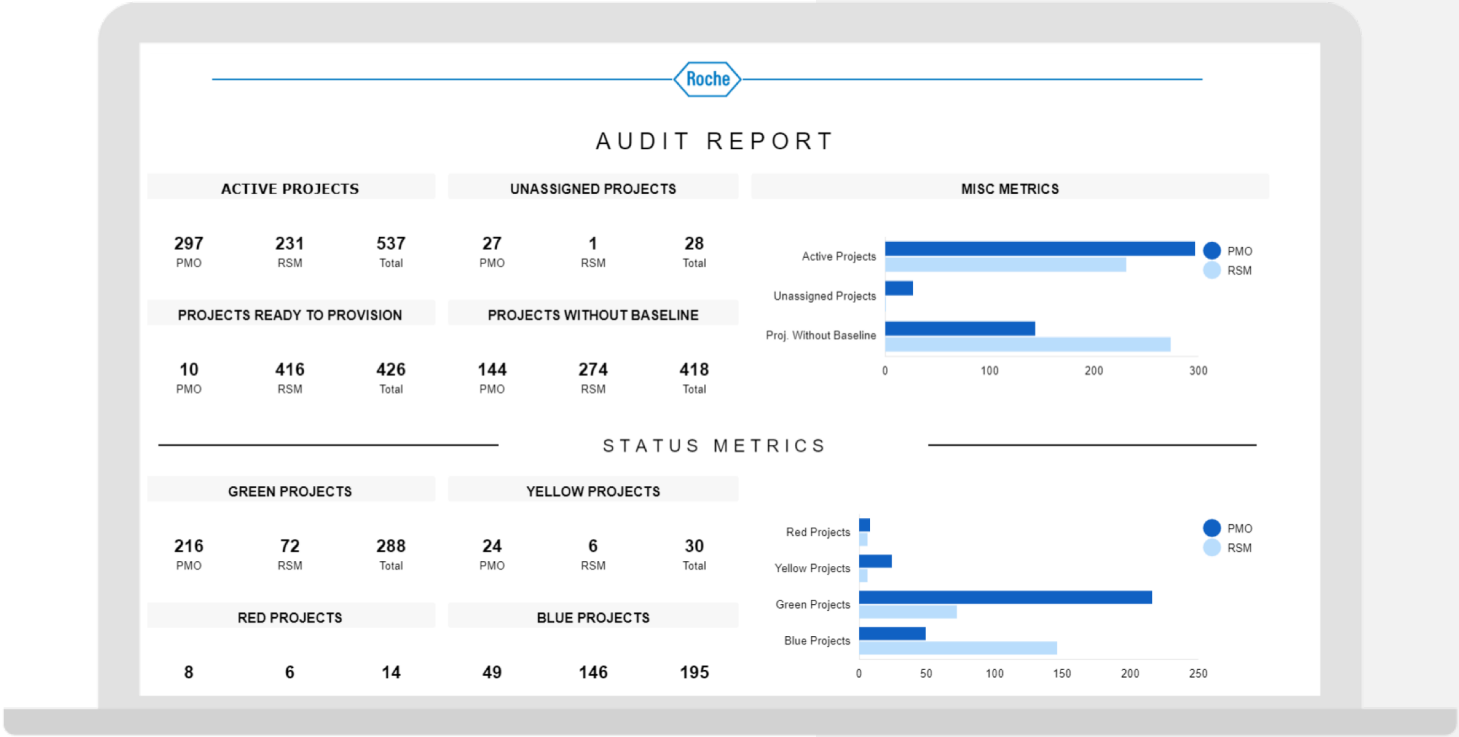


Project Dashboard

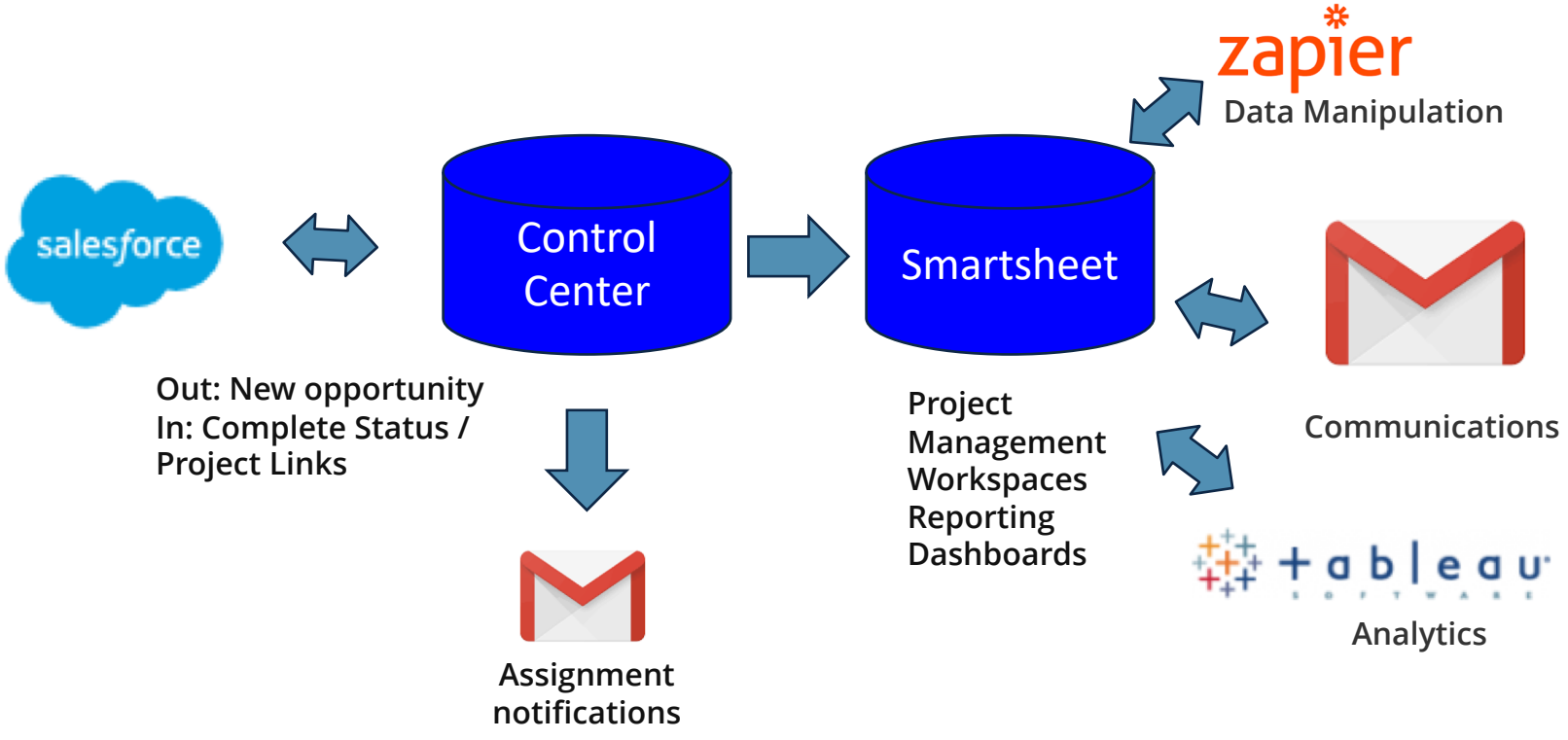
Customer Facing



Compliance / Audit Dashboard



Data Connections



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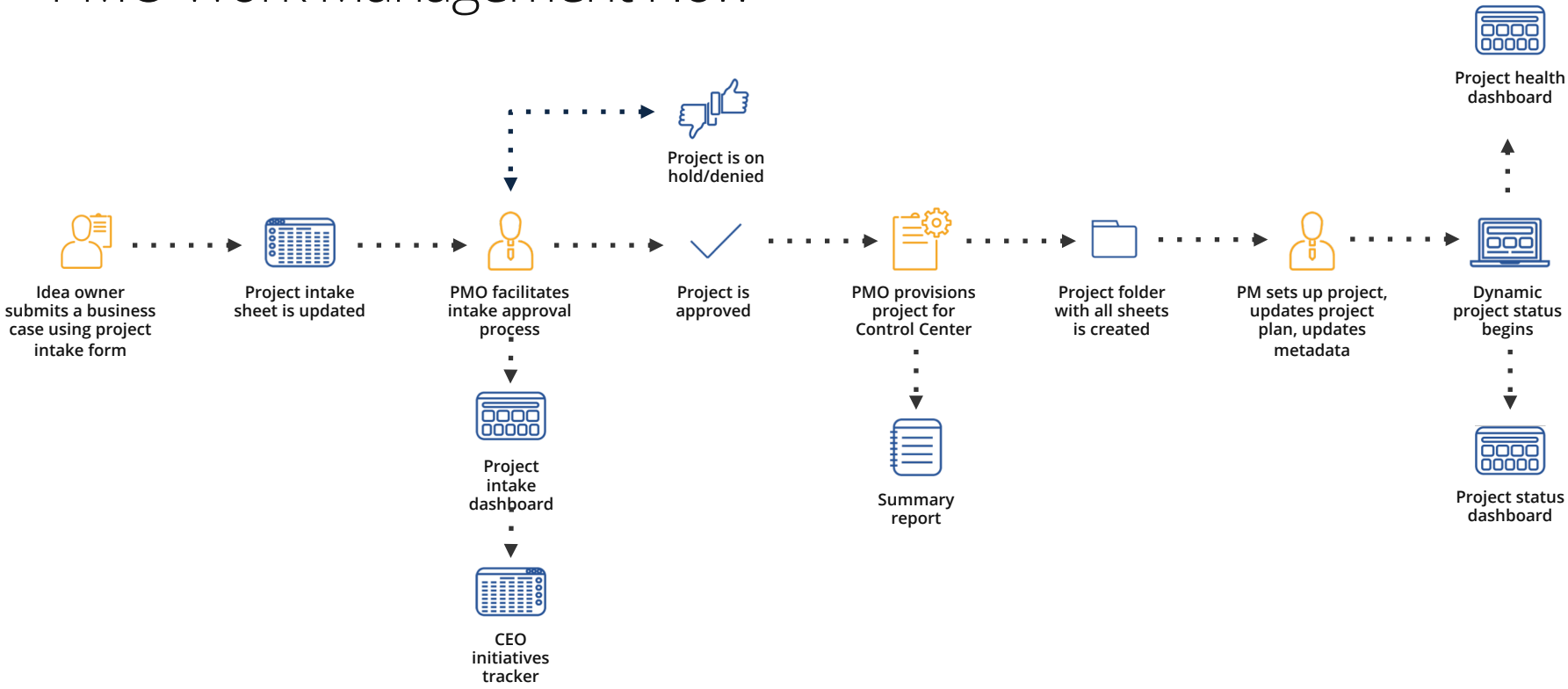
PMO Work Management Flow



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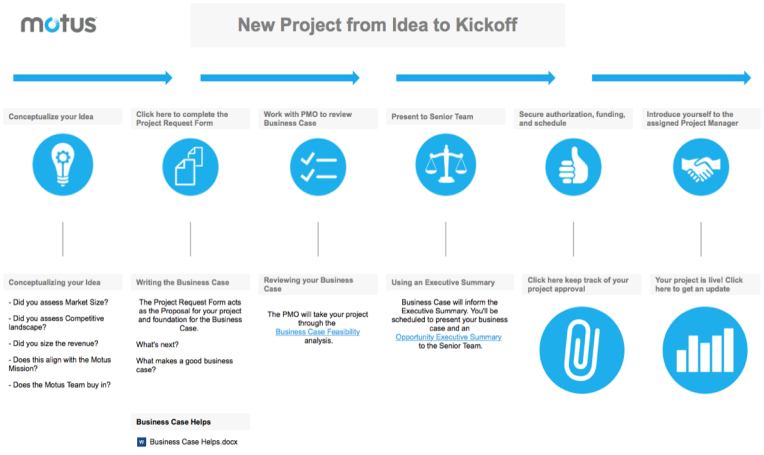
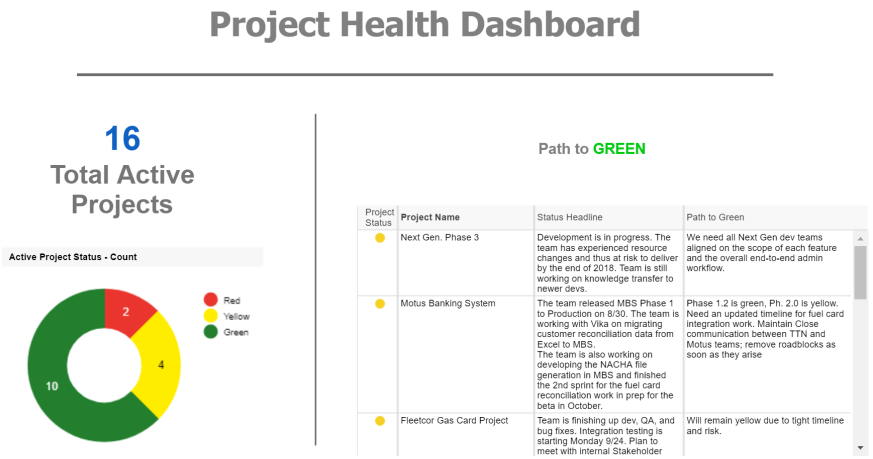
How Motus Optimizes Their PMO

Optimizing portfolio and project management insights in real time

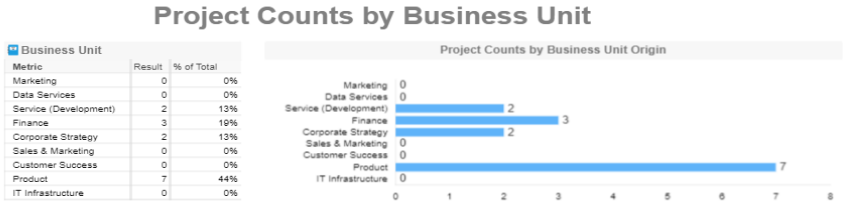


Automate Work Processes

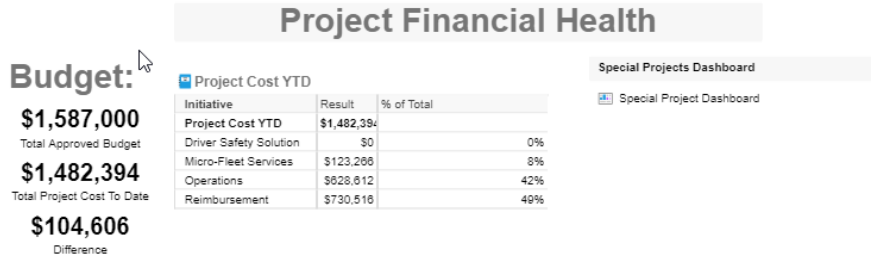


Deploy with Confidence

How Motus Optimizes Their PMO



Make Collaboration Work



Make Better Decisions, Faster

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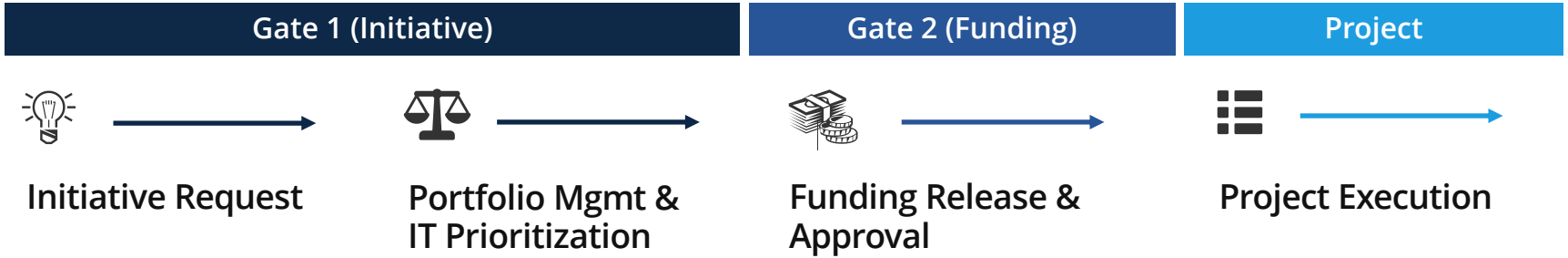
IT Portfolio Management Process Flow

Key Success Factors: IT Leadership Team Support and a Structured Governance



Pain Points

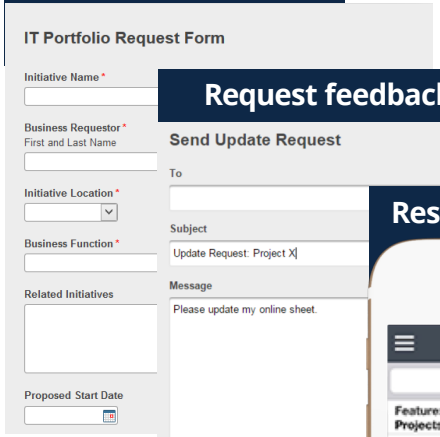
- Manual Excel forms
- Frequent status requests
- Transpose PowerPoint to Excel

Smartsheet Solution

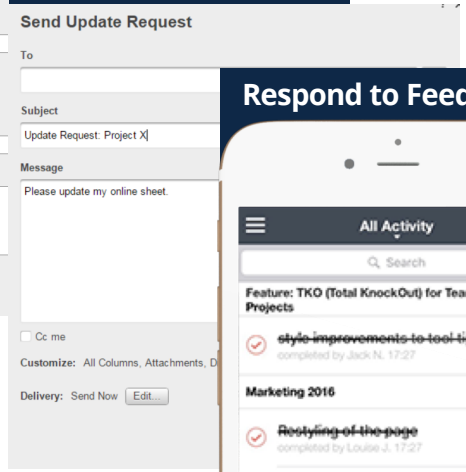
- Automated web forms
- Real-time status updates
- Single source of truth

IT Portfolio Management Process Using Smartsheet

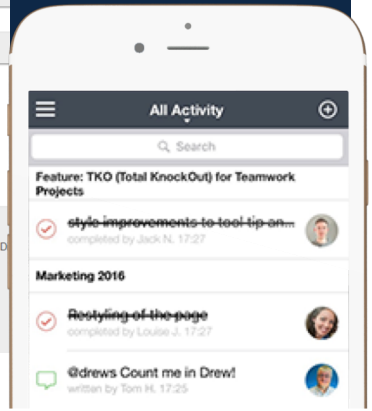
Submit web form



Request feedback



Respond to Feedback



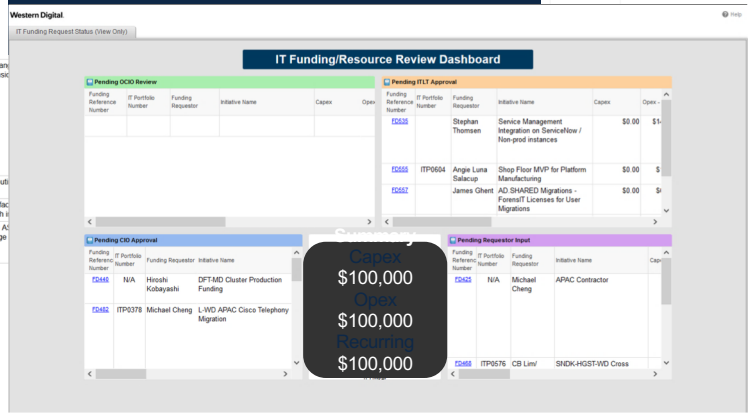
Check Status

Initiative Status	Initiative Submitter	Initiative #	Initiative Name	Description	ITFunction	Funded By	Est. Total Cost ($K)	Est. Capex($K)	Est. Opex($K)	Increase to Yearly Opex (Recurring)
New	Mary Tran	FY18-0014	SmartSheet Implementation Phase 2	This is to implement phase 2 of SmartSheet.	OCIO	IT	$170	50	50	$70

Customized reports for Reviewing

Funding Reference Number	Primary	ITLT Member Approval	Funded By	CAPEX	OPEX - Yearly Recurring	OPEX - One-time	Funding Status	Status/Comments	Funding Requestor
FD463	Extension of Oracle EDQ Licensing for 'SanDisk Exception Management using EDQ'	JuneAn Lanigan	IT	[redacted]	$0.00	$0.00	Approved - Pending CRB	4/10 - Larry to follow up with Terry & JuneAn. Need a quote. 4/12 - Needs to go to Gate 1. 4/25 - Requestor asking for an update.	shraddha.miyani@
FD471	L-S Ban... expansi...								
FD497	Comput... IPP								
FD498	Manufac... refresh i...								
FD515	eSSD A... Storage								

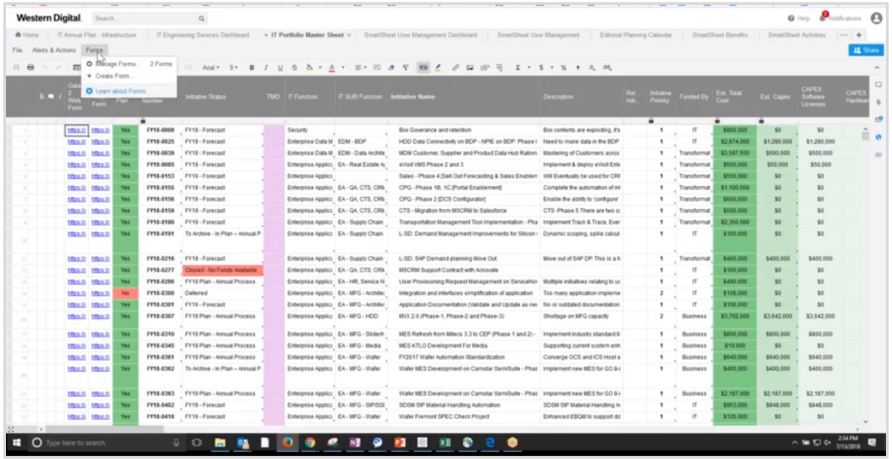
Publish Status on the Intranet



PMO Optimization with Work Mgmt

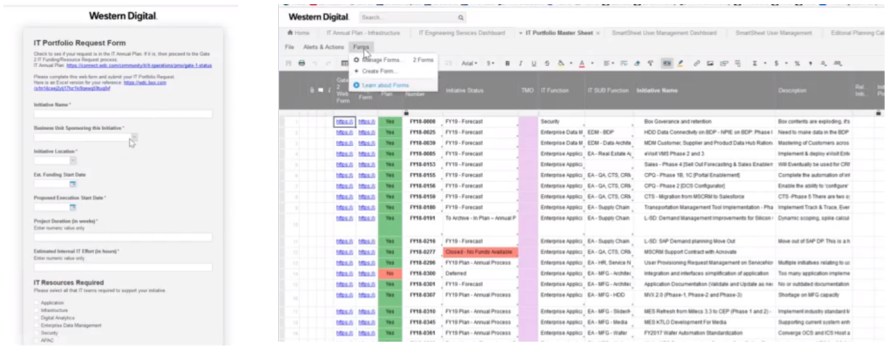
Net benefit? Optimizing portfolio and project management insights in real time!

IT Portfolio Master Sheet



Automate Work Processes

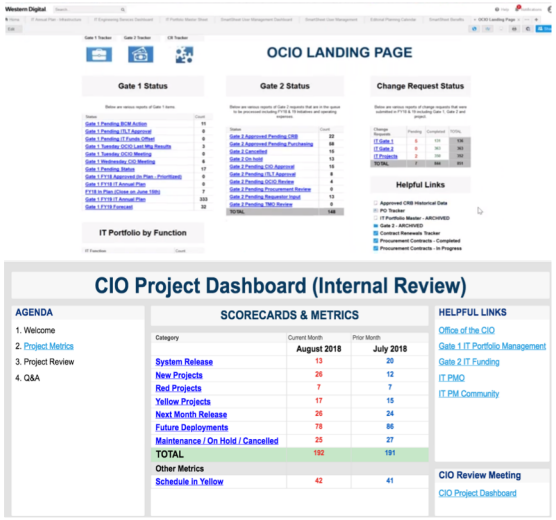
IT Funding Request Tracker



Deploy with Confidence

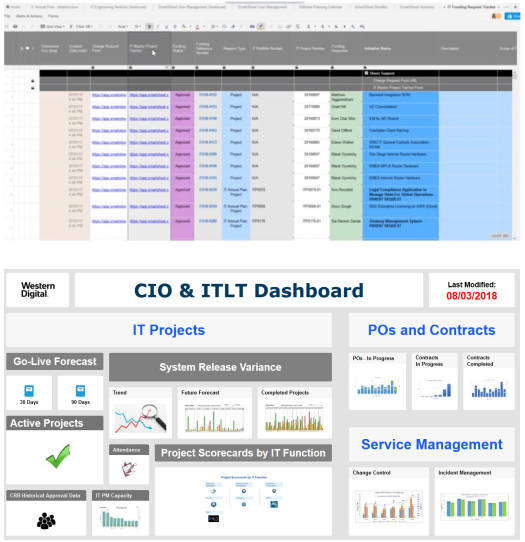
PMO Optimization with Work Mgmt

Status Dashboard & Change Request Tracker



Make Collaboration Work

Master Project Tracker & Portfolio Management



Make Better Decisions, Faster

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