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Behind the Curtain: How Smartsheet Uses Smartsheet in Product Development

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55% Growth

Engineering + Product + Design

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500% Growth

Project Management

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Boston, MA USA

Edinburgh, Scotland

UENO STATION

MOOGIE
MILKY WAY
INTERURBAN
GUGGENHEIM 7653 MI.
OUTDOOR CINEMA
LOUVRE 9757 KM.
RAPUNZEL
TAIWAN

INFORMATION

TEAMWORK

Product Pillar Level Organization

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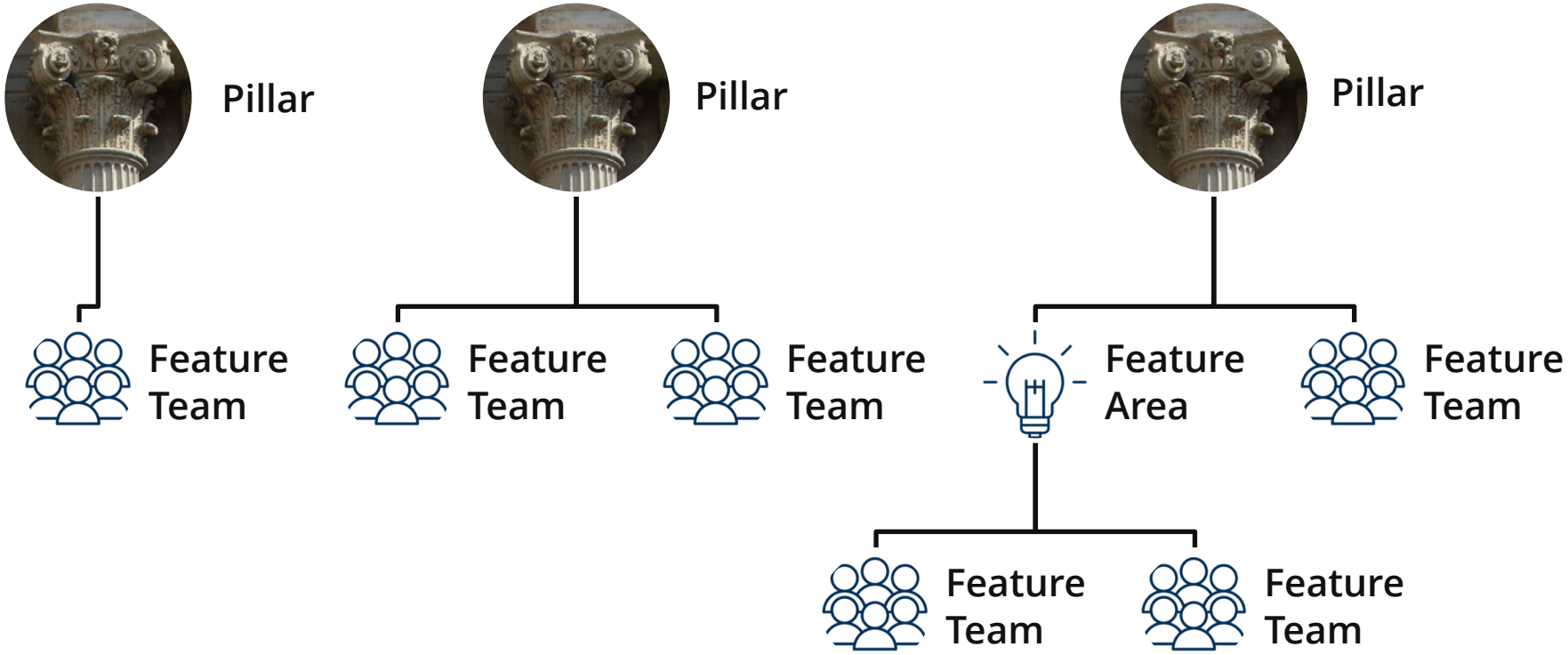
Pillar Teams



Product Planning

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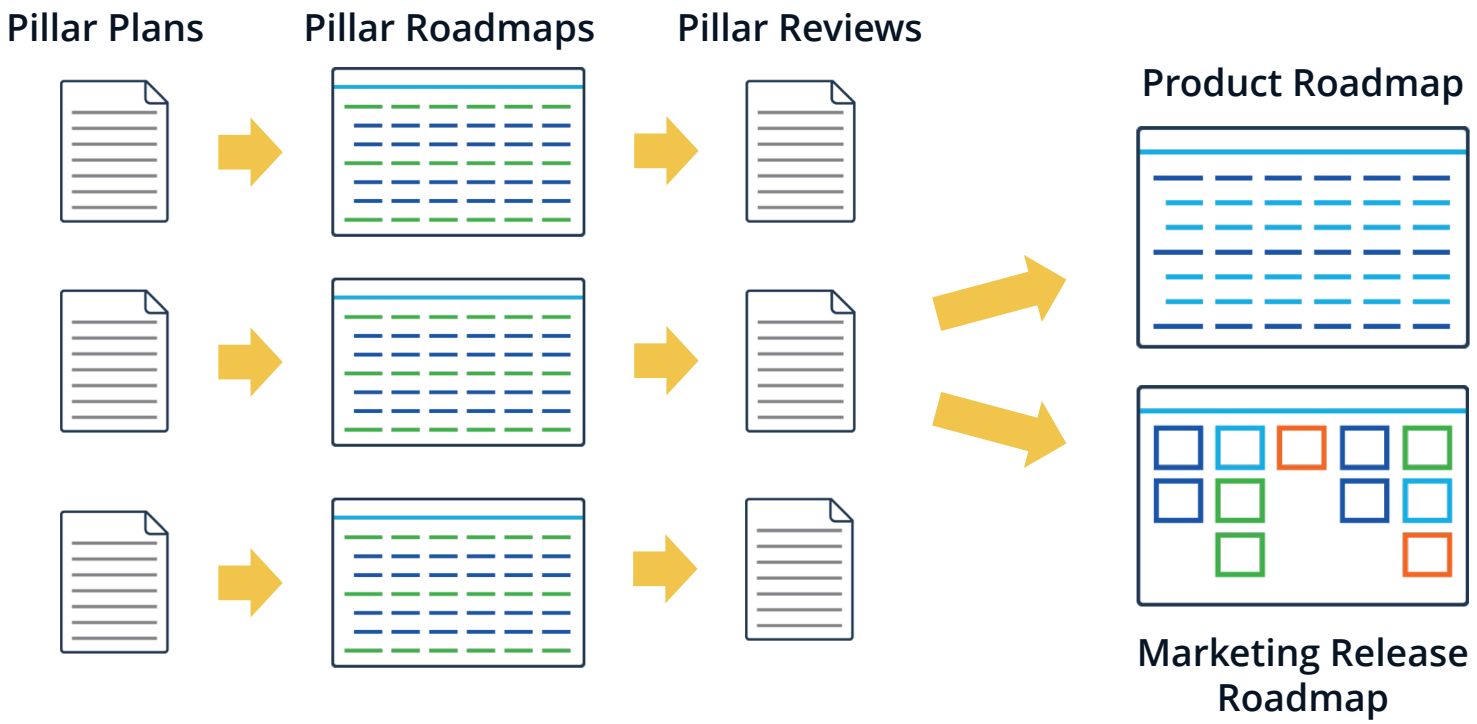
Annual Planning



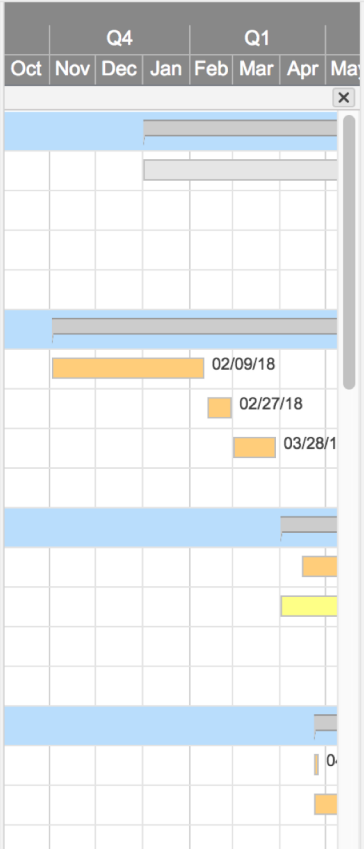
MBFCORP Search... Help Notifications

Home | Dashboard Prototype | Dashboard Metrics | Backlog | IT Portfolio Scorecard | Azure Migration - Project Plan | Sample Pillar Timeline

File | Alerts & Actions | Forms | Share

Gantt View | Filter Off | Arial | 10

	Prio...	Project ID	Deli... Health	Target Release	Stage	Project	Project Tweet	Dev/QA Start	Dev/QA Finish	In Prod Enviro...
1						**Feature Area 1**		01/01/18	12/28/18	
2	0			Ongoing	6 - Deployed to	Project 1		01/01/18	12/28/18	TBD
3	0	P-1529		Ongoing	6 - Deployed to	Project 2		07/02/18	09/21/18	TBD
4	1	P-0148		TBD	X - On Hold	Project 3		10/01/18	11/09/18	TBD
5	3	P-0936		Q4	4 - Implementa	Project 4	09/05: We are waiting	06/25/18	08/10/18	TBD
6	0			All year		**Feature Area 2**		11/02/17	08/03/18	
7	0	P-0075		Jan	7 - Launched to	Project 1		11/02/17	02/09/18	TBD
8	1	P-1216		Feb	7 - Launched to	Project 2		02/12/18	02/27/18	TBD
9	2	P-1239		Mar	7 - Launched to	Project 3		03/01/18	03/28/18	TBD
10	1	P-1384		Apr	7 - Launched to	Project 4	09/07: We have an in	07/09/18	08/03/18	TBD
11						**Feature Area 3**		04/01/18	01/17/19	
12	1	P-0852		Oct	6 - Deployed to	Project 1	8/29: Went EAP on 8/	04/15/18	07/02/18	TBD
13	1	P-1072		Nov	2 - Requiremer	Project 2		04/01/18	10/25/18	TBD
14	2	P-0200		Dec	2 - Requiremer	Project 3		10/26/18	01/17/19	TBD
15	100	P-1335		TBD	Z - Rejected	Project 4				TBD
16						**Misc Features (Smalls)**		04/23/18	11/23/18	
17	0.5	P-1330		Q2	7 - Launched to	Feature 1		04/23/18	04/25/18	TBD
18	0.5	P-0153		Q3	5 - Production	Feature 2	9/11: Signed off and r	04/23/18	09/07/18	TBD
19	3	P-1323		Q4	2 - Requiremer	Feature 3		10/01/18	11/23/18	TBD



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Home | Dashboard Prototype | Dashboard Metrics | Backlog | IT Portfolio Scorecard | Azure Migration - Project Plan | FY19 Product Goals

File | Alerts & Actions | Forms | Share

Grid View | Filter Off | Arial | 10

	Pillar	Goal Number	Engage Feature	Goals	Goal Status	Goal Date	Revised Goal Date	Completion	Pillar Owner	Comment
1				**CORE DESKTOP**						
2	**Core**			**Multi-Assignee**		09/25/18			Robin Sherwood	
3				**Dasboards/Portals**						
4	**Core**			Launch Charts and Graphs MVP		02/14/18			Robin Sherwood	Shippec
5	**Core**			Rebrand Sights to Dashboards/Portals		02/14/18			Robin Sherwood	Shippec
6				**Reporting**						
7	Core			Sheet Profile - EAP		07/12/18			Robin Sherwood	EAP Lai
8	Core			Project 2		09/20/18	TBD		Robin Sherwood	This pro
9	Core			Project 3		01/01/19	TBD		Robin Sherwood	This is c
10				**UX Refresh**						Phase 1
11	Core			Launch Phase 1 - Visual Styling		02/14/18			Robin Sherwood	Shippec
12	Core			Launch Phase 2 - Toolbar and Right Tabs		04/09/18			Robin Sherwood	Shippec
13	Core			Project 3					Robin Sherwood	9/19: R
14				**ENTERPRISE**						
29				**MOBILE**						
30	Mobile	Mob-1	No	Launch Edit in Grid		07/31/18			Chris Barrows	Launche
31	Mobile	Mob-2	Yes	Launch Native Forms		10/01/18			Chris Barrows	In dev. A
32	Mobile	Mob-3	No	Refresh sign-up experience		01/31/19			Chris Barrows	Researc socializ
33	Mobile	Mob-4	Yes	Project 3		12/17/18	**10/31/18**		Chris Barrows	In dev/C

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Home | Dashboard Prototype | Dashboard Metrics | Backlog | IT Portfolio Scorecard | Azure Migration - Project Plan | Sample Marketing Release Roadmap

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Card View | Filter Off | Level 1 | View by Release Month

Uncategorized (2)

JAN 2018 (16)

- r60 Abacus Launch Plan
- CC: Global Updates Launc...
- CC: Global Updates
- **Notification Center - January enhancements**
  Release Date Confidence
  Current Status
  Product Owner: Daniel Stein
  Marketing Owner: Joosung Nam
  Add Subtask
- **Filter on Critical Path, Attachments, Comments**
  Release Date Confidence
  Current Status
  Product Owner: Kara Lumley
  Marketing Owner

FEB 2018 (11)

- Release 1 - Launch Plan
- Dashboards with Charts La...
- Cross-sheet formulas and ...
- CC: Global Updates - Find and Replace
- **Cross-sheet formulas (GA)**
  Release Date Confidence
  Current Status
  Product Owner: Daniel Stein
  Marketing Owner: Dan Sills
  Add Subtask
- **Rename Sights to Dashboards + Charts**

MAR 2018 (3)

- Release 2 - Launch Plan
- **Mobile: iOS customers can find/search for enterprise c...**
  Product Owner: Chris Barrows
  Marketing Owner: Joosung Nam
  Add Subtask
- **Mobile: chart presentation improvements**
  Current Status
  Product Owner: Chris Barrows
  Marketing Owner: Joosung Nam
  Add Subtask
- +

APR 2018 (17)

- Release 3 - Launch Plan
- Slack Integration Launch P...
- Mar-Apr 2018 Summary La...
- **UI Refresh - Phase 2: Toolbar & Bottom Tabs**
- **Solution Center**
  Release Date Confidence
  Current Status
  Product Owner: Scott Bean
  Marketing Owner: Joosung Nam
  Add Subtask
- **Auto-create "Notify Assignee" Rule**
- **New chart types (Desktop+Mobile)**

MAY 2018 (7)

- Release 4 - Launch Plan
- Facebook Workplace Laun...
  Release Date Confidence
  Current Status
  Product Owner: Scott Tewel
  Marketing Owner: Andre Ropeta
  Add Subtask
- **Facebook Workplace Chat Integration (Requests/Notif...**
  Release Date Confidence
  Current Status
  Product Owner: Scott Tewel
  Marketing Owner: Andre Ropeta
  Add Subtask
- **UI Refresh - Phase2: Active User Faces in Appl bar**

Project Execution

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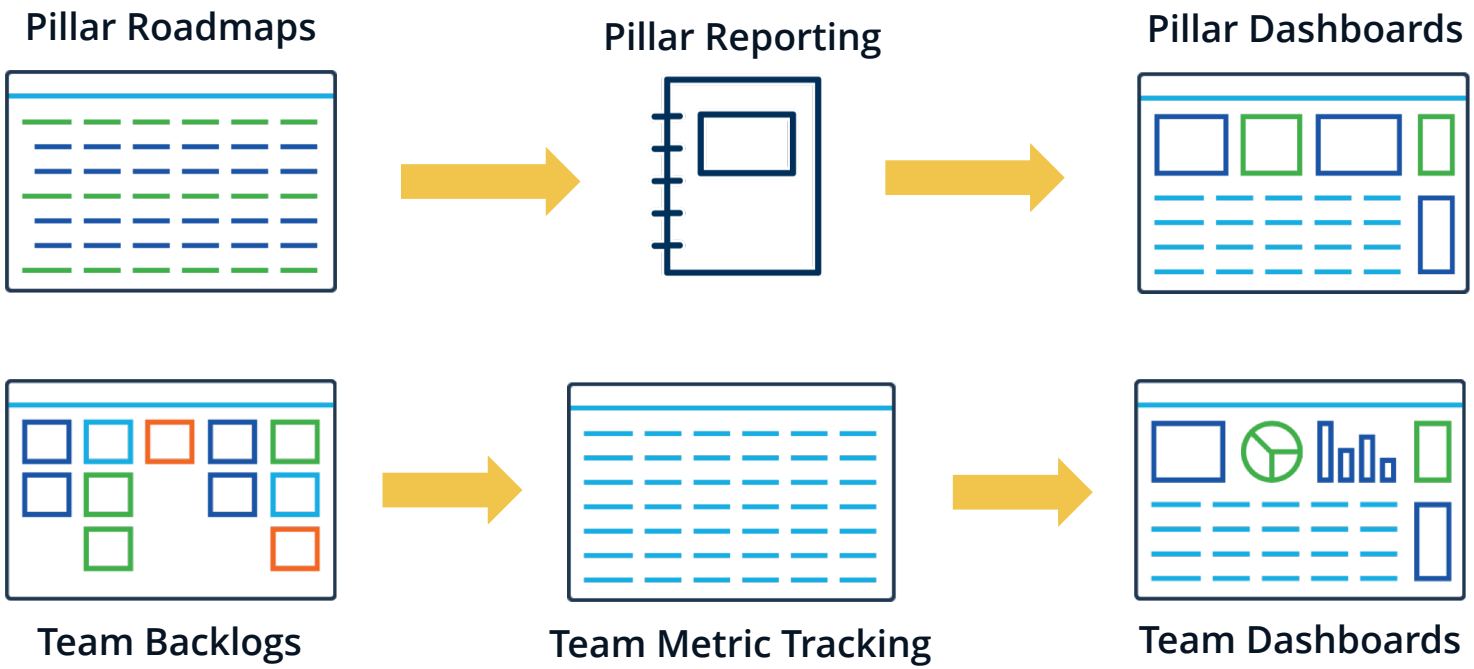
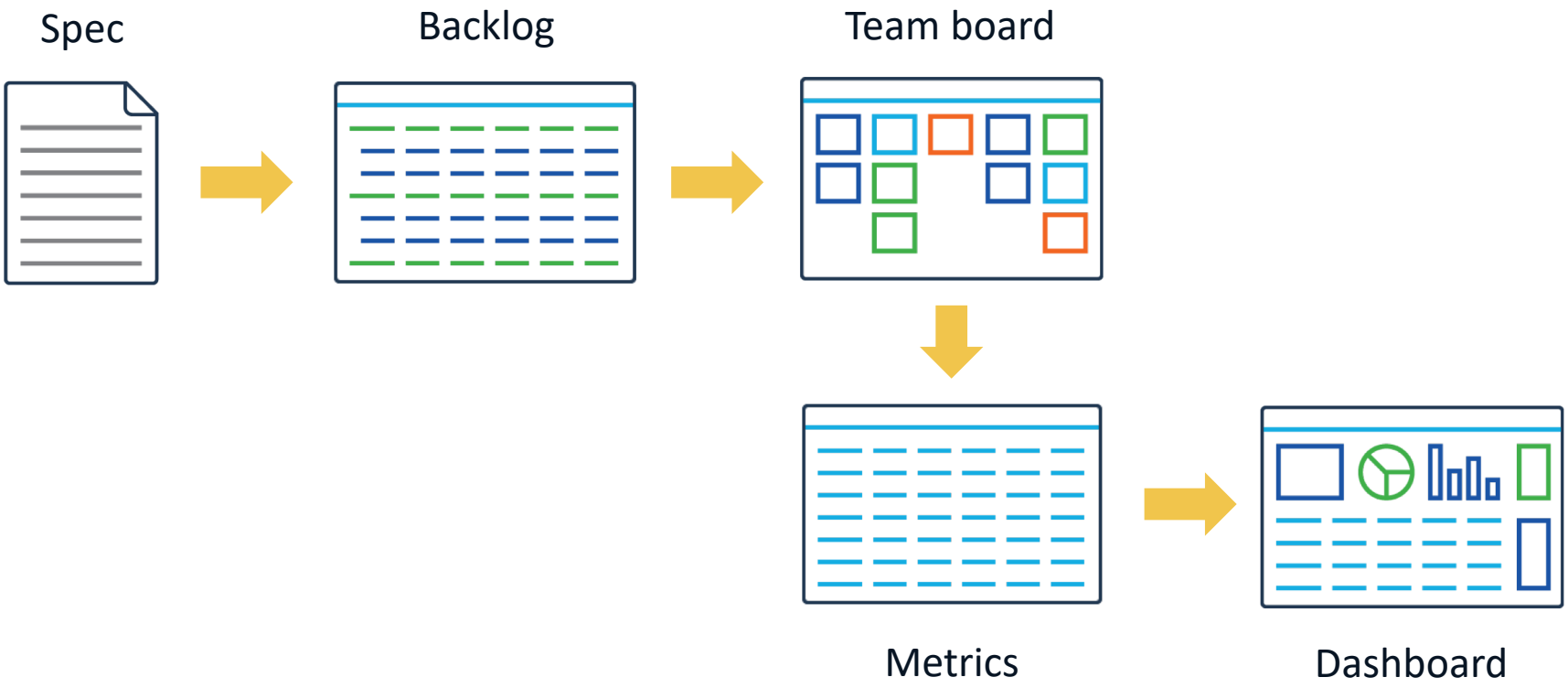
Pillar Assets



Large Project



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Home | Dashboard Prototype | Dashboard Metrics | Backlog | IT Portfolio Scorecard | Azure Migration - Project Plan | EXAMPLE Enterprise Team Backlog

File | Alerts & Actions | Forms | Share

Grid View | Filter Off | Arial | 10

	ProjID	Project Name	Type	Pillar ID	Item Description	Status	Resolution	New Scop
1	Proj-ESC	Enterprise Escalations	Project	ENT-239	Project to hold all escalations that the Enterprise team is assigned	Ongoing		
2	Proj-ESC	ESC-505	Escalation	ENT-241	User Received Org Invite email from UAP enabled org. Email sent from themselves even though they weren't a member currently	Complete		
3	Proj-ESC	ESC-522	Escalation	ENT-301	Test	Needs More Info		
4	Proj-BUG	Production Bugs	Project	ENT-250	Project to hold Production bugs that come from outside of an ongoing project, e.g. Bug Tracker.	Ongoing		
5	Proj-1350	Expose profileImageUrl in service user search response	Project	ENT-251	Mobile needs us to expose profileImageUrl as a part of the service user search response in order to ?	7 - Launched to		
6	Proj-1111	GDPR	Project	ENT-112	General Data Protection Requirements Compliance	7 - Dev+QA		
48	Proj-1403	GDPR Follow up	Project	ENT-341	GDPR follow-up work for x release	7 - Launched to		
49	Proj-1403	GDPR Follow up	Story	ENT-219	Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.	Not Started		
50	Proj-1233	SAML & SSO updates	Project	ENT-113	SAML & SSO Updates	5 - In Dev		
51	Proj-1233	SAML & SSO updates	Story	ENT-3	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua	Complete		
52	Proj-1233	SAML & SSO updates	Story	ENT-4	As an Operations Engineer, I need an OpsCon tool to allow me to more effectively troubleshoot issues with metadata.xml	Complete		
53	Proj-1233	SAML & SSO updates	Story	ENT-5	IdP Group Creation	Complete		

COUNT: 208

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Home | Dashboard Prototype | Dashboard Metrics | Backlog | IT Portfolio Scorecard | Azure Migration - Project Plan | EXAMPLE Enterprise Team Backlog

File | Alerts & Actions | Forms | Share

Card View | Filter Off | Level 2 | View by Status

Uncategorized (15) | Summary Rows (0) | Admin (0)

Not Started (41)

Lorem ipsum dolor sit amet, consectetur adipiscing elit,...

Project to implement FEDRamp
Lorem ipsum dolor sit amet, consectetur adipiscing elit,...
ProjID
Proj-1177
Project Name
Smartsheet Gov (CRITICAL)
Pillar ID
ENT-151
Points
2
Sprint
Backlog
Add Subtask

Big Project 1
Duis aute irure dolor in reprehenderit in voluptate ...
ProjID
Proj-1262
Project Name
Account Merge v2
Pillar ID
ENT-375
Sprint
Backlog

Blocked (3)

Big Project 1
Lorem ipsum dolor sit amet, consectetur adipiscing elit,...
ProjID
Proj-1262
Project Name
Big Project v2
Pillar ID
ENT-40
Points
1
Sprint
Backlog

- Transfer container ownership (She...
- Transfer in-org container sharing (...
- Transfer in-org membership
- Lorem ipsum dolor sit amet, conse...
- Transfer roles
- Transfer user contacts
- Transfer favorites
- Transfer API keys
- Transfer profile information
- Transfer profile image
- Close the account that the assets ...

Add Subtask
11

In Progress (6)

General Data Protection Requiremen...
Duis aute irure dolor in reprehenderit in voluptate ...
ProjID
Proj-1111
Project Name
GDPR Compliance
Pillar ID
ENT-175
Sprint
Backlog
Developer
Yury Zhuk
Priority
Low
Resolution
Won't Fix
Add Subtask

Research pagination for Ops

As an Ops user I should be able to view an interface th...

Download sheet history messaging should commu...

Form Delete event returning

In Review (3)

Untitled
Lorem ipsum dolor sit amet, consectetur adipiscing elit,...
ProjID
Proj-1109
Project Name
Big Project 2
Pillar ID
ENT-152
Sprint
Backlog
Add Subtask

- Transfer the Payment History in ad...
Design and implement Schema for Change
ProjID
Proj-0195
Project Name
Payment History Transfer
Pillar ID
ENT-154
Sprint
Backlog
Add Subtask

As a user of Smartsheet, I want my uploaded attachm...

Ready for Test (8)

Lorem ipsum dolo consectetur adipis

Lorem ipsum dolo consectetur adipis

Lorem ipsum dolo consectetur adipis

Duis aute irure do reprehenderit in v

As an OpsCon us be able to rollback

As an org-admin I able to see the err

As an SDET, I nee the Enterprise Eve

Multi-thread attac purging from S3

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Home | Dashboard Prototype | Dashboard Metrics | Backlog | IT Portfolio Scorecard | Azure Migration - Project Plan | EXAMPLE Core Team Backlog

File Alerts & Actions Forms Share

Grid View Filter Off Arial 10

	ID	Name / Description	Sprint	Type	Status	Story Points	Acceptance Cases / Repro Steps
73	UXR-0128	Sharing Button Intro Tip	Sprint 4	Story	Ready for T	2	Most of work done already in branch: story/uxr-0128-sharing-intro-tip See line 611 introTipsData.js // TODO: show if a report, sheet, or dashboard is being vie 1) Tip points a the new share button 2) Title: New Look and Sharing Location! 3) Text: Sharing has moved and is now more visible for new users First load of a sheet, report or dashboard you can edit this is all temporary text that will need to be finalized by marketing.
74	UXR-0190	Sharing intro tip is not shown for Sights/dashboards	Sprint 4	Bug	Not Started		https://screencast.com/t/qzNAPoJHX3Pk 1.Manually trigger the sharing intro tip to have the SiteSettingStatus option in OpScon. 2.In OpScon go to Site Settings for your user 3.Change boolean value for the sharing introtip to False 4.Change the date for SS_LOGIN_COUNT and SS_SITESETTINGDSTATUS (this will o a date 14+ days in the past 5.Open a new sight or refresh the browser for an existing sight Sharing intro tip is not shown for a sight. If you switch to a report or a sheet then sharing
75	UXR-0186	Sharing intro tip is cut off on the right side (even in full screen)	Sprint 4	Bug	In Progress		1. Open a page (task list for example) 2. Look at the sharing tip (or use the debug menu to show the sharing intro tip) expected: The full tip displays in the browser window actual: the right side of the intro tip is cut off. See screenshot The tip bubble is not as cut off on Sights/Dashboard, but it is still cut off.
76	UXR-0131	Buttons - Web Forms	Sprint 4	Story	Not Started	1	All buttons: 1) Border Radius: 2px 2) No Border 3) No text shadow Upload button: 1) Re

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Home | Dashboard Prototype | Dashboard Metrics | Backlog | IT Portfolio Scorecard | Azure Migration - Project Plan | EXAMPLE Core Team Backlog

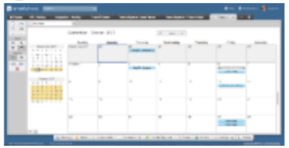
File | Alerts & Actions | Forms | Share

Card View | Filter Off | Level 1 | View by Sprint

Uncategorized (40)

Needs More Info (1)

Calendar View
UXR-0068
ToDo
Phillip Gockel



Sprint 1 (36)

Framework Review Scheduled
UXR-0016
Complete
Jenna Shimek

Practice Presentation Scheduled
UXR-0017
1
Complete
Jenna Shimek

Global Toolbar
UXR-0018
1) Remove the word "Accoun…
3
Complete
Ben Gilbert

Background Color
UXR-0019

Sprint 2 (53)

React app not working when obfuscated
UXR-0009
2
Complete
CB Chris Bobo

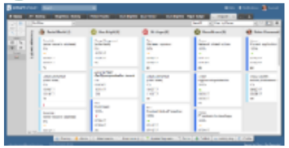
Final Documentation
UXR-0011
Why did we choose react vs …
5
Complete
4

Tabs Styling
UXR-0021
1) Tab button borders are re…
3
Complete
Andrew Bair

Help Tips / First use tips

Sprint 3 (15)

Card View
UXR-0066
1) cardview bg changes to #…
3
Complete
ME Marvin Evans



Grid View
UXR-0056
1) Remove outer border from…
1
Complete
ME Marvin Evans

Sprint 4 (61)

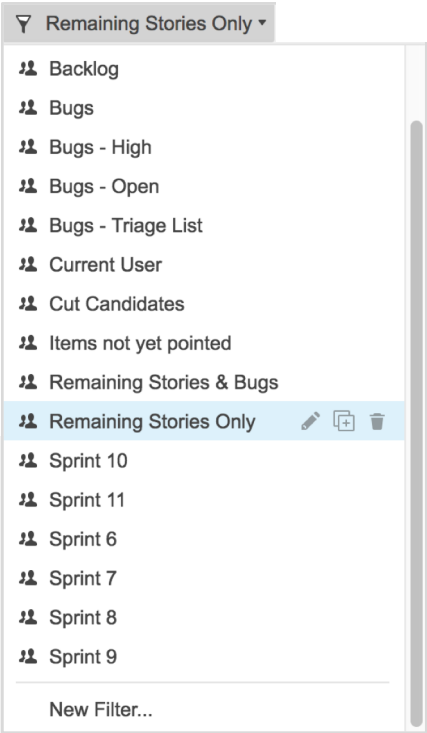
Sharing Button Intro Tip
UXR-0128
Most of work done already in…
2
Ready for Test
Andrew Bair

2

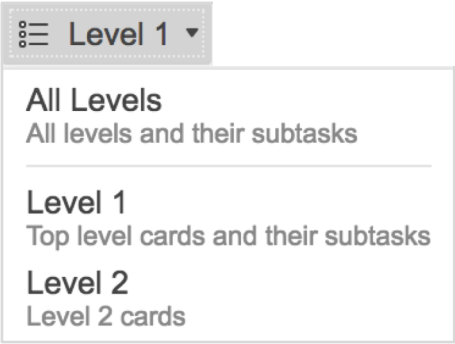
Buttons -Web App
UXR-0103
All buttons: 1) Border Radius…
3
Not Started
Brent Grossman
4

Buttons - Web Forms
UXR-0131
All buttons: 1) Border Radius…

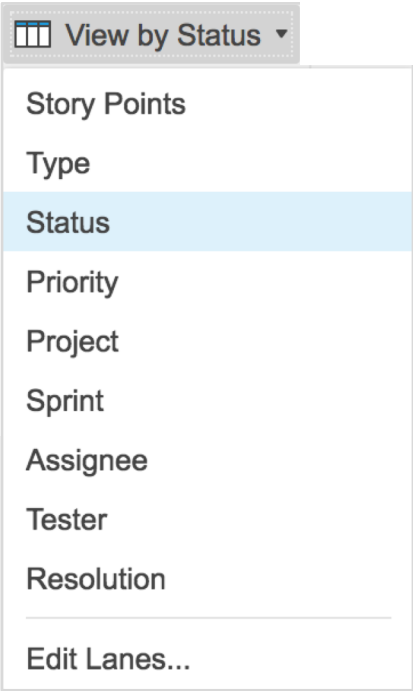
Leverage Sheet Functionality Such As...



Filters for sprints



Levels for stories, tasks or bugs



View by for many things

Insights: Project Data & Practices

Practices

- Create “current user” filter
- Color code cards
- WIP card limit
- Periodic review of card details
- Use update requests or reminders to capture initial sprint metrics

Key Learnings

- Set the guidelines for:
  - Card color
  - Level purpose
  - Filters
- Challenging to capture sprint-end metrics before carrying unfinished cards over

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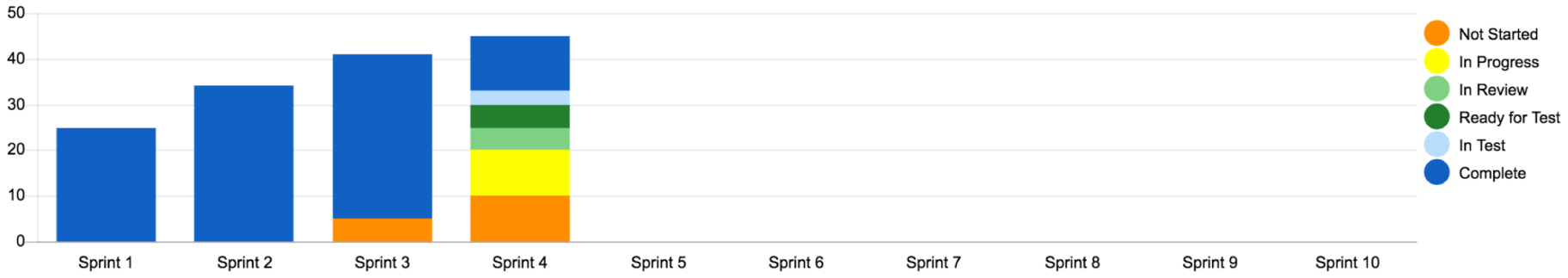
Home | Dashboard Prototype | Dashboard Metrics | Backlog | IT Portfolio Scorecard | Azure Migration - Project Plan | EXAMPLE Project Metric Tracker

File | Alerts & Actions | Forms | Share

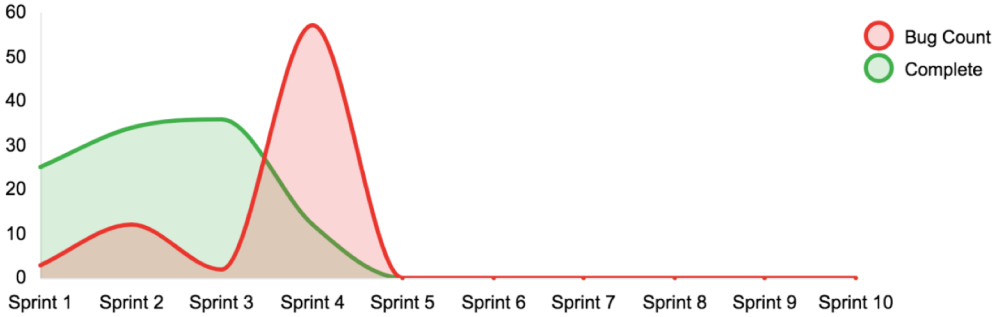
Grid View | Filter | Arial | 10

	Status	Sprint	Week Start	Week Finish	Dura...	Pred...	Points Committed	Points Actual	New Scope	Point Predictability	New Scope %	Stories Comm
1							Required	Point	Metrics			Re
2			Sprint Start	Sprint Finish			Committed	Actual	New Scope	Point Predictability (Actual/Committed)	New Scope % (New Scope/Actual)	Co
3		Sprint 0										
4	Complete	Sprint 1	12/04/17	12/15/17	10d		35	25	0	71%	0%	
5	Complete	Sprint 2	12/18/17	12/29/17	10d	4	38	34	0	89%	0%	
6	Complete	Sprint 3	01/01/18	01/12/18	10d	5	40	36	0	90%	0%	
7	In Progress	Sprint 4	01/15/18	01/26/18	10d	6	45	12	6	27%	50%	
8	Not Started	Sprint 5	01/29/18	02/09/18	10d	7		0	0	0%	0%	
9	Not Started	Sprint 6	02/12/18	02/23/18	10d	8		0	0	0%	0%	
10	Not Started	Sprint 7	02/26/18	03/09/18	10d	9		0	0	0%	0%	
11	Not Started	Sprint 8	03/12/18	03/23/18	10d	10		0	0	0%	0%	
12	Not Started	Sprint 9	03/26/18	04/06/18	10d	11		0	0	0%	0%	
13	Not Started	Sprint 10	04/09/18	04/20/18	10d	12		0	0	0%	0%	
14	Scheduled	Release Fe	05/03/18	05/03/18	0							
15	Scheduled	Release Cc	05/17/18	05/17/18	0					Bug Status		
16	Scheduled	Release	05/21/18	05/21/18	0					Not Started	23	
17										In Progress	8	
18										In Review	2	
19										Ready for Test	1	

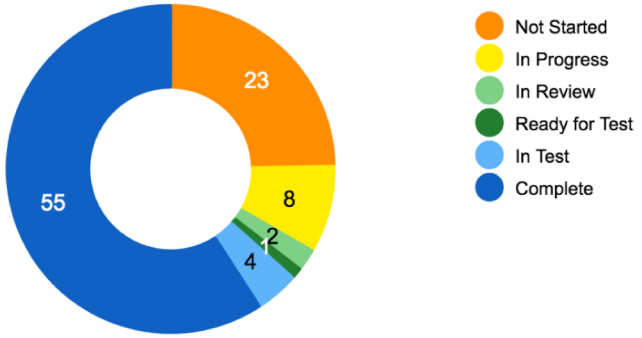
Point per Sprint



Bug Count vs Story Points Complete

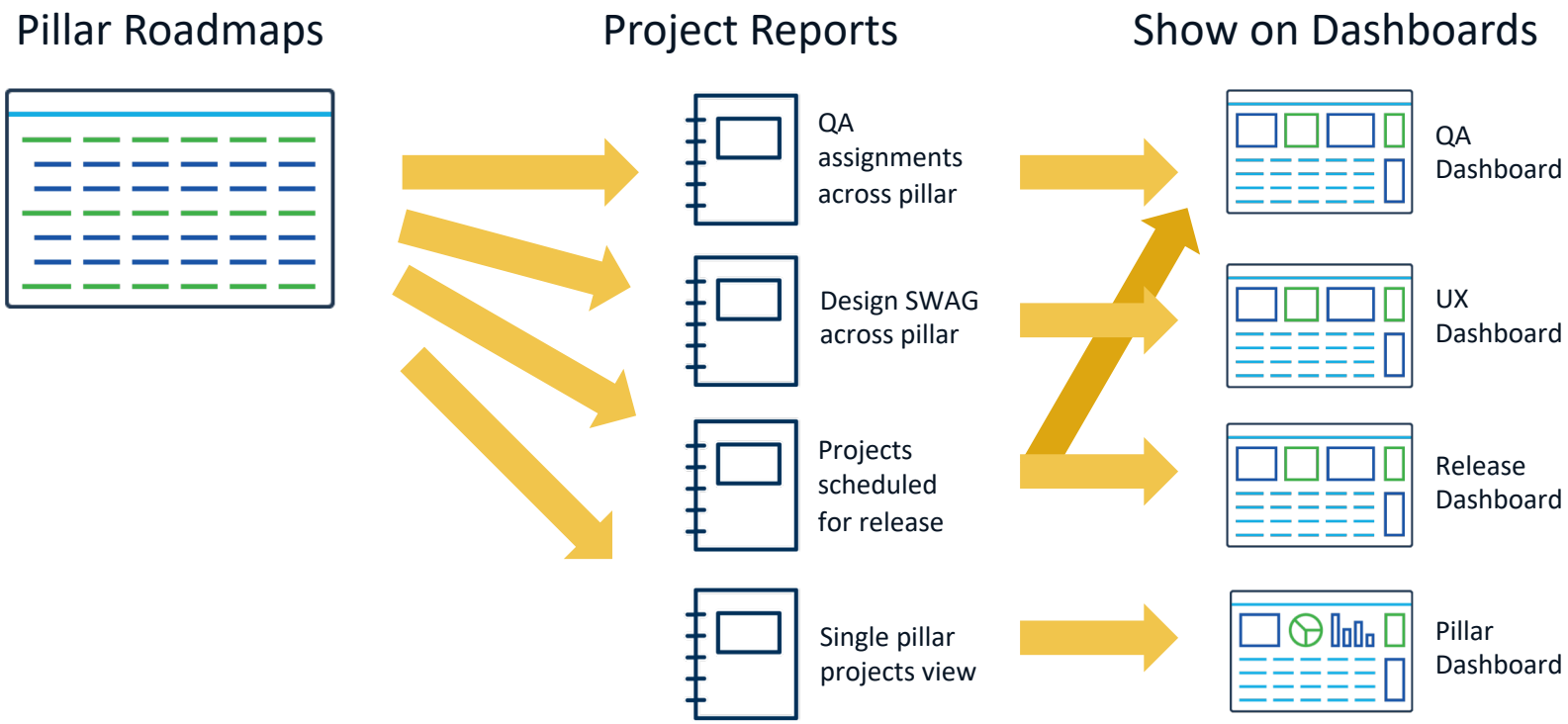


Bug Count



Cross-Team Communication

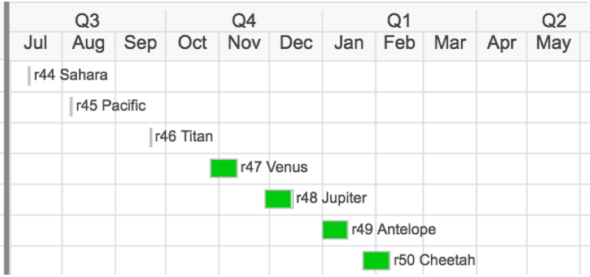
Remember Pillar Roadmaps?



Engineering Release Dashboard

Release Schedule & Status

Service	Primary	Status
App Core	r44 Sahara	Event Complete
App Core	r45 Pacific	Event Complete
App Core	r46 Titan	Event Complete
App Core	r47 Venus	Event Complete
App Core	r48 Jupiter	Event Complete
App Core	r49 Antelope	Event Complete
App Core	r50 Cheetah	Event Complete



Resources

RELEASE INFORMATION

- Environment Statuses
- Release Event Master Calendar
- Hot Fixes and Change Events
- Release Management Folder
- Internal Release Notes GDrive

PROJECT REPORT LINKS

- Development Tracker Report
- Critical Projects Report
- Engage Projects Report

Project Status - All Pillars

In Prod Environment	Project ID	Project	Stage	Pillar	Component
		AUGUST			
08/29/18	Proj-1521	DB: Migrate AWS Connectors Databases to new AWS Environment	7 - Launched to Customers	Infrastructure	Infrastructure
08/27/18	Proj-1554	Network: Logging & Metrics & Alerting	7 - Launched to Customers	Infrastructure	Infrastructure

Insights – Project Collaboration

Practices

- Product roadmap structured consistently across pillars to allow for reporting.
- Reports and dashboards used for:
  - Project assignments
  - Project prioritization
  - Release management
  - Alignment across functional disciplines
  - Alignment across departments
  - Knowledge sharing

Key Learnings

- Use automatic update requests to regularly capture project tweets
- Create separate reports for key delivery dates or customers
- Utilize RYGG status balls to reflect project health/confidence

In Summary

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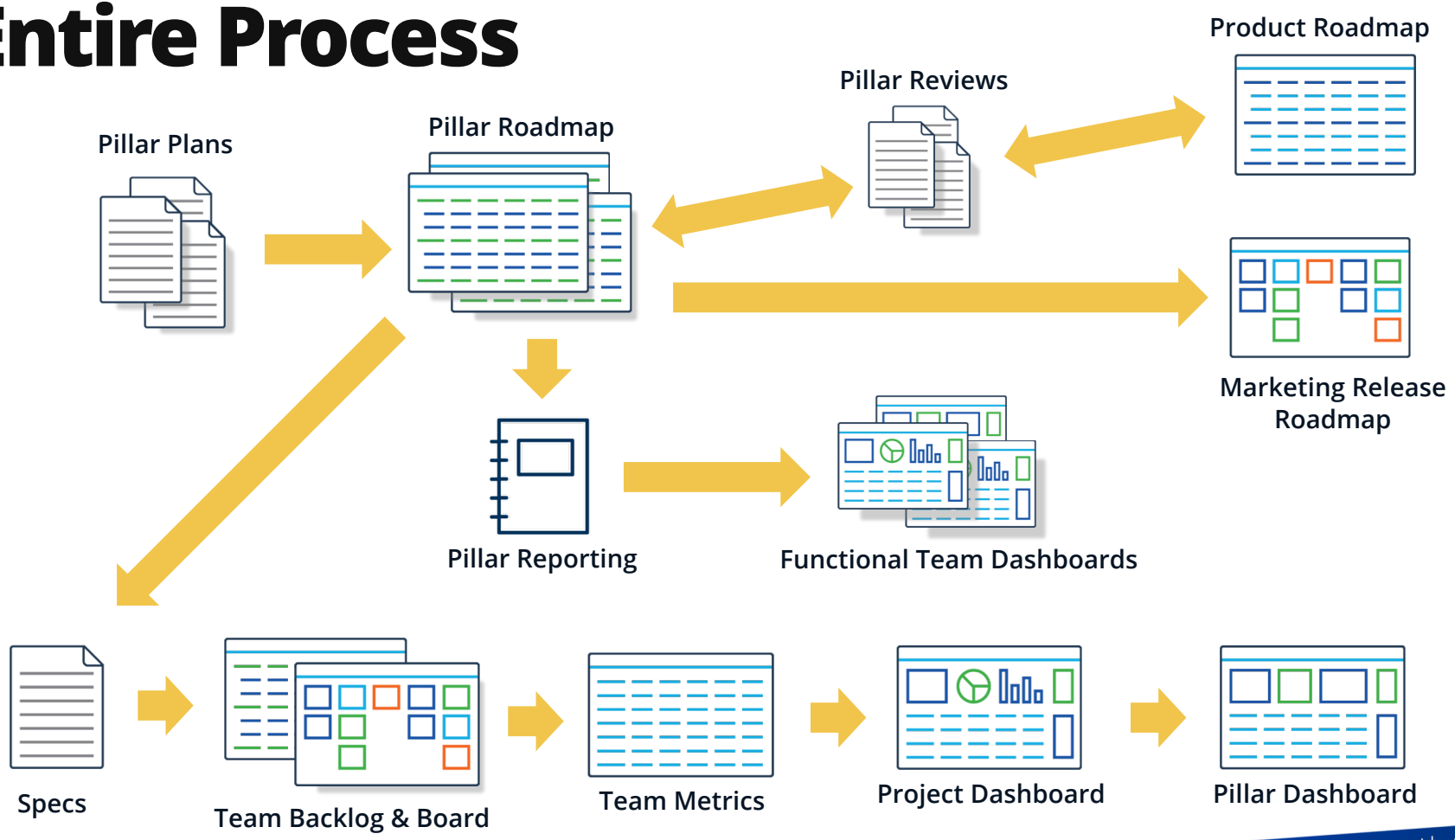
Entire Process



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- Visit the Innovation Center for hands-on learning, support, services, swag, and more

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