

smartsheet ENGAGE /

How Smartsheet Uses Smartsheet: Sales



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#SmartsheetENGAGE

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**How Smartsheet Uses Smartsheet: Sales
New Hire Onboarding**

ONBOARDING EXPERIENCE – PRE-SMARTSHEET



Learning management systems

Cumbersome reporting

Time consuming content updates

Challenging curriculum construction

CREATING THE “RIGHT” EXPERIENCE

Speed to deployment

One environment

Single dashboard

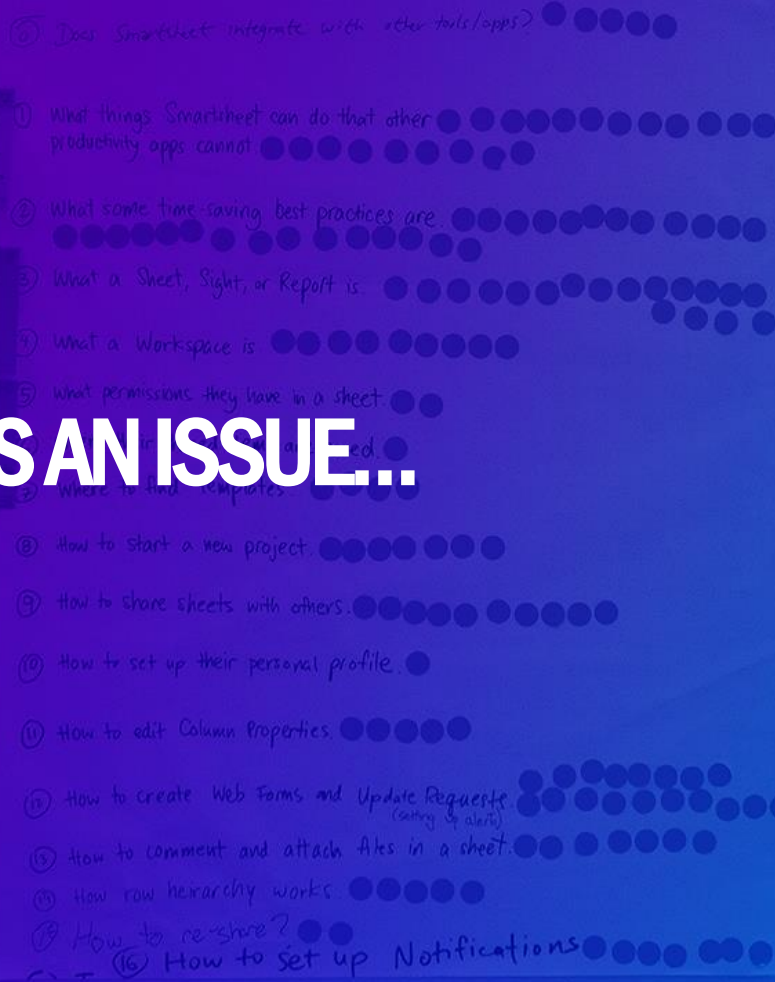
Intuitive

Real-time updates



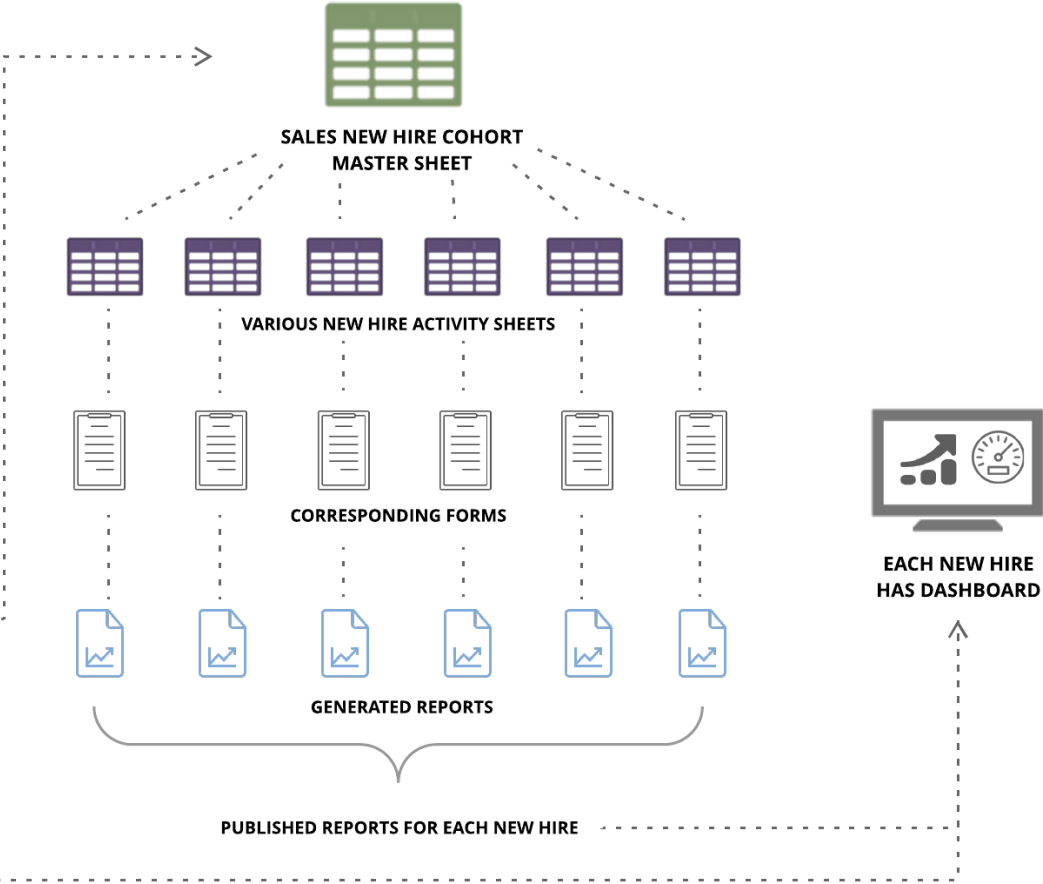
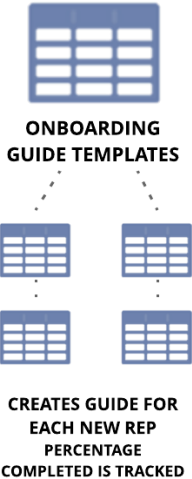
ONBOARDING WALK-THROUGH

BUT THERE WAS AN ISSUE...

- 
- # AN ISSUE..
- 1) Does SmartSheet integrate with other tools/apps?
 - 2) What things SmartSheet can do that other productivity apps cannot.
 - 3) What some time-saving best practices are.
 - 4) What a Sheet, Sight, or Report is.
 - 5) What a Workspace is.
 - 6) What permissions they have in a sheet.
 - 7) Where to find templates.
 - 8) How to start a new project.
 - 9) How to share sheets with others.
 - 10) How to set up their personal profile.
 - 11) How to edit Column Properties.
 - 12) How to create Web Forms and Update Requests (saving & alerts).
 - 13) How to comment and attach files in a sheet.
 - 14) How row hierarchy works.
 - 15) How to re-share?
 - 16) How to set up Notifications.

ONBOARDING

IN SMARTSHEET



A woman with dark hair, wearing a maroon sweater, is sitting at a desk. She is looking at a laptop screen with a weary expression, resting her head on her hand. The laptop screen displays a Smartsheet interface with a grid of data. In front of her is a black mug with the Smartsheet logo and the tagline 'coordinate. anytime.' A vase of flowers is visible in the background.

OKAY, BUT HOW BAD COULD IT REALLY BE?

THAT BAD!

1 MAN HOUR

- Per rep environment
- Highly manual
- Complex



100+ SALESPEOPLE

- New hires onboarded last year
- Human error
- No repeatable structure
- Inability to globally update



100+ HOURS

- Less training delivery
- Less content creation
- Less time for projects

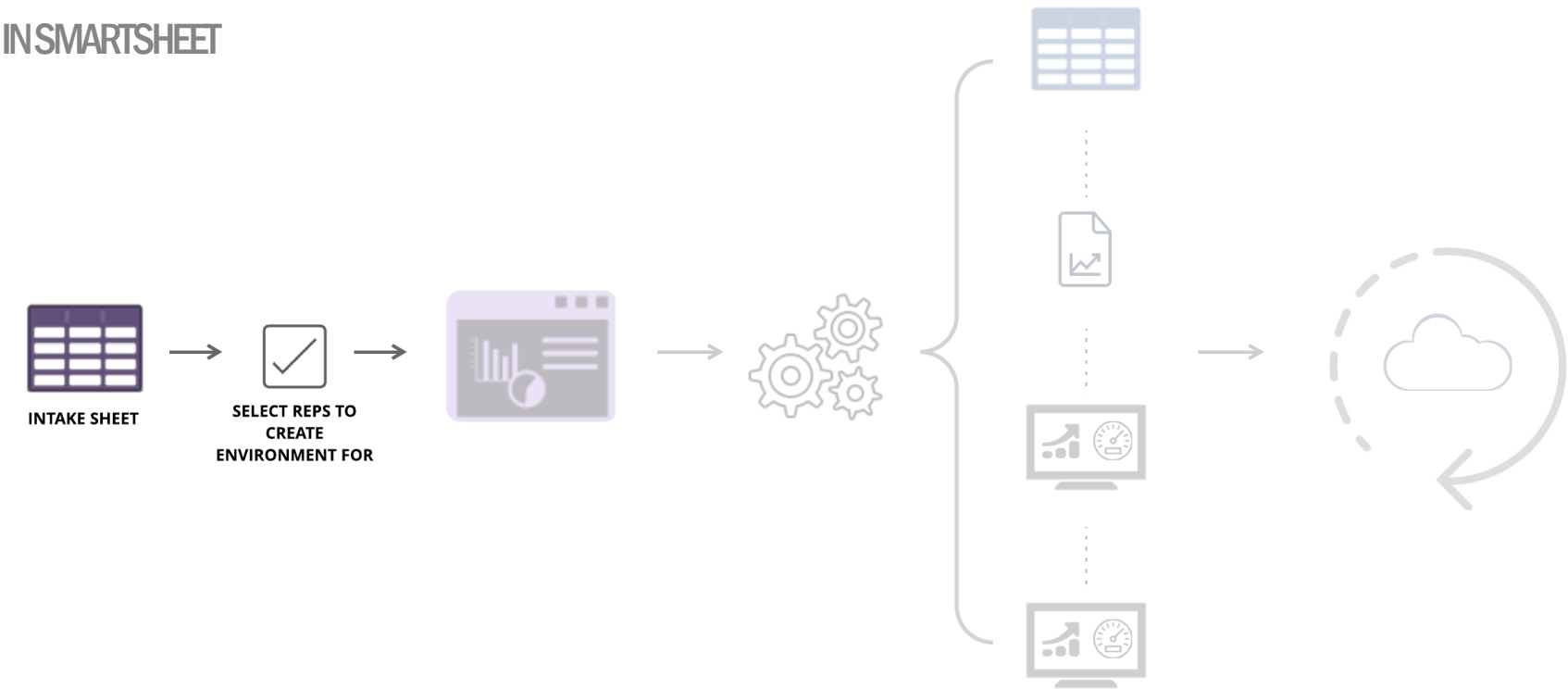


ENTER CONTROL CENTER...

Status	Assigned To	Start Date	Due Date	Budget	Actuals	% DI
Complete	Elizabeth Bennet	07/31/17	08/01/17	\$5,000	\$3,755	
Complete	Elizabeth Bennet	08/01/17	08/04/17	\$10,000	\$9,278	
Complete	Elizabeth Bennet	08/01/17	08/04/17	\$5,000	\$5,315	
Complete	Elizabeth Bennet	08/07/17	08/11/17	\$5,000	\$4,714	
Complete	Emmitt Fitzgerald	08/07/17	08/11/17	\$25,000	\$27,808	
Complete	Emmitt Fitzgerald	08/07/17	08/11/17	\$25,000	\$26,779	
Complete	Roman Mars	08/14/17	08/21/17	\$65,000	\$66,280	
Complete	Roman Mars	08/21/17	09/01/17	\$65,000	\$67,310	
In Progress	Charlotte Lucas	09/04/17	09/08/17	\$75,000	\$73,000	
Not Started	William Darcy	09/11/17	09/22/17	\$70,000		

CONTROL CENTER

IN SMARTSHEET



smartsheet

New Hire Cohorts

Home

Smartsheet Customer Stories

Sales Enablement Team Projects

Weekly Sales Enablement Team Meeting Agenda

Product Launch Center

Marketing Release Roadmap

FY19 Sales New Hire Summary Reporting

File

Alerts & Actions

Forms

Grid View

Filter

Arial

10

B

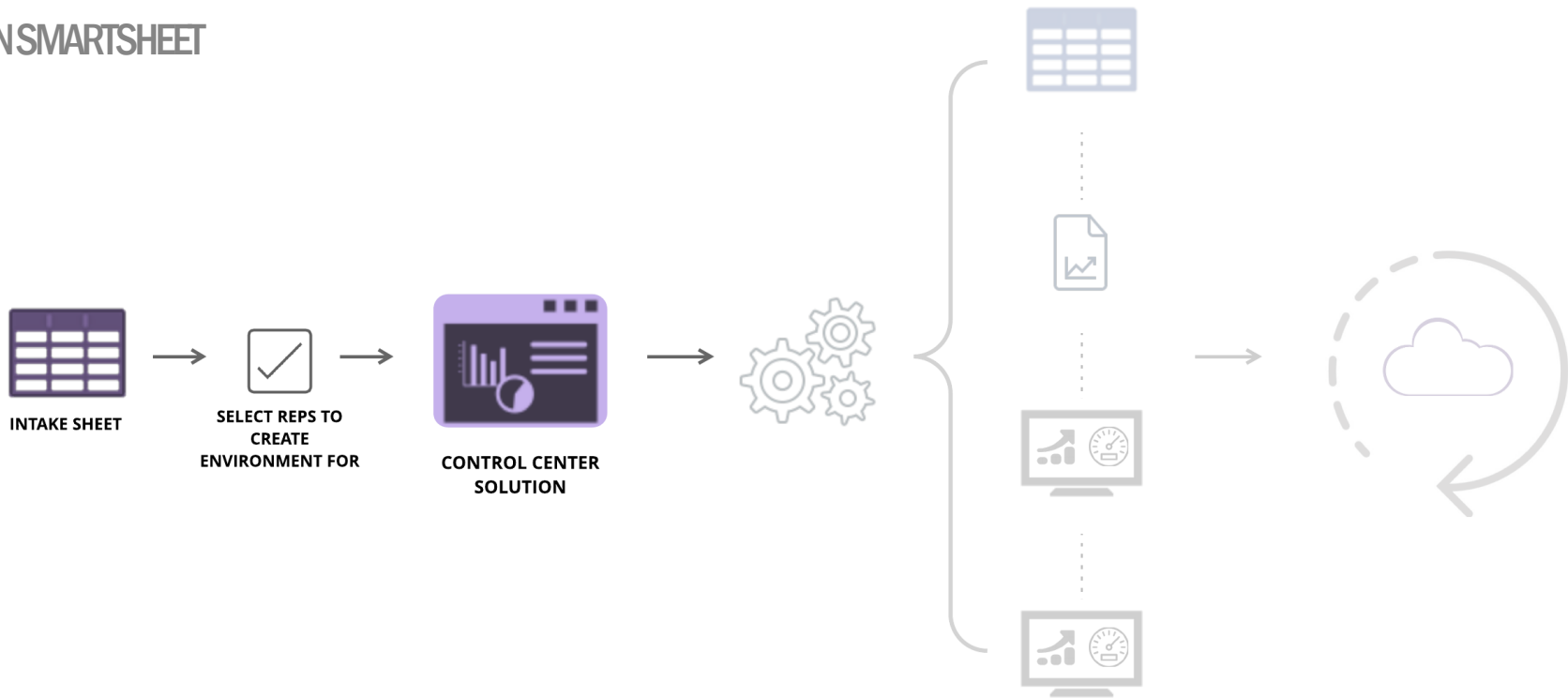
I

U

</

CONTROL CENTER

IN SMARTSHEET





Select Blueprint

Select the blueprint that you want to use

CDM + Manage sales training materials for CDMs.	NBR + Manage sales training materials for NBRs.	NAS + Manage sales training materials for NAS.	SDR + Manage training materials for SDRs.
SSR + Manage sales training materials for SSRs.	SAE + Manage training materials for SAEs.	SE + Manage sales training materials for SEs.	

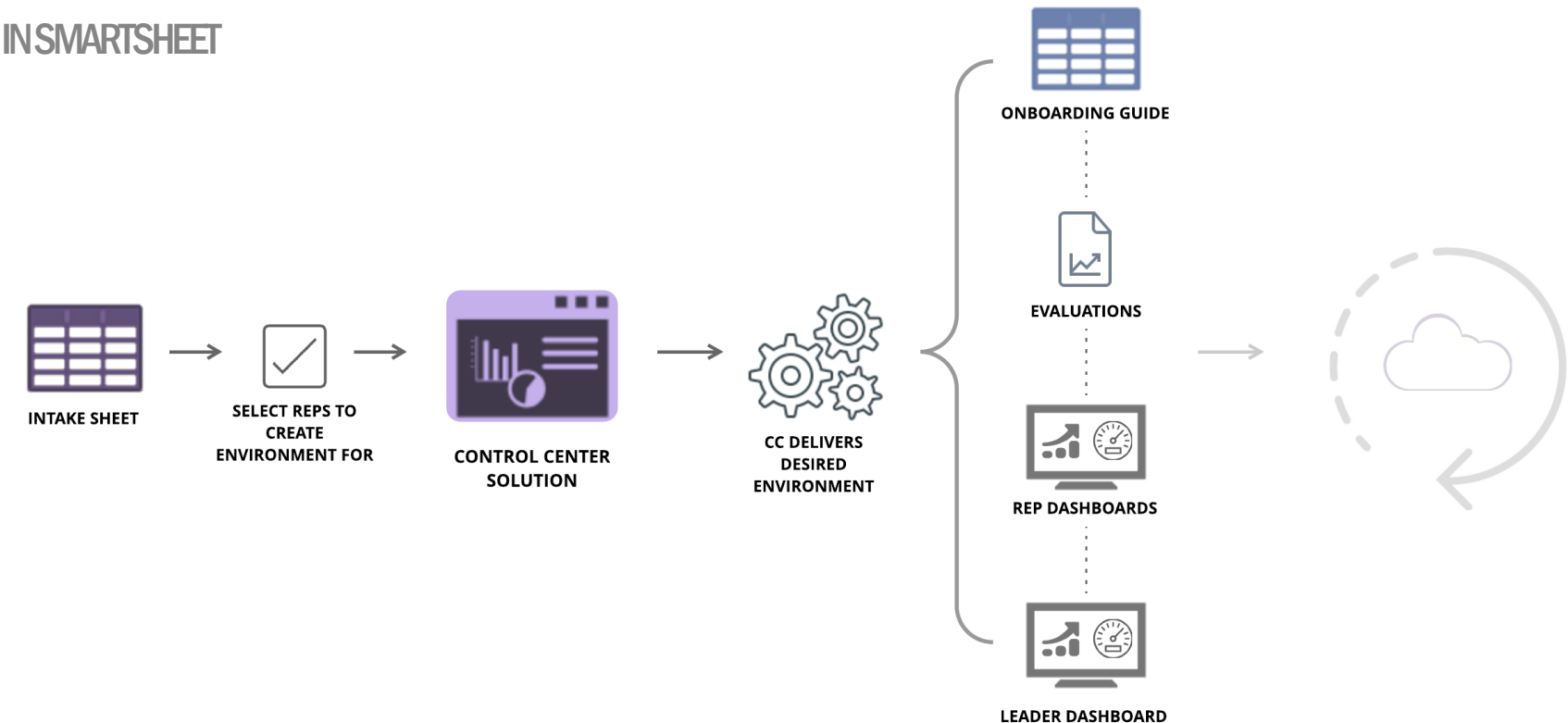
Preview

- ☒ **Select Blueprint**
- ▼ Required Templates (0)
- None Selected
- ☐ ▶ Optional Templates (0)
- ☐ ▶ Profile Data
- ☐ ▶ Sharing

[Cancel](#)[Next >](#)

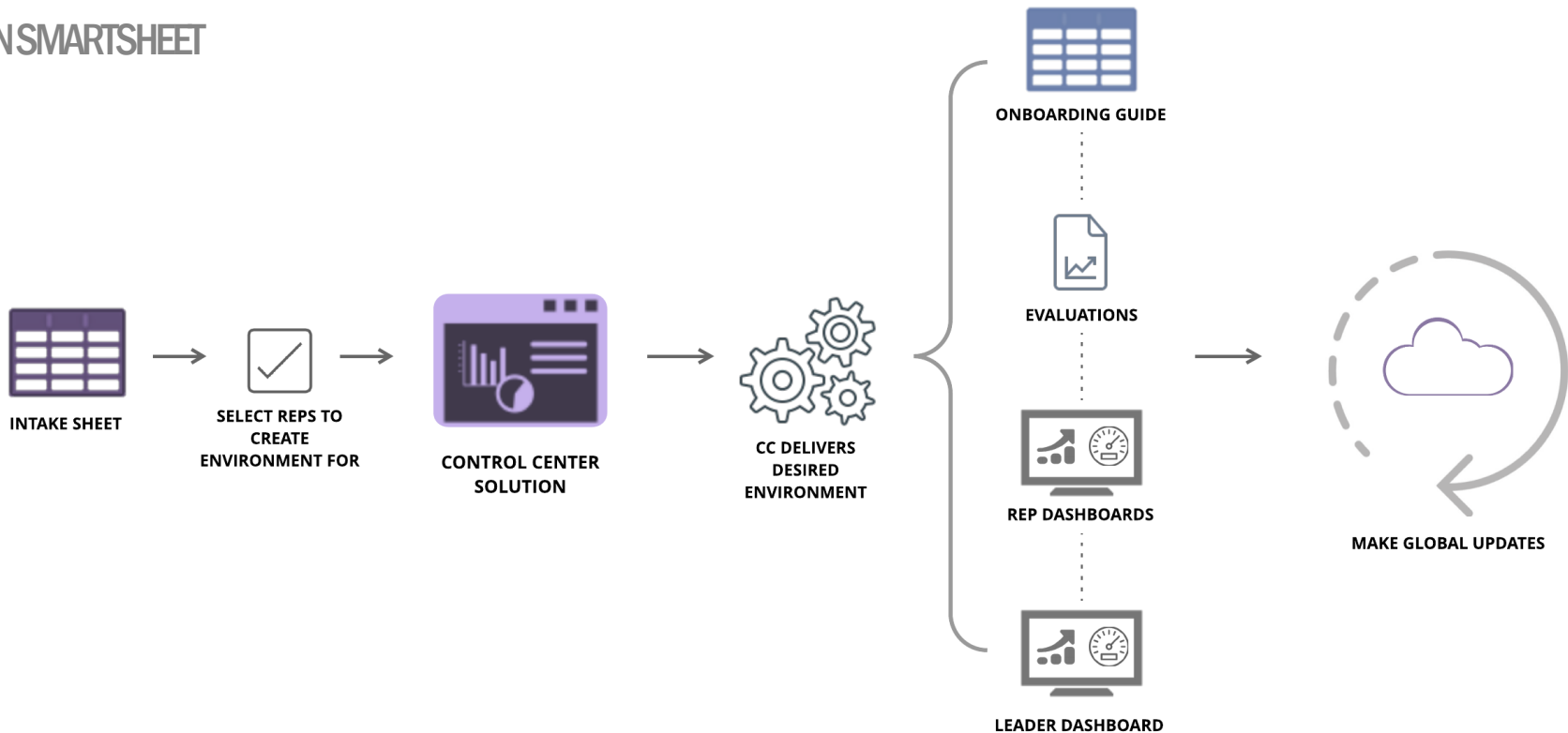
CONTROL CENTER

IN SMARTSHEET



CONTROL CENTER

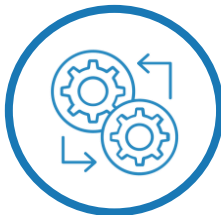
IN SMARTSHEET



WHAT WE'VE GAINED

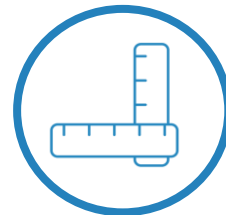
AUTOMATION

- 1 minute to create
- No data entry errors



SCALE

- Real-time updates
- Custom to role



CONSISTENT STRUCTURE

- Same per new hire
- Complete environment



OPTIMIZED MANAGEMENT

- Single source of truth
- Integrates multiple sources





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**How Smartsheet Uses Smartsheet:
Forecasting and Deal Reviews**

WE'LL EXPLORE

FORECASTING PROCESS

- Traditional forecasting experience
- Forecasting in Smartsheet

DEAL REVIEWS















- Approach for strategic opportunities
- Deal Review process in Smartsheet



INDIVIDUAL FORECAST SHEETS

	A	B	C	D	E	F	G	H	I	J
1	AE Name									
2										
3		Month Forecast	Month Upside	Quarter Forecast	Quarter Upside					
4	New									
5	Upsell									
6	Total	\$0	\$0	\$0	\$0					
7										
8	Month Pipeline		Quarter Pipeline			https://na2.salesforce.com/00O40000003evhs				
9	Total Deals		Total Deals			Use this link to review your pipeline (filter for month/quarter as needed).				
10	Calculated MRR		Calculated MRR			Calculated MRR is the 'probable' MRR filed. Lower right hand corner.				
11	Total MRR		Total MRR							
12										
13	Key Deals (\$1k)									
14	Company	Close Month	MRR	C/BC	New/Upsell					
15	Company 1	Feb	\$1,500	C	New					
16	Company 2	Mar	\$2,500	BC	Upsell					
17	Company 3	Mar	\$1,000	C	Upsell					
18										
19										
20										
21										
22										

FORECAST CONSOLIDATION FOLDER

Name	Date modified	Type	Size
 Alex Forecast Sheet - Q4	12/10/2013 3:52 PM	Microsoft Excel 97...	39 KB
 Drew Forecast Sheet - Q4	12/10/2013 3:52 PM	Microsoft Excel 97...	22 KB
 EAE_Top_10_Accounts_(10 19 12) v2	12/10/2013 3:52 PM	Microsoft Excel W...	36 KB
 Jennifer Forecast Sheet - Q4	12/10/2013 3:52 PM	Microsoft Excel 97...	23 KB
 Key Deals - Q4	12/10/2013 3:52 PM	Microsoft Excel W...	149 KB
 Marie Forecast Sheet - Q4	12/10/2013 3:52 PM	Microsoft Excel 97...	23 KB
 Matt A. Forecast Sheet - Q4	12/10/2013 3:52 PM	Microsoft Excel 97...	22 KB
 Matt D. Sheet - Q4 - MD	12/10/2013 3:52 PM	Microsoft Excel 97...	22 KB
 Mauricio Forecast Sheet - Q4	12/10/2013 3:52 PM	Microsoft Excel 97...	22 KB
 Michael Forecast Sheet - Q4	12/10/2013 3:52 PM	Microsoft Excel 97...	22 KB
 Nick Forecast Sheet - Q4	12/10/2013 3:52 PM	Microsoft Excel 97...	22 KB
 Phil Forecast Sheet - Q4	12/10/2013 3:52 PM	Microsoft Excel 97...	22 KB
 Sub 2k pipeline	12/10/2013 3:52 PM	Microsoft Excel 97...	275 KB
 Vivian Forecast Sheet - Q4	12/10/2013 3:52 PM	Microsoft Excel 97...	28 KB

CONSOLIDATED MASTER FORECAST

	A	B	C	D	E	F	G	H	I	J	K
1	Name	Quarter Forecast	Quarter Upside	Quarter Quota	Manager Forecast	Manager High	Key Deals	C9	Won	Funnel	Coverage
2	Rep1	\$6,000	\$8,000	\$9,000	\$5,000	\$9,000		\$3,974	\$1,120	\$8,069	1.0
3	Rep2	\$5,600	\$8,000	\$9,000	\$5,000	\$9,000	Company1 @ \$1.2k BC, Company2 @ \$1	\$5,328	\$780	\$13,487	1.6
4	Rep3	\$18,000	\$27,000	\$15,500	\$18,000	\$25,000	Company1 @ \$3k BC, Company2 @ \$12	\$10,159	\$528	\$40,578	2.7
5	Rep4	\$12,100	\$16,500	\$9,000	\$12,000	\$16,000	Company1 @ \$4k C, Company2 @ \$2.2k	\$9,806	\$2,001	\$18,368	2.6
6	Rep5	\$17,500	\$22,500	\$15,500	\$17,500	\$20,000	Company1 @ \$3k BC, Company2 @ \$12	\$15,688	\$1,348	\$34,589	2.4
7	Rep6	\$6,000	\$8,000	\$9,000	\$5,000	\$9,000		\$4,722	\$1,255	\$9,263	1.2
8	Rep7	\$6,500	\$7,500	\$6,600	\$5,000	\$7,500		\$1,712	\$758	\$6,588	1.1
9	Rep8	\$6,000	\$7,500	\$9,000	\$800	\$2,000	Company1 @ \$1.2k BC, Company2 @ \$1	\$1,370	\$514	\$4,907	0.6
10	Rep9	\$18,000	\$36,000	\$13,500	\$14,000	\$18,000	Company1 @ \$3k BC, Company2 @ \$12	\$20,986	\$1,463	\$45,365	3.8
11	Rep10	\$16,750	\$20,400	\$15,500	\$16,000	\$20,000	Company1 @ \$4k C, Company2 @ \$2.2k	\$18,625	\$2,123	\$31,174	2.3
12	Rep11	\$13,500	\$15,000	\$13,500	\$14,000	\$15,000	Company1 @ \$1.2k BC, Company2 @ \$1	\$11,178	\$1,322	\$20,729	1.7
13	NH1			\$0				\$0	\$0	\$0	0.0
14	NH2			\$0				\$0	\$0	\$0	0.0
15	Team Totals	\$125,950	\$176,400	\$125,100	\$112,300	\$150,500		\$103,548	\$13,211	\$233,115	2.08
16											
17				\$ 144,809		78%			9%	\$99,089	2.16
18	Forecast	\$112,300									
19	Booked	\$13,211									
20	Remaining	\$99,089									
21							\$158,620	8%			40000
22	Qualify	\$21,087	137	\$2,109			\$131,598	11%			23%
23	Discover	\$10,555	34	\$2,111						\$22,460	33%
24	Present Solution	\$9,845	31	\$4,922							
25	Deliver Proposal	\$9,173	28	\$6,421			24				
26	Negotiate	\$1,212	5	\$1,091							
27	Funnel	\$51,871	235	\$16,654							
28											
29											

Forecast Archive

Forecast Sheet

Q1M2

Q1M1

Pipeline Pivot

Closed Deal Pivot

Closed Data

Pipeline Data ...



LEGACY FORECAST PROCESS AT SCALE



6 HOURS/MGR

Per rep and per team files

- Highly manual
- Repeats (weekly/monthly)



25+ TEAMS

All needs to be aggregated

- Error-prone
- Administrative in nature



150 MGR HOURS

Per cycle! (week/month/quarter)

- Less time driving business
- Less time developing team

FORECASTING – PRE-SMARTSHEET

NEEDS ANALYSIS

Simplify monthly/quarterly setup

Single source of truth

Faster turnaround time for updates

Improve visibility on changes

Scale with fast growing organization

FORECASTING IN SMARTSHEET

FORECASTWORKFLOW

IN SMARTSHEET



**SET UP / UPDATE
FORECAST SHEET**



**RE-SHARE
SHEET**



**REPS FORECAST
MANAGERS
VALIDATE & FINALIZE**

FORECAST SHEET

SMARTSHEET FORECAST EXPERIENCE

File Alerts & Actions Forms											
<div> <div> Grid View Filter Off </div> <div> Arial 10 B I U </div> <div> Σ \$ % </div> </div>											
			Manager Validated	Name	Team	Role	QTD Delta	Product Forecast (90%)	Product Quota	Services Forecast (90%)	Services Quota
1			<input type="checkbox"/>	December 2017							
2			<input type="checkbox"/>	Rep	Team	Role	QTD Delta	Product Forecast	Product Quota	Services Forecast	Services Quota
3			<input type="checkbox"/>	Abbie Andrews	Eric Roszkowski	CDM	\$99,244	\$43,600	\$40,000	\$6,000	\$6,000
4			<input type="checkbox"/>	Adrian Cendoya	Jonathan Tallariti	CDM	\$102,360	\$20,000	\$40,000	\$3,000	\$6,000
5			<input type="checkbox"/>	Adrian Lyons	Justin Aebischer	CDM	\$62,261	\$18,000	\$20,000	\$4,000	\$3,000
6			<input type="checkbox"/>	Akira Barrett	Zachary Batson	NBR	\$65,578	\$33,381	\$32,500	\$7,000	\$7,000
7			<input type="checkbox"/>	Alex Bedford	Jonathan Tallariti	CDM	\$108,441	\$27,500	\$40,000	\$17,400	\$6,000
8			<input type="checkbox"/>	Alex Gamoran	Jennifer Buhrmann	CDM	\$44,040	\$30,000	\$42,500	\$28,500	\$8,000
9			<input type="checkbox"/>	Bradley Marsh	Brahm Heyman	CDM	\$46,065	\$25,000	\$40,000	\$6,000	\$6,000
10			<input type="checkbox"/>	Bruce Merrell	Kevin Ahern	CDM	\$22,500	\$7,500	\$7,500	\$1,000	\$1,000
11			<input type="checkbox"/>	Bryan Gilster	Justin Aebischer	CDM	\$49,188	\$12,000	\$17,500	\$2,000	\$3,000
12			<input type="checkbox"/>	Caleb Thompson	Justin Aebischer	CDM	\$58,602	\$25,000	\$32,500	\$4,000	\$4,000
13			<input type="checkbox"/>	Cameron Tucker	Christine Allanson	CDM	\$72,409	\$40,000	\$32,500	\$25,000	\$4,000
14			<input type="checkbox"/>	Cathy Clark	Brahm Heyman	CDM	\$120,668	\$34,000	\$42,500	\$15,000	\$8,000
15			<input type="checkbox"/>	Catrina Sheputis	Zachary Batson	NBR	\$74,926	\$35,700	\$32,500	\$17,400	\$7,000
16			<input type="checkbox"/>	Chad Johnson	Steve Timmerman	CDM	\$74,004	\$33,450	\$40,000	\$17,400	\$6,000
17			<input type="checkbox"/>	Chris Gibbs	Justin Aebischer	CDM	\$81,672	\$20,000	\$30,000	\$2,000	\$4,000

Share

SMARTSHEET FORECAST EXPERIENCE

The screenshot displays the Smartsheet interface. On the left, a spreadsheet grid is visible with rows 82 through 100. Row 86 is highlighted with a red circle. A 'Comments (2)' dialog box is open, showing two comments. The first comment is from Jennifer Buhrmann, dated September 24, 2018, at 8:15 AM. The second comment is from Kelly Welch, dated September 23, 2018, at 2:23 PM. The dialog box also includes a 'Share' button in the top right corner.

Comments (2)

Row 92: Team Jennifer

Add comment

JB Jennifer Buhrmann September 24, 2018 8:15 AM

Thanks Kelly! Yes, the pipeline coming into this month was really healthy and it helped boost our production. 8 out of my team's top 10 opportunities are fully committed for the month and the other two are best case. Top 3 by size are as follows...

- 1) Company 1 @ \$43k w/Rebecca - out for signature and closing Tuesday of next week
- 2) Company 2 @ \$25k w/Alex - executive sign-off complete but working through procurement process. Expected to route for signature by Wed.
- 3) Company 3 @ \$22.5k w/Michael - Signed but waiting for PO; PO expected tomorrow

[Add reply](#)

KW Kelly Welch September 23, 2018 2:23 PM

Looking like a strong month for your team. Nice work! Can you touch on the top 3 opportunities you are driving with your team this month? Thanks!

[Add reply](#)

[Share](#)

FORECASTING TODAY



IT

Accommodates teams of
any size



OPERATIONS

Supports any frequency
necessary and across different
types of teams



MARKETING

Schedule updates with
conditional reminders



PMO

Contextual intelligence through
use of Cell History and
Dashboards

DEAL REVIEWS IN SMARTSHEET

DEAL REVIEWS AS PROJECT MANAGEMENT

Categories in Solution

- Define interest (problem & Smartsheet alignment)
- Map evaluation team (requirements)
- Clarify decision team (funding)
- Understand purchasing process (contracting)
- Assess mutual risks
- Establish next steps

DEAL REVIEW COMPONENTS

SFDC Opportunity Record

Deal Review Sheet

Deal Review Dashboard

Rep Deal Review Dashboard

DEAL REVIEW WORKFLOW IN SMARTSHEET



ASSETS GENERATED



DATA SHEET



REP INPUT SHEET



DASHBOARD

DEAL REVIEW SOLUTION – SFDC

Opportunity
test account - Enterprise - New USD (36,900.00)

[Customize Page](#) | [Printable View](#) | [Help for this Page](#)

Show Feed

[Products \(Current MSRP\) \(4\)](#) | [Quotes \(0\)](#) | [Sales Engineer Requests \(0\)](#) | [Scoping Requests \(0\)](#) | [Open Activities \(0\)](#) | [Activity History \(0\)](#) | [Contact Roles \(0\)](#) | [DocuSign Status \(0\)](#) | [Approval History \(0\)](#) | [Services \(0\)](#) | [Campaign Influence \(0\)](#) | [Opportunity Team \(0\)](#) | [Google Docs, Notes, & Attachments \(0\)](#) | [Content Deliveries \(0\)](#) | [Stage History \(5\)](#) | [Opportunity Field History \(5+\)](#) | [Files \(0\)](#)

Opportunity Detail

[Edit](#) [Edit Opportunity Team](#) [SDR Kick Back](#) [Order Management](#) [New Use Case](#) [Request Sales Engineer](#) [Scoping Request](#) [Deal Wizard](#)
[Send DocuSign](#) [Send SOW](#) [Send Back to Sales](#)

Opportunity Owner	Kelly Welch [Change]	Stage	Differentiate
Opportunity Record Type	New [Change]	Close Date	10/31/2018
Opportunity Name	test account - Enterprise - New USD (36,900.00)	Forecast	Stretch
Account Name	test account	ARR Variance	USD 36,900.00
Description		Opportunity Recurring Total	USD 36,900.00
Strategic Sales Process		Opportunity One-Time Total	USD 21,400.00
Key Roles	<input type="checkbox"/>	Opportunity Subscription Discount	USD 0.00
Opportunity Review	<input checked="" type="checkbox"/>	New Plan ARR	USD 36,900.00
Order Management Assisted	<input type="checkbox"/>	Previous ARR	
HIPAA	<input type="checkbox"/>	Previous License ARR	USD 0.00
		Consolidation ARR	USD 0.00

Deal Management

SDR Notes	Legal Requirement
Proactive, Reactive, Multithread	Security Requirement
Interest Seeking a lightweight and intuitive replacement for XYZ, which they found to be inflexible and not well implemented. Users are falling back to excel and email due to limitations of existing system. Need to be able to support growing demand from within the organization and headcount is not expected to increase going into next year. Need to get more efficient in their process and reduce some of the reporting overhead created by the manual solutions teams are using now in lieu of XYZ. This will be for the Enterprise Transformation Department (Enterprise Architecture, PMO, Change Management, and Training teams)	Pricing/Scope Agreement

DEAL REVIEW SOLUTION – CONTROL CENTER

smartsheet

Control Center

Sharing

Select people to share with

Commercial Deal Review Solution Sharing

Owner

1 kelly.welch@smartsheet.com

Admins

1 andrew.bennett@smartsheet.com

Editors (can share)

1 rajiv.arunkundram@smartsheet.com x |

Editors (cannot share)

Viewers

Template Sharing

User or Group

Permission

Templates

Cancel

Back

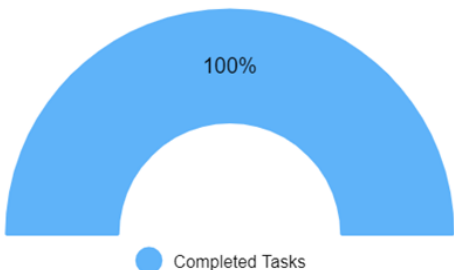
+ Create Project

DEAL REVIEW SOLUTION – ASSETS CREATED



Deal Review Fields Remaining

Deal Review Tasks Status




Account

7 of 7+


Opportunity

12 of 8+


Next Steps

4 of 4


Deal Mgmt

20 of 20


Assessment

6 of 6

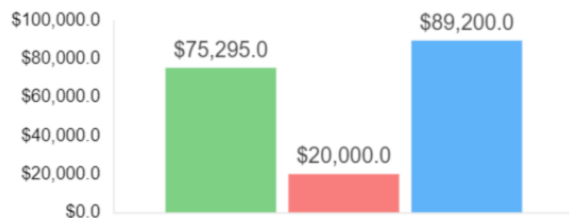
Key Links

-  [Commercial Management - test acc...](#)
-  [Commercial Management - test acc - DR ...](#)

DEAL REVIEW SOLUTION – REAL TIME VISIBILITY

Opportunity Metrics

Revenue by Stage



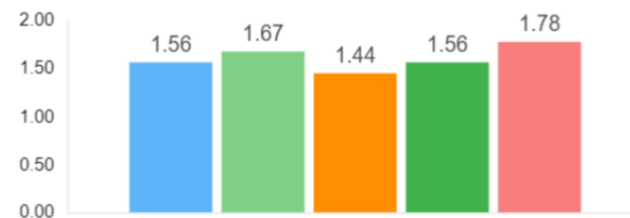
● Closed Won ● Closed Lost ● Open

Average Age by Stage

Closed Won: **145**
Closed Lost: **258.5**
Open: **130**

Assessment Metrics

Average Self Assessment Score by Category



● Interest ● Evaluation ● Decision ● Purchase ● Risks



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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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