

Handout: Become a Workflow Design Expert



Process: A series of actions or steps taken in order to achieve a particular end

- What is your current process today? Map it out!
- Are you able/willing to make changes to the process to make it more efficient?

Goals: The result or achievement toward which our process is directed

- How do you define success?
- How is success or completion measured?

Roles: Functions performed by people involved in the process

- Who's involved in each step of the process?
- Are there internal and external roles?

Visibility: Providing a clear and unobstructed view for participants in process

- What type of information is required by whom in the process?
- How will they consume this and how often do they need to update?

Smartsheet Building Blocks:

- **Sheets**
 - Where all of your data is stored, your home base
 - Where you set tracking, notifications, alerts, automations and formatting rules
- **Forms**
 - Collecting data from anywhere, including via mobile
 - Request management process
- **Report**
 - Work management across multiple sheets
 - Answering key business questions
- **Automation**
 - Automate alerts and reminders to colleagues
 - Automate update requests and approval requests
- **Dashboards**
 - Surface real-time metrics across a program or process, without exposing underlying data
 - Create a portal to centralize data and resources for a team
- **Integrations**
 - Connecting to other apps such as Salesforce, Jira and more
 - Automation within Smartsheet or between Smartsheet and other apps
- **Mobile**
 - Easily access your data on the go
 - Great for remote or field stakeholders to update information and submit forms, edit data, update requests and approvals

TO DOWNLOAD A PREBUILT WORKFLOW: <https://help.smartsheet.com/learning-track/solutions>