smartsheet

Strategic Plan

Template Set Getting Started Guide

With the Strategic Plan template set, you can review project details that align with each of your overall strategic objectives, monitor projects by risk, category, or person, and use a form to capture new project requests so you can take action faster.

smartsheet.com
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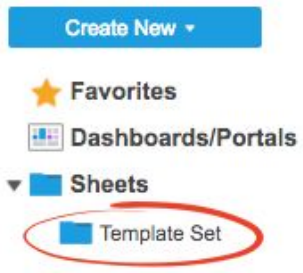
REQUIREMENTS: This template set has been designed to utilize the full suite of functionality available in Smartsheet. Select plans do not have access to all premium features like Dashboards, Automated Actions, and Activity Log. If you are on a limited plan you can still use the template set however not all premium functionality will be available. Click here to see a list of discontinued plans.

Get the Template Set

Click the link below to add the template set to your Sheets folder, located on the left side of the screen under Sheets.

Strategic Plan Template Set



What's Included in the Set

With the Strategic Plan template set, you can quickly find critical project details, monitor projects by risk, category, or person, and use a form to capture new Project Requests.

In Progress Report
A live, filtered view of all current work orders in progress.

Project Sheet (x2)
Tracks all of the tasks and deadlines for your projects.

Master Roll-Up Sheet
A central repository that rolls up metrics across all projects.

Project Request Sheet
A hub for project requests that includes an approval workflow.

At Risk Report
A running log of at-risk tasks.

Strategic Plan Dashboard
A dashboard that summarizes key information across multiple projects.

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Set Up

Using a workspace is a best practice when building a collaborative process. Workspaces allow you to centralize your work and control sharing with different stakeholders.

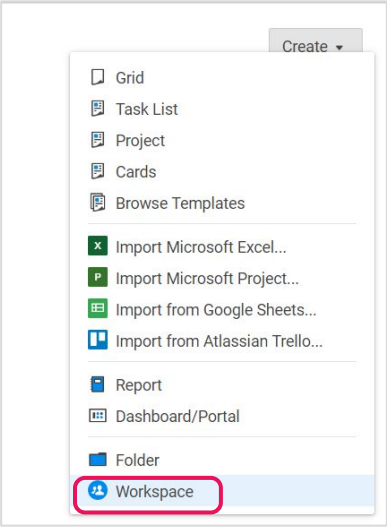
Step 1:

Create a New Workspace

Open *Home.* From the home menu, click the *Create* button in the upper right hand corner. From the drop-down menu, select *Workspace*. Name the workspace.

Learn more:

Workspaces Overview, Workspace Sharing, Home Tab



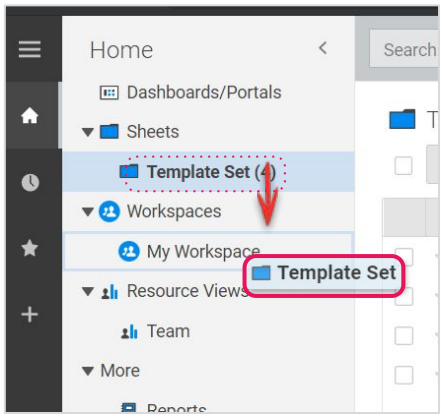
Step 2:

Drag the Files into Workspace

Select the template set folder under your *Sheets* folder. Drag and drop the folder down to the workspace you just created.

Learn more:

Manage Items in a Workspace (Add, Move, Remove)



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Customize

Step 3:

Update Project Requests Sheet

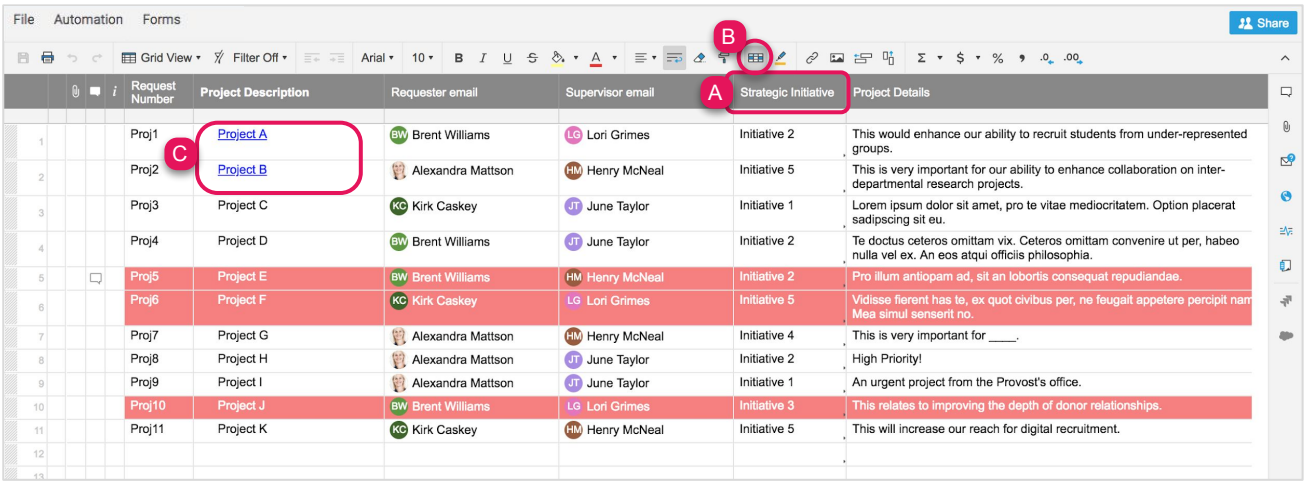
The Project Requests sheet tracks your critical projects that support your strategic initiatives. As you receive new project requests and a new row is added, the Request Number and Created Date *Auto-Number/System* columns automatically assigns the row a unique request number and records the date when data is first saved on the row to help you with tracking.

We have also set up conditional formatting rules so you can visually identify declined requests (displayed in red font). The Requester email and Supervisor email columns are *Contact List* column type. It's a best practice to use *Contact List* columns when assigning owners so they can be leveraged to set automated actions, alerts, reports, and more.

A. Replace the placeholder values in the Strategic Initiative column, which is a *Dropdown* column type, to list your business initiatives by double-clicking the column header and edit the options under Values.

B. Customize, disable, or add the conditional formatting rules by clicking on the conditional formatting button in the top toolbar.

C. From this sheet you can hyperlink to each project sheet where the tasks and details are managed. To modify the hyperlink, right click on the cell and select Hyperlink. You can create hyperlinks to other Smartsheet items, or to a relevant website.



	Request Number	Project Description	Requester email	Supervisor email	Strategic Initiative	Project Details
1	Proj1	Project A	Brent Williams	Lori Grimes	Initiative 2	This would enhance our ability to recruit students from under-represented groups.
2	Proj2	Project B	Alexandra Mattson	Henry McNeal	Initiative 5	This is very important for our ability to enhance collaboration on inter-departmental research projects.
3	Proj3	Project C	Kirk Caskey	June Taylor	Initiative 1	Lorem ipsum dolor sit amet, pro te vitae mediocritatem. Option placerat sadipscing sit eu.
4	Proj4	Project D	Brent Williams	June Taylor	Initiative 2	Te doctus ceteros omittam vix. Ceteros omittam convenire ut per, habeo nulla vel ex. An eos atqui officiis philosophia.
5	Proj5	Project E	Brent Williams	Henry McNeal	Initiative 2	Pro illum antiopam ad, sit an lobortis consequat repudiandae.
6	Proj6	Project F	Kirk Caskey	Lori Grimes	Initiative 5	Vidisse fierent has te, ex quot civibus per, ne feugait appetere percipit nam Mea simul senserit no.
7	Proj7	Project G	Alexandra Mattson	Henry McNeal	Initiative 4	This is very important for ____.
8	Proj8	Project H	Alexandra Mattson	June Taylor	Initiative 2	High Priority!
9	Proj9	Project I	Alexandra Mattson	June Taylor	Initiative 1	An urgent project from the Provost's office.
10	Proj10	Project J	Brent Williams	Lori Grimes	Initiative 3	This relates to improving the depth of donor relationships.
11	Proj11	Project K	Kirk Caskey	Henry McNeal	Initiative 5	This will increase our reach for digital recruitment.
12						

Learn more:

Project Management and Gantt Charts, Parent Rollup Functionality, Hierarchy: Indent or Outdent Rows, Creating a Milestone to Mark a Significant Event in Your Project, Create a Hyperlink to a Sheet, Report, or Website

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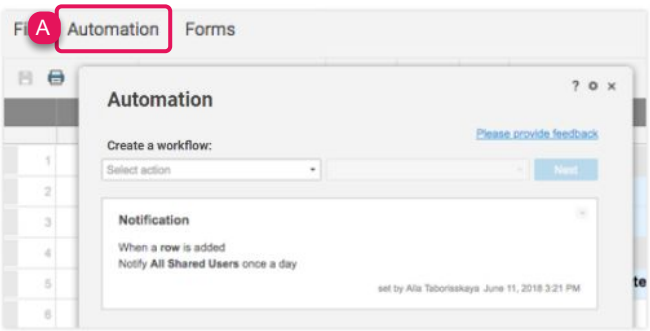
Step 4:

Modify Automated Approval Request

An automated approval request has already been set on this sheet to request the manager for their approval. An approval request is a great way to automatically ask someone to approve or deny an item on your sheet. The approval request will be sent to the manager listed in the Supervisor email contact column, which is a required field in the Project Requests form.

A. To modify the automated approval request, click on *Automation* and select *Manage Workflows* in the dropdown menu.

B. Then double-click on the Manager Approval Request workflow in order to open the editor window.



Learn more:

[Save Time and Work Faster With Automated Workflows]

Step 5:

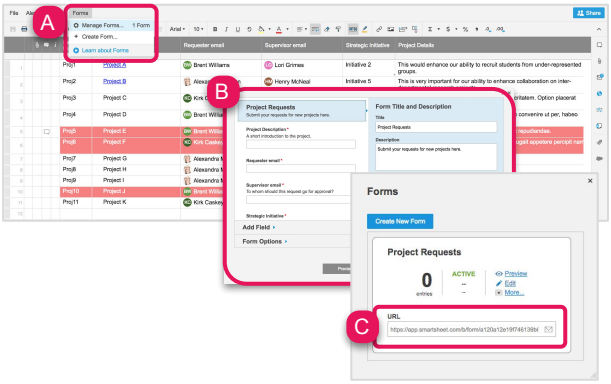
Revise Project Requests Form

The Project Requests Form is how people submit new project requests. Submissions are then added to the Project Requests sheet, where you can track request items and get manager approvals.

A. Customize the form by first opening the Project Requests sheet and clicking on *Forms* in the top menu.

B. Click on *Manage Forms* and then *Edit* to customize the existing fields. You can add or remove fields, change field titles or descriptions, and modify *Form Options*.

C. Hit *Save* to close the form builder and copy and save the URL displayed. This URL is what you'll give to everyone who will be submitting requests.



Learn more:

[Forms], [Edit Existing Form Fields]

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Step 6:

Sheet Bonus: View or Edit Your Project Summary Data

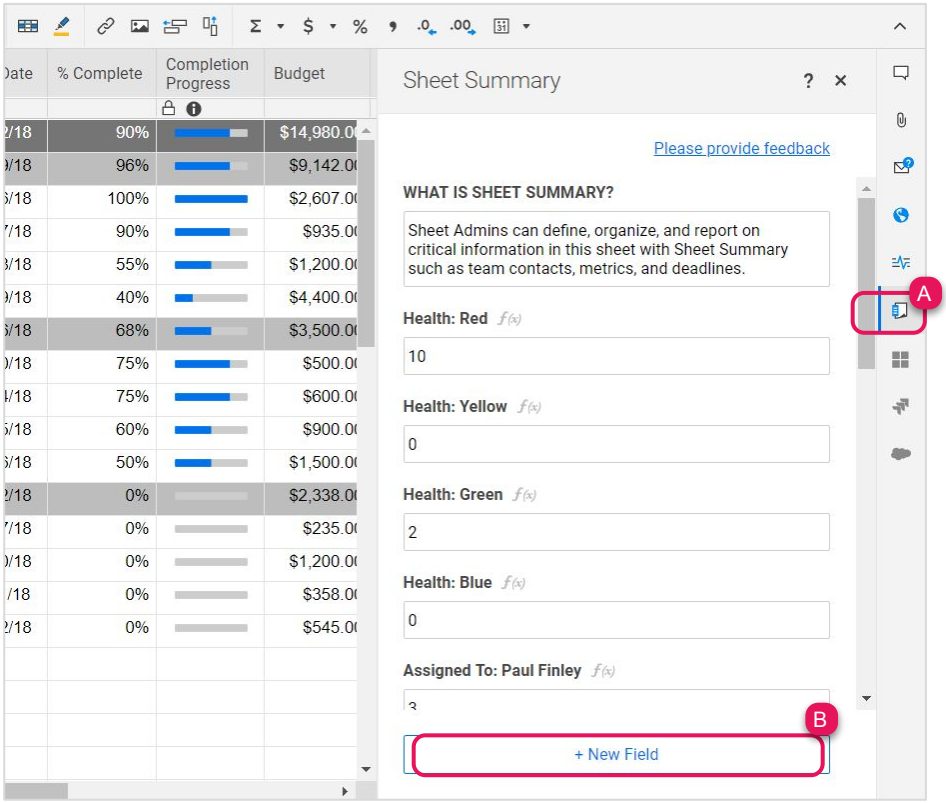
For those with a *Business* or *Enterprise* plan, this template set utilizes the *sheet summary* feature. The Project Requests sheet and the Project sheets include a pre-populated sheet summary that provides a standard, robust way to organize and report on project information in your sheet. On the Project Requests sheet, get a snapshot of projects approved or declined per initiative. On the Project sheets, you can see a quick recap of the health of tasks, budget information, and project team allocations. Open the sheet summary on the right panel to view or edit your project summary fields. You can use formulas and reference another summary fields.

A. Click the sheet summary icon to expand the sheet summary. You can expand and collapse the right panel to stay in the context of your sheet or maximize your sheet real estate when you don't need to view it.

B. To add fields, click +New Field.

C. Name your field and select the field type: Text/Number, Contact list, Date, Dropdown list, Checkbox, or Symbols.

D. To edit the field properties, hover over the right side of the field and click on the vertical ellipsis (⋮) to open the field options dropdown menu.



Learn more:

Define Your Work with Sheet Summary, Maximize Your Sheet Summary Usage, Create a Portfolio View with a Summary Report

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Step 7:

Modify the Project Sheets (x2)

Use the Project Plan sheet to track and maintain critical data about a project. Create a project sheet for each of your projects and use it to manage tasks and deadlines. Project sheets in Smartsheet have dependencies enabled and includes columns such as Duration, Predecessors, and % Complete. It's best to enable dependencies for projects with deadlines to ensure every moving part in your project is tracked and on time, and ultimately meet your deadline.

A. In the Task Name column, name the project phases in the parent (light gray) rows.

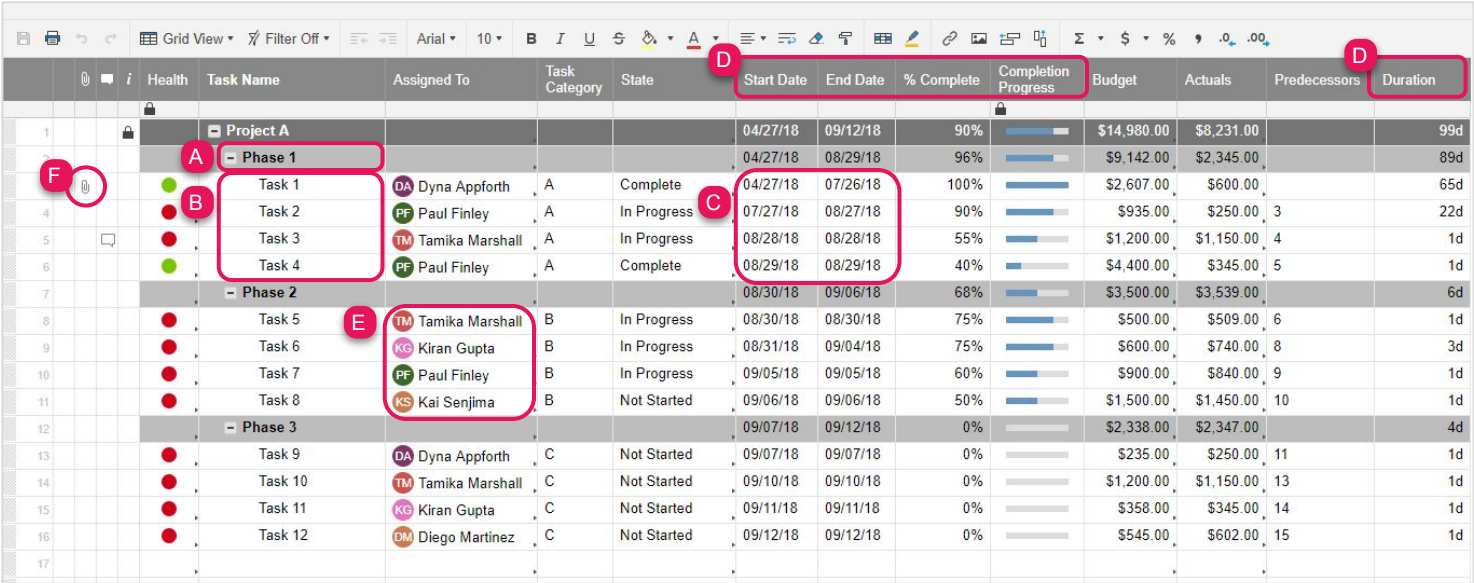
B. Use the indented child (white) rows in your hierarchy, to enter tasks in the Task Name column.

C. Starting on row 3, enter dates in the Start Date and End Date columns.

D. The other data on your ancestor and parent rows, including Start Date, End Date, % Complete, and Duration are auto-calculated by the tasks below the parent row.

E. Enter contact names in the Assigned To columns to assign task owners.

F. Attach documents and other files to the row in the Attachment (*paperclip* icon) column to keep all of your project information and resources in one place.



	Health	Task Name	Assigned To	Task Category	State	Start Date	End Date	% Complete	Completion Progress	Budget	Actuals	Predecessors	Duration
1		Project A				04/27/18	09/12/18	90%		$14,980.00	$8,231.00		99d
2		Phase 1				04/27/18	08/29/18	96%		$9,142.00	$2,345.00		89d
3		Task 1	Dyna Appforth	A	Complete	04/27/18	07/26/18	100%		$2,607.00	$600.00		65d
4		Task 2	Paul Finley	A	In Progress	07/27/18	08/27/18	90%		$935.00	$250.00	3	22d
5		Task 3	Tamika Marshall	A	In Progress	08/28/18	08/28/18	55%		$1,200.00	$1,150.00	4	1d
6		Task 4	Paul Finley	A	Complete	08/29/18	08/29/18	40%		$4,400.00	$345.00	5	1d
7		Phase 2				08/30/18	09/06/18	68%		$3,500.00	$3,539.00		6d
8		Task 5	Tamika Marshall	B	In Progress	08/30/18	08/30/18	75%		$500.00	$509.00	6	1d
9		Task 6	Kiran Gupta	B	In Progress	08/31/18	09/04/18	75%		$600.00	$740.00	8	3d
10		Task 7	Paul Finley	B	In Progress	09/05/18	09/05/18	60%		$900.00	$840.00	9	1d
11		Task 8	Kai Senjima	B	Not Started	09/06/18	09/06/18	50%		$1,500.00	$1,450.00	10	1d
12		Phase 3				09/07/18	09/12/18	0%		$2,338.00	$2,347.00		4d
13		Task 9	Dyna Appforth	C	Not Started	09/07/18	09/07/18	0%		$235.00	$250.00	11	1d
14		Task 10	Tamika Marshall	C	Not Started	09/10/18	09/10/18	0%		$1,200.00	$1,150.00	13	1d
15		Task 11	Kiran Gupta	C	Not Started	09/11/18	09/11/18	0%		$358.00	$345.00	14	1d
16		Task 12	Diego Martinez	C	Not Started	09/12/18	09/12/18	0%		$545.00	$602.00	15	1d

Learn more:

Project Management and Gantt Charts, Parent Rollup Functionality, Hierarchy: Indent or Outdent Rows, Creating a Milestone to Mark a Significant Event in Your Project

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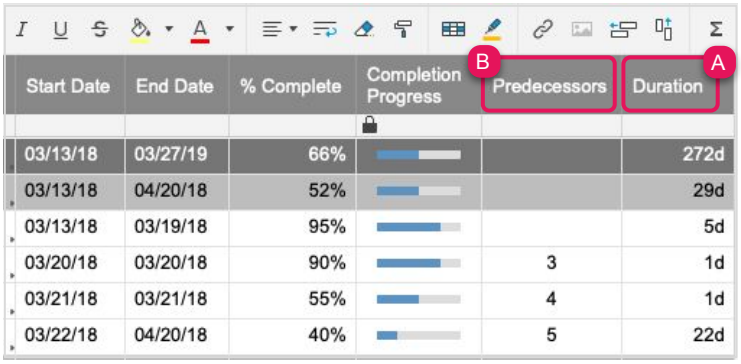
Step 8:

Adjust Duration and Predecessors

Duration and Predecessor are two unique column types that exist in project sheets.

A. Set the duration of each task in the Duration column.

B. Set predecessors, or relationships between tasks, in the Predecessors column.



Start Date	End Date	% Complete	Completion Progress	Predecessors	Duration
03/13/18	03/27/19	66%			272d
03/13/18	04/20/18	52%			29d
03/13/18	03/19/18	95%			5d
03/20/18	03/20/18	90%		3	1d
03/21/18	03/21/18	55%		4	1d
03/22/18	04/20/18	40%		5	22d

Learn more:

Project Sheet Columns: Start Date, End Date, Duration, % Complete and Predecessors

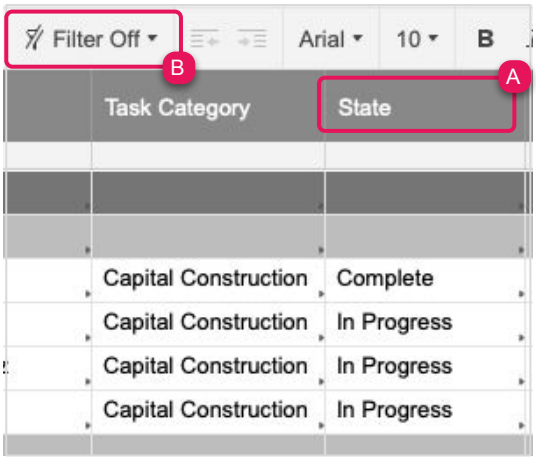
Step 9:

Update State of Task and Filters

After you assign task owners, the owner can update the state of the task by selecting an option from a custom dropdown list in the State column. If you have multiple owners, filters are a great way to help people focus on their assignments. On the project sheets, we created a shared filter called Tasks Assigned to Me. Anyone viewing the sheet can select that filter to see their assigned items.

A. To modify the options in the dropdown list, double-click on the State column header and edit the placeholders including the order of the list in the *Values* box. Repeat these steps to modify the options in the Task Category column.

B. Select the *Filter Off* button in the toolbar to create, use, or modify filters.



Task Category	State
Capital Construction	Complete
Capital Construction	In Progress
Capital Construction	In Progress
Capital Construction	In Progress

Learn more:

Dropdown List, Filters, Shared Filter

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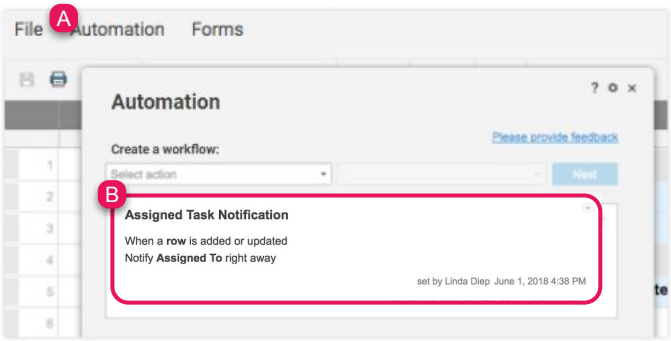
Step 10:

Set Alert for Assigned Tasks

An alert workflow is a great way to let your team know they have new tasks to fulfill as soon as they are assigned. An alert has been set on the project sheets to instantly notify anyone shared to the sheet when a new task has been assigned to them.

A. To edit the alert workflow, click on *Automation* and select *Manage Workflows* in the dropdown menu.

B. Then double-click on the workflow itself in order to edit the criteria.



Learn more:

Save Time and Work Faster With Automated Workflows

Step 11:

Understand the Health Column Formula

The Health column operates by a formula that looks at the Date columns and the State column. If the task is marked "Complete", the color will be green, regardless of Dates. If the task is not yet "Complete" and the Due Date is in the past, the color will be red. If the task is "Not Started", it will be blue. Otherwise, it will be yellow.

Health	Task Name	Assigned To	Task Category	State	Start Date	End Date
	Project B				07/09/18	04/02/19
	Phase 1				07/09/18	07/30/18
	Task 1	PF Paul Finley	A	Complete	07/09/18	07/23/18
	Task 2	PF Paul Finley	A	Complete	07/24/18	07/26/18
	Task 3	DA Dyna Appforth	A	Complete	07/27/18	07/27/18
	Task 4	KS Kai Senjima	A	Complete	07/30/18	07/30/18
	Phase 2				07/31/18	10/05/18
	Task 5	PF Paul Finley	B	In Progress	07/31/18	08/03/18

Learn more:

Create and Edit Formulas in Smartsheet

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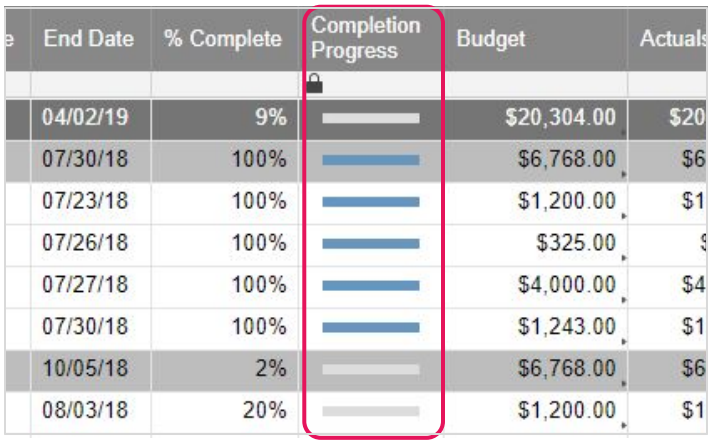
Step 12:

Understand the Completion Progress Column

The Completion Progress column also operates by a formula that looks at the % Complete column. If the % Complete is less than 25%, then the bar is empty. If % Complete is between 25%-50%, then the bar is one quarter full. If % Complete is between 50%-75%, the bar is one half full. If % Complete is more than 75% but less than 100%, then the bar is three quarters full. If % Complete is 100%, then the bar is completely full.



End Date	% Complete	Completion Progress	Budget	Actuals
04/02/19	9%		$20,304.00	$20
07/30/18	100%		$6,768.00	$6
07/23/18	100%		$1,200.00	$1
07/26/18	100%		$325.00	$
07/27/18	100%		$4,000.00	$4
07/30/18	100%		$1,243.00	$1
10/05/18	2%		$6,768.00	$6
08/03/18	20%		$1,200.00	$1

Learn more:

Create and Edit Formulas in Smartsheet

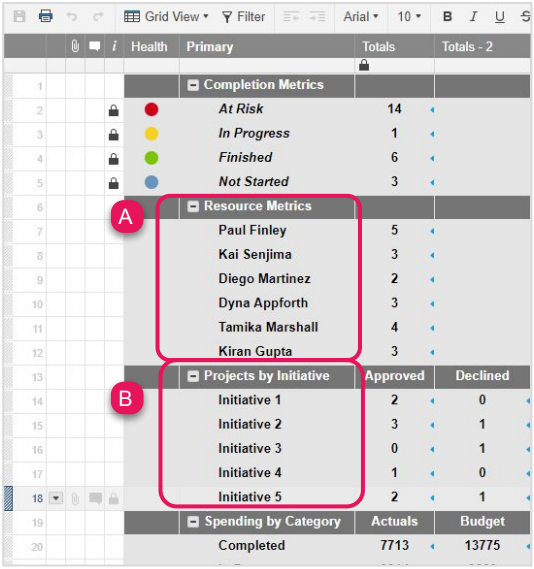
Step 13:

Use the Master Roll-Up Sheet

The Master Roll-Up sheet is a central repository where you can roll-up the combined metrics you want to track across all of the projects. We've designed this sheet with cross-sheet formulas so the metrics always reflect, in real-time, the information in the underlying sheets.

A. Overwrite the categories under each section to match the dropdown lists in the project sheets and/or the Project Requests sheet. Replace the names of the assignees in the Resource Metrics section.

B. If you added new Strategic Initiatives in the Project Requests sheet, insert a new row to the Projects by Initiative hierarchy and copy the formula. The formulas will automatically recognize the value you enter in this section.



Health	Primary	Totals	Totals - 2
	Completion Metrics		
	At Risk	14	
	In Progress	1	
	Finished	6	
	Not Started	3	
	Resource Metrics		
	Paul Finley	5	
	Kai Senjima	3	
	Diego Martinez	2	
	Dyna Appforth	3	
	Tamika Marshall	4	
	Kiran Gupta	3	
	Projects by Initiative	Approved	Declined
	Initiative 1	2	0
	Initiative 2	3	1
	Initiative 3	0	1
	Initiative 4	1	0
	Initiative 5	2	1
	Spending by Category	Actuals	Budget
	Completed	7713	13775

Learn more:

Cross-Sheet Formulas

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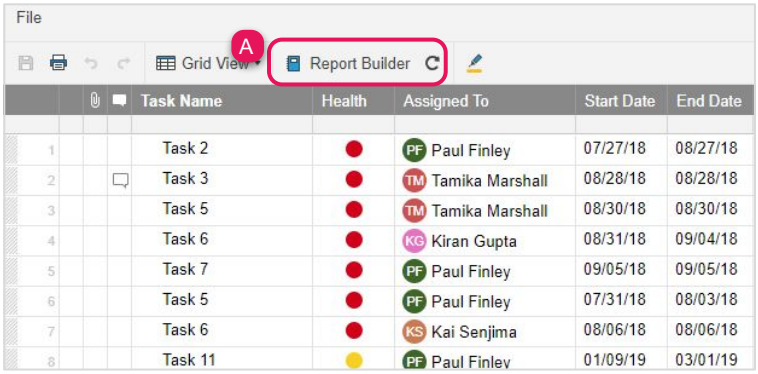
Step 14:

Manage the In Progress Report

Use reports to create cross-sheet filtered lists of the tasks that meet certain criteria. For instance, the In Progress report shows all items from both of your project sheets that are in progress in the State column. Reports are live, so as the state of tasks is updated, so will the data on the report.

A. The report is already set up. If you want to make any changes to the criteria used for the report, open the report and click on *Report Builder* and set your criteria.



Learn more:

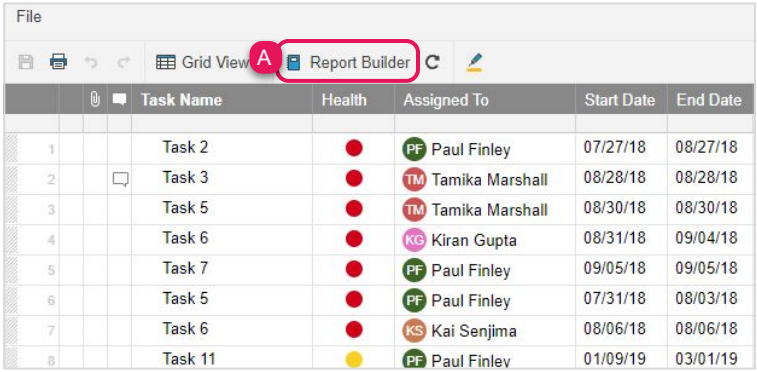
Reports

Step 15:

Monitor the At Risk Report

The At Risk report shows all of the tasks that are at risk.

A. The report is already set up. If you want to make any changes to the report's criteria, open the report and click on *Report Builder* and set your criteria.



Learn more:

Reports

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Step 16:

Update the Strategic Plan Dashboard

The Strategic Plan dashboard is the keystone of your template set. It pulls together all of the critical project information you need to track. Dashboards are made of different widgets that pull real-time information in from your sheets and reports.

A. Click *Edit* in the upper left corner of the sheet to begin customizing. Hover your mouse over any widget and select the *pencil icon* to start modifying the widget and its contents.

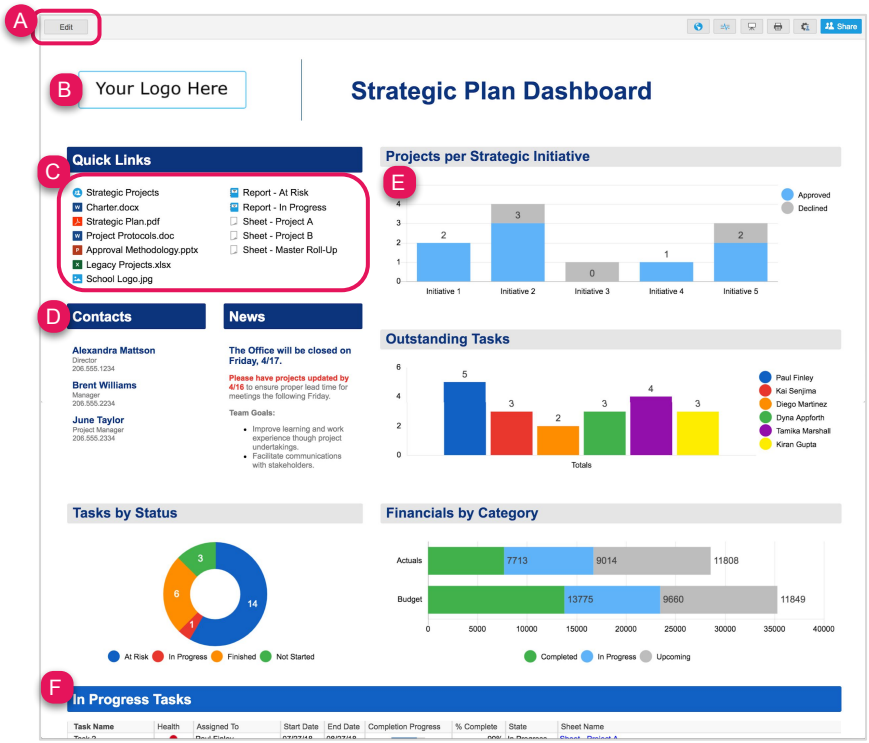
B. Use the *Image* widget to replace the logo placeholder with your company's logo.

C. Use the *Shortcut* widget to attach links to websites, files, or Smartsheet items in Quick Links.

D. Update the Key Contacts with information about your team and News with project updates.

E. Projects per Strategic Initiative, Outstanding Tasks, Tasks by Status, and Financials by Category are all *Chart* widgets that pull live data from your Master Roll-Up sheet.

F. Both In Progress Tasks and At Risk Tasks (not shown in image below) are *Report* widgets, which display your live reports in your dashboard.



Learn more:

Make Changes to an Existing Dashboard, Viewing and Sharing a Dashboard, Widget Types for Smartsheet Dashboards

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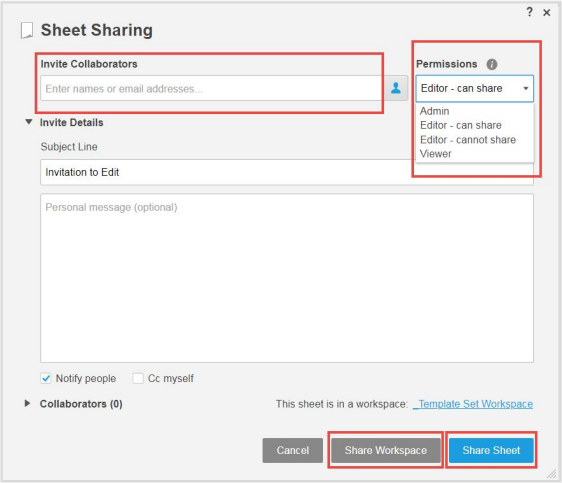
Step 17:

Share your Strategic Plan Template Set

Sharing is the best way to collaborate with others involved in the work on your Strategic Plan. You can share your entire workspace with members of your department, or share individual items within the workspace. For more information on sharing and permission levels, check out this infographic.



Learn more:

Workspace Sharing

FEEDBACK: Let us know what you think of the Strategic Plan template set! Share your feedback **here**.