



ENGAGE 2019

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Gather Information at Scale: Forms

Caroline Sheldon
Product Manager

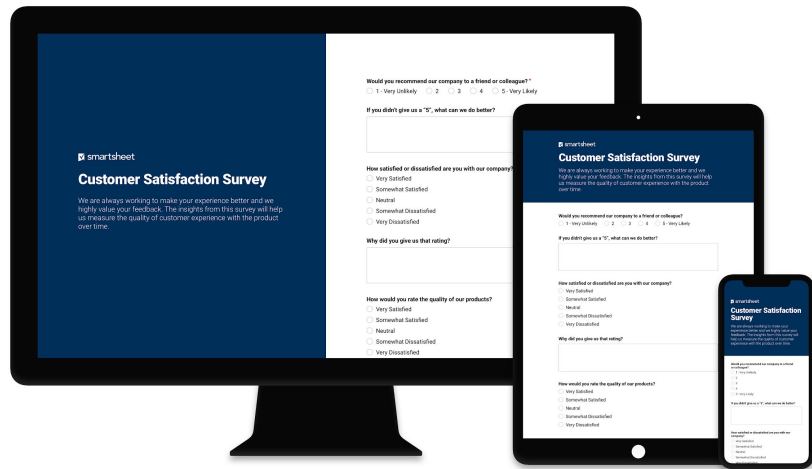


Why use a form?

Why use a form?

Collect and act on consistent, error-free information from anyone, anywhere, at any time to save time and achieve more.

Collect information anywhere



smartsheet Spaces People Create

✓ We use forms to collect customer feedback about our products. The information from these forms is in SmartSheet and can be used to analyze feedback from our customers. Please see the survey form below.

To login to SmartSheet, go to app.smartsheet.com and login with your company email and password.

If you are having trouble signing in, please contact IT help@company.com

smartsheet Customer Satisfaction Survey

We are always working to make your experience better and we highly value your feedback. The insights from this survey will help us measure the quality of customer experience with the product over time.

Would you recommend our company to a friend or colleague? *

☐ 1 - Very Unlikely ☐ 2 ☐ 3 ☐ 4 ☐ 5 - Very Likely

If you didn't give us a "5", what can we do better?

How satisfied or dissatisfied are you with our company?

☐ Very Satisfied ☐ Somewhat Satisfied ☐ Neutral ☐ Somewhat Dissatisfied ☐ Very Dissatisfied

Why did you give us that rating?

How would you rate the quality of our products?

☐ Very Satisfied ☐ Somewhat Satisfied ☐ Neutral ☐ Somewhat Dissatisfied ☐ Very Dissatisfied

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smartsheet

HOME DATABASE FOLDER REQUEST CALENDAR CONTACT MY TASKS

COMPLETE THIS SURVEY

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Why did you give us that rating?

REQUESTS BY STAGE

24% 6% 12% 18% 41%

● Pending Approval
● Pending Assignment
● In Progress
● Completed
● Rejected

PRIORITY REPORT

Initiator	Request	Priority
Valter Aguilera	Need a handbook for a trade show, something with	High
Jordan Lamoreaux	Engineering release plan glossy	Medium
Alaina Shires	Top 10 reasons for SmartSheet dashboard - new v	Low
Alaina Shires	Blog article for resource management	Medium
Alaina Shires	New version tips	Low
Alaina Shires	Sample content for governance	Medium
Alaina Shires	Something new please!	Low
Alaina Shires	Roadmap slide deck	Medium
Alaina Shires	Roadmap slide deck	Medium

Agenda

How to build a form

How to use forms with other Smartsheet features

Future enhancements

Q&A

How to Build a Form



Future Enhancements

Conditional logic



Customer Satisfaction Survey

Thank you for joining us at Smartsheet ENGAGE19. Please let us know what you think of our products by filling in this form.

On a scale from 1-10, how likely are you to recommend our product to a friend or colleague?

10 - Highly likely

How well does our product meet your needs?

☐ Not well at all ☐ Not so well ☐ Somewhat well ☐ Very well ☒ Extremely well

How does our product compare to similar products you've used? *

☒ Better than others
☐ About the same
☐ Worse than others
☐ I haven't used similar products

Which customer representative helped you today?

Aaron Tinling

Name *

Caroline Sheldon

Email address *

caroline.sheldon@smartsheet.com

☐ Send me a copy of my responses

Submit

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Form Builder

Last edited: 06/09/19, 9:23 AM

Active

Open Form

Send Options

Form Theme Settings

Theme

Modern

Classic


Plain

Background Color

003059

Add a Logo


Select a PNG, GIF, or JPG logo file smaller than 2MB



smartsheet-logo.png

☒ Include "Powered by Smartsheet" on your form

Preview

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Name *

Email address *

☐ Send me a copy of my responses

Submit

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Summary

- How our customers use Smartsheet Forms
- How to build a form and add new fields
- How to use forms with formulas and automation
- Future enhancements to forms including new conditional logic and customized forms

Visit our booth!

Q & A





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