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Transform Your Team's Efficiency with Automated Workflows

Scott Tewel, Senior Product Manager



Agenda

A brief intro to Smartsheet automation

Two conversations about the power of automation

- Sangsu Nam, Wadiz
- Max de Arriz, Dixon Valve

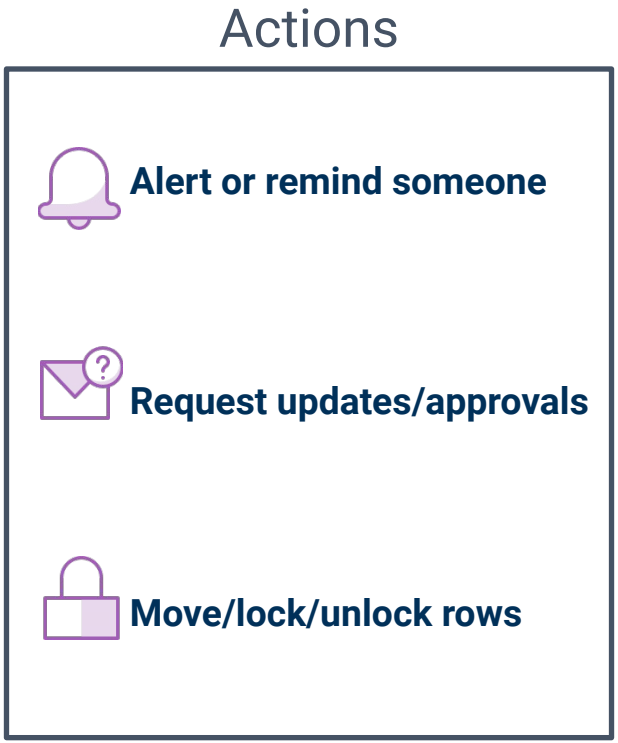
Audience Q&A

What is Smartsheet Automation?



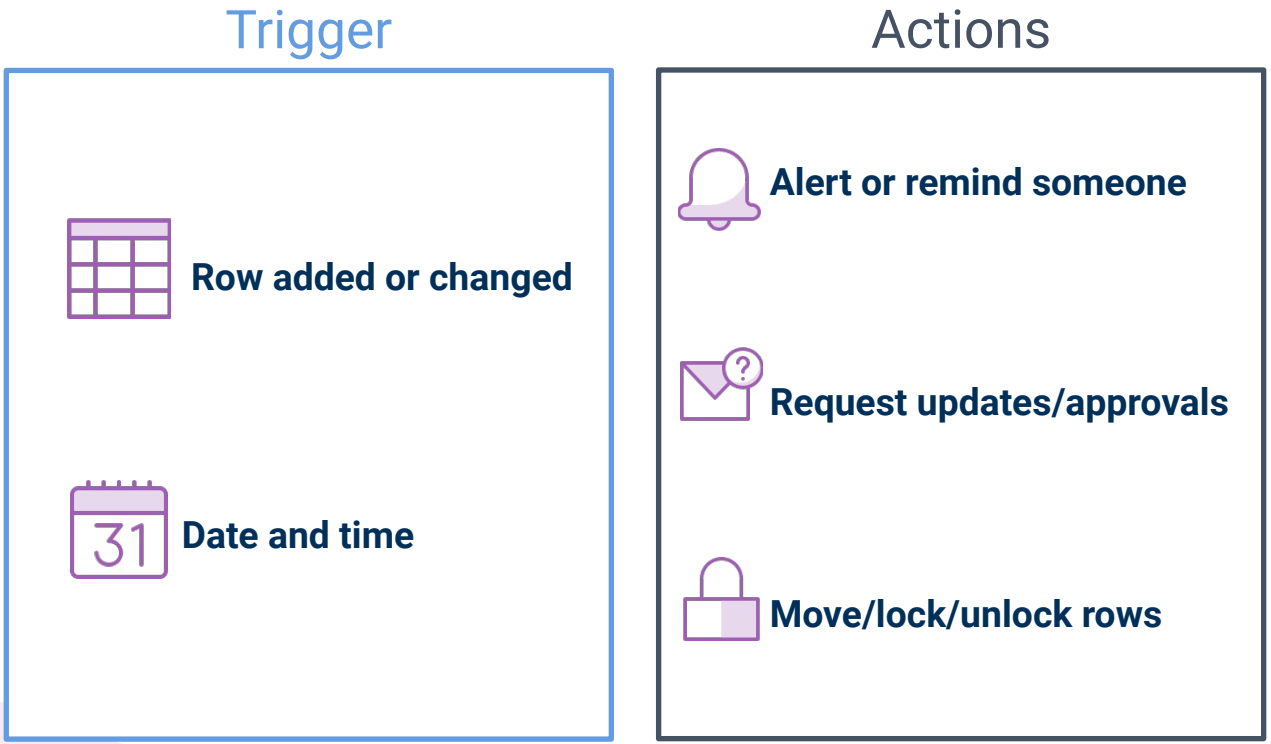
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Automate repetitive, manual tasks



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Automate at the right moments



Automate when your conditions are met

Trigger



Row added or changed



Date and time

Condition(s)



If column X is _____

Actions



Alert or remind someone

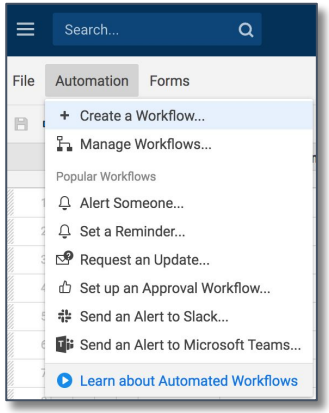


Request updates/approvals



Move/lock/unlock rows

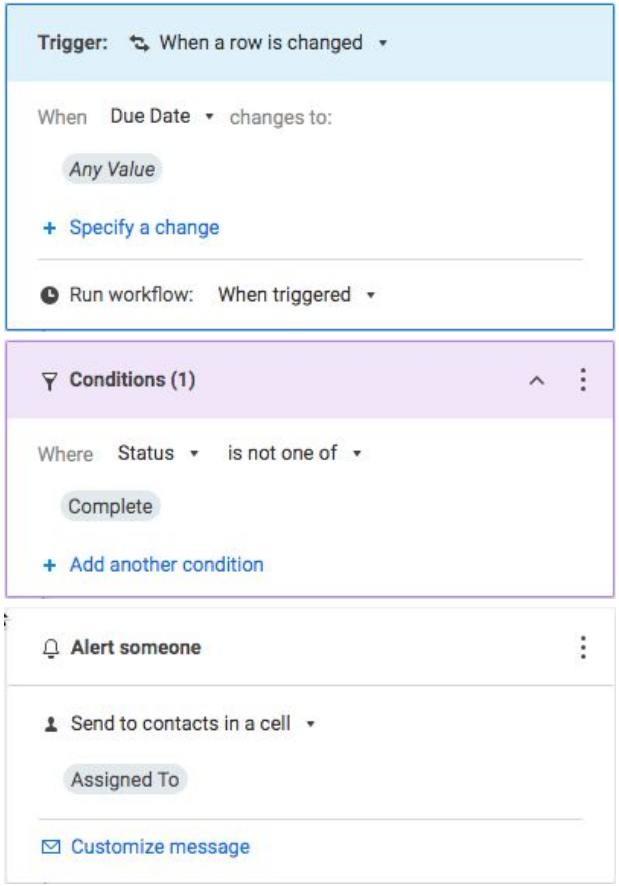
Automate your workflows in the visual editor



Trigger

Condition

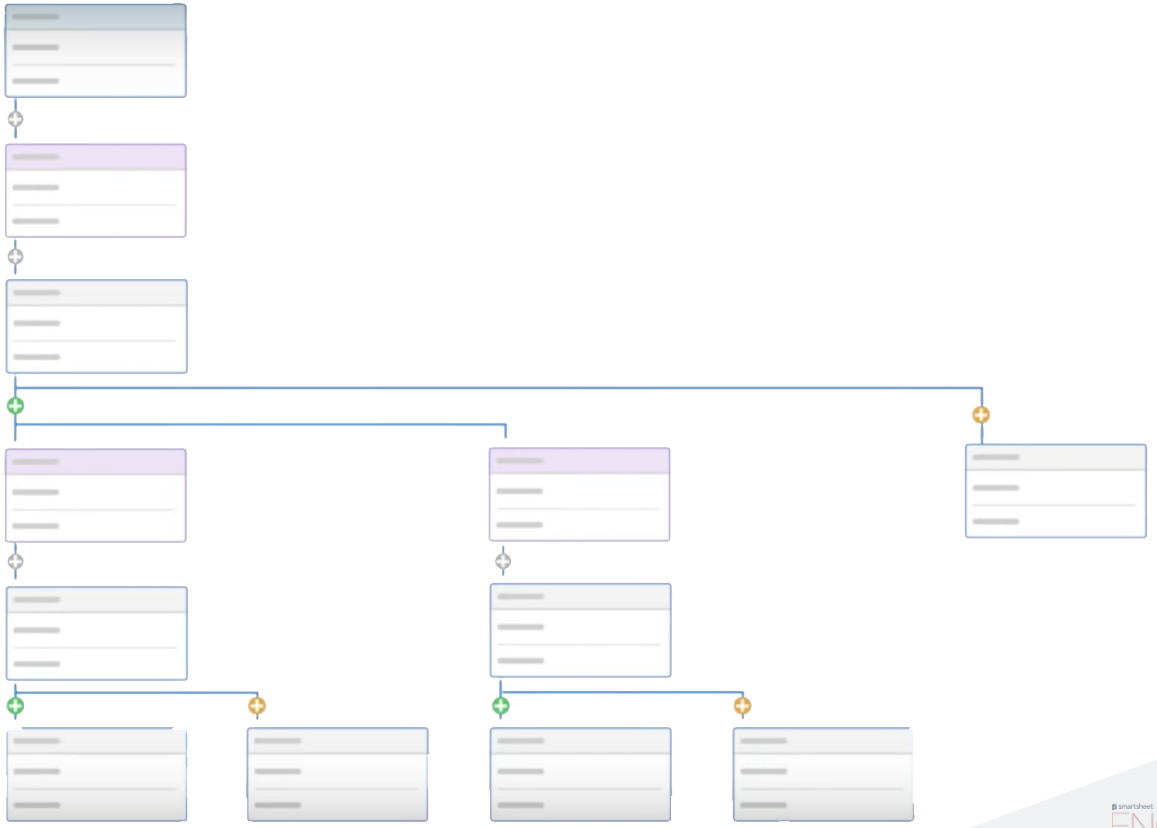
Action



3 building blocks for automated solutions



3 building blocks for automated solutions



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3 building blocks to impact your org

Trigger



Row added or changed



Date and time

Condition



If column X is _____

Actions



Alert or remind someone



Request updates/approvals



Move/lock/unlock rows

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Streamlining Investment Processes at Wadiz



Sangsu Nam, Information System Team Lead

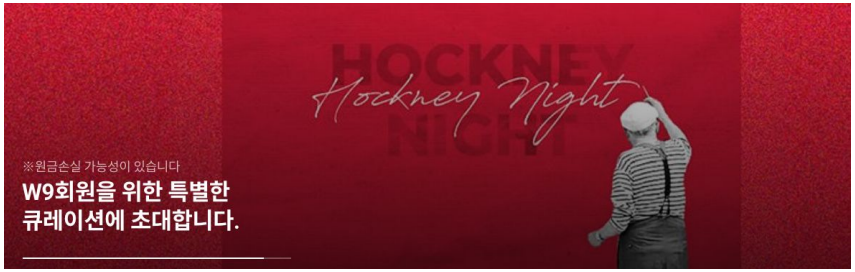
Intro to Wadiz

- Startup investments and product crowdfunding in Korea
- Founded in 2012
- HQ in Pangyo, South Korea

Intro to Sangsu Nam

- 2+ years at Wadiz
- Information System Team Lead
- Smartsheet user for 7+ years







The Impact

95% of 180 employees regularly use Smartsheet

Employees **save an hour a day** on average



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The Challenge

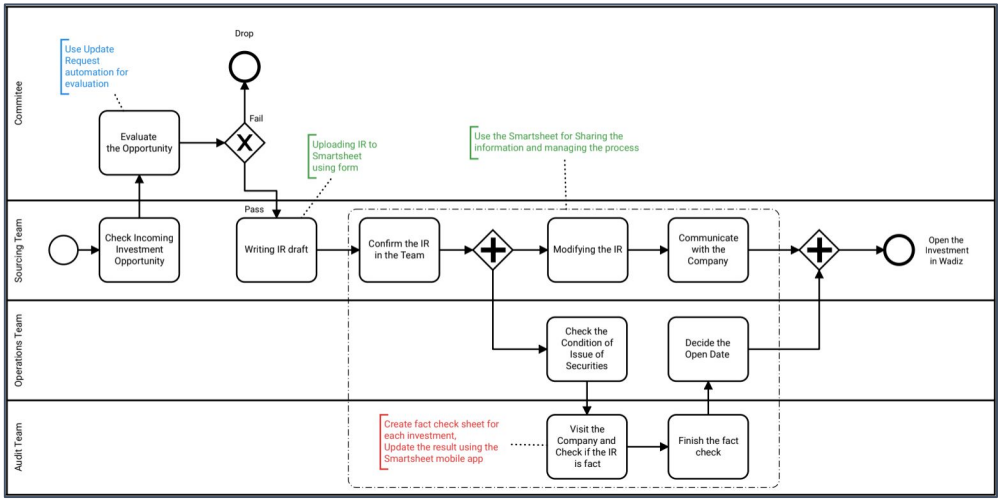
Too many stakeholders, dependencies, and moving pieces to handle manually

Balance startup velocity with investment due diligence and data integrity needs



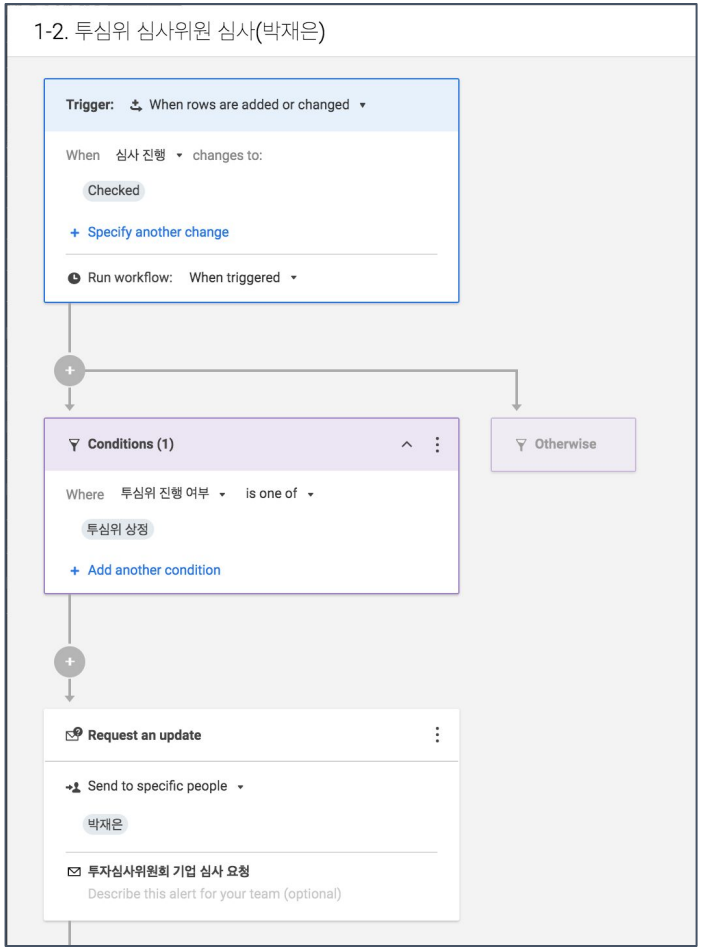
The solution

Introduce forms, automated update requests and alerts, and the Smartsheet mobile app into the process to cut down on unnecessary communication and reduce data integrity concerns



The Solution

Introduce forms, automated update requests and alerts, and the Smartsheet mobile app into the process to cut down on unnecessary communication and reduce data integrity concerns





Getting Buy-In From Other Stakeholders

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Giving Time Back to the Engineers at Dixon Valve



Max de Arriz, Engineering Supervisor

Intro to Dixon Valve

- Industrial manufacturer and supplier for fluids transfer
- Founded in 1916
- HQ in Maryland

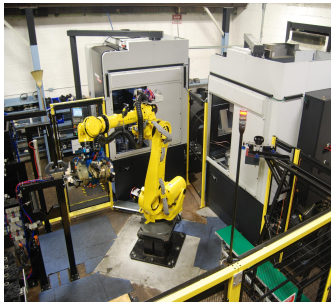
Intro to Max de Arriz

- 8+ years at Dixon
- Engineering Supervisor
- Smartsheet user for 5 years









The Impact

Save 30 minutes on each frequently created report

Reinvest time in high-value engineering work



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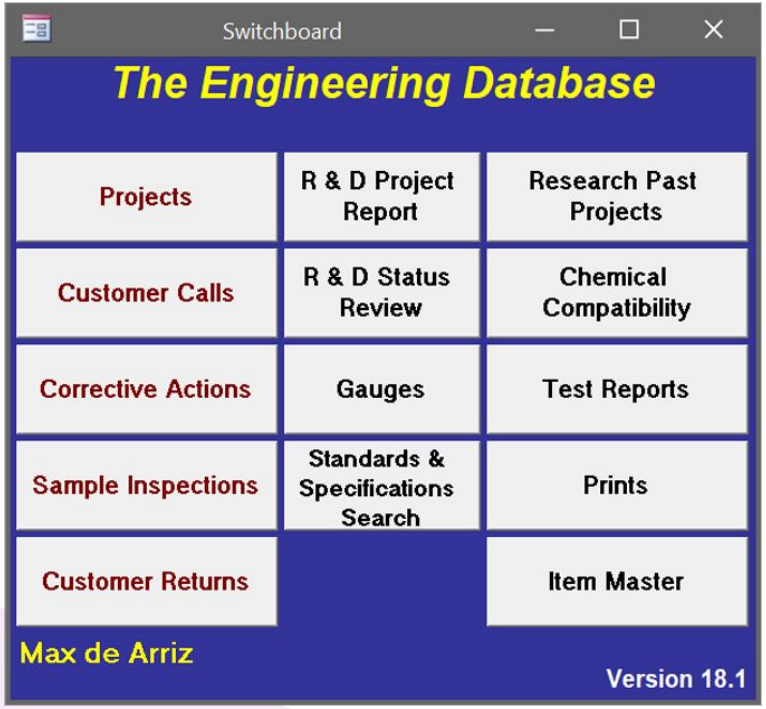
The Challenge

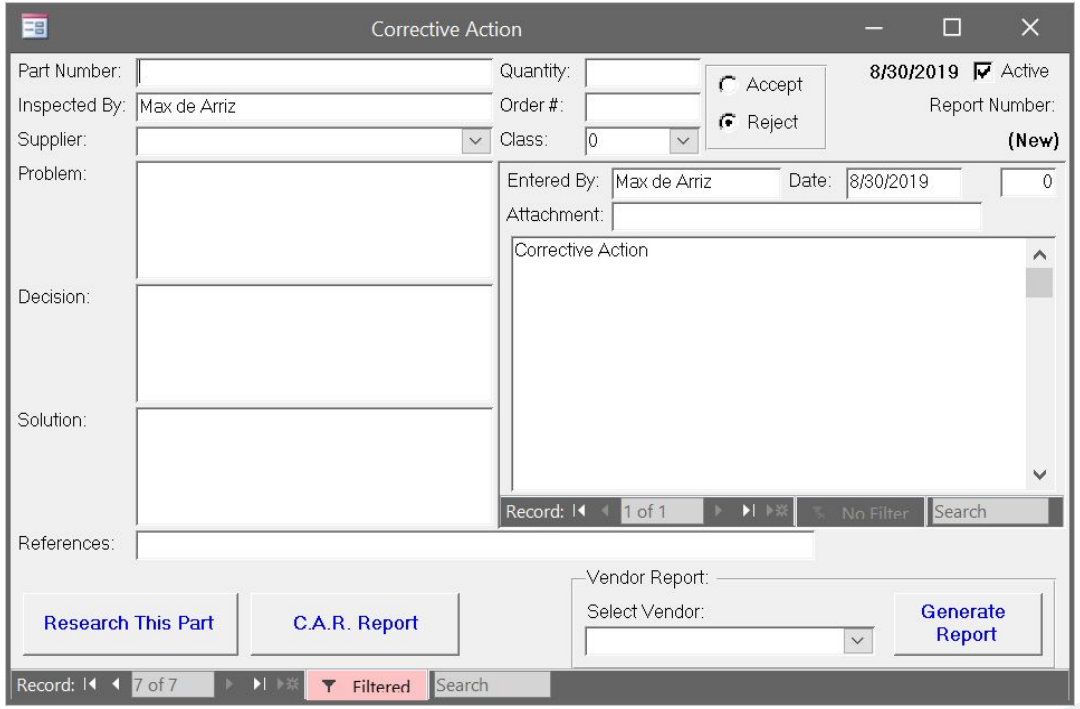
Multiple (internal and external) stakeholders involved in creating and approving corrective action reports

Engineers spend too much time on the logistics—need a more efficient option



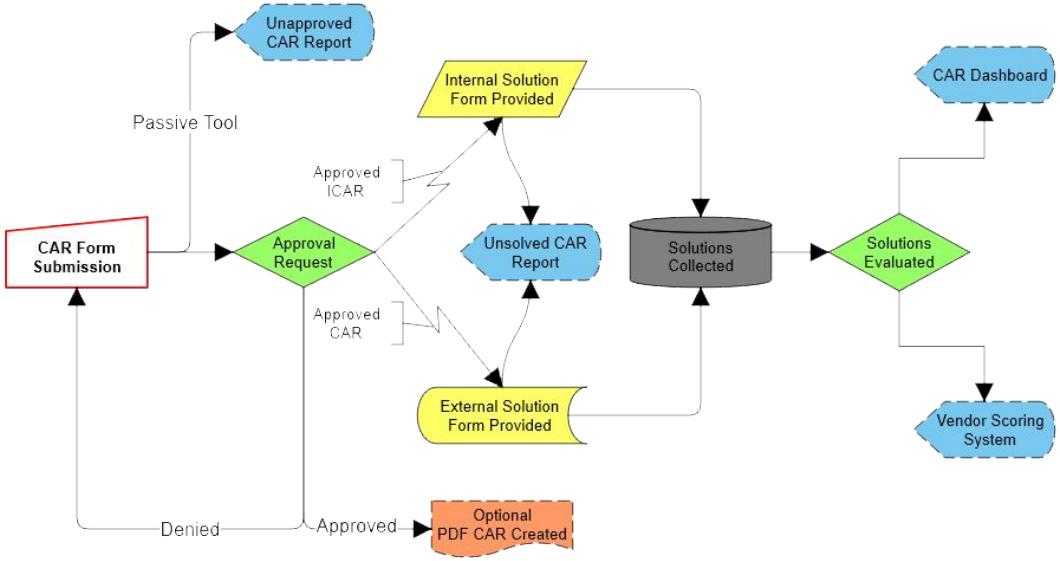
The status quo





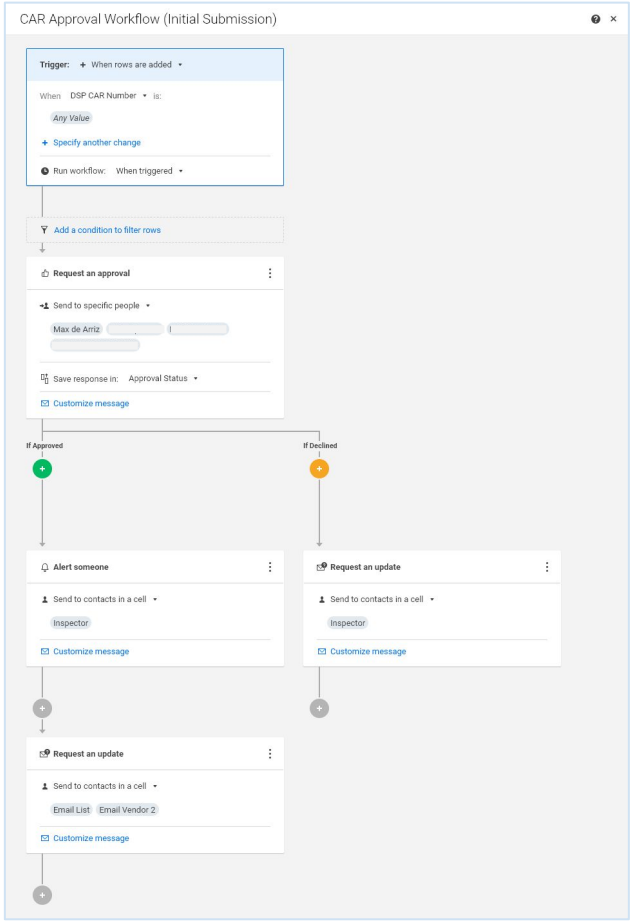
The solution

Introduce forms, formulas, automated approval requests, and dashboards into the process to reduce back-and-forth processing and limit the number of stakeholders needing to monitor report generation.



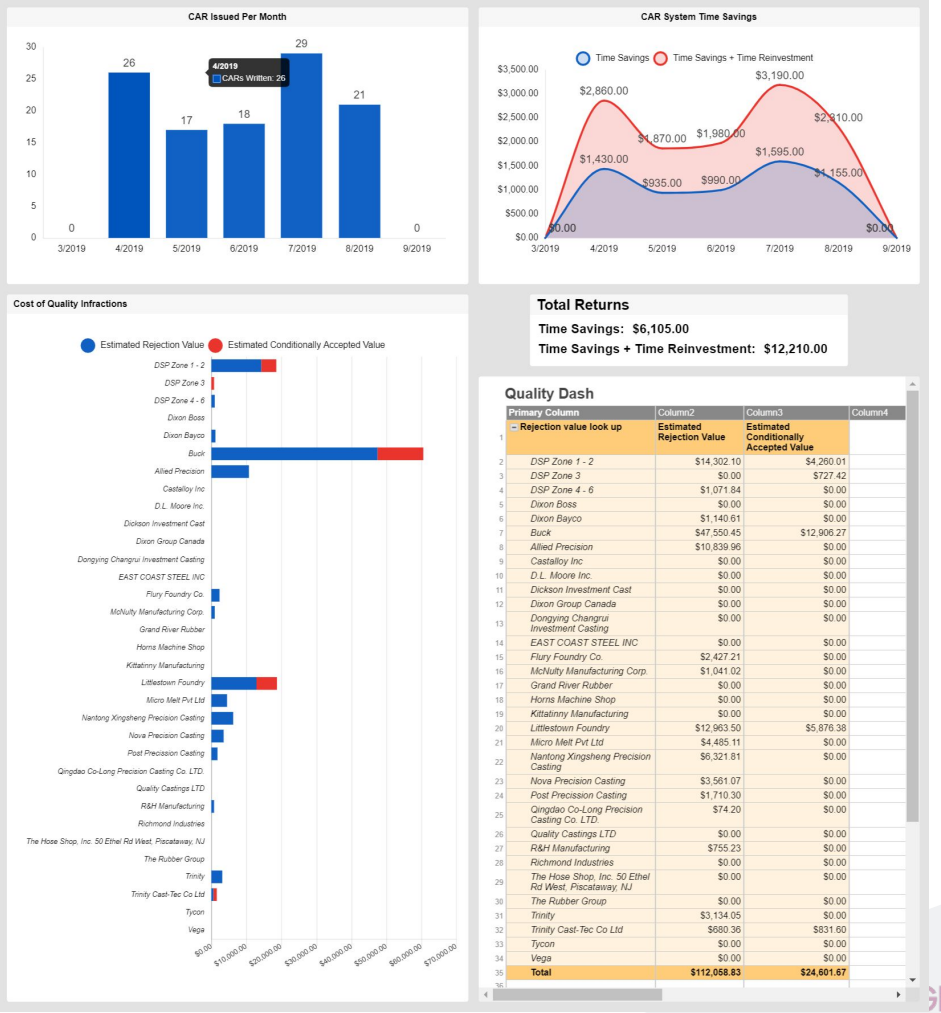
The solution

Introduce forms, formulas, automated approval requests, and dashboards into the process to reduce back-and-forth processing and limit the number of stakeholders needing to monitor report generation.



The solution

Introduce forms, formulas, automated approval requests, and dashboards into the process to reduce back-and-forth processing and limit the number of stakeholders needing to monitor report generation.



	Primary Column	Column2	Column3	Column4
1	Rejection value look up	Estimated Rejection Value	Estimated Conditionally Accepted Value	
2	DSP Zone 1 - 2	$14,302.10	$4,260.01	
3	DSP Zone 3	$0.00	$727.42	
4	DSP Zone 4 - 6	$1,071.84	$0.00	
5	Dixon Boss	$0.00	$0.00	
6	Dixon Bayco	$1,140.61	$0.00	
7	Buck	$47,550.45	$12,906.27	
8	Allied Precision	$10,839.96	$0.00	
9	Castalloy Inc	$0.00	$0.00	
10	D.L. Moore Inc.	$0.00	$0.00	
11	Dickson Investment Cast	$0.00	$0.00	
12	Dixon Group Canada	$0.00	$0.00	
13	Dongying Changrui Investment Casting	$0.00	$0.00	
14	EAST COAST STEEL INC	$0.00	$0.00	
15	Flury Foundry Co.	$2,427.21	$0.00	
16	McNulty Manufacturing Corp.	$1,041.02	$0.00	
17	Grand River Rubber	$0.00	$0.00	
18	Horns Machine Shop	$0.00	$0.00	
19	Kittatinny Manufacturing	$0.00	$0.00	
20	Littlestown Foundry	$12,963.50	$5,876.38	
21	Micro Melt Pvt Ltd	$4,485.11	$0.00	
22	Nantong Xingsheng Precision Casting	$6,321.81	$0.00	
23	Nova Precision Casting	$3,561.07	$0.00	
24	Post Precission Casting	$1,710.30	$0.00	
25	Qingdao Co-Long Precision Casting Co. LTD.	$74.20	$0.00	
26	Quality Castings LTD	$0.00	$0.00	
27	R&H Manufacturing	$755.23	$0.00	
28	Richmond Industries	$0.00	$0.00	
29	The Hose Shop, Inc. 50 Ethel Rd West, Piscataway, NJ	$0.00	$0.00	
30	The Rubber Group	$0.00	$0.00	
31	Trinity	$3,134.05	$0.00	
32	Trinity Cast-Tec Co Ltd	$680.36	$831.60	
33	Tycon	$0.00	$0.00	
34	Vega	$0.00	$0.00	
35	Total	$112,058.83	$24,601.67	



Getting Buy-In From Other Stakeholders

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Q&A



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