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ENGAGE 2019

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ENGAGE 2019

Customer Spotlight: Smartsheet in Construction

Stephanie Viers

Customer Success Manager | Smartsheet

Brian Davey

VP of Preconstruction | Build Group



Stephanie Viers

Customer Success Manager, construction lead

- Joined Smartsheet in July 2017
- Dedicated construction CSM on the Commercial CSM team
- Vertical program owner of construction/engineering at Smartsheet
- Seattle, WA



Agenda

Introductions

9:45–9:48am

Top 3 ways to collaborate better

9:48–10:00am

Customer story

10:00–10:20am

Open Q&A

10:20–10:45am

Top 3 reasons construction customers use Smartsheet to collaborate better

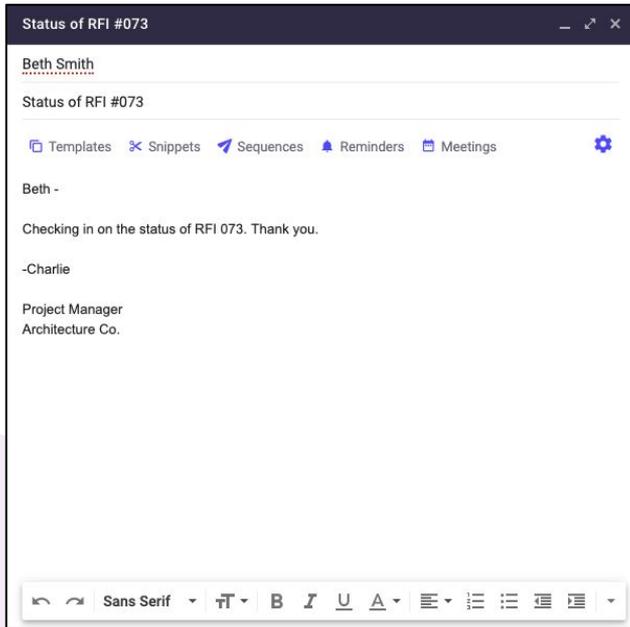
Collaboration

Confidentiality

- Publishing
- Reports
- **Dynamic View**
- Permissions
- Update requests
- Approval requests

Confidentiality

- Why: Need to keep certain information confidential
- Example: RFIs involving multiple subcontractors and architects
- How: Dynamic View



Status of RFI #073

Beth Smith

Status of RFI #073

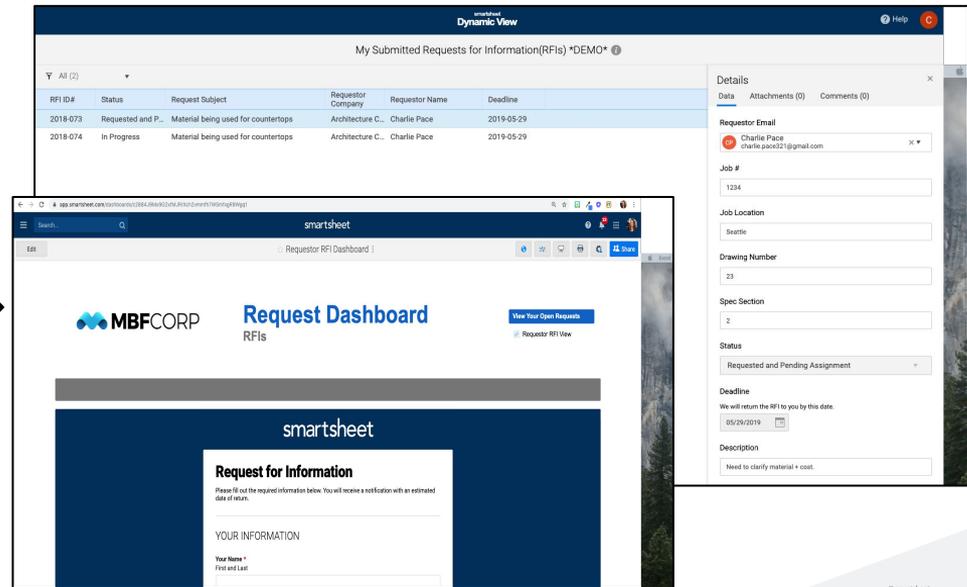
Templates Snippets Sequences Reminders Meetings

Beth -

Checking in on the status of RFI 073. Thank you.

-Charlie

Project Manager
Architecture Co.



Dynamic View

My Submitted Requests for Information (RFIs) *DEMO*

RFI ID#	Status	Request Subject	Requestor Company	Requestor Name	Deadline
2018-073	Requested and P...	Material being used for countertops	Architecture C...	Charlie Pace	2019-05-29
2018-074	In Progress	Material being used for countertops	Architecture C...	Charlie Pace	2019-05-29

Details

Requestor Email: Charlie Pace (charlie.pace21@gmail.com)

Job #: 1234

Job Location: Seattle

Drawing Number: 23

Spec Section: 2

Status: Requested and Pending Assignment

Deadline: 05/29/2019

Description: Need to clarify material + cost.

Request Dashboard

Request for Information

YOUR INFORMATION

Your Name *

First and Last

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Relevancy

- Dashboards
- Dynamic View
- Reports
- Filters
- Alerts

Relevancy

- Why: Need to surface relevant information to each stakeholder audience
- Example: Project status summaries for owner, architect, and contractor
- How: Dashboards

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Job #882 - MBF New Construction - Master Schedule

Task Name	Assigned To	Status	Start	Finish	Hours	Resource Budget	Actuals	Variance	Notes
Approve Revised Plans	Jamal King	Completed	05/27/19	05/27/19	0	\$0.00	\$0.00	\$0.00	
Approve Revised Specifications	Kiran Gupta	Completed	05/27/19	05/27/19	0	\$0.00	\$0.00	\$0.00	
Approve Revised Site Plan	Tamara Marshall	Completed	05/27/19	05/27/19	0	\$0.00	\$0.00	\$0.00	
Review Contracts			05/28/19	07/18/19		\$3,000.00	\$1,000.00	-\$1,000.00	
Make Copies of Plans	Kiran Gupta	Completed	07/01/19	07/03/19	24	\$1,000.00	\$0.00	-\$500.00	
Make Copies of Specifications	Guadalupe Garcia	Completed	05/28/19	05/29/19	16	\$1,000.00	\$500.00	-\$500.00	
Distribute Plans and Specifications	Jamal King	Completed	07/04/19	07/04/19	8	\$1,000.00	\$500.00	-\$500.00	
Review Bids	Guadalupe Garcia	Completed	05/28/19	05/29/19	80	\$0.00	\$0.00	\$0.00	
Review Bids	Jamal King	In Progress	07/03/19	07/11/19	40	\$0.00	\$0.00	\$0.00	
Execute Subcontractor Agreements	Guadalupe Garcia	In Progress	07/12/19	07/18/19	40	\$0.00	\$0.00	\$0.00	
Grading and Building Permits			05/28/19	07/18/19		\$17,000.00	\$17,000.00	\$0.00	
Schedule lot Stake-out	Diana Kennedy	In Progress	06/24/19	06/24/19	8	\$0.00	\$0.00	\$0.00	
Stake Lot	Kelly Smart	Completed	06/26/19	06/26/19	8	\$2,000.00	\$2,000.00	\$0.00	
File Grading Permit Application	Brooklyn James	Completed	05/28/19	05/28/19	8	\$500.00	\$500.00	\$0.00	
File Building Permit Application	Sasha Petrov	In Progress	07/01/19	07/03/19	24	\$500.00	\$0.00	\$0.00	
Post Lot Identification	Hiro Serjima	Completed	07/04/19	07/04/19	8	\$0.00	\$0.00	\$0.00	
Meet Sediment Control Inspector	Diana Kennedy	Completed	07/04/19	07/04/19	8	\$0.00	\$0.00	\$0.00	
Walk Lot with Owner	Kelly Smart	Completed	07/05/19	07/05/19	8	\$0.00	\$0.00	\$0.00	
Install Construction Entrance	Brooklyn James	Completed	07/08/19	07/08/19	8	\$5,000.00	\$5,000.00	\$0.00	
Install Sediment Controls	Diana Kennedy	Completed	07/08/19	07/08/19	16	\$5,000.00	\$5,000.00	\$0.00	
Sediment Control Map	Kelly Smart	Completed	07/10/19	07/10/19	8	\$1,000.00	\$1,000.00	\$0.00	
Grading Permit Issued	Diana Kennedy	In Progress	07/15/19	07/17/19	8	\$1,000.00	\$1,000.00	\$0.00	
County Permit Process	Kelly Smart	In Progress	07/04/19	07/17/19	80	\$1,000.00	\$1,000.00	\$0.00	
Building Permit Approved	Brooklyn James	In Progress	07/18/19	07/18/19	8	\$0.00	\$0.00	\$0.00	
Pay Permit Fees	Sasha Petrov	In Progress	07/18/19	07/18/19	8	\$1,000.00	\$1,000.00	\$0.00	
Building Permit Issued	Hiro Serjima	In Progress	07/18/19	07/18/19	0	\$0.00	\$0.00	\$0.00	
Pre-Site Work			07/19/19	07/22/19		\$50,000.00	\$50,000.00	\$0.00	
Clear Lot	Jamal King	In Progress	07/19/19	07/19/19	24	\$10,000.00	\$10,000.00	\$0.00	
Ship Topsoil & Stockpile	Guadalupe Garcia	In Progress	07/17/19	07/17/19	8	\$10,000.00	\$10,000.00	\$0.00	
Stake Lot for Excavation	Jamal King	In Progress	07/17/19	07/17/19	8	\$10,000.00	\$10,000.00	\$0.00	
Grade Rough Lot	Diana Kennedy	In Progress	07/18/19	07/18/19	8	\$10,000.00	\$10,000.00	\$0.00	
Excavate Foundation	Kelly Smart	In Progress	07/18/19	07/22/19	16	\$10,000.00	\$10,000.00	\$0.00	



JOB#882 - MBF NEW CONSTRUCTION

Owner View

PROJECT STATUS

Project Summary

Development Director: **Stephanie Viers**

Project Start Date: **05/26/19**

Project Finish Date: **11/08/19**

Project Budget: **\$91,000.00**

Budget Actuals: **\$89,000.00**

Budget Variance: **-\$2,000.00**

News

News Goes here

Contracts

05/26/19

Contracts Completion Date

●

Contracts Review

06/28/19

Contracts Review and Revision Completion Date

●

Bids

07/18/19

Bids and Contracts Completion Date

●

News

News Goes here

Grading and Permits

07/19/19

Grading and Building Permits Completion Date

●

Pre Site

07/22/19

Pre Site Completion Date

●

Construction

11/08/19

Construction Completion Date

●

UPCOMING

Task	Status	Start	Finish
Building Shell Control	Not Started	06/26/19	06/30/19
Exterior Building Finish	Not Started	09/03/19	09/06/19

Aug 25

S	M	T	W	T	F	S	S	M	T	W	T

Aug 31

Important Links

- Submittal Log
- Contracts

Collaboration

Confidentiality

- Publishing
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Relevancy

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Speed

- Alerts
- Forms
- Mobile

Speed

- Why: Need to send and receive information in a timely manner
- Example: Safety incident reporting
- How: Forms and alerts

Construction Phase (Health & Safety) Plan for
WH166-Essex House

NEAR MISS/HAZARD REMEDIAL ACTION CARD
TO BE COMPLETED BY THE SITE MANAGER

1. IS ACTION NECESSARY Y / N (See a and b below)
a) IF YES COMPLETE FORM BELOW b) IF NO SIGN FORM AND ANNOTATE NO FURTHER ACTION

DATE OF INCIDENT: 9/9/19 DATE OF CORRECTIVE ACTION:

BRIEF DESCRIPTION / LOCATION:
Floor 4
"Fall protection req." sign missing

DETAILS OF REMEDIAL ACTIONS TAKEN:

Signature of Manager / Supervisor: _____

cut along dotted line



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Safety Issue Submission

Safety Issue
Safety sign missing

Description
"Fall protection required" sign is missing

Floor
1 2 3 4

Photo (optional)
Screen Shot 2019-09-09 at 12:50:18 PM.png

Drag and drop files here or [browse files](#)

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Collaboration

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Speed

- Alerts
- Forms
- Mobile

Customer Story

Brian Davey

VP of Preconstruction, Build Group

- Joined Build Group in 2012
- Leads pre-construction and estimating for Build Group, Inc. (San Francisco, Oakland, and Silicon Valley offices)
- Focus Groups – Revenue forecasting, procurement, quality control, and document control
- San Francisco, CA

BUILDGROUP



Build Group Challenges

- Needed a platform that scaled beyond CRM and offline spreadsheets
 - Managing \$150-\$750 million dollars of estimates per month along with managing preconstruction across 12-20 projects valued from \$450-\$900 million
 - 28 hours of meetings on average for each member in the preconstruction team

Build Group's solution = collaboration

Estimating input and internal collaboration

- Immediate notification across multiple internal companies with one data entry point
- Direct feedback, document tracking, and management of internal accountability
- Engineering control to ensure immediate deliverable accountability

"It is the long history of humankind (and animal kind, too) that those who learned to collaborate and improvise most effectively have prevailed." – Charles Darwin

Build Group

Impacts and challenges

- Key notes on the solution to date
 - Streamlined communication across 7 internal companies
 - Accountability
 - Revenue forecasting
 - Resource forecasting
 - Staffing forecasting
- Realizing we have resources issue

Workflow Diagram

Demo

Demo Walkthrough

1. Master estimating dashboard
2. Build Group NC C+S estimating dashboard
3. Pacific Structures estimating dashboard
4. Preconstruction dashboard
 - Developer collaboration
 - Architect/consultant collaboration



Q&A



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