



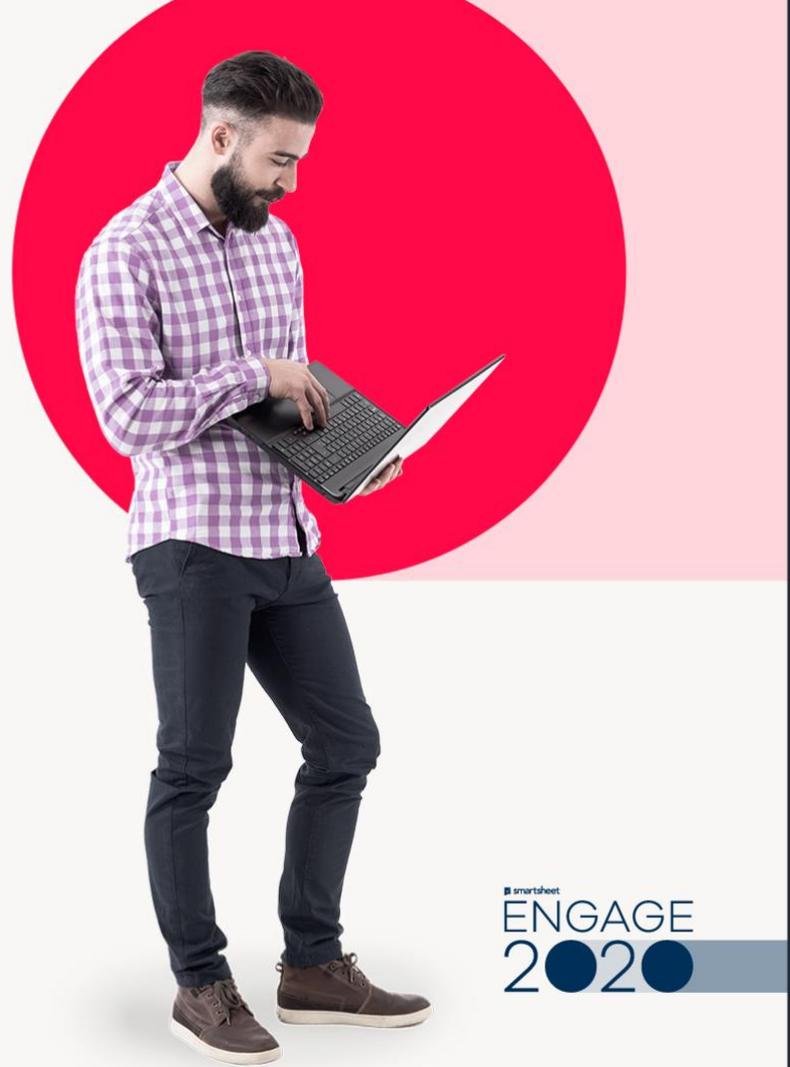
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2020 ENGAGE 2020

Product Roadmap Showcase

Kara Lumley and Kyle Gostinger

Smartsheet
October 1, 2020



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2020

Welcome!



Kara Lumley
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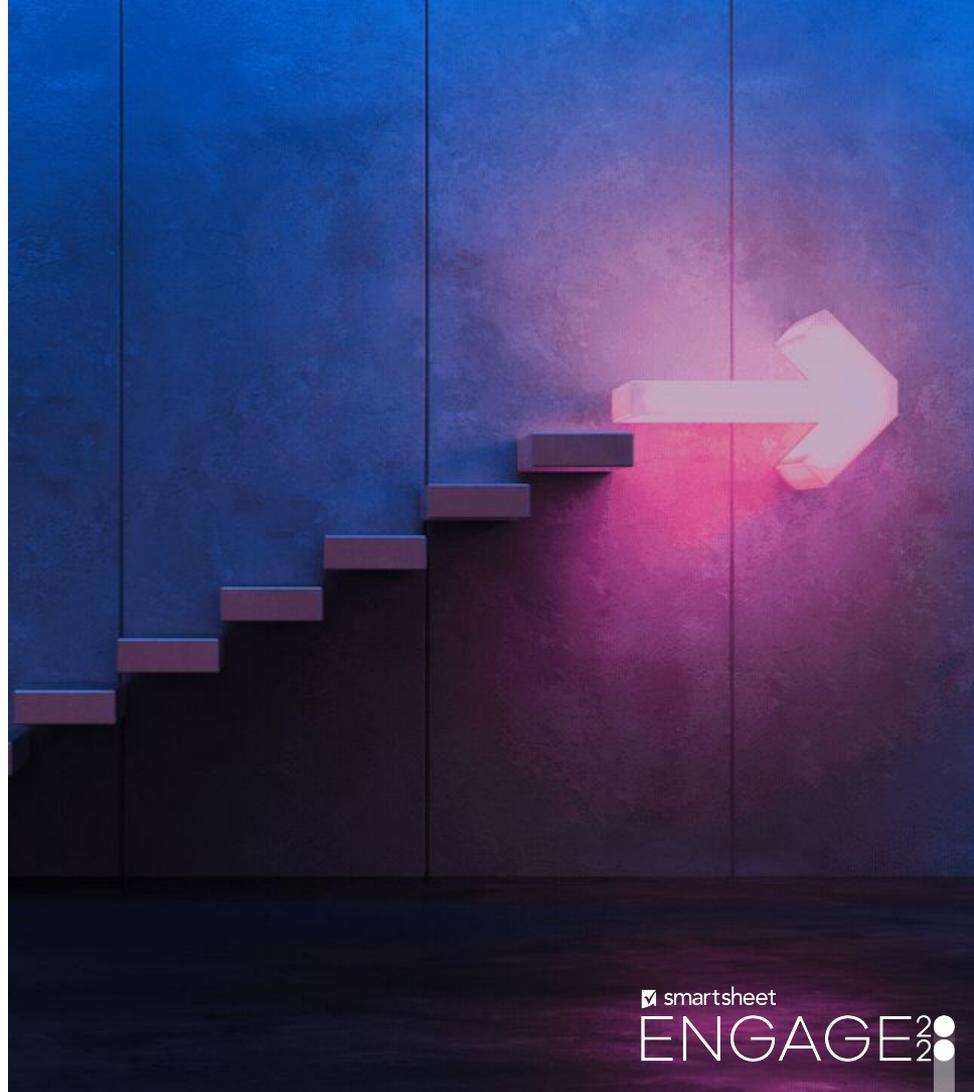
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Learning objectives

1. Learn about new features, and what's changed.
2. See how it all comes together, so you're ready to go.
3. Have a product question? We'll answer it!



Product roadmap

How you help us shape our roadmap



CUSTOMER FEEDBACK

Product enhancement requests

Support, CSM, Services, and Sales teams



USER RESEARCH

Customer surveys

On-site visits

Exploratory research and focus groups

Usability testing



FORMAL PROGRAMS

Smartsheet Community

Early Adopter Program

Local user groups

Mobilizer Program

So, what have we been working on?

Column formulas

Have more confidence,
and more reliable
results throughout
your sheets.



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We get it — formula management at the cell level can be tedious.

One small cell-level error or accidental edit can lead to a sheet full of incorrect data.

Enter, column formulas.

Column formulas

Use formulas, uniformly:

- Build formulas once, then apply them to an entire column.
- Prevent accidental edits as new rows automatically inherit column formulas.
- Eliminate formula frustration and ensure more reliable results.

Project Category	Effort	YTD Spent	YTD Budget	Budget Remaining	YTD Variance	Project Stage
Growth	👤👤👤👤	\$855,062.50	\$2,477,296.00	\$1,622,233.50	35%	Live
Maintenance	👤👤👤👤	\$1,122,900.00	\$4,641,601.39	\$3,518,700.00		
Productivity	👤👤👤👤	\$387,108.09	\$2,806,200.21	\$2,419,092.12		
Process Efficiency	👤👤👤👤	\$85,982.50	\$4,641,601.39	\$4,555,618.89	2%	Approved
Innovation	👤👤👤👤	\$2,217,000.19	\$4,641,601.39	\$2,424,601.20	48%	Live

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Reports, overhauled

Easily build more impactful reporting, and increase visibility into trends and key information.



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We heard:

- Reports are great for connecting information across sheets, but setup is time consuming and not intuitive
- Reports increase visibility into key information, but don't support formulas or offer a way to group information together

Well, we're here to help.

Report builder

Re-designed and more intuitive:

- An expanded report builder is front and center, to quickly see included sheets, columns, and filter criteria.
- Filter criteria can be adjusted effortlessly, making it easier to get the desired view of data.
- The building experience is now consistent across row and sheet summary reports.

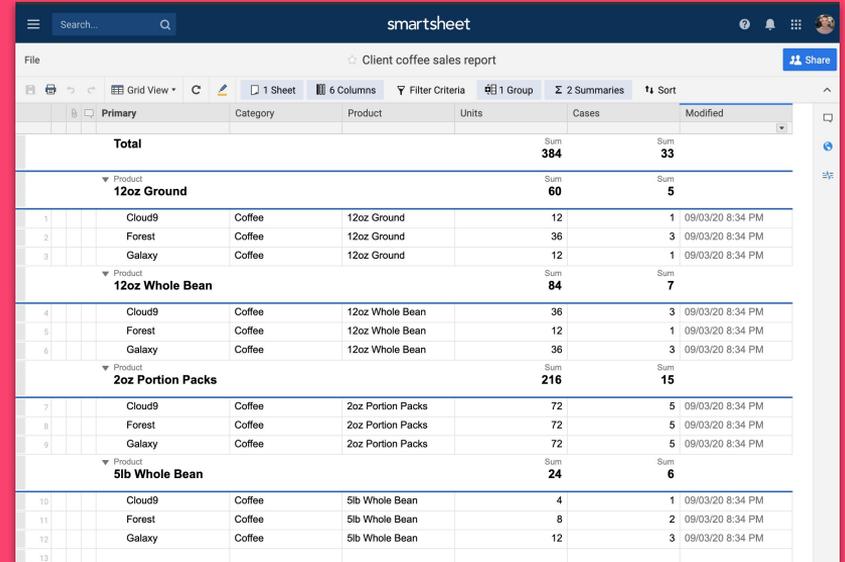
The screenshot displays the Smartsheet 'New Blank Report' interface. On the left, a data table is visible with columns for Territory, Sales, and Sales Owner. The table contains 19 rows of data. On the right, a filter criteria panel is open, showing two filter conditions: 'Territory is equal to North' and 'Sales Owner is equal to Alla'. The panel includes options to 'Add a Condition' and 'Drop to create filter group'. The interface also shows navigation icons, a search bar, and a 'Share' button.

	Territory	Sales	Sales Owner
1	North	\$50,000	Abbie Andrew
2	South	\$20,000	Tyler Colton
3	South	\$10,000	Alla Tarasenko
4	North	\$70,000	Abbie Andrew
5	North	\$23,000	Troy Silverma
6	North	\$23,000	Troy Silverma
7	Southwest	\$56,000	Andy Marker
8	North	\$10,000	Troy Silverma
9	South	\$55,000	Troy Silverma
10	South	\$80,000	Ian Carlson
11	South	\$76,000	Abbie Andrew
12	North	\$34,000	Troy Silverma
13	South	\$20,000	Alla Tarasenko
14	Southwest	\$50,000	Becky Lawson
15	North	\$90,000	Troy Silverman
16	Northeast	\$13,000	Andy Marker
17	North	\$50,000	Abbie Andrews
18	South	\$10,000	Troy Silverman
19	South	\$80,000	Alla Tarasenko

Grouping and summary

Data analysis, unlocked:

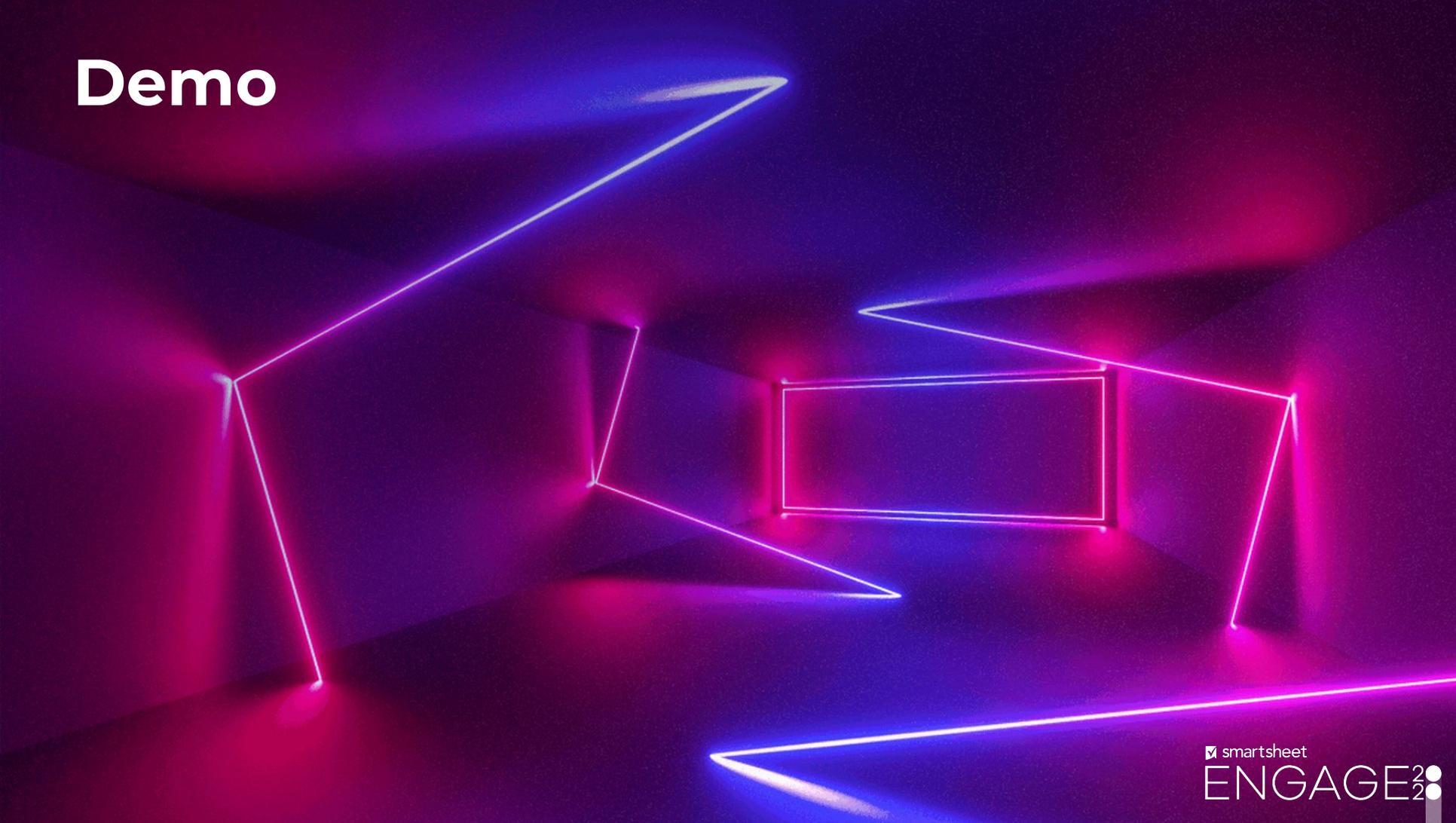
- **Group:** Consolidate common sets of data into groups.
- **Summarize:** Use functions like Sum, Count, Max, Min, and Average without formulas.



The screenshot displays a Smartsheet interface for a 'Client coffee sales report'. The data is organized into a grid with columns for 'Primary', 'Category', 'Product', 'Units', 'Cases', and 'Modified'. The report is grouped by product type, with summary rows for each group. The summary rows use the 'Sum' function to calculate totals for 'Units' and 'Cases'.

	Primary	Category	Product	Units	Cases	Modified
			Total	Sum	Sum	
				384	33	
			▼ Product	Sum	Sum	
			12oz Ground	60	5	
1		Cloud9	Coffee	12oz Ground	12	1 09/03/20 8:34 PM
2		Forest	Coffee	12oz Ground	36	3 09/03/20 8:34 PM
3		Galaxy	Coffee	12oz Ground	12	1 09/03/20 8:34 PM
			▼ Product	Sum	Sum	
			12oz Whole Bean	84	7	
4		Cloud9	Coffee	12oz Whole Bean	36	3 09/03/20 8:34 PM
5		Forest	Coffee	12oz Whole Bean	12	1 09/03/20 8:34 PM
6		Galaxy	Coffee	12oz Whole Bean	36	3 09/03/20 8:34 PM
			▼ Product	Sum	Sum	
			2oz Portion Packs	216	15	
7		Cloud9	Coffee	2oz Portion Packs	72	5 09/03/20 8:34 PM
8		Forest	Coffee	2oz Portion Packs	72	5 09/03/20 8:34 PM
9		Galaxy	Coffee	2oz Portion Packs	72	5 09/03/20 8:34 PM
			▼ Product	Sum	Sum	
			5lb Whole Bean	24	6	
10		Cloud9	Coffee	5lb Whole Bean	4	1 09/03/20 8:34 PM
11		Forest	Coffee	5lb Whole Bean	8	2 09/03/20 8:34 PM
12		Galaxy	Coffee	5lb Whole Bean	12	3 09/03/20 8:34 PM
13						

Demo



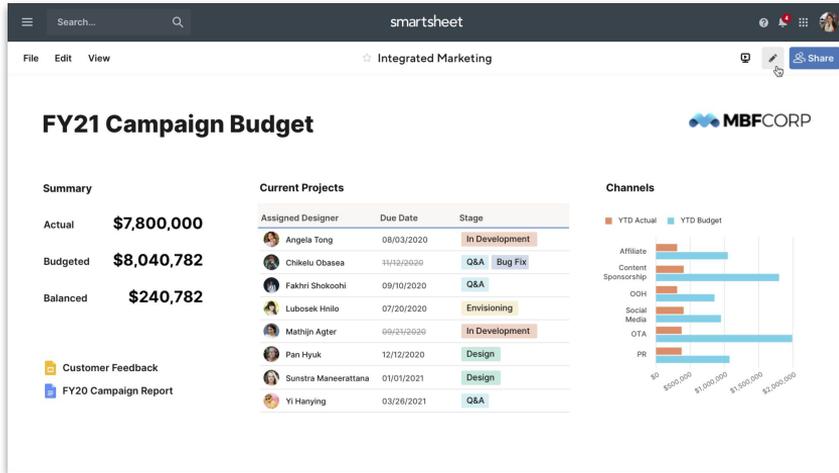
Sneak
peek:

Dashboards,
reimagined

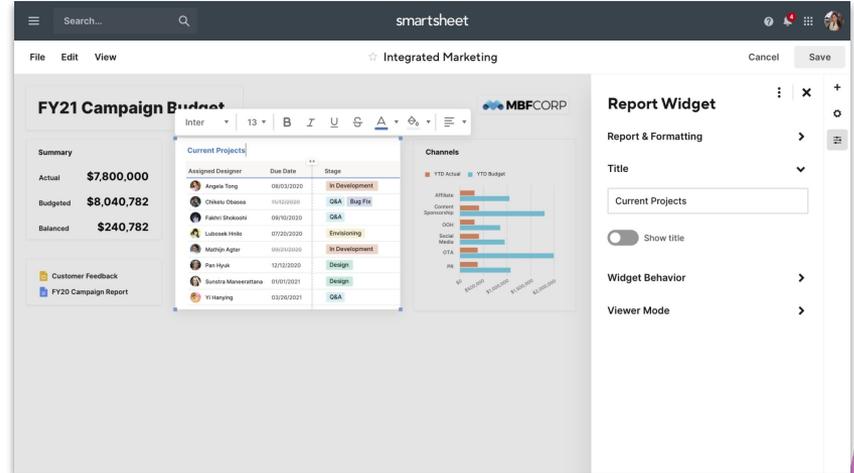


The future of dashboards

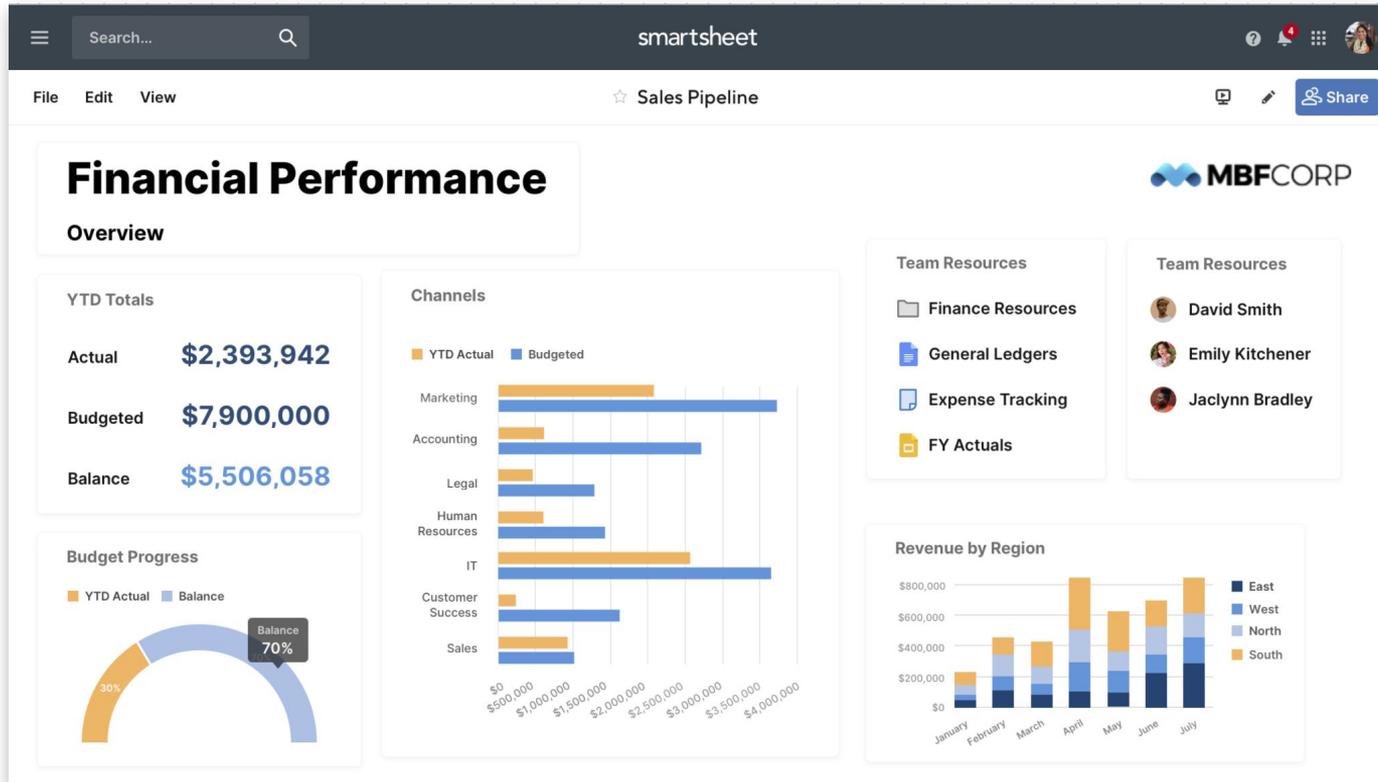
Modern UI



Contextual editing



Click-through demo



In closing...

1. **Use column formulas for more reliable results.**
 - Prevent formula frustration.
 - Easily scale across sheets.
2. **Upgrade your reporting using new features.**
 - Group common data sets.
 - Summarize columns with functions.
3. **Get excited about the future of dashboards.**
 - Use a right-panel to make quick edits.
 - Create cleaner-looking dashboards with a new UI and custom colors.



Resources

User Groups

- smartsheet.com/user-groups

Enhancement Requests

- smartsheet.com/enhancements

Formulas & Functions Community

- smartsheet.com/community

The screenshot shows the Smartsheet Help and Learning Center homepage. The header includes navigation links for 'Help & Learning', 'Help Articles', 'Community', and 'Training', along with 'Contact Support' and 'Log In' buttons. The main content area features the Smartsheet logo, the title 'Help and Learning Center', and a search bar with the placeholder text 'What do you need help with?'. Below this is a section titled 'Curated Learning Tracks' with a sub-heading: 'Smartsheet learning tracks provide a guided self-paced format to learn how to use Smartsheet.' Four learning track cards are displayed, each with a numbered badge and a right-pointing arrow:

- 1 Get Started**: The basics of building a sheet. 15 Topics
- 2 Smartsheet Intermediate**: Collect, track, automate, and report on work.
- 3 Smartsheet Advanced**: Work at scale with content, projects, and dashboards.
- Free Users**: Capabilities of a free user shared to work in Smartsheet.

Q&A

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