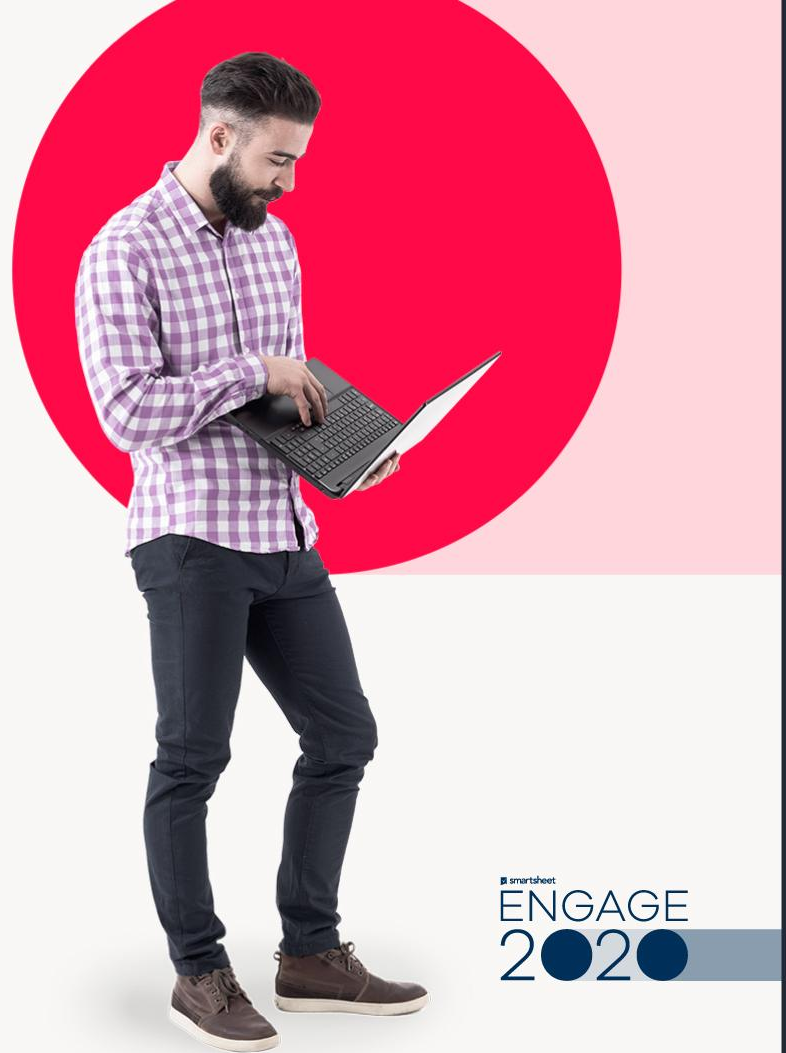# Request Management Nirvana

How to Use Smartsheet to Master Multi-step Processes

Rashmi Shekhar

Senior Product Manager, Smartsheet
October 1, 2020

ENGAGE 2020

Legal

Certain information set forth in this presentation may be "forward-looking information." Except for statements of historical fact, information contained herein may constitute forward-looking statements. Forward-looking statements are not guarantees of future performance and undue reliance should not be placed on them. Such forward-looking statements necessarily involve known and unknown risks and uncertainties, many of which are and will be described in Smartsheet's filings with the US Securities and Exchange Commission, and these risks and uncertainties may cause actual performance and financial results in future periods to differ materially from any projections of future performance or results expressed or implied by such forward-looking statements. Although forward-looking statements contained herein are based upon what Smartsheet management believes are reasonable assumptions, there can be no assurance that forward-looking statements will prove to be accurate, as actual results and future events could differ materially from those anticipated in such statements. Smartsheet undertakes no obligation to update forward-looking statements except as required by law.

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Welcome to ENGAGE'20!

1. Explore conditional logic with forms.

2. Learn to manage multi-step processes with Dynamic View.

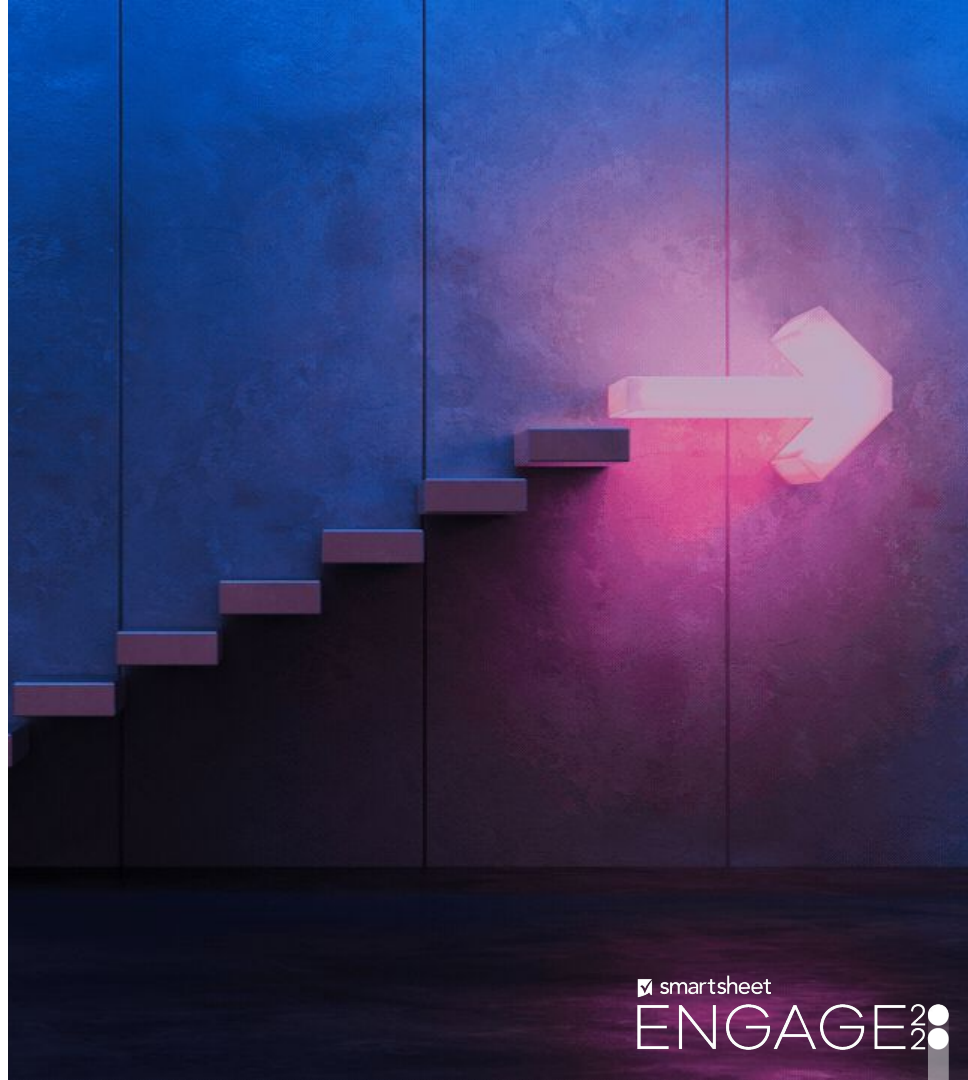3. Find out how to manage vendors using forms and Dynamic View in a product demo.

Rashmi Shekhar
Senior Product Manager
Smartsheet

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Forms and conditional logic

Forms

Easily collect and act on information quickly

"When you ask the right questions to the right people, you'll make it easier for colleagues, customers, and other stakeholders to provide the high quality data that your team needs to successfully operate with speed."

Forms with conditional logic

Use a single form to ask different questions to different respondents based on their answers for:

- Requests for proposal submissions

- Ticketing requests

- Remote issue tracking

- Event management

- Sales and marketing requests

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Dynamic View

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Dynamic View

Manage multi-step processes by sharing only what is needed to the right people at the right time for viewing or editing.

Simplified views

Simplify and accelerate collaboration by emphasizing only critical, relevant information.

Data access governance

Protect sensitive information with identity or condition based access control.

In-context guidance

Lead users through multi-step process with guidance and guardrails.

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Scenarios for Dynamic View

Dynamic View business process and data management use cases

VENDOR MANAGEMENT

Supply / Procurement

VP of Finance, Accounting, Supply Chain

CONTRACT MANAGEMENT

Supply / Procurement

VP of Legal, Procurement

PERFORMANCE REVIEWS

Human Resources

VP of Human Resources

REVENUE FORECASTING

Sales / Services

VP of Sales

ORDER MANAGEMENT

Customer Service

VP of Customer Service

SALES ACTIVATION MANAGEMENT

Professional Services

VP of Sales

CREATIVE SERVICES TICKETING

Marketing, Product

VP of Marketing

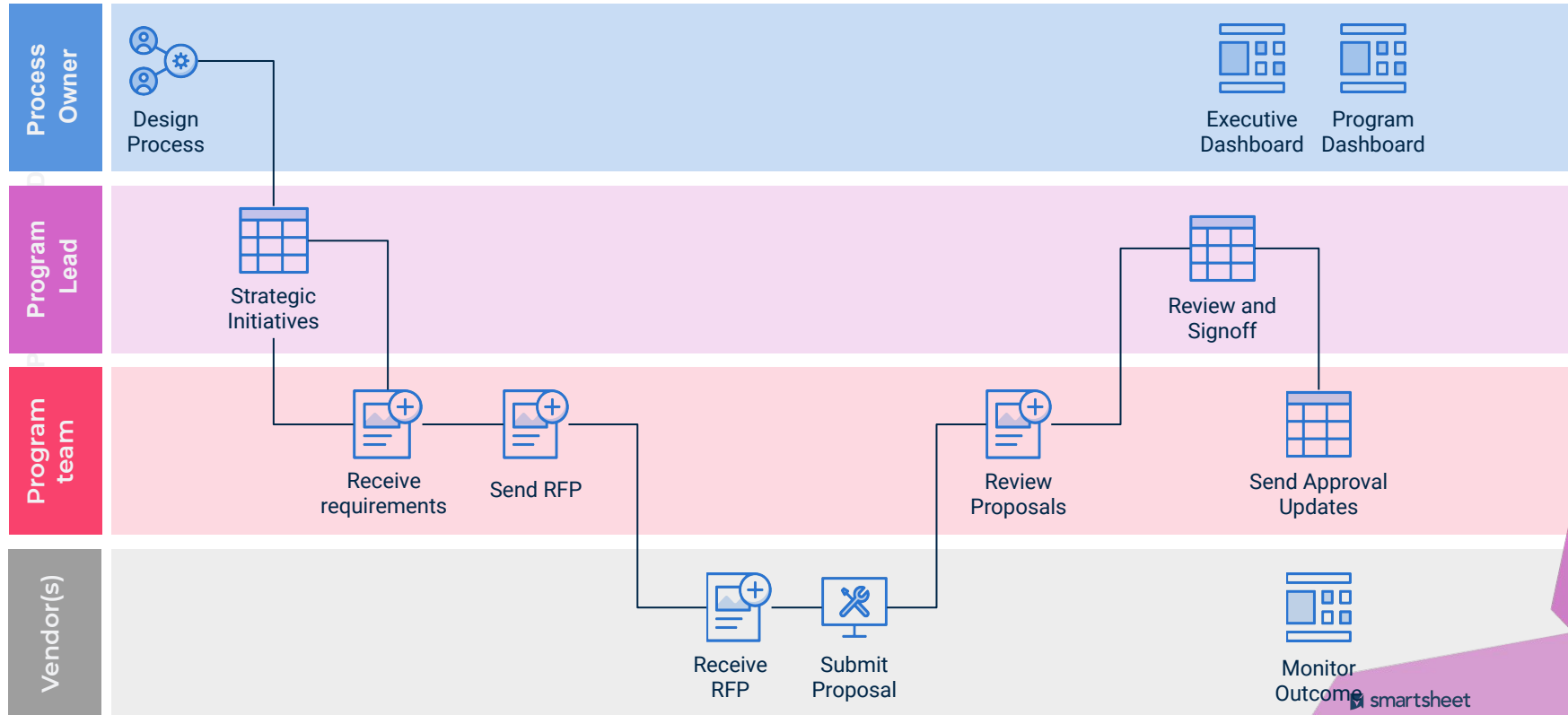**BI / IT TICKET MANAGEMENT**

Information Technology

CIO, Director IT

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Product Demo

Vendor program management and RFPs

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Vendor management

Process Owner	Program Lead	Program team	Vendor(s)
Design Process	Strategic Initiatives	Receive requirements	
		Send RFP	
			Receive RFP
			Submit Proposal
		Review Proposals	
	Review and Signoff	Send Approval Updates	
Executive Dashboard	Program Dashboard		Monitor Outcome

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In closing...

1. **Learn more about forms in our [intermediate](#) learning track.**

2. **Dig into the [ENGAGE Brain Boost](#) for Dynamic View.**

3. **Start managing multi-step processes with Dynamic View today.**
   [Contact our team](#) to learn more about using Dynamic View to solve process-based workflows.

4. **Join the 'Smartsheet for Dynamic Work' community group.**
   Share ideas and collaborate with fellow professionals who are using Smartsheet.

Thank you