



☑ smartsheet



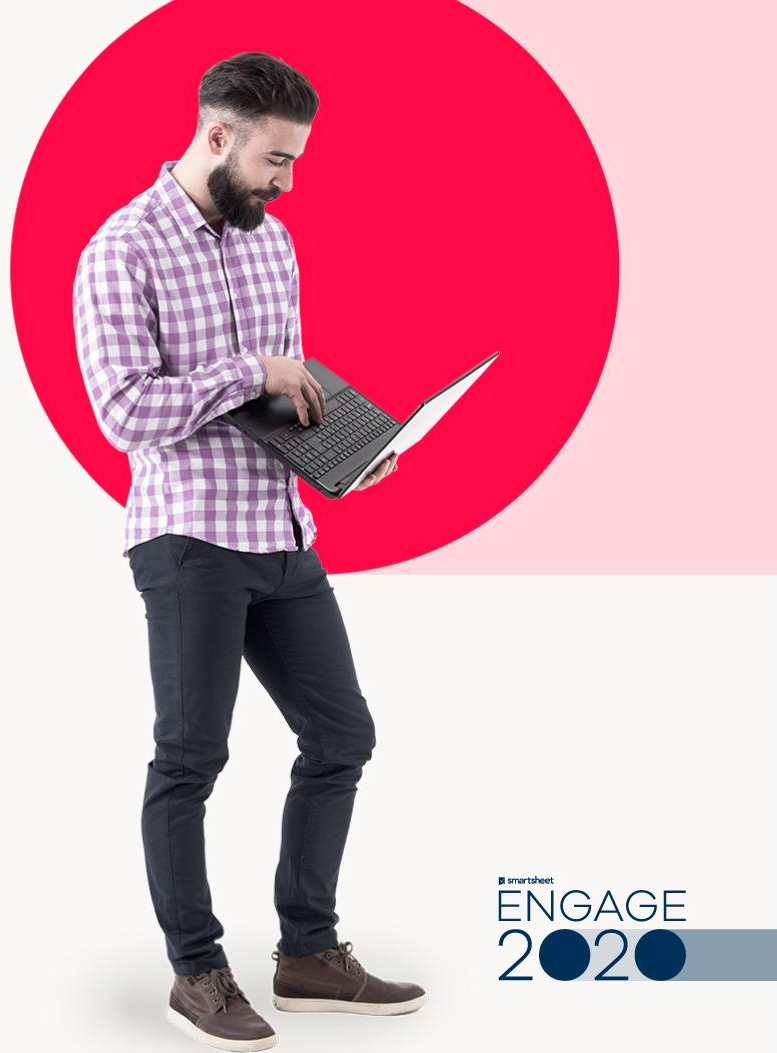
20 ENGAGE 20

Customer Spotlight: How to Scale Process from a Single Team to Your Entire Company

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Senior Manager, Product Marketing
Smartsheet

October 1, 2020



Learning objectives

Learn how Motus scaled their customer onboarding program with Control Center, Bridge, and WorkApps.



Rachel Schiele

Director, Professional Services &
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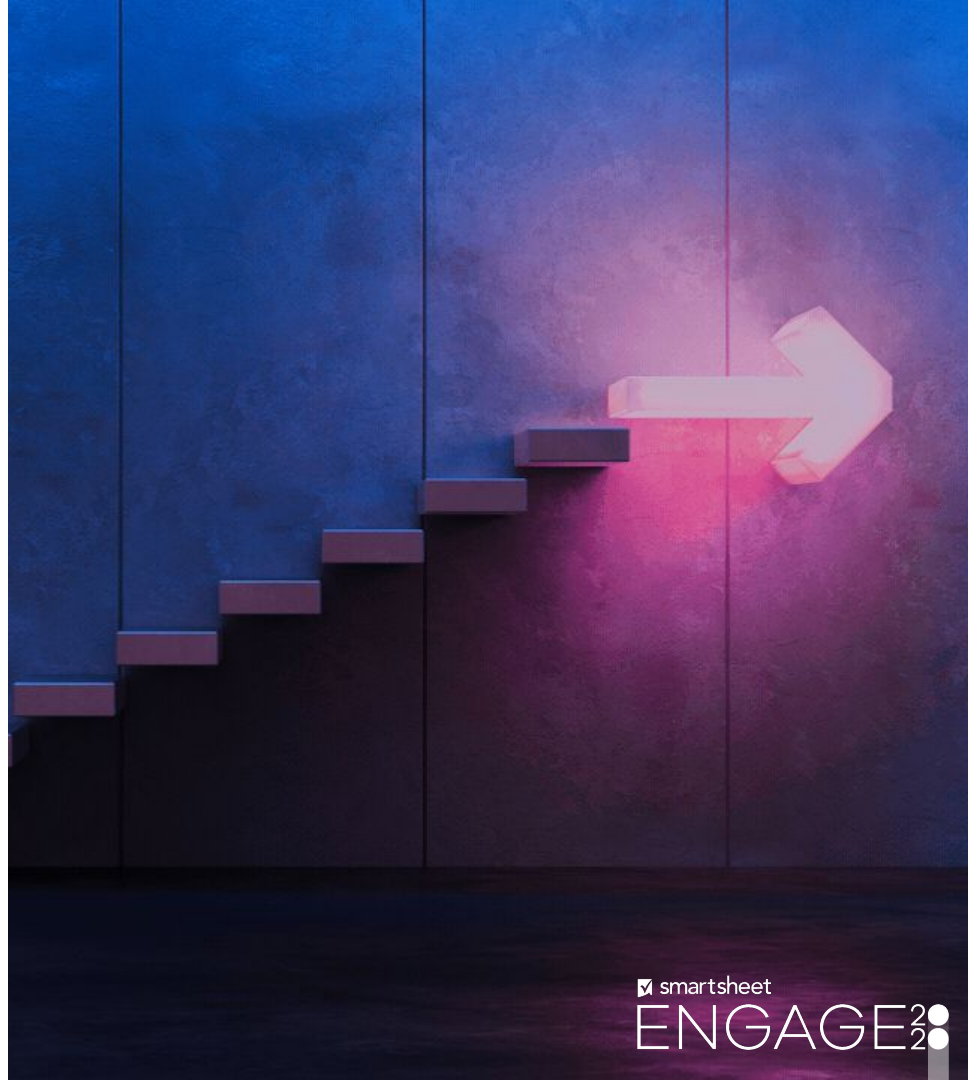
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Recap

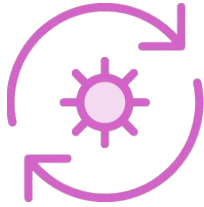
1. Scale your program with WorkApps and Bridge
2. Manage requests with forms and Dynamic View
3. Align your stakeholders by building WorkApps
4. Connect to outside data sources with Data Uploader and Connectors
5. Automate across platforms with Bridge





Vehicle reimbursement
Fleet management
Mileage tracking
Business intelligence

Professional Services | Motus



Customer
Implementation &
Onboarding



Post-Implementation
Account Support

Challenges

The challenge:

- Need for a scalable process to manage customer onboarding activities efficiently and effectively while supporting increased customer growth.
- CEO challenged Implementation to support increased customer growth with existing resources (personnel).

The constant question: *“What, where, when, how, and by whom?”*

- How to provision projects in one place for time savings on reporting and customer onboarding activities?
- How to efficiently provide reports with different levels of detail to different audiences?
- How to provide transparency to our customers on their onboarding activities?

Real-time work collaboration and visibility for our company and our customers!

[illegible]

SmartSheet | Mutual Investments

➤ Create New Project

1. Project Type | Terminex

2. Project Information | 4. Sharing

Configuration Time

Total Set-Up Time

Total Time Spent

Total Specialized Time

Total Average Time

Number of Work Hours

Total Call Count

Project Summary

Investment Projects

- Terminex (2)

Project Information

- Project Name: UMSI - Brainerd Co
- Project Health: Green
- Location: 61000000000000000000
- Information Provided: Yes
- Property or Name: UMSI - Brainerd Co - 100000000000000000000
- Close Date: 12/31/2016

Cancel Previous Next

2019 Implementation Numbers by Status

11
Not Started

52
In Progress

3
Delayed

171
Completed

237
Year-To-Date

2019 Implementations by Go-Live Date

Month	In Progress	Completed
January 2019	51	0
February 2019	35	0
March 2019	24	0
April 2019	17	0
May 2019	32	0
June 2019	35	0
July 2019	28	0
August 2019	4	0
September 2019	1	0
October 2019	1	0
November 2019	1	0
December 2019	0	0

Implementations by Status

Status	Count	Percentage
Not Started	11	11%
In Progress	52	79%
Delayed	3	1%

The screenshot displays the 'Mallory Kay Project Overview' page in Microsoft Dynamics CRM 2013. The page is divided into several sections:

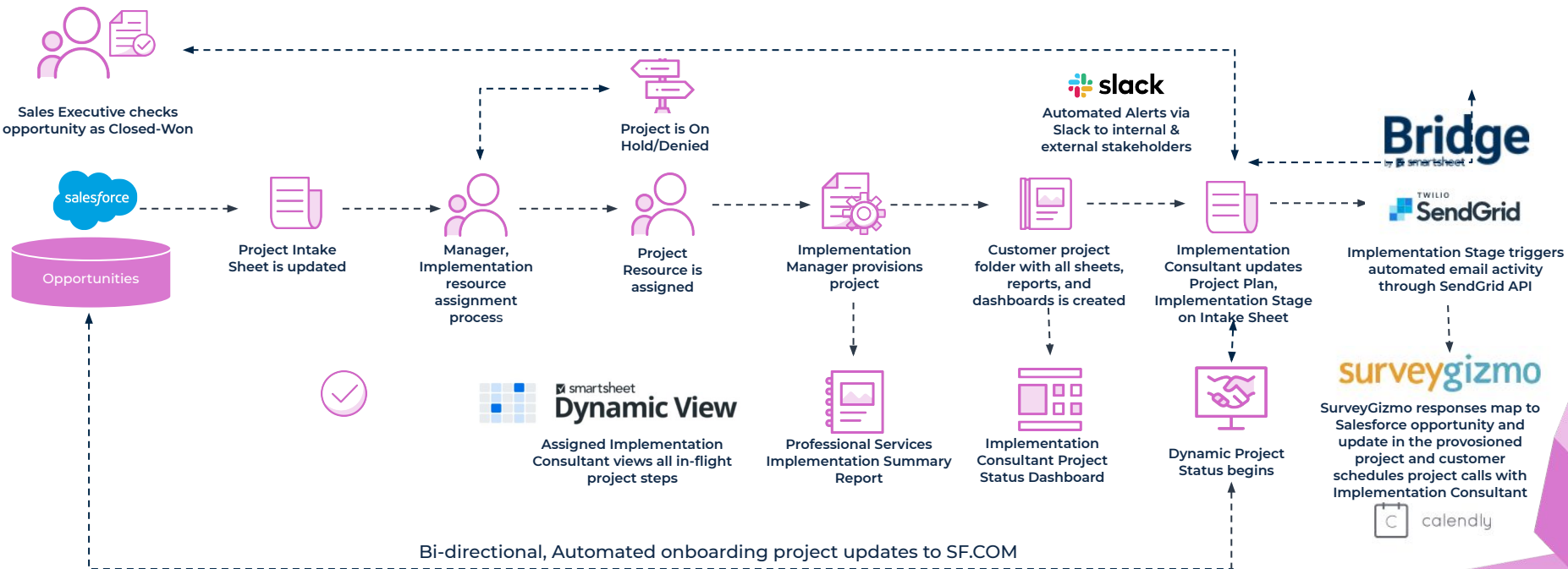
- Contact Card:** Displays the contact information for Mallory Kay, including her name, phone number, email address, and a photo. The 'Status' is set to 'Active'.
- Project Overview:** A section titled 'Mallory Kay Project Overview' showing a project timeline. The timeline includes a 'Start Date' of 10/1/2013 and an 'End Date' of 12/31/2013. The project is currently in the 'Planning' phase.
- Project Tasks:** A list of tasks associated with the project, including 'Project Planning', 'Project Execution', and 'Project Closure'. Each task has a status (e.g., 'Not Started', 'In Progress', 'Completed') and a due date.
- Project Details:** A section containing a table with project details, including 'Project Name', 'Project Manager', 'Project Status', and 'Project Budget'.



smartsheet

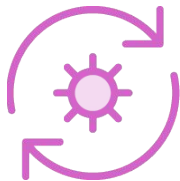
Customer Onboarding

Automation: Implementation work management flow

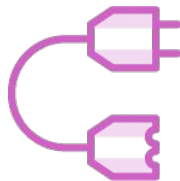


Bridge

Automate business processes across platforms



Process automation



Systems integration



Business alignment

Onboarding alerts and notifications

Salesforce project updates
(e.g. PM, Status, Progress Status)

Slack channel updates
(e.g. Real-time issue alerts)

Vast reduction in ongoing status meetings

Opportunity Name	Company Name	Actual Go Live Date	Implementation Status	Implementation Phase	Implementation Stage	Number of Drivers	Program Type	Account Payment Type
Hart's Mountain-FW/IR		04/01/18	In Progress	Phase II	Program Approval	15	FAWR	Concur
Kelly Moore Paint Corp		04/01/18	In Progress	Phase I	Contract Execution	MC Only	ACH Transfer	
Boyd Corp MVR Subco		04/01/18	In Progress	Phase I	Contract Execution	MC Only	ACH Transfer	
JFEAD Beverage Co.		07/01/18	In Progress	Phase I	Program Setup	19	FAWR	Concur
Somakaba USA Inc. - I		07/01/18	In Progress	Phase I	Program Setup	383	FAWR	Concur
Southeastern Grocers		05/01/18	In Progress	Phase II	Account Finalization	336	FAWR	Concur
United Beverages of Nc		05/01/18	In Progress	Phase I	Program Approval	60	FAWR	ACH Transfer
Baker Distributing - CFI		05/01/18	In Progress	Phase I	Program Review	107	CFM	ACH Transfer
3X2 United Records		05/01/18	In Progress	Phase I	Program Review	8	CFM	ACH Transfer
MC Media App - FAW		05/01/18	In Progress	Phase II	Account Finalization	133	CFM	ACH Transfer
KBP Foodie App - FAW		05/01/18	In Progress	Phase I	Implementation Transit	104	FAWR	Payroll File
Alter Trading Corporate		06/26/18	In Progress	Phase I	Implementation Transit	85	CFM	Concur
Warren County Board C		06/01/18	Delayed	Phase II	Transitioned to Custom	130	CFM	Payroll File
VeriDirect Asset Connect		05/01/18	In Progress	Phase II	Program Approval	52	FAWR	Concur
2020 Intake Sheet		07/01/18	In Progress	Phase I	Contract Execution	1000	MC Only	ACH Transfer
MillenniumSigma - MVR		05/01/18	In Progress	Phase I	Program Setup	MC Only	ACH Transfer	
Medtronic CVG Driver I		05/01/18	In Progress	Phase I	Program Setup	MC Only	ACH Transfer	
Grocery Outlet SSO		05/01/18	In Progress	Phase I	Program Setup	MC Only	ACH Transfer	
Vulcan Materials Comp		11/01/18	In Progress	Phase I	Program Review	1200	FAWR	ACH Transfer



Smartsheet APP 8:58 AM

Wahoo! A new opportunity closed!

sanderson@motus.com, rschiele@motus.com made changes to a sheet:

2020 Intake Sheet

Rows

1 added, 1 updated

As of 09/12/20 | Sent by rschiele@motus.com

smartsheet
ENGAGE2

Onboarding Connector workflow

Workflow enables real-time updates in both applications critical to the business

Optimizes reporting and ability to add additional fields quickly with no IT involvement

The screenshot shows the 'Settings' step of the onboarding workflow. The header bar includes the 'smartsheet + salesforce' logo. Below the header is a navigation bar with tabs: 'Settings' (active), 'Fields', 'Salesforce Filters', 'Sheet Filters', 'Row Groups', and 'Save'. The main content area is titled 'Settings' with the instruction 'Choose a Smartsheet sheet and a Salesforce Object to connect.' Below this is a dropdown menu labeled 'What do you want this workflow to do?' with the selected option 'Keep records automatically updated in both Smartsheet and Salesforce'. There are two required fields: 'Sheet Name' with the value '2020 Intake Sheet' and 'Salesforce Object' with the value 'Opportunity'. At the bottom right are 'Cancel' and 'Continue' buttons.

smartsheet + salesforce

Settings Fields Salesforce Filters Sheet Filters Row Groups Save

Settings
Choose a Smartsheet sheet and a Salesforce Object to connect.

What do you want this workflow to do? *
Keep records automatically updated in both Smartsheet and Salesforce

☒ Sheet Name: * 2020 Intake Sheet

☒ Salesforce Object: * Opportunity

Cancel Continue

Individual and customer project dashboards

Project visibility by Implementation for internal and external stakeholders

Vast reduction in ongoing status meetings



Insights

Best practices

- Planning is critical
- We used data flows and illustrations of workflow to build the process and to train the team
- Illustrating how projects come about in one single platform
- Consistency in project initiation makes accountability and reporting much easier to manage
- Use the fewest number of project templates to effectively manage future updates

Key learnings

- Iteration when developing a control center is important
- Some of our key capabilities have to be phased in e.g. automating management exception approval
- Integrating Salesforce with Smartsheet
- Empower the team to identify additional efficiency gains and process improvements

Results

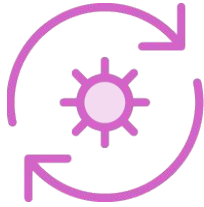
Benefits

- Process automation for tracking, launching, and managing project information
- Consistency across projects and efficiency for the team
- Continued efficiency gains, process improvements, and ability to scale
 - Easily identified and executed
 - Currently working on expanding value to other functions within Professional Services
- Transparency to all key stakeholders at the right level of detail
 - Implementation Consultants, Executive Team, Account Executives
 - Customers love this!

ROI / value return

- Service Projects—we currently have about 50 onboarding projects in motion at any given time—about 350 per year with a 40% increase in projects year-over-year
- Five Customer Implementation Consultants
- Time savings for program review, approval and set up—four hours/week (\$65k annual savings)
- Time savings for reporting and status updates, meeting prep—four hours/service manager/week (\$80k)
- Overall value—\$145k/year less cost of license
- Over 3,000 hours saved since rollout and on-track to increase ROI with extension into other functions within Professional Services

Professional Services | Motus



Customer
Implementation &
Onboarding



Post-Implementation
Account Support

WorkApps is a no-code platform for building intuitive web and mobile apps to streamline your business and simplify working together.

Use sheets, forms, dashboards, and more to create one easy-to-navigate app with no technical skills required.

WorkApps

Achieve more, *faster*



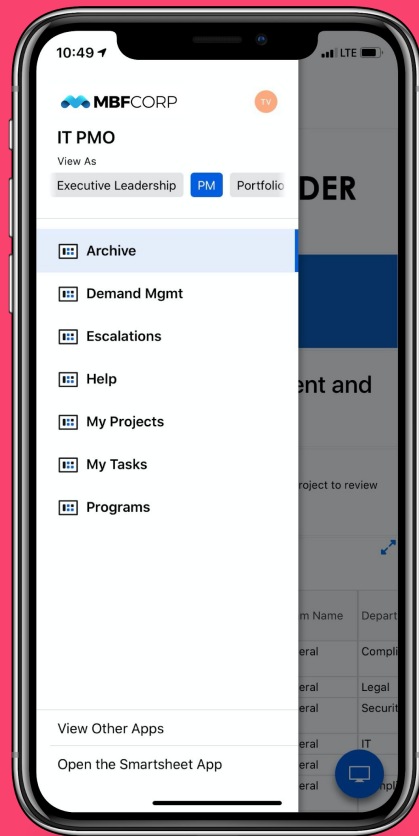
Streamlined



Purpose-built



Scalable



Join the Preview



DEMO- WorkApps

Looking forward

Automate time
tracking with Bridge

Capacity planning
with 10,000ft

In closing...

1. Join the WorkApps preview at offers.smartsheet.com/workapps
2. Learn more about Bridge at smartsheet.com/platform/bridge
3. Learn more about Motus at Motus.com

**Thank
you**



ENGAGE²