Best-in-Class Project Management

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Learning objectives

1. Understand the basics of project management in Smartsheet
2. Learn how to take advantage of new and existing capabilities for project managers
3. Architect your projects for portfolio management
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PPM lifecycle

Planning
- Portfolio management
  - Intake

Project management
- Business case
  - Initiation

Resource management
- Capacity planning
  - Utilization

Execution and Monitoring
- Portfolio reporting
  - Planning
  - Execution
  - Delivery

Benefit
- Benefit Icon

PPM lifecycle steps:
1. Portfolio management: Intake
2. Project management: Business case, Initiation
3. Resource management: Capacity planning, Utilization
4. Execution and Monitoring: Planning, Execution, Delivery
5. Benefit: Icon
Components of a project plan

Key
Plan sheet
- Automation
- Conversations
Plan dashboard
- Reports
- Metric sheet

Helpful
Budget sheet
Contacts sheet
RAID log sheet
- Open RAID items report
Milestone report
Project demo
Project demo
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.

- **Organize:** Sort and filter what’s visible to create a view of what you need.
Components of a project plan

Key
- Plan sheet
  - Automation
  - Conversations
- Plan dashboard
  - Reports
  - Metric sheet

Helpful
- Budget sheet
- Contacts sheet
- RAID log sheet
  - Open RAID items report
- Milestone report
Template sets

In the Solution Center

- Project Management Office
- Marketing Shared Services
- Team Operations and Sync
- Objective and Key Result (OKR) Tracker
- Employee Pulse Check
- And dozens more!
Consistency and visibility at scale

Smartsheet Control Center

Demand management → Portfolio reporting → Process improvement → Archiving

Project 1 → Project 2 → Project 3
Next Steps

Learn more about project management with Smartsheet.

Download project management templates at the Solution Center

Dig in with ENGAGE Brain Boosts on the Center of Excellence
  Automation
  Project Management
Thank you
**Project Sheet**

### Client Implementation 5.0 - Plan

<table>
<thead>
<tr>
<th>Task Name</th>
<th>Status Headline</th>
<th>Start Date</th>
<th>End Date</th>
<th>% Complete</th>
<th>Completed Date</th>
<th>Assigned To</th>
<th>Allocation</th>
<th>Duration</th>
<th>Predicted</th>
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</thead>
<tbody>
<tr>
<td>Planning</td>
<td></td>
<td>09/07/20</td>
<td>09/30/20</td>
<td>52%</td>
<td>01/01/19</td>
<td>Brooklyn Jansen</td>
<td>100%</td>
<td>18d</td>
<td>5d</td>
</tr>
<tr>
<td>Define high level requirements</td>
<td></td>
<td>09/07/20</td>
<td>09/07/20</td>
<td>100%</td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Identify and secure key project resources</td>
<td></td>
<td>09/08/20</td>
<td>09/11/20</td>
<td>99%</td>
<td></td>
<td>Brooklyn Jansen</td>
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<td>4d</td>
<td>18d</td>
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<tr>
<td>Conduct kick off meeting</td>
<td></td>
<td>09/14/20</td>
<td>09/16/20</td>
<td>90%</td>
<td></td>
<td>Brooklyn Jansen</td>
<td>100%</td>
<td>3d</td>
<td>19d</td>
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<tr>
<td>Create project charter</td>
<td></td>
<td>09/16/20</td>
<td>09/16/20</td>
<td>86%</td>
<td></td>
<td>Devon Gomez</td>
<td>100%</td>
<td>0d</td>
<td>20d</td>
</tr>
<tr>
<td>Baseline initial resource &amp; project plan</td>
<td></td>
<td>09/17/20</td>
<td>09/18/20</td>
<td>46%</td>
<td></td>
<td>Devon Gomez</td>
<td>100%</td>
<td>2d</td>
<td>21d</td>
</tr>
<tr>
<td>Perform risk management</td>
<td></td>
<td>09/21/20</td>
<td>09/22/20</td>
<td>23%</td>
<td></td>
<td>Devon Gomez</td>
<td>100%</td>
<td>2d</td>
<td>22d</td>
</tr>
<tr>
<td>Create project repository</td>
<td></td>
<td>09/23/20</td>
<td>09/23/20</td>
<td>15%</td>
<td></td>
<td>Devon Gomez</td>
<td>100%</td>
<td>2d</td>
<td>23d</td>
</tr>
<tr>
<td>Establish project status report</td>
<td></td>
<td>09/24/20</td>
<td>09/24/20</td>
<td>10%</td>
<td></td>
<td>Devon Gomez</td>
<td>100%</td>
<td>2d</td>
<td>24d</td>
</tr>
<tr>
<td>Create Issue/Decision Log</td>
<td></td>
<td>09/25/20</td>
<td>09/25/20</td>
<td>10%</td>
<td></td>
<td>Devon Gomez</td>
<td>100%</td>
<td>2d</td>
<td>25d</td>
</tr>
</tbody>
</table>
Project dashboard

Client Implementation 5.0

**Project KPIS**

- **Project Issue Status:**

- **High Priority RAID Items:** 1

**Status Headline**

Project is currently on track, kicked off on 1/7/19, tasks assigned and project plan is aligned with due date.

**Key Contacts**

- Business Owner: Brooklyn Jansen
- Department Lead: Diana Kennedy
- Program Manager: Devon Gomez
Automation

Alert someone
Set a reminder
Request an update
Set up an approval workflow
Move or copy rows to another sheet
Lock rows
Unlock rows
Conversations

Sheet and workspace level
Tag someone using @mentions
iOS and Android