36ADV - Customer Spotlight: Tales From the Trenches

Top 20 Questions & Answers

1. **Q: Rachel hello- What were the challenges you encountered, and how long from the start of your initiative to getting it adopted, used etc.?**
   A: Great question! For our use of Control Center, it took around 3 months to implement fully. For Bridge, similar timeline. It required dedicated time spent to map out workflows to go from initial stage to our desired end goal. Adoption has really come from empowering my team to suggest additional improvements and support as many creative, automated ways to make their work better. -Rachel

2. **Q: Rachel, what has been your biggest learning experience or piece of advice you would give to other Smartsheet users in a Professional Services organization?**
   A: Another great question! My biggest learning experience has been just how much we're able to scale our work and processes by thinking creatively and figuring out ways to make automation do more. My advice is even if your current state is manual or lacks current automation and needs to be streamlined or scaled, to not be afraid to think creatively and start putting in small enhancements which can build over time. -Rachel

3. **Q: A question for Rachel- I understand that Control Center is an additional cost. How did you build the business case?**
   A: We listed out each step in the process that the team was previously doing manually and the associated time it took without any automation in place. We then projected the expected growth that the team would experience, and the total time that would be needed to support that work through FTEs. We then calculated the cost savings and expected reduction in FTEs by the number of hours saved per project, so we could clearly show we would save at least 1.5 FTEs by just deploying our initial solution with Control Center. -Rachel

   Also, your account team can help with some return on investment calculations. You can reach out to them here.
   https://www.smartsheet.com/marketplace/premium-apps/control-center -Brian

4. **Q: How much does <Smartsheet/other service service/app> cost?**
    A:Please reach out to your account team for more information on pricing via this link: https://www.smartsheet.com/contact.

5. **Q: Are all of these products licensed separately?**
    A: Yes. For specifics, please visit the following link to get in touch with your Account Manager. https://www.smartsheet.com/contact

6. **Q: What Connectors are available off the shelf?**
    A: You can see a full list of our Connectors and Integrations, including SalesForce, Jira, Microsoft Dynamics 365, Slack, Microsoft Teams, and more at https://www.smartsheet.com/marketplace/apps

7. **Q: What Bridge integrations are available off the shelf?**
    A: You can find help documentation for bridge, including all current integrations, at https://help.smartsheet.com/bridge

8. **Q: Can Bridge help me integrate <app/service/product>?**
    A: If the other endpoint has some kind of API, chances are good that our Professional Services team can build an integration. Contact your account team at https://www.smartsheet.com/contact

9. **Q: I have a Work Apps question: I have an audit tracking solution that is going to be replicated for each new audit. Would the Work App configuration be part of the associated workspace for that audit? We don't have Control Center. Trying to figure out how you scale it.**
    A: Thank you for your question! In the scenario you describe, as you create each new audit, you would update your app to add the new audit as a page. WorkApps is meant to be adaptable so as your program needs change, you can add/remove pages quickly from apps and publish them to your users.

10. **Q: Can we set a reminder before a date has been reached, ie a reminder that a deadline is a week away for a task, etc.?**
    A: Yes! In the trigger block, when you click on the dropdown that says "on," you'll see many options for choosing dates up to a year before and after the selected date. If you want it to be sent before a deadline in a specific column (instead of a hardcoded date), click the "date field" radio button instead of selecting a specific date.

11. **Q: How quickly does Smartsheet notify via email through the workflow notifications? For any changes done in our Smartsheets, we receive an email notification, but that is hours later. Hoping these workflow notifications come much quicker**
A: These are sent immediately (unless you choose less frequent when setting up your automation). If you are receiving this in a delayed manner, it may be taking time to get through your company's email filters. All automations can also be sent to Google hangouts chat, seen in the notifications center, or received as mobile push notifications

12. **Q: Can you assign multiple resources to a single task?**
A: Yes, you can assign multiple resources - admins or owners on a sheet can enable this when you double click on a column and select Contact List

13. **Q: Can I uninvite a former collaborator?**
A: Yes, you can click the Share button and remove them by clicking the X

14. **Q: Where do we find the Brain Boosts?**
A: https://learn.smartsheet.com/page/engage-brain-boosts?access_code=engage2020

15. **Q: I would like to know more about the integration with SalesForce.**
A: You can learn more here: https://www.smartsheet.com/marketplace/partners/salesforce

16. **Q: Can you chat in Teams just like Skype for business from smartsheet?**
A: This is planned, but Microsoft does not have the available APIs for Teams integration at this time. Skype for Business will be available until Skype end of life, which is planned for July 2021.

17. **Q: Will SmartSheet ever be able to embed Content from other Social Media streams, like Twitter or LinkedIn?**
A: We'll share this request with our product team, but it's not currently on the roadmap.

18. **Q: Would you recommend tracking contract budgets in Smartsheet or Excel?**
A: We always recommend doing it in Smartsheet because then you can directly link it to your project and roll up and metrics to a portfolio dashboard in Smartsheet.

19. **Q: What's the point of locking the rows/columns?**
A: Locking prevents anyone who is not a sheet admin or owner from making changes in a row or column.

20. **Q: Can a form be used to update cells in the sheet? like start and end dates or qty data in a cell?**

A: Forms only add new data to a sheet. If you want to update existing data, then you'll want to use an update request:

https://help.smartsheet.com/learning-track/smartsheet-intermediate/update-requests