Solution Guide
SALES .02

Customer Success

Find it online: smartsheet.com/sales-solutions/customer-success-management
About Customer Success Management

In any business, especially those that rely on renewals or subscriptions, it’s important to manage customer experiences to ensure that customers have success using your product or service. That requires a dedication to each customer’s success in order to reduce churn, and increase repeat and new sales. This guide is built to help you use Smartsheet to manage everything that goes into delivering successful customer experiences.

Deliver consistent customer onboarding
Ensure all information captured during the sales process, from onboarding to completion, gets handed off to the Customer Success Managers.

Track and measure program success
Measure the success of your programs and build a culture of accountability and constant improvement.

Ensure strong renewal and retention rates
Track activities that have proven to drive high renewal rates and include them in all accounts.
Who should use this guide

Anyone who is involved with helping to ensure that customers have successful experiences with your product or service will find this solution valuable. Some common roles / titles who will benefit from this solution include:

- Customer Success Managers
- Sales Representatives
- Sales Operations
- Sales Executives
- Sales Enablement Managers
- Account Executives
- Account Managers
- Marketing managers

Purpose

This guide is designed to offer examples of how your customer success team can use Smartsheet to oversee, monitor and track your ongoing engagement with your partner network. We have a wealth of specific how-to resources in our Help Center, so the focus of this guide is:

1. An overview of the solution
2. A tour of the individual sheets
3. How to get going
4. Helpful resources and cheat sheets
Components

1. **ONBOARD**
   - New Account Handoff
   - Customer Onboarding Checklist
   - Set your customers up for success by ensuring a consistent onboarding experience.

2. **TRACK**
   - Renewal Tracker
   - Give extra attention to the accounts at risk of not renewing.

3. **MEASURE**
   - Net Promoter Score
   - Measure customer success efforts using the Net Promoter Score methodology.

Customer Success Solution Guide
New Account Handoff

Too often, sales teams don’t know how to pass along customer information they’ve captured during the sales process. Smartsheet’s New Account Handoff sheet helps ensure that information about your new customers is seamlessly handed off from sales to customer success teams. With web-enabled forms and the ability to attach any type of file to a sheet, everyone will have the context needed to begin delivering a great customer experience.

A. Attach relevant files directly to a row or through a web form to ensure that success managers have all relevant information about the account.

B. Add symbols to call attention to key accounts that need special attention or have high revenue potential.

C. Create web forms so sales teams provide all of the information that success teams need to begin helping the customer.
Customer Onboarding Checklist

It can be hard enough to define an ideal onboarding experience, but it can be even harder to ensure that every single customer gets that ideal onboarding experience. Smartsheet's Customer Onboarding Tracker gives you a single place to track the progress of activities that must happen for every customer. With simple checklists and drop-downs, success managers know how to deliver a consistent experience in a way that anyone can see progress.

A. Use discussions to log notes, attach files, or to keep team communication in context.
B. Use customizable drop-down menus to track where a customer is in the onboarding process.
C. Check off tasks as they are completed to ensure that every customer has a complete onboarding experience.
D. Add date columns so you can see how long onboarding took from beginning to end.
Renewal Checklist

Even with a great product and the best onboarding experience, you’ll still worry about certain accounts not renewing. Smartsheet helps you track all of your accounts up for renewal so you can spend extra time on one that need your attention. And with the ability to automatically send PDF on a recurring basis, you and your team can spend less time giving status updates and more time with the customer.

- Attach proposals or signed agreements directly to the sheet so you can keep things in context.
- Sort on any row, like ‘Likelihood to Renew’ so you can see your at-risk accounts.
- Set up the sheet to automatically send as a PDF or Excel attachment for your weekly reporting process.

Customer Success Solution Guide
Net Promoter Score

Although renewal rates are a good measure of your customer success efforts, many teams have realized that this alone is insufficient. To really understand your customer’s sentiment, use Smartsheet to help you get to your Net Promoter Score, which is a methodology designed to measure how likely customers are to recommend your offering. With integrated web forms for survey collection and formulas to automatically roll up results, you and your team can always have a real-time view of your Net Promoter Score.

A. Create a summary table using formulas so scores continuously recalculate as responses come in.

B. Lock rows so those who have access to your sheet don’t accidentally change or delete anything.

C. Use conditional formatting to call attention to negative responses so you can take action.

D. Use web forms to have customer survey responses flow directly into your sheet.
Jump-Start Your Customer Success Management with Smartsheet

- **Read through the solution guide**
  You’ve had an overview of the solution – now try Smartsheet for yourself.

- **Sign up or log in to Smartsheet**
  You can also use this with your existing account by logging in.

- **Open the Getting Started Sheet**
  Once you’re in Smartsheet, click on the “Getting Started” sheet in the pane on the right. This sheet will orient you to everything you need to start working in Smartsheet.

- **Customize the sheet**
  The sample data and structure is only there to help you get going. You can type over things, insert or delete rows or columns, rename columns, change column types etc.

- **Start working and sharing**
  To open another sheet in the solution, simply return to the home tab, select the folder, and then the sheet. You can invite others to collaborate by clicking the sharing tab on the bottom of the sheet.
### Other Recommended Steps

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete sheets you don’t need</td>
<td>Deleting a sheet is easy! You can learn how to <a href="#">here</a>.</td>
</tr>
<tr>
<td>Build your own sheet</td>
<td>We know you have unique needs – that’s why we built Smartsheet. Click the + tab at the top of the sheet so you can build your own solution from a blank sheet.</td>
</tr>
<tr>
<td>Use the “cheat sheets” in this guide</td>
<td>To help you get the most out of Smartsheet, we’ve included cheat sheets for formulas and shortcuts at the end of this guide.</td>
</tr>
</tbody>
</table>
Have questions or want to learn more about Smartsheet?

**Smartsheet Help Center** - help.smartsheet.com
Everything you need to help you get the most out of Smartsheet.

**Smartsheet Community** - community.smartsheet.com
Ask questions, share best practices, and get help.

**Submit your question** - solutions@smartsheet.com
Want personalized help? Our design and services teams have you covered!

**Send us your feedback** - help.smartsheet.com/customer/portal/emails/new
Share your thoughts or suggestions about Smartsheet or our Solutions.

**Plans and Pricing** - smartsheet.com/pricing
Enjoy your 30-day free trial.
**Smartsheet Cheat Sheet**

**Keyboard Shortcuts**

### Basics

- **F2 / Fn + F2**
  - Enters *edit mode* on selected cell

- **Ctrl + S**
  - Saves all unsaved information

- **Ctrl + Z**
  - *Undo* the previous action since last save

- **Ctrl + Y**
  - *Redo* the previous action since last save

- **Ins**
  - Inserts a row above the selected row.

  To insert multiple rows at once, press **Shift** and select multiple row headers, then click **Ins**.

### Formatting

- **Ctrl + Enter** *(or) Alt + Enter**
  - Inserts a carriage return or line break in Text / Number cells. In order to see the carriage returns in the sheet, apply wrap formatting to the cell by clicking the **Wrap** icon in the left toolbar.

- **Ctrl + K**
  - *Indents* Primary Column only

- **Ctrl + M**
  - *Outdents* Primary Column only

- **Ctrl + I**
  - *Italic*

- **Ctrl + B**
  - *Bold*

- **Ctrl + U**
  - *Underline*

  **NOTE:** Mac users should use **Cmd** instead of **Ctrl** unless otherwise noted.
Formulas

- **Ctrl + L x 1** Inserts $ before column name (horizontal cell reference lock).
- **Ctrl + L x 2** Inserts $ after column name (vertical cell reference lock).
- **Ctrl + L x 3** Inserts $’s around column name (full cell reference lock).

Date Column Cells

- **t**: Inserts today’s date.
- **+:** Enters date x days from today.
- **-**: Enters date x days before today.
- **mon / tue / wed / etc...**: Inserts date of the current week’s Monday, Tuesday, Wednesday, etc.
- **yes**: Inserts yesterday’s date.
- **tom**: Inserts tomorrow’s date.
- **next week**: Inserts date seven days from today.
- **last week**: Inserts date from seven days ago.
- **Dec 15 / Jan 3 / etc**: Inserts date of string entered.

Additional

- **Ctrl + /** Displays the Open a Sheet form.
- **Ctrl + G** Displays the Go To Row form. Type in the row number you’d like to scroll to then click OK.
- **Ctrl + Home** Takes you to the first cell of the row you are currently on.
- **Ctrl + End** Takes you to the last cell of the row you are currently on.
- **Pg Up** Moves you up in your sheet.
- **Pg Dn** Moves you down in your sheet.
- **Space** Displays or removes a checked box, star or flag in the selected cell. Learn more about checkbox, star and flag columns in our Column Types article.
## Numeric Formulas

<table>
<thead>
<tr>
<th>Formula</th>
<th>Description</th>
<th>Example</th>
<th>Result</th>
</tr>
</thead>
</table>
| **SUM()**: Adds selected values, or a range of cells.  
Example: =SUM(Cost1: Cost5) | Adds selected values, or a range of cells. |  
Result: 1125.75 |
| **AVG()**: Averages selected values, or a range of cells.  
Example: =AVG(Cost1: Cost5) | Averages selected values, or a range of cells. |  
Result: 225.15 |
| **MAX()**: Returns the highest numeric value, or latest date.  
Example: =MAX(Cost1: Cost5) | Returns the highest numeric value, or latest date. |  
Result: 425.75 |
| **MIN()**: Returns the lowest numeric value, or earliest date.  
Example: =MIN(Cost1: Cost5) | Returns the lowest numeric value, or earliest date. |  
Result: 100 |
| **INT()**: Returns the integer portion of a given number.  
Example: =INT(Cost5) | Returns the integer portion of a given number. |  
Result: 425 |
| **ROUND()**: Rounds a given number to the desired # of digits.  
Syntax: ROUND(cell1, #_of_digits)  
Example: =ROUND(Cost5, 1) | Rounds a given number to the desired # of digits. |  
Result: 425.8 |
| **ABS()**: Returns the absolute value of a given number.  
Example: =ABS(-85) | Returns the absolute value of a given number. |  
Result: 85 |
| **COUNT()**: Counts non-blank cells in a given range.  
Example: =COUNT([Task Name]:[Task Name]) | Counts non-blank cells in a given range. |  
Result: 5 |
| **LEN()**: Returns the number of characters (length) in a given cell.  
Example: =LEN([Task Name]5) | Returns the number of characters (length) in a given cell. |  
Result: 6

NOTE: Formatting/currency values aren’t included.  
Dates have a length of 5.
Logic Formulas

**IF()**: Performs a logical test. One value is returned if the test is true, a different value is returned otherwise.

- **Syntax**: `IF(logical_test, value_if_true, value_if_false)`
- **Example**: `=IF([Due Date]1 > [Due Date]2, “Date 1 is Larger”, “Date 2 is Larger”)`
- **Result**: Date 2 is Larger

**ISBLANK()**: Used within an IF formula to test if a cell is blank.

- **Example**: `=IF(ISBLANK([Task Name]1), “Cell is blank”, “Cell isn’t blank”)`
- **Result**: Cell isn’t blank

**ISTEXT()**: used within an IF formula to test if a cell contains text (and not checkboxes, dates, numbers, etc).

- **Example**: `=IF(ISTEXT([Due Date]1), “Cell is text”, “Cell isn’t text”)`
- **Result**: Cell isn’t text

**ISNUMBER()**: Used within an IF formula to test if a cell contains a number (a value which is not text, date, or checkbox).

- **Example**: `=IF(ISNUMBER([Task Name]1), “Cell is a number”, “Cell isn’t a number”)`
- **Result**: Cell isn’t a number

**ISDATE()**: Used in an IF formula to test if a cell contains a date.

- **Example**: `=IF(ISDATE([Due Date]1), “Cell is a date”, “Cell isn’t a date”)`
- **Result**: Cell is a date

**ISBOOLEAN()**: Used in an IF formula to test if a cell contains a boolean value (check box, priority, star or flag).

- **Example**: `=IF(ISBOOLEAN(Done1), “Cell is a boolean”, “Cell isn’t a boolean”)`
- **Result**: Cell is a Boolean
Logic Formulas (cont.)

**AND():** Used within an IF formula. Evaluates if a set of logical expressions are True or False. If any expression is False it will evaluate as False.

Syntax: `AND(boolean_expression1, boolean_expression2, boolean_expression3, ...)`
Example: `=IF(AND(Done1, Done2, Done3), "All Tasks Complete", "Tasks Incomplete")`
Result: Tasks Incomplete

**NOT():** Used within an IF formula. Performs a logical NOT on the supplied boolean expression (or cell reference).

Syntax: `NOT(Done1)`
Example: `=IF(NOT(Done1), "Task A Not Complete", "Task A Complete")`
Result: Task A Complete

**OR():** Used within an IF formula. Performs a logical OR on the supplied boolean expression or cells. Returns true if any are true; otherwise returns false.

Syntax: `OR([Due Date]1 > [Due Date]2, [Due Date]1 > [Due Date]3)`
Example: `=IF(OR([Due Date]1 > [Due Date]2, [Due Date]1 > [Due Date]3), "Due Date 1 isn't the smallest", "Due Date 1 is the smallest")`
Result: Due Date 1 is the smallest

**NESTED IF():** Performs multiple logical tests. Smartsheet reads the IF statements in the formula from left to right, displaying a value based on which one evaluates to true.

Syntax: `IF(logical_test, value_if_true, IF(second_logical_test, value_if_true, value_if_all_false))`
Example: `=IF([Task Name]1 = "Task A", "This is Task A", IF([Task Name]1 = "Task B", "This is Task B", "Neither Task A nor Task B"))`
Result: This is Task A
Additional Formulas and Help

**Formula Basics**  -  smartsheet.com/formula-basics  
How to create a formula and reference cells, columns, and ranges in your sheet

**Text Formulas**  -  smartsheet.com/text-formulas  
Find, Replace, capitalizing text, etc

**Date Formulas**  -  smartsheet.com/formula-basics  
TODAY() formula, calculating working days, creating dates, etc

**Advanced Formulas**  -  smartsheet.com/date-formulas  
Weighted average, prorate, countif, countifs, sumif, sumifs

**Using Hierarchy in Formulas**  -  smartsheet.com/using-hierarchy-in-formulas  
How to reference child rows

**Formula Error Messages**  -  smartsheet.com/formula-error-messages  
What they mean, and how to troubleshoot