About Event Management

While marketing as a discipline has changed considerably over the past few years, event marketing continues to be a key pillar for any organization. A successful event requires attention to detail, great content, engaging speakers and a well-oiled venue plan. You’ll need to manage thousands of activities and coordinate hundreds of staff and vendors in real time. This guide is built to help you use Smartsheet to coordinate your next big event.

Stay in control every step of the way
Track key event milestones, drive ownership, assign budget, and monitor status of key activities.

Keep everyone on the same page
Easily paint the big picture for management while maintaining detailed views for your team.

Run your event like clockwork
Our Event Day Checklist ensures every activity that needs to get done, gets done.
Who should use this guide?

Whether you’re a marketing professional trying to deliver a great event or an event agency, you’re in the right place.

Common roles/titles who will benefit from this solution include:

- Marketing Directors
- Marketing Managers
- Event Marketers
- Event Managers
- Event Coordinators
- Marketing Consultants
- Event Consultants

What You’ll Learn

This guide is designed to show you how you can deliver a world-class event using Smartsheet.

This guide will cover the following:

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. PLAN
   - Event Master Plan
   - Detailed Volume Plan
   Monitor key milestones, drive ownership, and track budget and dependencies.

2. PREPARE
   - Attendee Tracker
   - Content Development
   - Issue Tracker
   - Event Communications
   Coordinate the thousands of activities and tasks that need to happen before event day.

3. EXECUTE
   - Event Day Checklist
   Never miss a beat. Our Event Day Checklist keeps every detail in one place.

Event Management Solution Guide
Event Master Plan

Managing big events means understanding the big picture as well as the small details. Smartsheet’s Event Master Plan helps you outline high level categories and milestones early in the planning phase but also allows you to layer in detail as it appears. Assign ownership and monitor status, completion, budget, and actual spend, all in one sheet.

A Link to detailed plans and dig into the minutiae of key event milestones.

B Use hierarchy to organize milestones into high-level categories.

C Visually convey status and comment on tasks in real time.

D Track budget and actual spend against milestones.

Event Management Solution Guide
Venue Plan

Attention to detail is your best friend. Smartsheet’s Venue Plan captures every bit of detail and enables you to act on that information. Set up automated follow-up reminders and report up to management by surface milestone status and completion % in the Event Master Plan.

- Attach cost estimates, space plans, staff schedules, and registration forms for the whole team to access.

- Drive accountability by layering in ownership, due dates and status.

- Set custom permissions and easily share the venue plan with vendors and consultants.

- Communicate within the sheet so everyone knows why milestones changed. And, ensure that new event staff can instantly find and access all details. No more lost emails or version control issues.
Attendee Tracker

Side meetings are just as important as planned sessions. The Attendee Tracker helps you capture and act on attendee information, then flag key guests to automatically email sales reps so they can follow up. Easily publish the sheet to an internal portal or web page for a single, always-updated attendee list.

Set up an easy registration process for attendees with a customizable web form.

Sales reps automatically get one email per day with a list of attendees.

Publish this sheet to a web page so everyone has access to a constantly-updated attendee list.

Sales reps automatically get one email per day with a list of attendees.
**Issue Tracker**

No more tracking issues with sticky notes, spreadsheets, or emails. Log, triage, and track problems in one central place. And, with the mobile app, you can submit issues on the go with a customizable form.

**A** Attach documents or images to help the event team better understand issues.

**B** Use hierarchy to clearly categorize issues as High, Medium or Low priority.

**C** New issues submitted via the web form get color coded and filed in the “Unassigned” category. Manually move issues to “High Priority,” “Medium Priority” or “Low Priority” sections.

**D** Easily log issues when you are away from your desk using a customizable web form.
Content Development

Create content that stays on-message and resonates with your attendees. Assign due dates, attach drafts, and work through multiple rounds of reviews, rehearsals, and more.

Log action items and notes over multiple rounds of content reviews.

Easily switch to a Gantt view to visualize timelines and dependencies. Color-code tasks for quick reference.

Publish Content Development milestones to an internal portal.

Ask for feedback on content, clarify questions that come up in reviews using the Discussions feature.
Event Communications

Equally important to creating great content is engaging with your attendees before the event. The Event Communications template helps you build a communications strategy for each marketing channel. Decide on themes, identify tone and list frequency for each channel.

Use hierarchy to organize themes for each communication channel.

Easily attach Content Drafts or Examples of great messaging from previous events.

Think through the needs of each channel and how your message can be tailored.
Event Day Checklist

Event day should run like clockwork. But with hundreds of variables, there’s always room for error. Our Event Day Checklist ensures every activity that needs to get done, gets done.

**A**
Attach registration forms, security badges or event flyers in case staff needs quick access to print extra copies.

**B**
Easily share checklists with vendors and consultants. Apply appropriate levels of permissions to protect information.

**C**
Easily check-off activities as they are completed. Setup notifications that go out to team leads when key activities get done.

**D**
Run a paperless operation - Access your checklist on the go on a phone or tablet.
Jump-Start Your Event 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**
  Sign up at [smartsheet.com/marketing-solutions/event-management](http://smartsheet.com/marketing-solutions/event-management)
  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>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Delete sheets you don’t need</strong></td>
<td>Deleting a sheet is easy! You can learn how to <a href="#">here</a>.</td>
</tr>
<tr>
<td><strong>Build your own sheet</strong></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><strong>Use the “cheat sheets” in this guide</strong></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

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ctrl + L x 1</td>
<td>Inserts $ before column name (horizontal cell reference lock).</td>
</tr>
<tr>
<td>Ctrl + L x 2</td>
<td>Inserts $ after column name (vertical cell reference lock).</td>
</tr>
<tr>
<td>Ctrl + L x 3</td>
<td>Inserts $’s around column name (full cell reference lock).</td>
</tr>
</tbody>
</table>

### Date Column Cells

<table>
<thead>
<tr>
<th>Shortcut</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>t</td>
<td>Inserts today’s date.</td>
</tr>
<tr>
<td>+</td>
<td>Enters date x days from today.</td>
</tr>
<tr>
<td>-</td>
<td>Enters date x days before today.</td>
</tr>
<tr>
<td>mon / tue / wed / etc...</td>
<td>Inserts date of the current week’s Monday, Tuesday, Wednesday, etc.</td>
</tr>
<tr>
<td>yes</td>
<td>Inserts yesterday’s date.</td>
</tr>
<tr>
<td>tom</td>
<td>Inserts tomorrow’s date.</td>
</tr>
<tr>
<td>next week</td>
<td>Inserts date seven days from today.</td>
</tr>
<tr>
<td>last week</td>
<td>Inserts date from seven days ago.</td>
</tr>
<tr>
<td>Dec 15 / Jan 3 / etc</td>
<td>Inserts date of string entered.</td>
</tr>
</tbody>
</table>

### Additional

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ctrl + L</td>
<td>Displays the Open a Sheet form.</td>
</tr>
<tr>
<td>Ctrl + G</td>
<td>Displays the Go To Row form. Type in the row number you’d like to scroll to then click OK.</td>
</tr>
<tr>
<td>Ctrl + Home</td>
<td>Takes you to the first cell of the row you are currently on.</td>
</tr>
<tr>
<td>Ctrl + End</td>
<td>Takes you to the last cell of the row you are currently on.</td>
</tr>
<tr>
<td>Pg Up</td>
<td>Moves you up in your sheet.</td>
</tr>
<tr>
<td>Pg Dn</td>
<td>Moves you down in your sheet.</td>
</tr>
<tr>
<td>Space</td>
<td>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.</td>
</tr>
</tbody>
</table>
**Smartsheet Cheat Sheet**

**Formulas**

### Numeric Formulas

**SUM():** Adds selected values, or a range of cells.
- **Example:** =SUM(Cost1: Cost5)
- **Result:** 1125.75

**AVG():** Averages selected values, or a range of cells.
- **Example:** =AVG(Cost1: Cost5)
- **Result:** 225.15

**MAX():** Returns the highest numeric value, or latest date.
- **Example:** =MAX(Cost1: Cost5)
- **Result:** 425.75

**MIN():** Returns the lowest numeric value, or earliest date.
- **Example:** =MIN(Cost1: Cost5)
- **Result:** 100

**INT():** Returns the integer portion of a given number.
- **Example:** =INT(Cost5)
- **Result:** 425

**ROUND():** Rounds a given number to the desired # of digits.
- **Syntax:** ROUND(cell1, #_of_digits)
- **Example:** =ROUND(Cost5, 1)
- **Result:** 425.8

**ABS():** Returns the absolute value of a given number.
- **Example:** =ABS(-85)
- **Result:** 85

**COUNT():** Counts non-blank cells in a given range.
- **Example:** =COUNT([Task Name]:[Task Name])
- **Result:** 5

**LEN():** Returns the number of characters (length) in a given cell.
- **Example:** =LEN([Task Name]5)
- **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
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(boolean)
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