Solution Guide
HUMAN RESOURCES .01

Learning & Talent Development

Find it online: smartsheet.com/hr-solutions/learning-talent-development
About Learning & Talent Development

Employees are the greatest asset of any organization. Management teams who thrive work diligently to set themselves up for long-term success by being disciplined about how they are helping, nurturing and growing their employees. Smartsheet’s solution for Learning and Talent Development helps organizations identify the skills they need, onboard new employees in a consistent way and align team and individual priorities with those of the business so that everyone’s set up to make a positive impact. This guide is built to show you how to use Smartsheet to achieve your Learning and Talent Development goals.

Accelerate new hire onboarding
Give managers simple tools like the 30-60-90 day onboarding template to ensure that new employees focus on the most important set of resources and activities.

Maximize individual and team performance
Provide the tools that employees and managers need to identify gaps in skills, recognize areas of strengths, set objectives, and assess performance on an ongoing basis.

Drive business results
Ensure individuals and teams align their goals with those of the organization so that everyone is set up to make a positive impact on the business.
Who should use this guide

As an HR professional, improving the employee experience and working with managers to ensure you have the right people in the right job is an essential part of your role. Common roles/titles who would benefit from this solution include:

- HR Assistant
- HR Generalist
- HR Director
- HR Manager
- HR Supervisor
- HR Coordinator
- HR Consultant
- HR Business Partner
- HR Associate
- Diversity Manager

Purpose

This guide is designed to help you capture and strengthen the talent growth plan for your organization using Smartsheet. 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. **ASSESS**
   - Gap Assessment
   - Identify the skills your team needs and then assess what’s available.

2. **ONBOARD**
   - Employee Onboarding
   - Ensure a consistent onboarding experience for new employees.

3. **EVALUATE**
   - Employee Objectives & Review
   - Performance Management
   - Align employee goals to business objectives and manage performance.

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Gap Assessment

Assessing your team’s competencies and coming up with a gap assessment of skills often means looking up performance records for each team member, or in the worst case, flipping through reams of paper. This process slows down your ability to compare skills across an entire team. Smartsheet’s Gap Assessment template helps you build and maintain a snapshot assessment of your group, their skills, and how your management team perceives each employees’ competencies, enabling you to have an impactful discussion as part of your talent portfolio and review process.

- Identify high-Potential employees so the focus is on developing their skills via special assignments or customized training.
- Use row hierarchy to organize team members under their respective managers.
- Use Update Requests so that managers can update skills and competencies for just their team.
- Use symbols like Harvey balls for a visual snapshot of employee potential based on the percentage of competency acquired vs. needing to be developed.
- Share the gap assessment with key leaders in your organization while controlling access permissions.
Employee Onboarding

Managers are often too busy with their day-to-day tasks to provide a consistently positive onboarding experience for every new employee. Smartsheet’s Employee Onboarding template lets you build a 30-60-90 day ramp plan that helps HR, managers and employees build a consistent onboarding experience, ensuring every new employee is set up for success and ensuring the greatest long-term contribution for the organization.

A: Attach documents new employees will find useful while ramping up like Performance Management Overview or HR Systems Overview.

B: Add in dates and set reminders so employees don’t miss important onboarding tasks.

C: Use conditional formatting to visualize which tasks have been completed.

D: Enable new employees to check off as they go so that they stay on track with the onboarding process.
Employee Objectives & Review

Employees are held accountable for their work and for delivering results. But most organizations lack the tools necessary to properly document, track, and measure performance against specific, agreed-upon goals. Smartsheet’s Employee Objectives & Review template makes it easy and more systematic for managers to have regular conversations with their employees regarding performance, deliverables, priorities and long-term career goals.

- Lock rows containing employee goals after manager-employee discussions are complete.
- Add detailed discussions that clearly articulate whether goals were attained or not.
- Turn on the ‘Highlight Change’ feature to see changes to information within the sheet.
- Capture weights and attainment against each objective and then sum up weighted attainment across all objectives.
- Automatically send the sheet to the employee and manager every month so that goals and objectives are top of mind.

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Performance Management

It would be great if every employee was an outstanding performer. One that excelled at every task, followed-up on open issues, and positively contributed to the organization. Obviously, this is not always the case. For those employees who are falling behind, a consistent approach in dealing with performance issues is necessary to protect the company and reduce risk. Smartsheet’s Performance Management template gives managers a tool to track performance and ensure employees get the necessary feedback and direction they need. The template also ensures that efforts to improve performance are recorded to protect HR, the employee, and the company.

- Attach documents associated with performance issues or improvements.
- Discuss issues with the manager, legal team, or others who should be involved in the performance management process.
- Use row hierarchy to easily organize performance data.
- Share the sheet with HR and the employee to ensure all parties are aware of any performance issues.
- Send update requests to get feedback from peers or customers while only giving them access to specific information.
## Jump-Start Your Learning & Talent Development with Smartsheet

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

2. **Sign up or log in to Smartsheet**
   - Sign up at [smartsheet.com/hr-solutions/learning-talent-development](http://smartsheet.com/hr-solutions/learning-talent-development). You can also use this with your existing account by logging in.

3. **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.

4. **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.

5. **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

- **Delete sheets you don't need**
  Deleting a sheet is easy! You can learn how to [here](#).

- **Build your own sheet**
  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.

- **Use the “cheat sheets” in this guide**
  To help you get the most out of Smartsheet, we’ve included cheat sheets for formulas and shortcuts at the end of this guide.
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**: 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 + (horizontal cell reference lock).
- Ctrl + (vertical cell reference lock).
- Ctrl + (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.
- \( \text{yes} \): Inserts yesterday’s date.
- \( \text{tom} \): Inserts tomorrow’s date.
- \( \text{next week} \): Inserts date seven days from today.
- \( \text{last week} \): Inserts date from seven days ago.
- Dec 15 / Jan 3 / etc: Inserts date of string entered.

Additional

- Displays the Open a Sheet form.
- Displays the Go To Row form. Type in the row number you’d like to scroll to then click OK.
- Takes you to the first cell of the row you are currently on.
- Takes you to the last cell of the row are are currently on.
- Moves you up in your sheet.
- Moves you down in your sheet.

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

**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:**
  
  ```excel
  =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:**
  
  ```excel
  =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:**
  
  ```excel
  =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:**
  
  ```excel
  =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:**
  
  ```excel
  =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:**
  
  ```excel
  =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, countif s, sumif, sumif s

**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