Consolidate & Increase Visibility with Smartsheet Reports
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Matt Moskal
Company Overview & Role

• Randstad Sourceright, a part of Randstad Holding, a global provider of HR services (talent acquisition and human capital management strategies)

• Business Continuity Partner - create, deliver and drive business standards across the organization via process optimization, communication, and marketing strategies.

• 2 years with Randstad Sourceright and 6 years supporting HR services
Internal Company Realignment

• Newly formed centralized support organization created from 4 lines of business.

• New executive leadership team formed across internal lines of business.

• Four newly created teams within the support organization under new leadership.
Randstad Sourceright

Gaps & Challenges

- Lack of standardization
- Virtual communication & meetings
- Mid-year budget restraints
- Share new initiatives with teams
- Review progress in team meetings and 1:1's
- Share progress with leadership
Reporting Across Sheets
Cross-project portfolio view with reports

- Cross-project portfolio view to visualize and compare status across multiple teams
- See project timelines, statuses and crossover at a high level
- Pull from multiple sheets using standard criteria with a few simple clicks

click for Report

click for Dashboard
Consistency & Standardization
Best practices for building reporting portfolio

- Project sheet standardization and templating is key for referencing similar data across multiple sheets
- Hierarchy formula for surfacing high level information and best dashboard visualization
- Date columns included and utilized for best Gantt chart view in reports
Visibility

Reports to enhance dashboards

- Make metric widgets interactive
- Filters sheet by designated criteria
- Provides leaders more details while keeping dashboard clean
Progress Reporting

Enhance dashboards

- Monthly scorecard embedded in dashboard
- Gantt chart for timeline view of initiatives
- Can filter out details and report at high level for leadership

### csfc 2018 key indicators.

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<th>KI</th>
<th>Key Indicator</th>
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Reports

Best Practices

• Know your audience
• Start with clear understanding of your process
• Work back from the report to your sheets
• Limit reports to relevant metrics
• Standardize on columns
Consolidate & Increase Visibility with Smartsheet Reports
Company Overview & Role

- GE Renewable Energy – Unleashing limitless energy
- Site Manager – Renewable Sector – Wind Power Generation
- Team member for < 2yrs
- Turbines?
  - Approx. $1M per megawatt
  - 50 Turbines powers approx. 30,000 homes
  - Blade length 40 – 100+ meters
  - Complete asset management needed
Turbine Management Challenges

• Managing 75 Turbines - Three Sites
  – Note: There are over 300 Sites in US & Canada
  – Complexity is exponential (different turbine types, maintenance processes, parts)

• No systemic approach for turbine program management

• Disparate data stores, communication methods

• Wasting 20+% of labor resource - tracking, managing OT

• Manual direct material acquisition, receipt, usage

• “...way too many touchpoints...” (issue PO, track OT)

“So here I am, getting charged for all this money for labor, for parts and now starting to not trust the data the GE gives me. It's costing me and it's hitting my margin. I'm not hitting my op plan and I had no visibility to anything that was going on on the site.”

Gurmeet Mangat
Business Manager
Wind Power Generation
GE Renewable Energy
Reporting

What is the goal?

• Optimize the value stream
• Raw data ➔ Customer deliverable good

How do you do it?

• Everything must be understood in less than 100 seconds
• Follow the "3 click" philosophy
Reports Versatility

Filter data for dashboards

- Report for plan of day data entered via web form
- Reports on different sheets with Gantt timeline
- Shortcuts to secondary reports
• Report on additional tasks
• Report on technical history
Turbine-Specific Dashboard

Report Widget - Punch List of Issues to Resolve

Report Widget - Turbine Service History

Google Maps Turbine Locator
Turbine Management Insights, Benefits

• 20% OT Recovery - $400K Savings
• 30% Reduction in Email Communications - $180K Savings
• Consistency in Reporting Eases Director Review Process - Information Digestion
• Simplifies Data Collection at the Site - Better Data, Better Insights
• $25K savings due to holding inventory to 1%

“We are using just about every feature that Smartsheet has built into it today to really run the sites the way that they should be run in North America!”

Gurmeet Mangat
Business Manager Wind Power Generation
Benefits

- Turbine visibility is critical from top down perspective - and horizontally (customer)
- Accountability and audit trail
- Communication efficiency
- Overtime recovery
- Inventory managed to threshold
- Information is available to all key stakeholders at the right level of detail
- Project managers, executive team, customers

ROI / Value Return

- Communication reduction - 30% of leadership ($180K)
- Overtime recovery - 10% of FTE ($200K)
- Material savings for 1% threshold inventory management ($100K)
- Overall value - $480K per year
- 20X annual ROI conservatively
Reports

Best Practices

- Understand EVERYTHING in < 100 sec
- "3 click" philosophy
- Know your deliverables – KPI's
Product Update

#SmartsheetENGAGE
Project Metadata

High-level project information

- Stakeholder/sponsor
- Project manager
- Budget
- Overall % complete
- Overall status
- Start date
- End date
- Business unit
- Corporate initiative
Sheet Summary & Reporting
Consolidate information across multiple projects

What is it?
• A new set of custom fields about a sheet

Why should I use it?
• Standardize project level summary information across your org
• Rollup information across multiple projects through reporting
• Get near real-time updates
• Remove pain points associated with Summary rows

In EAP, Click for Demo
Sheet Summary
Use cases & benefits

Use Cases

• Communicate project summary information
• Elevate key stats from within a sheet using formulas
• Roll-up summary within a portfolio through reporting
• Tag & Track sheets for easier discovery and better organization/alignment to corporate initiatives
• Store general information/notes about a project

Benefits

• Standardized and consistent project level summary information across your org
• Increase visibility to your stakeholders for better decision making
• Make it convenient for your users to get summary info
• Increase your productivity by streamlining
• Easier reporting of summary information across multiple sheets
• Easily search sheets using the metadata
Sheet Summary Evolution
Side-by-side view & interaction

- Select while creating a formula
  - Grid to summary
  - Summary to grid
  - Summary to summary
- See references within a formula
- Open summary by default when sharing
Future capabilities
Continued platform investment

Investing to enable:

• Handling greater scale & volume of sheets and filters
• Faster performance
• Faster feature innovations:
  – Updating report builder
  – Saved filters
  – Formatting
  – Grid & summary as criteria
  – Grouping & Summary
 Reports – Grouping & Summary
Slice & dice the report any way you want

- Group by any data attribute
- Summarize information
  - Sum, Avg., Min, Max, Count, etc.
- Collapse or expand all
- Display as groups and summary in dashboards

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<th>Sales Stage</th>
<th>Product</th>
<th>Estimat...</th>
<th>Sum</th>
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User Education Sessions

Want to learn more?

• Thursday 10/4
  – Smartsheet Reports: Increase Transparency & Accelerate Productivity (Beginner) 9:45 – 10:45 a.m.
  – Tips, Tricks and Troubleshooting Reports (Intermediate) – 9:45-10:45 a.m.

• New Smartsheet Learning Center: smartsheet.com/learning-center
Don’t forget to:

• Share your feedback in our survey in the ENGAGE app
• Stop by the Smartsheet Reports booth on the first floor
• Visit the Innovation Center for hands-on learning, support, services, swag, and more
<table>
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<th>Task</th>
<th>Owner</th>
<th>Role</th>
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<th>End Date</th>
<th>Expense</th>
<th>Status</th>
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<td>Confirm Agenda and Speaker attendance/logistics</td>
<td>Cameron Hunt</td>
<td>Manager</td>
<td>05/23/16</td>
<td>05/24/16</td>
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<td>100%</td>
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<tr>
<td>Ensure gift bag list is part of presentation process</td>
<td>Cameron Hunt</td>
<td>Manager</td>
<td>05/23/16</td>
<td>05/24/16</td>
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<td>Review and Approve Event registration page(s) and emails</td>
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<td>05/11/16</td>
<td>05/12/16</td>
<td>$10,000</td>
<td>✔️</td>
<td>100%</td>
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<tr>
<td>Confirm hotel and C&amp;E reservation details</td>
<td>Cameron Hunt</td>
<td>Editor</td>
<td>05/11/16</td>
<td>05/12/16</td>
<td>$3,500</td>
<td>✔️</td>
<td>100%</td>
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<tr>
<td>Confirm all event details (registration/attendance, food and beverage, check-in, tech, speaker prep, etc.)</td>
<td>Cameron Hunt</td>
<td>Project Manager</td>
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<td>05/12/16</td>
<td>$3,500</td>
<td>✔️</td>
<td>100%</td>
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<tr>
<td>Ensure accessibility requirements are met</td>
<td>Cameron Hunt</td>
<td>Project Manager</td>
<td>05/11/16</td>
<td>05/12/16</td>
<td>$11,200</td>
<td>✔️</td>
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<tr>
<td>Estimate T minus communication plan (speakers, marketing, U&amp;A, LT, stakeholders, etc.)</td>
<td>Cameron Hunt</td>
<td>Editor</td>
<td>05/11/16</td>
<td>05/12/16</td>
<td>$3,000</td>
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<td>100%</td>
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<tr>
<td>Complete “Know Before You Go” call distribution to all event team, ABC</td>
<td>Cameron Hunt</td>
<td>Editor</td>
<td>05/11/16</td>
<td>05/12/16</td>
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**Market Analysis**

- **Market Research**
  - Cameron Hunt | Editor | 05/11/16 | 05/12/16 | $5,000 | ✔️ | 100% |
  - Cameron Hunt | Editor | 05/11/16 | 05/12/16 | $5,000 | ✔️ | 100% |

- **Subtasks**
  - Cameron Hunt | Editor | 05/11/16 | 05/12/16 | $5,000 | ✔️ | 100% |
  - Cameron Hunt | Editor | 05/11/16 | 05/12/16 | $5,000 | ✔️ | 100% |

- **Subtasks**
  - Cameron Hunt | Editor | 05/11/16 | 05/12/16 | $5,000 | ✔️ | 100% |
  - Cameron Hunt | Editor | 05/11/16 | 05/12/16 | $5,000 | ✔️ | 100% |

**Portal**

- **Ballard Store**

- **General Notes**
  - Octoberfest event on week of October 15th
  - City ordinance contact is Samantha Smith at 206-734-0934
  - Strict guidelines on signage

- **Business Unit**
  - Marketing

- **Corporate Initiative**
  - Store Openings
# Sheet Summary Details

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<td>New York Store</td>
<td>43%</td>
<td>$850,000</td>
<td></td>
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</tr>
<tr>
<td>Orlando Store</td>
<td>76%</td>
<td>$775,000</td>
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</tr>
<tr>
<td>Atlanta Store</td>
<td>51%</td>
<td>$875,000</td>
<td></td>
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</tr>
<tr>
<td>Boston Store</td>
<td>53%</td>
<td>$975,000</td>
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<td></td>
</tr>
<tr>
<td>San Diego Store</td>
<td>60%</td>
<td>$500,000</td>
<td></td>
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</tr>
</tbody>
</table>