Automate Your High-Value Processes with Smartsheet Control Center

Latonia Lewis
Services Operations PMO Leader, Sodexo

Rajiv Arunkundram
Director, Solutions Pillar, Smartsheet

Tony Elliot
Manager, Consulting, Trimble

Jim O'Farrell
Senior Product Marketing Mgr., Smartsheet

#SmartsheetENGAGE
Certain information set forth in this presentation may be “forward-looking information.” Except for statements of historical fact, information contained herein may constitute forward-looking statements. Forward-looking statements are not guarantees of future performance and undue reliance should not be placed on them. Such forward-looking statements necessarily involve known and unknown risks and uncertainties, many of which are and will be described in Smartsheet’s filings with the US Securities and Exchange Commission, and these risks and uncertainties may cause actual performance and financial results in future periods to differ materially from any projections of future performance or results expressed or implied by such forward-looking statements. Although forward-looking statements contained herein are based upon what Smartsheet management believes are reasonable assumptions, there can be no assurance that forward-looking statements will prove to be accurate, as actual results and future events could differ materially from those anticipated in such statements. Smartsheet undertakes no obligation to update forward-looking statements except as required by law.

Smartsheet is a registered trademark of Smartsheet Inc. The names and logos of actual companies and products used in this presentation are the trademarks of their respective owners and no endorsement or affiliation is implied by their use.
Agenda

Automating Your High Value Processes with Smartsheet Control Center

- Why Control Center?
- Control Center Usage Examples
- Trimble & Control Center Usage
- Demonstration
- Sodexo & Control Center Usage
- What’s coming!
- Questions and Answers
## Why We Did This...

### Smartsheet – Highly Repeatable Business Process Uses

<table>
<thead>
<tr>
<th>MARKETING</th>
<th>OPERATIONS</th>
<th>IT &amp; OPS</th>
<th>FINANCE</th>
<th>HR</th>
<th>PROJECT</th>
<th>PRODUCT DEV</th>
<th>SALES</th>
</tr>
</thead>
<tbody>
<tr>
<td>STORE COMMUNICATIONS</td>
<td>STORE OPENINGS &amp; RENOVATION</td>
<td>BI &amp; ANALYTICS</td>
<td>AUDIT MANAGEMENT</td>
<td>ONBOARDING &amp; TRAINING</td>
<td>PROJECT PORTFOLIO ROLLUP</td>
<td>NEW PRODUCT DEVELOPMENT</td>
<td>SALES ENABLEMENT</td>
</tr>
<tr>
<td>OMNI CHANNEL MARKETING</td>
<td>STORE MERCHANDISING</td>
<td>OFFICE OF THE CIO</td>
<td>M&amp;A PROJECT TRACKING</td>
<td>RECRUITING AND TALENT ACQUISITION</td>
<td>PROJECT &amp; TASK MANAGEMENT</td>
<td>AGILE DEVELOPMENT</td>
<td>PIPELINE MANAGEMENT</td>
</tr>
<tr>
<td>CONTENT MARKETING</td>
<td>VENDOR &amp; CONTRACT MANAGEMENT</td>
<td>HELP DESK</td>
<td>ASSET MANAGEMENT</td>
<td>RECRUITING EVENT MANAGEMENT</td>
<td>PROGRAM MANAGEMENT OFFICE</td>
<td>PRODUCT LAUNCH</td>
<td>CUSTOMER SUCCESS MANAGEMENT</td>
</tr>
<tr>
<td>EVENT MANAGEMENT</td>
<td>CLOUD MIGRATION</td>
<td>INVENTORY MANAGEMENT</td>
<td>LEARNING AND TALENT DEVELOPMENT</td>
<td>EMPLOYEE RELATIONS AND COMPLIANCE</td>
<td>PMO CORE FUNCTIONS</td>
<td>PRODUCT STRATEGY</td>
<td>SALES OPERATIONS</td>
</tr>
<tr>
<td>PAID SEARCH</td>
<td>DEPARTMENT BUDGET TRACKING</td>
<td>DEPARTMENT BUDGET TRACKING</td>
<td>EMPLOYEE RELATIONS AND COMPLIANCE</td>
<td>HR SUPPORT AND SYSTEMS</td>
<td>KNOWLEDGE MANAGEMENT</td>
<td>PRODUCT TESTING</td>
<td></td>
</tr>
<tr>
<td>WEBSITE MANAGEMENT</td>
<td>EMAIL MARKETING</td>
<td>PUBLIC RELATIONS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Deliver Consistency Across Lifecycle of Projects & Processes

- Demand Management
- Project Initiation
- Portfolio Reporting
- Change Management
- Close Out / Archival

Control at Scale
Real Time Visibility | Adoption of Best Practices | Automated Portfolio Reporting | Manage Change at Scale
Control Center Framework

Automation

Project Dashboards
PM, BUSINESS, IT DASHBOARDS

Reports
PM, BUSINESS, IT USER REPORTS

Sheets
PLANS, BUDGETS, ISSUE TRACKER, RESOURCE PLANNER

Profile Data

Demand Management

Intake

Portfolio Dashboard & Reports

Flexible & Easy to Use

Standards & Control

Control Center

Project A
Project B
Project C
Project D
Project E
Transportation Mobility – What We Do?

Safer, Greener, Better

• We enable our customers to connect all aspects of their fleet—trucks, drivers, freight and assets—to reach new levels of safety and efficiency.

• Unified by a common vision—to connect every facet of transportation through mobility—we are Trimble. We invite you on this journey. To work collaboratively, forge new roads, and make the world safer, greener, better.
TTM – Professional Services

PROFESSIONAL SERVICES

A Group of Professionals that include 11 Industry Certified Transportation Professionals and over 220 Combined Years of Industry Knowledge and Experience that are ready and waiting to help both Sales and Customers Identify, Implement, Track, and Achieve their Goals and ROI.
Business Challenges

- Started: MS Project, MS Word, MS Excel
  - Progressed to: Google Suite, sheets and docs and drive
- Common Pain Points with MS Suite and G Suite
- However, left a gap for project and portfolio management
Business Challenge

- Started to see the real power of Smartsheet
  - However, consistency, template control, complexities w. project creation surfaced
  - Reporting, dashboards especially aggregate reporting time consuming, manual
Key Benefits – Control Center

– Something we could learn and own
– Smartsheet Professional Services held us accountable to the project
– Templates that we could build and adapt
– Easy one process for users – select your templates and you’re in business
Long, Inc. - Automated WorkFlow Integration Project

**Project Health**

- Start Date: 06/18/18
- End Date: 09/16/18
- % Complete: 67%

**Task Progress**

- Total Completed Tasks: 29
- Total Overdue Tasks: 7
- Overdue Milestones: 4
- Red Tasks: 4
- Yellow Tasks: 3

**Task Health Count**

- Task Health - Red: 4
- Task Health - Yellow: 3
- Complete Tasks: 29

**Summary Gantt**

- Long, Inc. - Automated WorkFlow Integration Project
- Phase 1 - Project Preparation by Managed Services
- Phase 2A - Automated Work Flow Week 1 (Configuration & Testing)
- Phase 2B - Automated Work Flow Week 2 (Testing & Training)
- Phase 3 - Post On Site Follow Up

**Customer Project Links**

- Your Pre-Work Questionnaire
- Your Project Plan
- Your RACI (Roles & Responsibilities)
- Your Issues Tracker
- SOW - Project Objectives
- Other Project Documents/Files
Learnings – Best Practices

• **Learnings**
  – Understand yourself well.
  – Control Center was much easier to own than we anticipated

• **Best Practices**
  – Operate with fewer templates.
  – Challenge those assumptions for more templates in the beginning
  – Consistency and ease of use which drives compliance is much more valuable than any “special” requirements.

- **Operational** - Monitor ongoing KPIs for performance on specific initiatives and projects
- **Analytical** - Shows data over a time frame, encourages data-based decisions
Control Center

Demonstration
Smartsheet Control Center

Continuous Improvement of
NorAm So Project Management Practices
At Sodexo, we believe that the best way to create real, lasting value is to make people the central focus of organizations and society as a whole.

We develop, manage and deliver a unique array of On-site Services, Benefits & Rewards Services and Personal and Home Services for all our clients to improve the Quality of Life.

Sodexo provides support in the following industries: Corporate, Education, Energy & Resources, Government, Healthcare, Senior Living, Sports and Leisure.
The North American Service Operations organization is charged with supporting efforts to bring the best of Sodexo to our clients, consumers, and employees. It is an integral part of Operations. It drives standardization and expertise across all of our lines of business (Segments) in all regions with dedicated Food and FM Service Platforms.
We were facing an **uphill challenge** with effective project execution....

**Results:** project delays, scope creep, negative budget impacts, inconsistent project execution, continuation of “silo operations”, missed opportunities for innovative solutioning, duplication of efforts, lack of maturation in project management maturity.
## The Sodexo Project Management Framework (PMF)

### Building a Firm Enabling Foundation

**Defining a Platform For Enterprise Portfolio Management**

<table>
<thead>
<tr>
<th>Project Management</th>
<th>Robust Reporting</th>
<th>Monitoring &amp; Tracking</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Project Lifecycle</td>
<td>✓ Dimensional reporting at various stakeholder levels</td>
<td>✓ Use of key performance indicators (KPIs) to monitor:</td>
</tr>
</tbody>
</table>
| ✓ Standardized project artifacts and practices | ✓ Use of dashboards with real-time reporting providing planning & progress visibility to *both SO & Segments* | |`
| ✓ Portfolio governance process | ✓ Ability to produce meaningful ad-hoc reports to various stakeholder groups | |`
| ✓ Resource utilization analysis | | |`
| ✓ Prioritization of work efforts | | |`

- Compliance
- Efficiency
- Benefits
Monthly Project Status Update Reporting

**Monthly Status - Traditional Report**

- **06/05/18**

**Operational KPIs Recent Updates - Traditional**

- **KPI**
  - **KPI Description**
  - **Type of KPI**
  - **KPI Calculation**
  - **Areas Impacted**
  - **Areas Comments**
  - **Corporate Services Impact**
  - **Corporate Services Benefits**
  - **Energy & Resources Impact**
  - **Energy & Costs**
Introduction of any new process has to be managed
- Leadership buy in prior to implementation
- Created a strategic plan
- Garnered feedback from key stakeholders throughout the processes
- Provided constant communications
- Realize that there is a high probability that there will be resistance to the change

Realize that the system will continue to evolve
- System familiarity breeds expanded usage.
- Create a user group – we did!
- Plan for continuing education on Smartsheet – attend webinars or ENGAGE!
Road Map

Automating Your High Value Processes with Smartsheet Control Center

• What’s coming!
• Global Updates for dashboards and reports
• Managed Objects
• Open mic
Resources

Control Center

- Help articles
- Workshop series
- Customer use cases
- Best practices
- Documentation
- Managing change
  (technology, people, process)
- Training
Don’t forget to:

• Share your feedback in our survey in the ENGAGE app
• Stop by the Smartsheet Control Center booth on the first floor
• Visit the Innovation Center for hands-on learning, support, services, swag, and more