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Agenda

• Introductions
• Smartsheet in Marketing: 3 Use Cases
• Roundtable Discussion
• Open Q & A
Karrie Sanderson
Smartsheet - Moderator

- Senior Director Brand Marketing
- Joined Smartsheet in 2017
- 25 years of marketing and business strategy experience at Coca-Cola, Starbucks, Pfizer, Relevate Health Group (founded the agency), and Smartsheet
- Engineering education with undergrad (UW – Madison) and Masters (Georgia Tech)
Jessie Doel
Southeastern Grocers

- Marketing Partnerships
- 8+ years of marketing experience delivering fully integrated campaigns
- Joined SEG in 2017
- Identified by Senior Management as one of the Top 40 under 40 Executives at SEG
- Known for developing campaigns that deliver ROI through streamlining process, reducing investment and improving results
Robin Allen  
IQVIA

- MarCom Operations Manager
- Joined IQVIA in 2015
- Operations and Product Management background
- Implemented Smartsheet at the enterprise level twice
- Bachelors of Science in Business Administration (University of Redlands)
- Fun fact: Husband bought Smartsheet stock for my birthday present
Erin Libardoni
Fortune Brands Home & Security

- Corporate Communications Manager
- Joined Fortune Brands in 2016 & currently leads internal and external communications, social media strategy and community relations
- 10+ years leading marketing & corporate communication efforts across various industries
- BA English, Providence College, MS Communications Management, Simmons College
Fortune Brands Home & Security
Fortune Brands Home & Security

Overview

- Home and security consumer products company headquartered in Deerfield, IL Began trading on the New York Stock Exchange following our spin-off from Fortune Brands, Inc. (NYSE: FO) on October 4, 2011
- Industry-leading brands and innovative cabinetry, plumbing, door and security products
Fortune Brands Use Case

Cross-company uses

- Content management
- Corporate communications
- Project management
- Survey collection
- Data centralization
Fortune Brands Use Case

- **The Challenge:** Centralize content processes across internal and external channels to a workforce size of ~23,000 associates.

- **The Solution:** Leverage Smartsheet capabilities to create a customized corporate communications calendar.

- Support the build-out of corporate calendars across FBHS operating segments.
Identified most important categories to report on

Organized by month and broken out by week

Incorporated formulas, built-in automation, drop-down selectors & color coding

Example: Categorizing a piece of content for social media instantly populates an “external” field to use for amplification
Fortune Brands Insights

- Content planning and training are key
- Align on the most important reporting categories
- Share content process with key organizational stakeholders
- Make your sheet work for you
- Leverage Smartsheet resources and trainings
What is your experience?

Tell us about it!
Company Overview

IQVIA

- IMS Health (Technology/Data) and Quintiles (CRO) merged October 2016
- Changed name to IQVIA from (QuintilesIMS) November 2017
- Pronounced “eye-queue-vee-aah”
- Approximately 55,000 employees in more than 100 countries
- 3 global business units and 6 regional business units
- Provide solutions that enable life sciences companies to drive human health outcomes forward
IQVIA Use Cases

Strategy, Marketing, and Communications Department

• Event and Webinar Management (500-600 Year)
  – Use Control Center to provide project templates, consolidated reporting and real-time visibility for events

• Executive Approvals for Expense Submissions and Vendor Agreements
  – Use DocuSign integration and forms to submit SOWs, POs and contracts for approval

• Quarterly Executive Marketing Activity Dashboard
  – Use dashboard to provide analysis on all global marketing activities and marketing channels

• Executive Approvals for External Speaking Engagements and Presentations
  – Use automated approval workflows and update requests based on certain criteria for approvals

• SMC Department Portal (One-Stop Shop)
  – Use dashboard as a launch pad to key IQVIA resources and systems

• Managed the IMS Health/Quintiles Merger/Rebrand/Acquisitions
  – Required full visibility of all marketing activities for 9 business units
Deep Dive
Quarterly Executive Marketing Activity Dashboard

Drive insights for leadership on all global marketing activities and marketing channels

- View activities by business unit and activity type, active versus complete, planned versus not planned, budget/cost, vendor, duration, at risk, key priorities, marketer reports

How is this accomplished?

- Dashboard connects to channel calendar forms (over 500 contributors)
- Activity submissions populate calendars
- Activities link out to Marketers Action Plan (MAP) sheets by business unit
- Reports/dashboards pull from sheets managed by marketers
- Shared via url with leadership and key stakeholders
Best Practices

• Assign Smartsheet system administrator
  • Collaborate with team
  • Ensure consistency of platform for reporting/dashboards
• Continually learn and develop platform
  • Engage with your customer success manager/consultant
  • Attend webinars/follow blogs
  • Know available integrations to implement as required

Key Learnings

• Follow the paper trail to eliminate hours of manual work (save time and money)
• Identify repeatable tasks using LEAN techniques and reduce work by using templates and roll-up reporting
• Conduct open forums with teams to understand their pain points and determine how to streamline
• Prepare for quick user adoption so you can maintain control and consistency
• Enable operational excellence with consistent execution
Southeastern Grocers (SEG)
Overview of SEG

- 5th Largest grocery chain in the USA
- Operating across 7 states
- Four multilevel brands one bilingual
- 577 stores
- Over 50,000 associates
SEG Marketing

• Managed over 90, 20 week projects in 2018

• Each project requires of 10 weeks planning and 12 weeks in market

• Running 15-20 concurrent projects at a time

• Moved all project communication, campaign, media and creative briefs into Smartsheet

• Build marketing and project plans in Smartsheet

• Create shared workspace for all project collaborators
SEG Process run by Smartsheet

**Planning**
- Regional research shared
- Campaign brief submitted
- Marketing complete campaign brief

**Briefing**
- Write media brief
- Media recommendations received
- Media booked and marketing plan completed
- Creative brief written

**Execution**
- Studio/s deliver creative
- Marketing deliver artwork to all vendors
- LMM complete leadership docs
- Campaign live
Smartsheet Deep Dive

SEG Creative Briefs

- All briefs are sent for approval to the region
- All changes tracked requiring approval from project owners, all collaborators receive change notifications
- Multiple media, vendor and design agencies are sent briefs that are tracked and time stamped
- Department partners pull data from briefs into their Smartsheet content calendars and schedules
Smartsheet in action at SEG
Best Practices
• Take the whole team with you
• Define the process and language
• Keep everyone accountable
• Refine what works
• Don’t over complicate it

Key Learnings
• Have a 100ft and 10ft view at all times
• Be ruthless with automation
• You’re only as good as your weakest Smartsheet user
• Everything can live in Smartsheet
• We still have a lot more to learn
Don’t forget to:

- Share your feedback in our survey in the ENGAGE app
- Visit the Innovation Center for hands-on learning, support, services, swag, and more