

smartsheet ENGAGE /

Customer Panel:
Smartsheet in Healthcare



Oscar Gonzalez
Senior Planning Program
Manager, Karyopharm



Randy Cook
Director of Commercial
Operations & Market
Development, Aspen
Medical International



Shannon Lingwall
Revenue Cycle Manager,
University of Utah Health

#SmartsheetENGAGE

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Agenda

- Introduction
- Smartsheet in Healthcare: Customer Insights
- Open Q & A

Jana Morrelli

Smartsheet Senior Manager, Customer Success

- Healthcare background- UnitedHealthcare, Early Stage Medical Devices
- Lead a team of 9 customer success managers/associates
- Healthcare focus - learn from customers like you



Oscar Gonzalez

Karyopharm Therapeutics

- **Program Planning, Analytics, and Innovation department lead**
- **Delivering business solutions for the complexity of clinical research**
- **M.S. Boston University - 2016
M.B.A. Boston University- Present**



Randy Cook

Aspen Medical International

- Director of Operations & Market Development
- Global operations in Africa and the Middle East
- 20 years DoD: Leader in Special Operations



Shannon Lingwall

University of Utah Health

- Revenue Cycle Manager
- Training, Culture, and Innovation leader
- Smartsheet user for 2 years





Karyopharm Therapeutics

Oscar Gonzalez

Senior Program Planning Manager

The opinions expressed in this presentation and on the following slides are solely those of the presenter and not necessarily those of Karyopharm Therapeutics. Karyopharm Therapeutics does not guarantee the accuracy or reliability of the information provided herein.



- Clinical-stage pharmaceutical company founded in 2008
- Newton, MA
- ~300 full-time employees and contractors, and growing!
- Submitted first new drug application to the FDA in August 2018



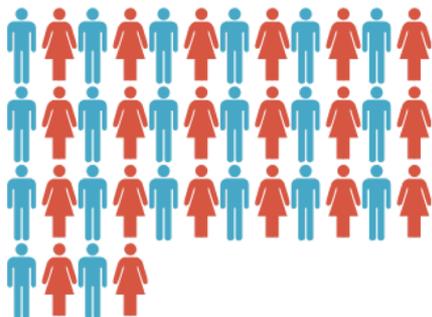
The Challenge

- Multiple spreadsheet trackers
- Lack of version control
- No visibility for collaborators
- Ph 3 study contained >50 internal/external team members



2600+

Patients dosed since 2009



8

Ongoing Company Sponsored Trials

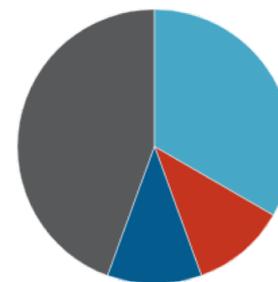


23

numbers of countries actively on study

300+

Hospitals and Clinics



- Multiple Myeloma 3
- Liposarcoma 1
- DLBCL 1
- Other Oncology 4



Team Leads

Sr. CPM: Leo D



Med. Dir. Ken J.



VP ClinOps: Oprah W.



 [BOSTON Team Roster](#)

Smartsheet Support: 1 (844) 498-5364 (9a-9p EST)

Smartsheet ProDesk:

[30 minute session sign up](#)

Activation Status

125

Sites Activated

120

Currently Active

Goal This Month: 122

Total Pending Activation: 5

In Feasibility: 0

FE CTA w/ No SIV: 0

SIV w/ No FE CTA: 0

SIV w/ FE CTA, Not Active: 1

No SIV w/ No FE CTA: 4

356

Enrollment Days
Remaining

Accrual Index (0 to 1): **0.91**

Enrollment Rate: **0.25**

Current % Sites Enrolling: **71%**

Projected Enrollment (of 275): **300**

Remaining Enrollment Months: 11.86

LPI: 07/31/2019

Key Reports

-  [R-330-023 FE CTA/ No SIV](#)
-  [R-330-023 SIV/ No FE CTA](#)
-  [R-330-023 SIV/ FE CTA, Not Active](#)
-  [R-330-023 No SIV/ No FE CTA](#)
-  [KCP-330-023 TMF Migration Issues](#)

72

Total Patients
Enrolled



Goal This Month: 70

Randomized Arm 1: 32%

Randomized Arm 2: 36%

Randomized Arm 3: 32%

Screening Patients: 12

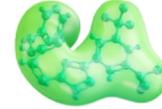
Pre-Screening: 32

Screen Fail Rate: 14%

Pre-Screen Fail Rate: 12%

Key Enrollment and Planned Activation Reports

-  [R-330-023 Patient Breakdown By Country](#)
-  [R-330-023 Active >2 Months Randomization](#)
-  [R-330-023 Active No Randomizations](#)
-  [R-330-023_BOSTON Escalations - Legal](#)



Selinexor NDA Workspace

NDA Lead: Barbara S



Project Manager: Drew S.



Project Manager: Jonathan S.



[Module Leads](#)

[Team Rosters](#)

Karyopharm's First NDA Submission

Selinexor- Multiple Myeloma

Module 1 Sub-Tasks	Module 2 Sub-Tasks	Module 3 Sub-Tasks	Module 4 Sub-Tasks	Module 5 Sub-Tasks
100% Completed	100% Completed	100% Completed	100% Completed	100% Completed
23 Total	86 Total	257 Total	83 Total	322 Total
0 In Progress	0 In Progress	0 In Progress	0 In Progress	0 In Progress
0 Not Started	0 Not Started	0 Not Started	0 Not Started	0 Not Started
Module 1 Completion	Module 2 Completion	Module 3 Completion	Module 4 Completion	Module 5 Completion
Milestones (of 7): 100% Parents (of 4): 100% Tasks (of 8): 100%	Milestones (of 6): 100% Parents (of 22): 100% Tasks (of 97): 100%	Milestones (of 2): 100% Parents (of 21): 100%	Milestones (of 2): 100% Parents (of 7): 100% Tasks (of 31): 100%	Milestones (of 7): 100% Parents (of 29): 100% Tasks (of 76): 100%

SUBMITTED

Days Until Module 3 Submission

SUBMITTED

Days Until Module 4 Submission

0

Days Until Final Submission

Key Reports

- [NDA Timeline](#)
- [Tasks by Lead](#)
- [R- Tasks Due in 7 Days](#)
- [R- Delayed Tasks](#)
- [R- QC Report Mod 5](#)

Health of Module Key

- <2% Delayed Sub-Task:
- 2-5% Delayed Sub-Task:
- >5% Delayed Sub-Task:

Selinexor NDA Workspace

NDA Lead: Barbara S



Project Manager: Drew S.



Project Manager: Jonathan S.



[Module Leads](#)

[Team Rosters](#)

Karyopharm's First NDA Submission



New Drug Application SUBMITTED

Module	Sub-Tasks	Total	Completed	Percentage
Module 1	Sub-Tasks	28	28	100%
Module 2	Sub-Tasks	97	97	100%
Module 3	Sub-Tasks	21	21	100%
Module 4	Sub-Tasks	31	31	100%
Module 5	Sub-Tasks	76	76	100%

SUBMITTED
Days Until Module 3 Submission

SUBMITTED
Days Until Module 4 Submission

0
Days Until Final Submission

Key Reports

- NDA Timeline
- Tasks by Lead
- R- Tasks Due in 7 Days
- R- Delayed Tasks
- R- QC Report Mod 5

Health of Module Key

- <-2% Delayed Sub-Task: 😊
- 2-5% Delayed Sub-Task: 😐
- >5% Delayed Sub-Task: 😞

Lessons Learned

- Transformation takes time
- Control HOW Smartsheet is being used early on
- “Does this make sense for my potential audience?”
- Once perfected, find a better way





Aspen Medical International

Randy Cook

Director of Operations & Market Development



Who We Are

- Global footprint HQs in both U.S. and Australia
- Provide outsourced healthcare solutions
- Specialize in remote, challenging, and under-resourced environments
- Collaborate across Americas, APAC, and EMEA
- Evolve our solutions to meet client demands

The Challenge

2016-2018

- 59% HQ staff reductions
- Expansion in Africa >2x

Loss of trust

- Reduced staff
- Resource constraints across disaggregated teams

Needed to evolve

- Business systems
- Processes
- Collaboration tools

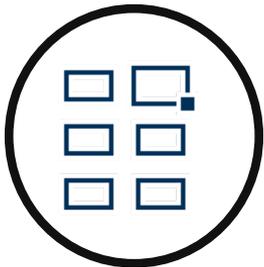
Implementation



Program Management Office
improvements via shared
workspace and real time
visibility



Outward-facing reporting
gaining partner and client
confidence



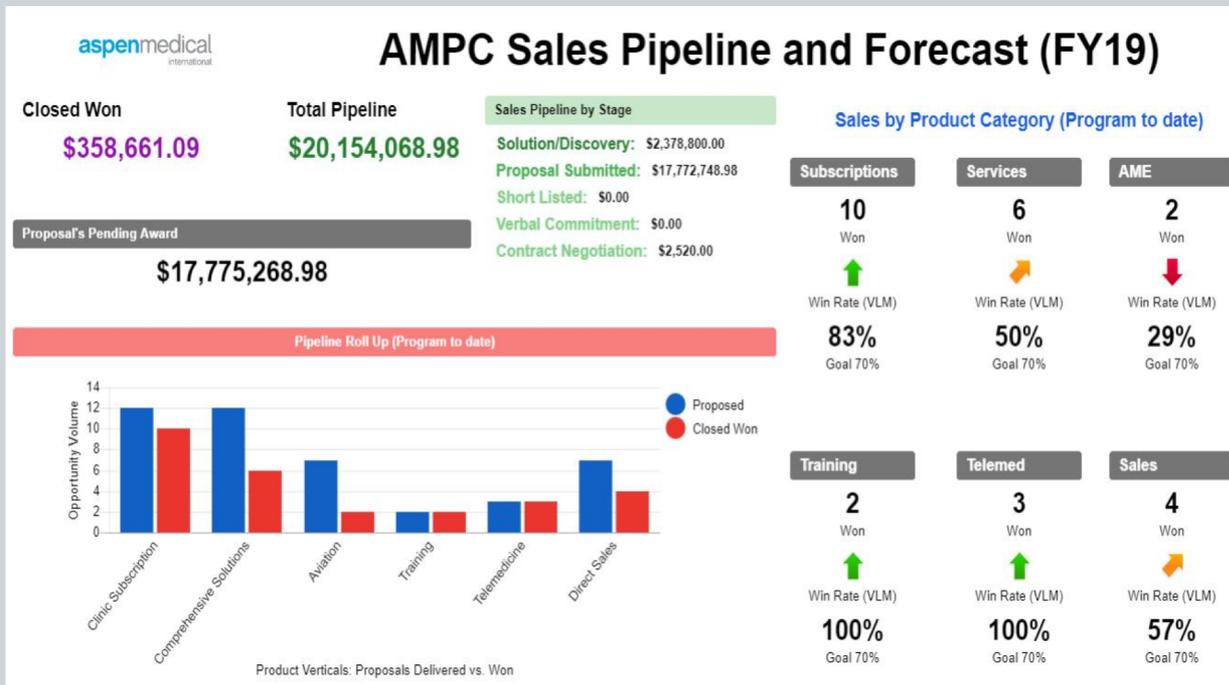
Mid- and high-level reporting
improvements via multi-level
dashboards fed by team
workspaces



Administrative processes
across the enterprise

Benefit Realization

- Clarity for internal and external stakeholders
- Real-time support for project and program managers across the enterprise (swifter information to action)
- Reduced meeting times via cleaner communication channels
- Improved access to information via plug-in tools such as Office 365





University of Utah Health

Shannon Lingwall

Revenue Cycle Manager



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4 Hospitals

747 Beds

12 Clinics

200 Specialties

1,400+ Physicians

2.5M Patients

The Challenge

- Need to increase efficiency
- Communication delays
- Creating an accurate and timely onboarding experience
- Ability for multiple users to access and update at the same time
- Ease of use

Solution

- Centralized onboarding/off-boarding using alerts and automation
 - Forms can be completed on a computer or mobile device
 - Templates provided a quick start to new sheets
 - One area for requests
 - Cross-team communication
- Training tracker for institutional requests
 - Makes prioritization a breeze
 - Quick view for status updates
- Customization tool for marketing
- Compiled survey results

Tracker

FY19 Goal	Column...	Area Requesting	Title	Training Requested	Duration	Start	Finish
	●	Community Clinics	Outpatient Services Director	Customer Service (15 staff)	3 Hours	01/08/18	01/08/18
	●	OD	OD Consultant	Birkman Team Activity	1.5 Hours		
	●	Interpreting Services	Interpreter	Supervisor Prep	5 Hours		
	●	Resiliency Center	Associate Professor	All Trainings	Varies		
	●	Community Clinics	Business Ops Manager	OneNote	1 Hour	03/27/18	03/27/18
	●	Health Plans	Project Manager	OneNote	1 Hour	03/27/18	03/27/18
	●	Internal Med	Internal Med Director of Operations	Revenue Cycle	16 Hours		
●	●	Huntsman Home	Director Hospital at Home	Birkman Team Activity	2 hours	07/27/18	07/27/18
●	●	Project Administrator	Project Administrator	Customer Service	3 hours		
●	●	Clinical Staff Nurse Educators	Clinical Staff Nurse Educator	Customer Service	3 hours	07/30/18	
●	●	Simulation Team	Executive Director of Simulation	Customer Service	3 hours	10/08/18	
●	●	Student Services	Associate Professor	Customer Service	3 hours	10/08/18	
●	●	Dermatology	Service Director	Customer Service	3 hours		

Forms



The desktop view of the form features the University of Utah Health logo at the top center. Below the logo, the title "Birkman Team Activity" is displayed. The form contains several input fields, each with a red asterisk indicating a required field. The fields are: "Team Name (web form)", "Request Date (Web Form)" with a date picker icon, "Requested By (Web Form)", "Manager (Web Form)", and "Supervisor (Web Form)".

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Birkman Team Activity

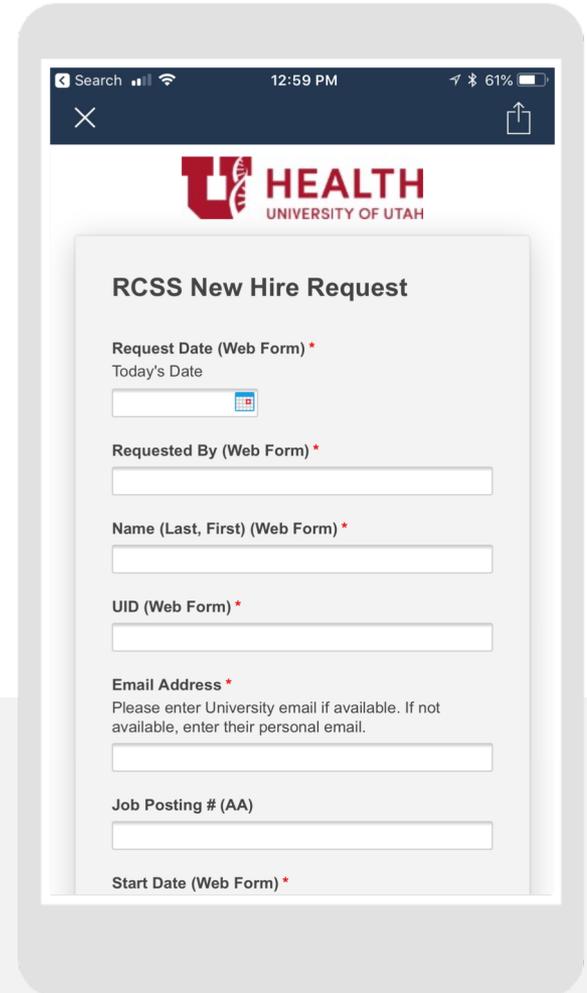
Team Name (web form) *

Request Date (Web Form) *
Today's date

Requested By (Web Form) *

Manager (Web Form) *

Supervisor (Web Form) *



The mobile view of the form displays the University of Utah Health logo at the top. The title "RCSS New Hire Request" is centered below the logo. The form includes several input fields, each with a red asterisk. The fields are: "Request Date (Web Form)" with a date picker icon, "Requested By (Web Form)", "Name (Last, First) (Web Form)", "UID (Web Form)", "Email Address" with a note: "Please enter University email if available. If not available, enter their personal email.", "Job Posting # (AA)", and "Start Date (Web Form)".

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RCSS New Hire Request

Request Date (Web Form) *
Today's Date

Requested By (Web Form) *

Name (Last, First) (Web Form) *

UID (Web Form) *

Email Address *
Please enter University email if available. If not available, enter their personal email.

Job Posting # (AA)

Start Date (Web Form) *



Survey Results Dashboard

Birkman Debriefs Complete : 98%

Birkman Debriefs Complete -NR/NI : 98%

Total Survey Results YTD : 100.0%

RCSS EQWIP Training Survey

RCSS EQWIP Training Survey - EXISTING STAFF

Total Results

FY18 : 98.5%
FY19 : 100%
FY20 :
FY21 :

What was your favorite part of the training?:

This was a great training. The examples, slides, presenters were very informative and gave a lot of great experience.

Current FY Monthly Results

July : 100%
August : 100%
September :
October :
November :
December :
January :
February :
March :
April :
May :
June :

Total Results

FY18 : 99.5%
FY19 :
FY20 :
FY21 :

What was effective in how the trainers taught?:

They made it so fun while passing on the information we needed to learn!!

Current FY Monthly Results

July :
August :
September :
October :
November :
December :
January :
February :
March :
April :
May :
June :

Professional Module #1

Professional Module #2

Total Results

FY18 : 98.4%

Current FY Monthly Results

July :

Total Results

FY18 : 96.2%

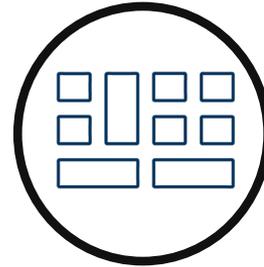
Current FY Monthly Results

July :

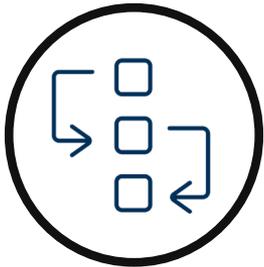
Outcome



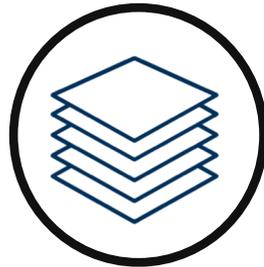
Increased accuracy in onboarding/off-boarding process



Dashboard helped **save time** searching for folders and files



30% efficiency gain through automation and forms



Training team is currently using **71 active sheets**

Dashboard

RCSS TRAINING DASHBOARD

Onboarding

- RCSS New Hire Request
- RCSS Termination
- Transfer out of RCSS
- Transfers within RCSS
- Folder Administrator List
- New Hire Questionnaire

Vendor

- Vendor Affiliate Forms
- Vendor Affiliate Onboarding
- Vendor LMS
- Vendor Terminations
- Vendor Transfer

Front Office

- Front Office Training

Professional Program

- Birkman Tracking
- Patricia Team Building S...
- Professional Minute
- Professional Program Ch...
- RCSS Employee Profess...
- RCSS Team building Se...
- RCSS Team Building Sta...
- Professional Champion T...
- Professional Module 1
- Professional Module 2
- Professional Module 3
- Professional Module 4

Supervisor Training

- Supervisor Fast Track
- Supervisor Prep Academy

Operational Program

- Department Operational...
- Realignment
- RCSS EQWIP Training S...
- RCSS EQWIP Training S...

Survey Results

- Customer Service Survey
- New Hire Questionnaire
- Professional Champion T...
- Supervisor Fast Track Su...
- Supervisor Prep
- Survey Results
- Professional Module 1
- Professional Module 2
- Professional Module 3
- Professional Module 4
- RCSS EQWIP Training S...

RCSS Sign-up Sheets

- Birkman Debrief
- Birkman Team Activity
- Customer Service Training
- Outlook 101
- RCSS Department Traini...
- RCSS Development Mod...
- RCSS Leadership Coach...
- RCSS Professional Minute
- RCSS Professional Mod...
- RCSS Professional Mod...
- RCSS Team Building Mo...

Customer Service

- e-Learning Tracker
- Facilitator Survey
- Customer Service Survey

Marketing Training

- 1 Customization Questio...
- 2 Customization Questio...
- 3 Customization Questio...
- 4 Customization Questio...
- Industry Contact Names
- Industry Contacts
- Marketing Communicatio...

Training Requests

- Institutional Needs
- RCSS Training Requests
- Certificates
- Audits
- Team Validation Meetings
- Training Plan
- Training Prioritization

Links

- [RCSS Training Pulse Te...](#)
- [RCSS Leadership Pulse...](#)

Survey Results

Total Survey Results YTD - 100.0%

RCSS Employee Professional Tracking List

- Birkman Assessments Complete : 99%**
- Birkman Debriefs Complete : 98%**

Lessons Learned

- It's so quick to start, I wish I would have started earlier
- It only takes minutes to import existing spreadsheets
- Efficiencies far outweigh invested time



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