Smartsheet in Customer-Centric Solutions

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#SmartsheetENGAGE
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Smartsheet in Customer Centric Solutions

What does this mean?

Communicate

Elevate

Grow
CAVUSmartTags™
A Smart Aircraft Dismantle Solution
Challenge

How do we allow our customers to quickly recoup their large capital investment?
Steps Taken...

- Started with a template sheet
- Leveraged forms
- Notifications via update requests
- Began utilizing the API
Customers have real-time access to parts, which translates to revenue.

Update requests give feedback to employees to correct issues before they become customer problems.
Management Results

CAVU Management can now easily collect data on performance & production across all sites.
Management Results

20% Reduction in time

95% Reduction in invalid parts

50% Increased output
Lessons Learned

• Do not fear the API
• Overcome other issues
• Identified employee inefficiencies to improve individual output production
• Saves money on human resources
Marketo University: Operations

Improved efficiency directly translates to better, faster service for all stakeholders
Marketo University Operations

Too much information in too many places!
Steps Taken...

- Identified areas of growth in current public training operations processes
- Prioritized needs based on customer service first
- Championed to team to streamline communication and automate
Results Dashboard

- Rapid response time for our customers
- Fast, accurate reporting
- Automated internal communication
Lessons Learned

• Smartsheet is so much more than a tool
• Spend a little time now to save a lot of time later!
• There is always room for improvement
SAP Ariba Supplier: Enabling Real-Time Visibility for the Customers

Improving real time visibility and collaborative effort for our customers = delightful customer experience
Challenge

How do customers NOT know who they buy from???
Steps Taken...

• Partner with customers to provide ideas to solve problems
• Validate data *early* using forms
• Monitor, understand and fix issues *later* using dashboards
Before...

- Assist customers to “survey” the people that do have the data
- Customize the form to collect data that will indicate best path forward
- Shared access allows project team to tap into one source of information
After...

### ABC Pilot Dashboard

- **Complete**: 14 (28.0%)
- **In Process**: 31 (62.0%)
- **With ABC**: 5 (10.0%)
- **New**: 0 (0.0%)

### Outreach Status (excluding not started)

<table>
<thead>
<tr>
<th>Outreach Status</th>
<th>Count</th>
<th>Percent</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete</td>
<td>14</td>
<td>28.0%</td>
<td>Supplier has taken action</td>
</tr>
<tr>
<td>Pending</td>
<td>9</td>
<td>18.0%</td>
<td>Waiting for response from supplier</td>
</tr>
<tr>
<td>Recontact</td>
<td>22</td>
<td>44.0%</td>
<td>ABC has resent invite or supplier action is not complete</td>
</tr>
<tr>
<td>ABC</td>
<td>0</td>
<td>0.0%</td>
<td>Pending direction from ABC</td>
</tr>
<tr>
<td>ABC RESEND</td>
<td>1</td>
<td>2.0%</td>
<td>ABC to resend invitation to supplier</td>
</tr>
<tr>
<td>ABC REQUESTOR</td>
<td>4</td>
<td>8.0%</td>
<td>Pending additional info from BMS Requestor</td>
</tr>
</tbody>
</table>

### Root Cause Issues

- **INCORRECT INITIAL CONTACT (FORWARDED)**: 6 (22.2%)
- **INVALID DATA**: 5 (13.9%)
- **MISSED EMAIL**: 3 (8.3%)
- **MISUNDERSTANDING OF REQUEST**: 11 (30.6%)
- **OTHER**: 6 (16.7%)
- **UNRESPONSIVE**: 3 (8.3%)

**PILOT SCOPE**

- **50 TOTAL SUPPLIERS IN SCOPE**
- **36 WITH ROOT CAUSE DIAGNOSIS**
Lessons Learned

• Be open to trying a new way to address challenges
• Real-time visibility can relieve anxiety and e-mail stress
• Turns a common project into a collaborative partnership
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
Thank you!
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