About Sales Operations

Empowering sales teams to focus on the best revenue generating activities is at the center of any good sales operation. Smartsheet’s Sales Operations solution helps you manage and coordinate sales teams, territories, escalations and more. This guide is built to help you use Smartsheet to run a world-class sales operations and, ultimately, to drive more revenue.

Run a world-class sales operation
Support deal-making escalations, organize and manage your territories, track rep performance and more.

Spend more time with customers
Give your sales team easy-to-use tools so they can spend more time with customers and less time on operational processes.

Increase deal value and velocity
Stay on top of what’s needed to close major deals so you can close faster.
Who should use this guide

Whether you lead or play a role in running sales operations for a small team or a large one, you’re in the right place.

Common roles/titles who will benefit from this solution include:

- Sales Operations
- Sales Executives
- Sales Enablement
- Sales Managers
- Account Managers
- Finance Managers
- Human Resources

Purpose

This guide is designed to offer examples of how your sales operations team can use Smartsheet to oversee, monitor and track sales operations. We have a wealth of specific how-to resources in our Help Center, so the focus of this guide is:

1. An overview of the solution
2. A tour of the individual sheets
3. How to get going
4. Helpful resources and cheat sheets
Components

1. PLAN
   - Territory Management
   Create an optimal territory structure that drives revenue.

2. TRACK
   - Sales Project Tracker
   - Sales Issues Tracker
   Get the most out of your investments by aligning your people with key accounts.

3. MANAGE
   - Commissions Management
   - Deal Management
   Streamline the deal-making process and ensure that you’re accurately rewarding your team.

Sales Operations Solution Guide
Territory Management

Managing territories involves consolidating a lot of disparate information – data from multiple systems, input from sales reps, approvals from executives, etc. Smartsheet’s Territory Management template helps you coordinate all of this work in one place. You can document basic territory information, add historical sales totals, show future projections, and more.

A. Use discussions to document input on territory structure.
B. Share the sheet so everyone from executives to individual reps can collaborate on the territory planning process.
C. Enable conditional formatting to visualize which territories have been improving YOY.
D. Use symbols, like dollar signs, to visually call attention to your best growth opportunities.
Sales Project Tracker

Sales operations teams need to help drive projects and initiatives across the sales organization to ensure that efforts are ultimately driving revenue. Smartsheet’s Sales Project Tracker Template gives you the ability to see information about all of your projects in real time, organize them by priority, show status, and assign owners.

A. Show project status visually with symbols like RYG balls.
B. Assign owners to promote accountability.
C. Articulate dependencies so teams know what inputs are needed to finish tasks on time.
D. Toggle on a Gantt view to see how project timelines stack up.

Sales Operations Solution Guide
Sales Personnel Tracker

Various business functions often look to sales operations teams as the single source of truth for information about their sales reps. Whether confirming quotas or compensation rates, sales ops needs to carefully organize and track information for each rep. This template is a great way to pull all of this information into one place that can be easily referenced or shared.

- Attach any supporting documentation about your reps, such as incentive plans.
- Send update requests so other functions, like finance or HR, can confirm or update information directly in the sheet.
- Set reminds for important information, like updating compensation details after a review.
Sales Issues Tracker

Your sales team will inevitably run into issues, but they won’t always know where to go to get their problems addressed. The Sales Issue Tracker simplifies the end-to-end issue logging and tracking process by giving reps a form to submit issues. This means that your sellers can get back to selling while you take care of prioritizing, assigning owners, and communicating issue status and resolutions.

A. Request updates from issue owners to ensure problems get fixed.

B. Assign issue owners to clearly show who is accountable for resolving an issue.

C. Use fully customizable web forms to allow the sales reps to submit issues on the go, even from their mobile devices.
Commission Management

Nothing erodes trust between sales management and sales reps more than failing to pay out commissions on a timely basis. Mitigate these risks by organizing information for each rep and giving various approvers one place to go to review and sign-off on payouts.

- Attach related documents, like compensation plans, directly to a row.
- Organize information using hierarchy to see commission information by sales rep.
- Send managers update requests directly to their inbox, so they know when their approval is needed.
- Use simple checkboxes to track the approval process.
Deal Management

Without a structured process to manage deals, sales operations teams don’t always do a good job of prioritizing opportunities, allocating resources, or communicating status. With Smartsheet’s Deal Management template, you can list your upcoming deals, flag high priority deals, assign resources, evaluate risk, and keep track of the key steps needed to close the deal.

A Easily drag and drop rows to move your high priority deals to the top of the list.

B Use RYG balls to show which deals are at risk of not closing.

C Attach any type of file directly to the sheet to keep deal information in context.

D Check off tasks as they are completed.
Jump-Start Your Sales Operations with Smartsheet

Read through the solution guide
You’ve had an overview of the solution – now try Smartsheet for yourself.

Sign up or log in to Smartsheet
Sign up at smartsheet.com/sales-solutions/sales-operations. You can also use this with your existing account by logging in.

Open the Getting Started Sheet
Once you’re in Smartsheet, click on the “Getting Started” sheet in the pane on the right. This sheet will orient you to everything you need to start working in Smartsheet.

Customize the sheet
The sample data and structure is only there to help you get going. You can type over things, insert or delete rows or columns, rename columns, change column types etc.

Start working and sharing
To open another sheet in the solution, simply return to the home tab, select the folder, and then the sheet. You can invite others to collaborate by clicking the sharing tab on the bottom of the sheet.
## Other Recommended Steps

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete sheets you don't need</td>
<td>Deleting a sheet is easy! You can learn how to <a href="#">here</a>.</td>
</tr>
<tr>
<td>Build your own sheet</td>
<td>We know you have unique needs – that’s why we built Smartsheet. Click the + tab at the top of the sheet so you can build your own solution from a blank sheet.</td>
</tr>
<tr>
<td>Use the “cheat sheets” in this guide</td>
<td>To help you get the most out of Smartsheet, we’ve included cheat sheets for formulas and shortcuts at the end of this guide.</td>
</tr>
</tbody>
</table>
Have questions or want to learn more about Smartsheet?

Smartsheet Help Center - help.smartsheet.com
   Everything you need to help you get the most out of Smartsheet.

Smartsheet Community - community.smartsheet.com
   Ask questions, share best practices, and get help.

Submit your question - solutions@smartsheet.com
   Want personalized help? Our design and services teams have you covered!

Send us your feedback - help.smartsheet.com/customer/portal/emails/new
   Share your thoughts or suggestions about Smartsheet or our Solutions.

Plans and Pricing - smartsheet.com/pricing
   Enjoy your 30-day free trial.
**Smartsheet Cheat Sheet**

**Keyboard Shortcuts**

### Basics

- **F2** / **Fn + F2**: Enters *edit mode* on selected cell
- **Ctrl + S**: Saves all unsaved information
- **Ctrl + Z**: *Undo* the previous action since last save
- **Ctrl + Y**: *Redo* the previous action since last save
- **Ins**: Inserts a row above the selected row.

To insert multiple rows at once, press **Shift** and select multiple row headers, then click **Ins**.

### Formatting

- **Ctrl + Enter** (or) **Alt + Enter**: Inserts a carriage return or line break in Text Number cells. In order to see the carriage returns in the sheet, apply wrap formatting to the cell by clicking the **Wrap** icon in the left toolbar.
- **Ctrl + K**: *Indents* Primary Column only
- **Ctrl + M**: *Outdents* Primary Column only
- **Ctrl + I**: *Italic*
- **Ctrl + B**: *Bold*
- **Ctrl + U**: *Underline*

**NOTE:** Mac users should use **Cmd** instead of **Ctrl** unless otherwise noted.
Formulas

| Ctrl + L | Inserts $ before column name (horizontal cell reference lock). |
| Ctrl + L | Inserts $ after column name (vertical cell reference lock). |
| Ctrl + L | Inserts $’s around column name (full cell reference lock). |

Date Column Cells

- **t**: Inserts today’s date.
- **+**: Enters date x days from today.
- **-**: Enters date x days before today.
- **mon / tue / wed / etc...**: Inserts date of the current week’s Monday, Tuesday, Wednesday, etc.
- **yes**: Inserts yesterday’s date.
- **tom**: Inserts tomorrow’s date.
- **next week**: Inserts date seven days from today.
- **last week**: Inserts date from seven days ago.
- **Dec 15 / Jan 3 / etc**: Inserts date of string entered.

Additional

- **Ctrl + /**: Displays the Open a Sheet form.
- **Ctrl + G**: Displays the Go To Row form. Type in the row number you’d like to scroll to then click OK.
- **Ctrl + Home**: Takes you to the first cell of the row you are currently on.
- **Ctrl + End**: Takes you to the last cell of the row you are currently on.
- **Pg Up**: Moves you up in your sheet.
- **Pg Dn**: Moves you down in your sheet.

| Space | Displays or removes a checked box, star or flag in the selected cell. Learn more about checkbox, star and flag columns in our Column Types article. |
### Numeric Formulas

<table>
<thead>
<tr>
<th>Formula</th>
<th>Description</th>
<th>Example</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SUM()</strong></td>
<td>Adds selected values, or a range of cells.</td>
<td>=SUM(Cost1: Cost5)</td>
<td>1125.75</td>
</tr>
<tr>
<td><strong>AVG()</strong></td>
<td>Averages selected values, or a range of cells.</td>
<td>=AVG(Cost1: Cost5)</td>
<td>225.15</td>
</tr>
<tr>
<td><strong>MAX()</strong></td>
<td>Returns the highest numeric value, or latest date.</td>
<td>=MAX(Cost1: Cost5)</td>
<td>425.75</td>
</tr>
<tr>
<td><strong>MIN()</strong></td>
<td>Returns the lowest numeric value, or earliest date.</td>
<td>=MIN(Cost1: Cost5)</td>
<td>100</td>
</tr>
<tr>
<td><strong>INT()</strong></td>
<td>Returns the integer portion of a given number.</td>
<td>=INT(Cost5)</td>
<td>425</td>
</tr>
<tr>
<td><strong>ROUND()</strong></td>
<td>Rounds a given number to the desired # of digits.</td>
<td>=ROUND(Cost5, 1)</td>
<td>425.8</td>
</tr>
<tr>
<td><strong>ABS()</strong></td>
<td>Returns the absolute value of a given number.</td>
<td>=ABS(-85)</td>
<td>85</td>
</tr>
<tr>
<td><strong>COUNT()</strong></td>
<td>Counts non-blank cells in a given range.</td>
<td>=COUNT([Task Name]):[[Task Name])</td>
<td>5</td>
</tr>
<tr>
<td><strong>LEN()</strong></td>
<td>Returns the number of characters (length) in a given cell.</td>
<td>=LEN([Task Name]5)</td>
<td>6</td>
</tr>
</tbody>
</table>

**NOTE:** Formatting/currency values aren’t included. Dates have a length of 5.
## Logic Formulas

**IF():** Performs a logical test. One value is returned if the test is true, a different value is returned otherwise.

**Syntax:** `IF(logical_test, value_if_true, value_if_false)`

**Example:** `=IF([Due Date]1 > [Due Date]2, "Date 1 is Larger", "Date 2 is Larger")`  
**Result:** Date 2 is Larger

**ISBLANK():** Used within an IF formula to test if a cell is blank.

**Example:** `=IF(ISBLANK([Task Name]1), "Cell is blank", "Cell isn’t blank")`  
**Result:** Cell isn't blank

**ISTEXT():** used within an IF formula to test if a cell contains text (and not checkboxes, dates, numbers, etc).

**Example:** `=IF(ISTEXT([Due Date]1), "Cell is text", "Cell isn’t text")`  
**Result:** Cell isn't text

**ISNUMBER():** Used within an IF formula to test if a cell contains a number (a value which is not text, date, or checkbox).

**Example:** `=IF(ISNUMBER([Task Name]1), "Cell is a number", "Cell isn’t a number")`  
**Result:** Cell isn't a number

**ISDATE():** Used in an IF formula to test if a cell contains a date.

**Example:** `=IF(ISDATE([Due Date]1), "Cell is a date", "Cell isn’t a date")`  
**Result:** Cell is a date

**ISBOOLEAN():** Used in an IF formula to test if a cell contains a boolean value (check box, priority, star or flag).

**Example:** `=IF(ISBOOLEAN(Done1), "Cell is a boolean", "Cell isn’t a boolean")`  
**Result:** Cell is a Boolean
Logic Formulas (cont.)

**AND():** Used within an IF formula. Evaluates if a set of logical expressions are True or False. If any expression is False it will evaluate as False.

Syntax: `AND(boolean_expression1, boolean_expression2, boolean_expression3, ...)`

Example: `=IF(AND(Done1, Done2, Done3), “All Tasks Complete”, “Tasks Incomplete”)`

Result: Tasks Incomplete

**NOT():** Used within an IF formula. Performs a logical NOT on the supplied boolean expression (or cell reference).

Syntax: `NOT(Done1)`

Example: `=IF(NOT(Done1), “Task A Not Complete”, “Task A Complete”)`

Result: Task A Complete

**OR():** Used within an IF formula. Performs a logical OR on the supplied boolean expression or cells. Returns true if any are true; otherwise returns false.

Syntax: `OR([Due Date]1 > [Due Date]2, [Due Date]1 > [Due Date]3)`

Example: `=IF(OR([Due Date]1 > [Due Date]2, [Due Date]1 > [Due Date]3), “Due Date 1 isn’t the smallest”, “Due Date 1 is the smallest”)`

Result: Due Date 1 is the smallest

**NESTED IF():** Performs multiple logical tests. Smartsheet reads the IF statements in the formula from left to right, displaying a value based on which one evaluates to true.

Syntax: `IF(logical_test, value_if_true, IF(second_logical_test, value_if_true, value_if_all_false))`

Example: `=IF([Task Name]1 = “Task A”, “This is Task A", IF([Task Name]1 = “Task B", “This is Task B", “Neither Task A nor Task B")`)

Result: This is Task A
Additional Formulas and Help

**Formula Basics** - smartsheet.com/formula-basics
How to create a formula and reference cells, columns, and ranges in your sheet

**Text Formulas** - smartsheet.com/text-formulas
Find, Replace, capitalizing text, etc

**Date Formulas** - smartsheet.com/formula-basics
TODAY() formula, calculating working days, creating dates, etc

**Advanced Formulas** - smartsheet.com/date-formulas
Weighted average, prorate, countif, countif s, sumif, sumif s

**Using Hierarchy in Formulas** - smartsheet.com/using-hierarchy-in-formulas
How to reference child rows

**Formula Error Messages** - smartsheet.com/formula-error-messages
What they mean, and how to troubleshoot