Smartsheet ENGAGE / Solution Certification Preparation

Crystal Morey
Certification Program Manager
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.
“Competing at the highest level is not about winning. It’s about preparation, courage, understanding and nurturing your people and heart. Winning is the result.”

- Joe Torre
Objectives

In this session, we will explore:

• Exam format
• Key features & functionality assessed
• Check-in & getting started
• Exam scoring and feedback
Solution Certification

Exam Overview
What is Solution Certification?

• Advanced Certification

• Certifying individuals who can create a solution with Smartsheet
  – Plan
  – Capture
  – Manage
  – Automate
  – Report on work at scale
Solution Certification

Overview

Given a set of business pain points

Inherit a set of project requirements

Create a solution to meet the project requirements
Solution Certification
Process Overview
Exam Format

Overview

- Accessed via Center of Excellence
- Open Book
Solution Certification

Process

Access the Solution Certification portals
Solution Certification

Download the Solution Certified Folder

- Budget Information: Actuals
- START HERE: Solution Certification Sheet
- Store 1
- Store 2
- Team Matrix
When Building the Solution

Key reminders:

- Starting sheets will be missing information.
- Add, change or format data to develop your solution.
- If something is not explicitly stated, you will need to make a decision about the best way to build the solution.
Solution Certification
Expectations and Functionality Tested
Test Specifications

Smartsheet items & features to include

- Solution must contain:
  - Dashboard(s)
  - Report(s)
  - Master roll-up sheet
  - Project sheets
  - Formulas
Key Features & Functionality
Tested Items

ACTIVITY

1. Check the features you can apply confidently

2. Circle the features to review

Solution Certification Features Tested

- Transform a base sheet into a project sheet
- Create task relationships
- Establish milestones
- Formulas:
  - Variance
  - Automating at-risk columns
- Publish items (sheets, reports, dashboards)
- Build cell links between sheets
- Roll up information at a project level
Solution Certification

Submitting Your Exam
Submitting Your Exam
Explaining how you met the requirements

- For each requirement, you will need to explain:
  1. Action(s) taken & data entered
  2. How the action(s) & data entered met the requirement
Let’s Practice: Examples
Advanced work management context

**Question:**
How did you track schedule variance?

**Answer:**

Include

- Action(s) taken & Data Entered
- Why/how actions and data met requirement
Question: How did you track schedule variance?

Answer: To track schedule variance, I:

- Inserted an Actual Finish - date column type.
- Then, inserted a new symbol column called Schedule Variance and subtracted the Actual from the Planned Finish.

<Insert actual formula>

Subtracting the Actual Finish Date from the Planned Finish date determines the variance.

Additionally, Schedule Variance is rolled up at the program level to communicate an overall schedule variance.
To track schedule variance, I:

1. Inserted an Actual Finish - date column type.
2. Then, I inserted a new symbol column called Schedule Variance and subtracted the Actual from the Planned Finish.

Subtracting the Actual Finish Date from the Planned Finish date determines the variance.

Additionally, Schedule Variance is rolled up at the program level to communicate an overall schedule variance.
# Explanation Expectations

- **Step #3:** Read the list of solution requirements below.

  Information placed in this column will be used to score your exam. For each project requirement in Step #3 (See YELLOW formatted cells below), write your explanation in this column. Each explanation must contain:

  1. Actions you took in Smartsheet to meet the requirement.
  2. Data you entered to meet the requirement.
  3. Why/how the action(s) you took met the requirement.

- **To successfully manage the project, your solution must address the following requirements:**

- **Use the store sheets to:**

  - Manage the schedule by tracking the schedule variance.
  - Communicate at-risk tasks for the project.
## Explanation Expectations

- **To successfully manage the project, your solution must address the following requirements:**

- **Use the store sheets to:**

  - Manage the schedule by tracking the schedule variance.

<table>
<thead>
<tr>
<th>To track schedule variance, I:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Inserted an Actual Finish - date column type.</td>
</tr>
<tr>
<td>2. Inserted a new symbol column called Schedule Variance</td>
</tr>
<tr>
<td>3. Using a formula, I subtracted the Actual Finish date from the Planned Finish date.</td>
</tr>
<tr>
<td>&lt;Insert actual formula&gt;</td>
</tr>
<tr>
<td>4. Subtracting the Actual Finish Date from the Planned Finish date determines the variance</td>
</tr>
<tr>
<td>5. Additionally, Schedule Variance is rolled up at the program level to communicate an overall schedule variance.</td>
</tr>
</tbody>
</table>
Let’s Practice: Examples
Advanced work management context

Question:
How did you communicate at-risk tasks?

Answer:
• Action(s) taken
• Data entered
• Why/how actions and data met requirement
Let's Practice: Examples
Advanced work management context

**Question:** How did you communicate at-risk tasks?

**Answer:**

To communicate at-risk tasks, I:

- Used a nested if formula to automate the At-Risk flag with the following formula:
  
  \[
  \text{Formula:} \ \text{<Insert Formula>}
  \]

- If any one of the Schedule, Budget or Work Variance columns are “Down”, the At-Risk flag will be raised by the previously stated formula.

- By automating these columns, a collaborator can come into the sheet and view any of the at-risk tasks.
Final Steps
Before you end the exam

1. Share your workspace

2. Submit via a form

3. Copy of workspace created for scoring
What Happens Next?
Final steps: feedback

- Alert sent from Smartsheet within 45 days
- Pass/Fail
What happens when I pass?

Pass:
- Post certificate to LinkedIn
- Post picture of yourself and certificate with #SmartsheetCertified
- Badge on Community
- Recognition at ENGAGE

Fail:
- Option to retake
- Certification team will follow up with next steps
Solution Certification

Coming Prepared
Certification: Know Before You Go!

Know Before You Go!

ENGAGE ‘18
smartsheet certification

PRODUCT CERTIFIED
2018

CLICK HERE
to View Study Guide!

Exam Date & Time

SOLUTION CERTIFIED
2018

CLICK HERE
to View Study Guide!

Exam Date & Time
Day of Test

Come prepared

What to bring:

• Personal laptop & Power cord
• Identification
• Headphones or earbuds

What not to bring:

• Cell phone and camera devices
Test-Taking Tips

Ahead of the exam:

• Attend the Advanced class
• Eat lunch
• Review the list of features tested
• Become familiar with Smartsheet learning resources

During Exam:

• Pace yourself
• Attempt every requirement
Check in Process

Getting into the exam

• Lunch at 12
• Check-in at 12:30
• Exam Starts at 1
• Hyatt 3rd floor
#SmartsheetCertified

Why is this valuable to you?
Why are you becoming #SmartsheetCertified

“I am excited to become certified because . . .”

“By becoming certified, I hope to . . .”
I Became #Smartsheet Certified...

“This certification is going to help me move forward with a promotion that I just earned which will be tied to developing workflows, procedures & processes, and project management on a much higher level.”
ENGAGE / Q&A

#SmartsheetENGAGE
See You Tomorrow

Check in begins at 12:30pm
Test start promptly at 1:00pm
Don’t forget to:

• Share your feedback in our survey in the ENGAGE app

• Stop by the Certification booth on the second floor to Snap & Share your #SmartsheetCertified story

• Visit the Innovation Center for hands-on learning, support, services, swag, and more