

# Solution Guide

PRODUCT DEVELOPMENT .01

# New Product Development

Find it online: [smartsheet.com/product-development-solutions/new-product-development](https://smartsheet.com/product-development-solutions/new-product-development)



Coordinate Anything

# About New Product Development

Product development is complicated because you need to manage multiple teams to deliver a product that meets both your customer's needs and considers your own requirements, constraints and strategic goals. Our New Product Development Solution helps you cut through the complexity with sheets to help you organize and manage the core tasks and processes needed to bring a winning product to market – everything from early-stage market analysis to actual launch plans.

## Better prioritize your efforts

Carefully evaluate features against criteria that matter most to you and your customers.

## Connect all aspects of your development

Manage your product development activities in real time so you never miss a deadline.

## Manage everything in one place

Track key event milestones, drive ownership, assign budget, and monitor key activities.



# Who should use this guide

Whether you're a director leading an end-to-end development effort or contributing to an important piece as a manager or associate, you're in the right place. Some common roles that will benefit from this solution include:

Product Development

Product Management

Product Research Management

Program Management

Project Management

Research and Development

Market Research

Business Intelligence

# Purpose

This guide is designed to help you build and execute a simple development process. 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 DEFINE

Market & Customer Analysis

Product Definition

Feature Prioritization

Understand your market and customers to set your product up for success.

## 2 DEVELOP

Development Plan

Product Testing

Set a clear plan for what you're developing and how you'll ensure quality.

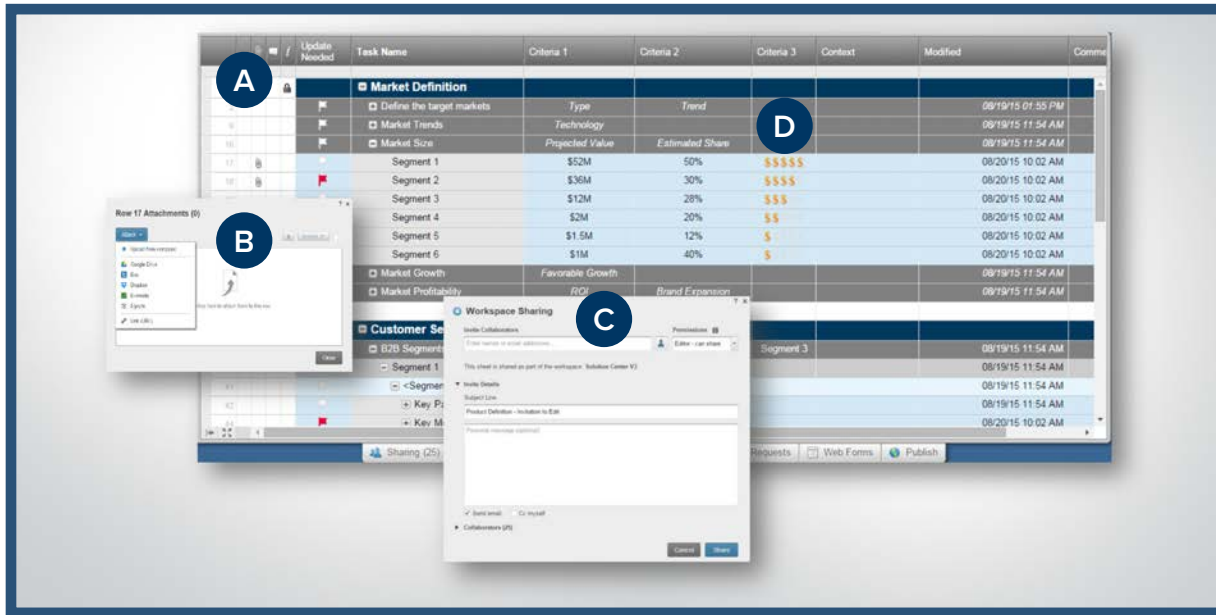
## 3 DELIVER

Launch Plan

Build awareness with your target audiences.

# Market & Customer Analysis

In highly competitive markets, it can be difficult to identify a product or service that profitably delivers value to a customer or segment. Smartsheet can help you think through and organize every aspect of your market and customer analysis, from understanding market trends to defining segments.



- A** Lock rows or columns to ensure your important data isn't accidentally over-written or deleted when sharing.
- B** Attach relevant documents, like market reports or financial analysis, to keep supporting information in context.
- C** Securely share the sheet for seamless and real-time collaboration.
- D** Use symbols to visually communicate criteria.

**A** Use hierarchy to structure requirements into categories.

**B** See a record of changes by viewing the change history of any cell.

**C** Set alerts to be immediately notified when certain information changes.

**D** Toggle on 'Highlight Changes' to quickly see what has changed since you last viewed the sheet.

## Product Definition

Things are always changing during the development process – you have to organize evolving requirements, manage version control, and keep your team in the loop. Track everything in one place so you don't have to worry about viewing information that's out of date. And with easy sharing and notifications that alert you when things change, your team can be more connected than ever.

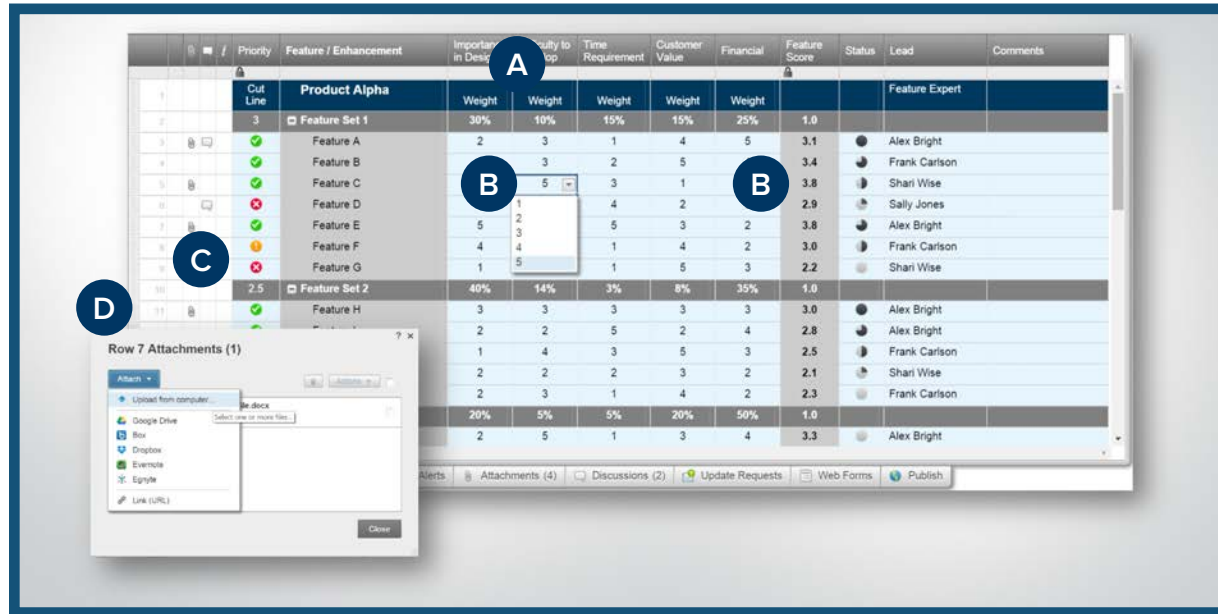
The screenshot displays a spreadsheet titled 'Product Definition' with columns for Index, Aspect, Description, Last Modified, and Comments. The spreadsheet is organized into a hierarchical tree structure under the 'Requirements' aspect. A yellow highlight is placed on a cell in the 'Description' column, labeled 'D'. A 'Highlight Changes' dialog box is open, showing a toggle switch set to 'ON' and a date range of 'Today' (08/11/15 12:00 AM). A 'View History: Description' dialog box is open, showing a list of changes with columns for Aspect, Description, and Last Modified. A 'Notifications' dialog box is open, showing a 'New Notification' button and a message: 'Receive email notifications when other people make changes to this sheet. Send Ryan Schield an email once a day when Priority changes. Set by Ryan Schield delete'. The spreadsheet data is as follows:

Index	Aspect	Description	Last Modified	Comments
1	Product Definition		08/11/15 10:22 AM	
2	<Enter Product Name>		08/11/15 10:22 AM	
3	Product/Service Description		08/11/15 10:39 AM	
4	Requirements		08/11/15 10:39 AM	
5	Functional Requirements		08/11/15 10:39 AM	
6	Performance Requirements		08/11/15 10:39 AM	
7	Technical Requirements		05/11/15 10:39 AM	
8	Physical Requirements			
9	Technical Environment			
10	2.3.2.1	<Enter Requirements>		
11	2.3.2.1	<Updated Description>		
12	2.3.3	Data Requirements		
13	2.3.4	External Interfaces		
14	2.3.5	Compatibility/Portability		
15	2.3.6	Maintenance		

# Feature Prioritization

One hard reality of product development is that you can't build everything that you want. Trade-offs will have to be made. Smartsheet can help you make the best decisions by helping you evaluate each feature against a set of common criteria so you know that what you're working on will add the most value.

- A Define your evaluation criteria and assign a relative importance weighting.
- B Score each feature on a scale of 1-5 and let Smartsheet calculate a feature score for you.
- C Show the features that the cut with symbols.
- D Attach supporting documents within the sheet to keep everything in context.



**A** Use symbols column, like RYG balls, to visually convey status.

**B** Toggle on the Gantt view to represent how timelines stack up.

**C** Enable dependencies so Smartsheet can shift schedules for you when individual tasks change.

**D** Securely publish your development plan onto your secure intranet or a website.

## Development Plan

Product development can often veer off track unless you have a detailed plan. With Smartsheet, you can manage interconnected processes and multiple aspects of your development to keep everyone up to date. You can even track status, ownership, and show dependencies to fully communicate progress.

The screenshot displays a Smartsheet Gantt chart for a 'Product Development Plan'. The main table lists tasks with columns for Start, Finish, % Complete, and Assigned To. Callout A points to the 'Status' column, which uses colored circles (Red, Yellow, Green) to indicate task status. Callout B points to the Gantt bars, which show task durations and dependencies. Callout C points to a dependency arrow between tasks. Callout D points to a 'Publish' button in the bottom right corner. A 'Read Only - HTML - Publish Links' dialog box is open in the foreground, showing options to 'Publish Link' and 'Embed Code'.

	Report	Status	Task Name	Start	Finish	% Complete	Assigned To
1			Product Development Plan				
2		●	Product Alpha	01/07/16	04/15/16	34%	Alex
3		●	Requirements	01/07/16	01/08/16	100%	Alex
4		●	Product Definition	01/07/16	01/08/16	100%	Alex
5		●	Specifications	01/11/16	01/29/16	82%	
6		●	Overview	01/11/16	01/14/16	78%	Corinne
10		●	Architecture Design	01/15/16	01/29/16	84%	Corinne
11		●	Logical View	01/15/16	01/20/16	100%	Alex
12		●	Hardware Architecture	01/15/16	01/21/16	100%	Alex
13		●	Software Architecture	01/15/16	01/21/16	100%	Alex
14		●	Security Architecture	01/22/16	01/22/16	90%	Corinne
15		●	Communication Architecture	01/25/16	01/29/16	70%	Corinne
16		●	Performance	01/25/16	01/29/16	50%	Alex
17		●	System Design	02/01/16		0%	Corinne
24		●	Specification Approval			100%	Corinne
36		●	Detailed Design	02/01/16	02/26/16	27%	
38		●	Implementation				
39		●	Testing				



# Product Testing

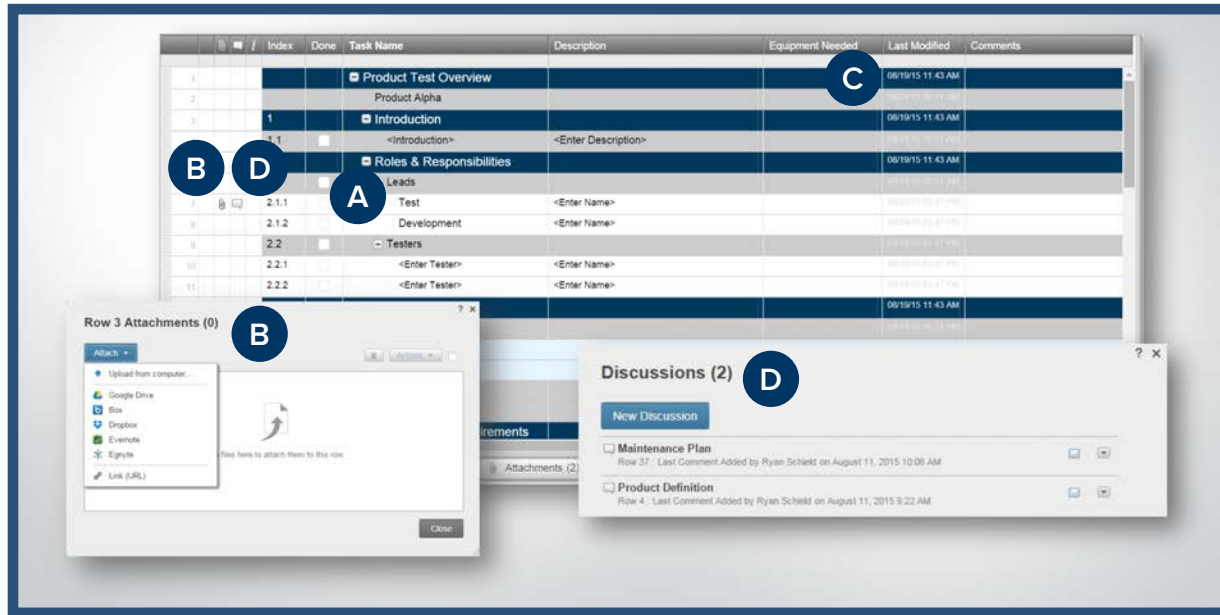
Whether you're building a product for a retail shelf or developing software, you need to ensure that your product meets your quality standards. This template helps you organize and streamline your testing process so you know that nothing is left untested. You can even check-off tasks as they are completed so you'll always know how things are progressing.

**A** Use hierarchy to expand and collapse information so you can focus on what you care about.

**B** Attach supporting documents, like detailed scenarios to test, directly to rows.

**C** See when something was last modified with automatic time stamps in the "Last Modified" column.

**D** Have discussions or keep notes within the sheet so everyone is on the same page.



**A** Attach relevant documents directly to the sheet.

**B** Connect Smartsheet to your company's email address list so you can pre-populate owners in the "Assigned To" column.

**C** Send update requests to ask task owners to update their status.

**D** Toggle on a Gantt view to see how timelines stack up.

## Launch Plan

The flurry of activity only increases leading up to a product launch, making it easy to overlook something or cut corners. With Smartsheet's Launch Plan, you can control the chaos. You can define and organize tasks, manage dependencies, track progress, store launch documents and more, all in one easily shareable and secure location.

The screenshot displays the Smartsheet Launch Plan interface. It features a task list on the left with columns for 'Complete?', 'Task Name', 'Assigned To', 'Start Date', 'Due Date', and 'Process'. A Gantt chart on the right visualizes the task dependencies and timelines. A 'Send Update Request' dialog box is open in the foreground, allowing users to send update requests to task owners. The dialog box includes fields for 'To', 'Subject', 'Update Request', and 'Message'. The interface also shows a 'Sharing' button and a 'Publish' button at the bottom.

Complete?	Task Name	Assigned To	Start Date	Due Date	Process
Done	Product Launch Timeline		07/30/14	07/09/15	
	4 months out		07/30/14	10/13/14	
	2 months out		10/22/14	11/17/14	
	1 month out		12/03/14	01/05/15	
	Train internal sales/support/consulting	Alex	12/03/14	12/09/14	1FS-30d
	Finalize content for collateral	Josh	12/09/14	12/12/14	27
	Create and design direct marketing program compo	Lindsey	12/15/14	12/18/14	28
	Update web site	Ryan	12/19/14	12/24/14	29
	Weekly team meeting on the books	Kristin	12/25/14	12/30/14	30
	Finalize content for launch event	Tyler	12/31/14	01/05/15	31
	2 weeks out		12/15/14	01/07/15	
	1 week out		12/15/14	03/11/15	
	Week of launch		12/15/14	06/16/15	
	Post-launch		12/15/14	07/09/15	

# Jump-Start Your Product Development Efforts 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/solutions](https://smartsheet.com/solutions). 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



### Delete sheets you don't need

Deleting a sheet is easy! You can learn how to [here](#).



### Build your own sheet

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.



### Use the “cheat sheets” in this guide

To help you get the most out of Smartsheet, we've included cheat sheets for formulas and shortcuts at the end of this guide.

# Have questions or want to learn more about Smartsheet?

**Smartsheet Help Center** - [help.smartsheet.com](https://help.smartsheet.com)

Everything you need to help you get the most out of Smartsheet.

**Smartsheet Community** - [community.smartsheet.com](https://community.smartsheet.com)

Ask questions, share best practices, and get help.

**Submit your question** - [solutions@smartsheet.com](mailto: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](https://help.smartsheet.com/customer/portal/emails/new)

Share your thoughts or suggestions about Smartsheet or our Solutions.











**Plans and Pricing** - [smartsheet.com/pricing](https://smartsheet.com/pricing)

Enjoy your 30-day free trial.

# Smartsheet Cheat Sheet

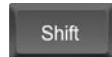
## Keyboard Shortcuts

### Basics

-  /  +  Enters **edit mode** on selected cell
-  +  **Saves all** unsaved information
-  +  **Undo** the previous action since last save
-  +  **Redo** the previous action since last save
-  **Inserts** a row above the selected row.






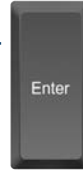
To insert multiple rows at once, press



and select multiple row headers, then click





### Formatting

 +  (or)  +  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.

 +  **Indents** Primary Column only

 +  **Outdents** Primary Column only

 +  **Italic**





 +  **Fill down**  
(also available by dragging cell corner)

 +  **Bold**

 +  **Underline**

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














# Formulas

-  +  x1 Inserts \$ before column name (horizontal cell reference lock).
- x2  Inserts \$ after column name (vertical cell reference lock).
- x3  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

-  +  Displays the **Open a Sheet** form.
-  +  Displays the **Go To Row** form. Type in the row number you'd like to scroll to then click OK.
-  Takes you to the first cell of the row you are currently on.
-  +  Takes you to the top left cell of your sheet.
-  Takes you to the last cell of the row you are currently on.
-  +  Takes you to the bottom right cell of your sheet.
-  Moves you up in your sheet.
-  Moves you down in your sheet.
-  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.

# Smartsheet Cheat Sheet

## Formulas

### Numeric Formulas

**SUM():** Adds selected values, or a range of cells.

Example: =SUM(Cost1: Cost5)

Result: 1125.75

**AVG():** Averages selected values, or a range of cells.

Example: =AVG(Cost1: Cost5)

Result: 225.15

**MAX():** Returns the highest numeric value, or latest date.

Example: =MAX(Cost1: Cost5)

Result: 425.75

**MIN():** Returns the lowest numeric value, or earliest date.

Example: =MIN(Cost1: Cost5)

Result: 100

**INT():** Returns the integer portion of a given number.

Example: =INT(Cost5)

Result: 425

**ROUND():** Rounds a given number to the desired # of digits.

Syntax: ROUND(cell1, #\_of\_digits)

Example: =ROUND(Cost5, 1)

Result: 425.8

**ABS():** Returns the absolute value of a given number.

Example: =ABS(-85)

Result: 85

**COUNT():** Counts non-blank cells in a given range.

Example: =COUNT([Task Name];[Task Name])

Result: 5

**LEN():** Returns the number of characters (length) in a given cell.

Example: =LEN([Task Name]5)

Result: 6NOTE: 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

# Smartsheet Cheat Sheet

## Formulas

### 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](https://smartsheet.com/formula-basics)** - [smartsheet.com/formula-basics](https://smartsheet.com/formula-basics)

How to create a formula and reference cells, columns, and ranges in your sheet

**[Text Formulas](https://smartsheet.com/text-formulas)** - [smartsheet.com/text-formulas](https://smartsheet.com/text-formulas)

Find, Replace, capitalizing text, etc

**[Date Formulas](https://smartsheet.com/formula-basics)** - [smartsheet.com/formula-basics](https://smartsheet.com/formula-basics)

TODAY() formula, calculating working days, creating dates, etc

**[Advanced Formulas](https://smartsheet.com/date-formulas)** - [smartsheet.com/date-formulas](https://smartsheet.com/date-formulas)

Weighted average, prorata, countif, countif s, sumif, sumif s

**[Using Hierarchy in Formulas](https://smartsheet.com/using-hierarchy-in-formulas)** - [smartsheet.com/using-hierarchy-in-formulas](https://smartsheet.com/using-hierarchy-in-formulas)

How to reference child rows

**[Formula Error Messages](https://smartsheet.com/formula-error-messages)** - [smartsheet.com/formula-error-messages](https://smartsheet.com/formula-error-messages)

What they mean, and how to troubleshoot



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