

smartsheet
ENGAGE '18

**Build Your Own
Smartsheet Solution**



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What is a Solution?

A way to get your work done.

Learning Objective

Learn to follow the 3 steps in the solution process.

The Solution Process Steps

Build your own Smartsheet solution

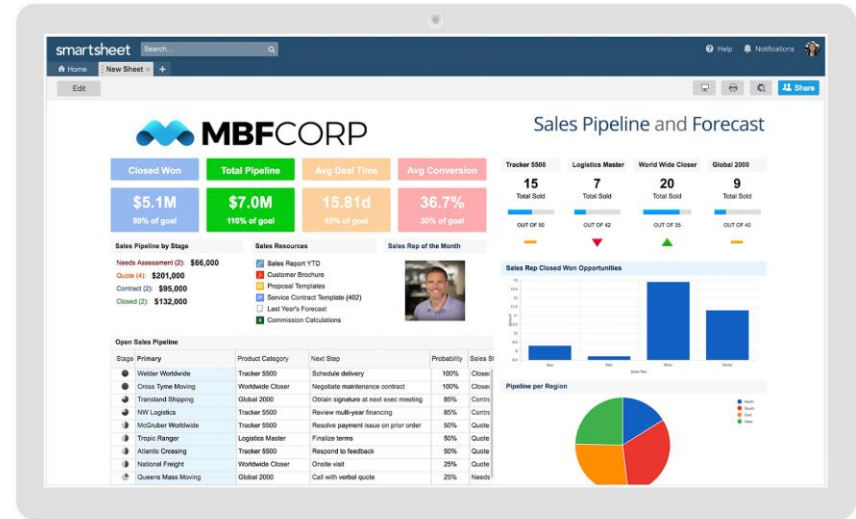
Plan



Build



Deploy



Plan Your Solution

A man wearing a dark fedora hat and a dark t-shirt is shown in profile, facing left. He is holding a cluster of colorful markers in his right hand and appears to be writing on a whiteboard. The background is a bright blue wall with a large, faint smiley face graphic. The overall lighting is a deep blue, creating a professional and focused atmosphere.

Plan Your Solution

Fail to prepare, prepare to fail

PLANNING

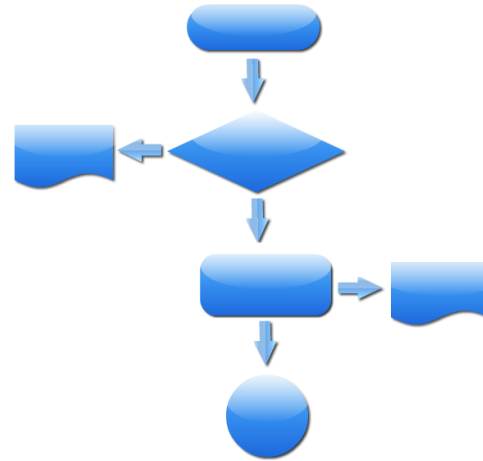


Plan Your Solution

1. How are you doing this today?
2. Where are you working?
3. What are your goals?
4. What tools are you using now?

Plan Your Solution

Ideas for planning your solution



Plan Your Solution



Plan Your Solution

Identify solution needs

- Visibility & standardization
- Metrics & reporting
 - at-risk tasks and financial KPIs
- Ask questions
- Stakeholder adoption

Plan Your Solution

Match a need with a feature

High-level visibility



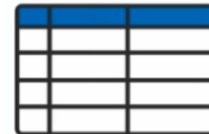
Dashboard

View at-risk tasks



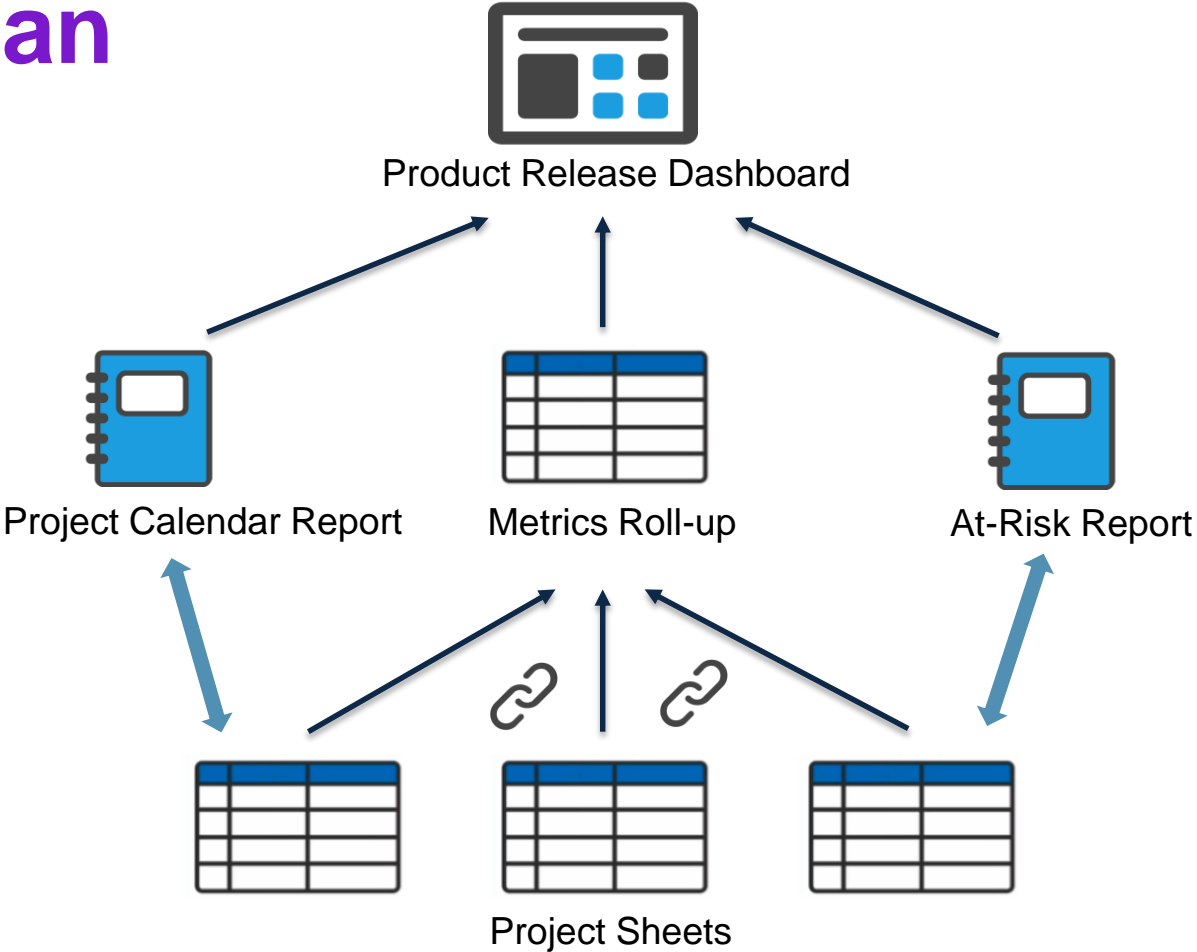
Report

Standardize tracking



Sheet

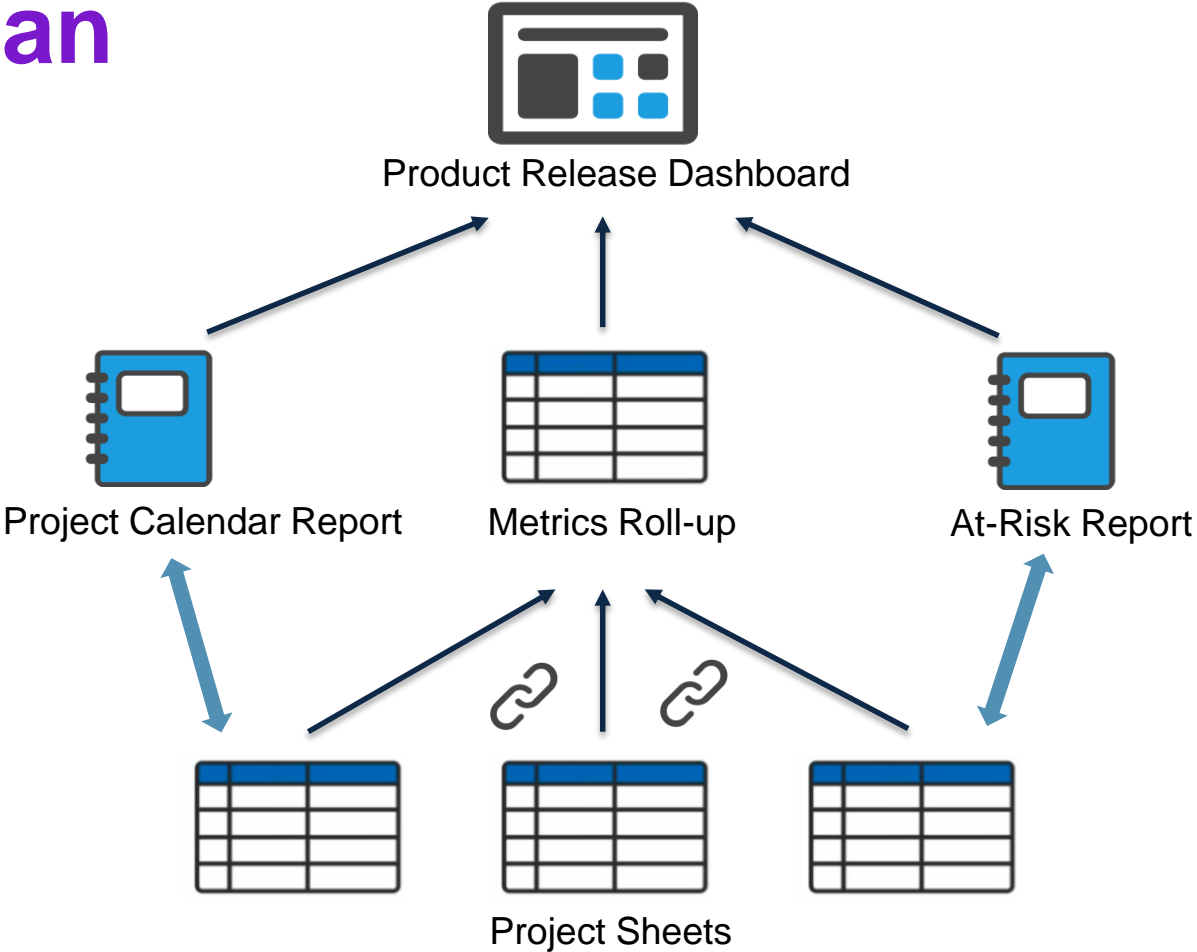
The Plan



A person is shown from the chest up, wearing a dark suit jacket and a light-colored shirt. They are holding a pen in their right hand and writing in an open notebook. The notebook is resting on their lap. The entire image is overlaid with a semi-transparent blue color. The text "Build Your Solution" is written in white, bold, sans-serif font across the middle of the image.

Build Your Solution

The Plan



A person is shown from the side, writing in a notebook with a pen. The scene is overlaid with a blue gradient. The text 'Deploy Your Solution' is prominently displayed in white.

Deploy Your Solution

More action

Deploy Your Solution

How does this benefit your team?

Deploy Your Solution

Train your users!



Directors



View



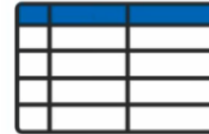
Dashboard



Project Managers



Own & Manage



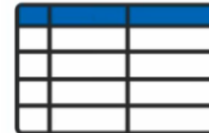
Project Sheet



Individual Contributors



Update



Project Sheet

Deploy Your Solution

Set expectations for your users

- **What do you need your users to do?**
- **When do users need to complete their part?**
- **Who owns each step?**
- **Document expectations!**

Deploy Your Solution

Share solution with correct permissions

Owner

- ✓ Delete & rename the sheet

Admin

- ✓ Edit locked columns & rows
- ✓ Conditional formatting
- ✓ Set alerts for others

LICENSED USERS ONLY

- ✓ Add & delete columns

Editor

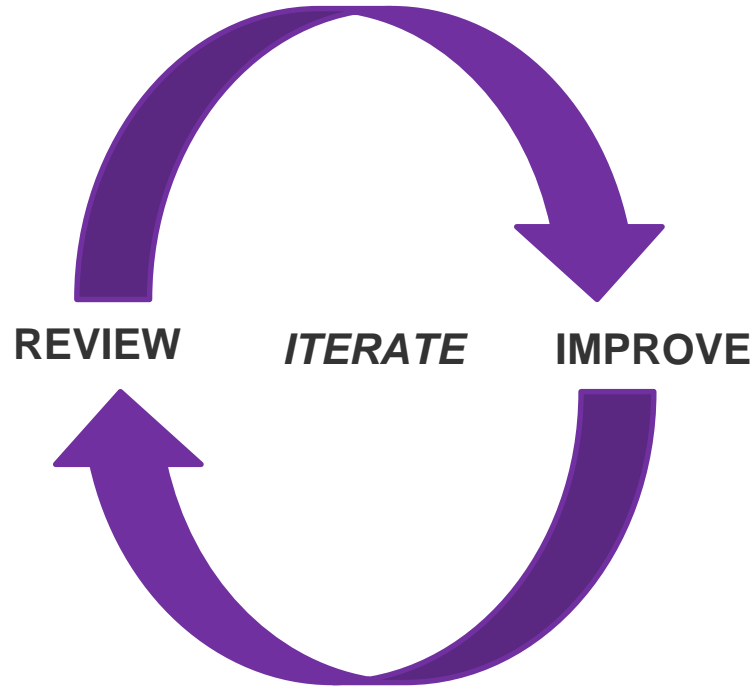
- ✓ Edit unlocked columns & rows
- ✓ Attachments
- ✓ Comments
- ✓ Send update requests

Viewer

- ✓ View all contents & export
- ✓ Set own alerts

Deploy Your Solution

Did this solution accomplish your goals?



Deploy Your Solution

Gather feedback from your team!

Try using a Smartsheet form!

Team Feedback Form

Please provide us feedback on how our new store opening process! We appreciate your hard work!

First and Last Name *

Mike Greening

Department *

Construction Marketing Human Resources

Rating *

Please rate this new process.

1 - Very Negative 2 - Negative 3 - Neutral 4 - Positive
 5 - Very Positive

Comments *

Please provide written feedback on any changes you would like made to this process or things you liked about its current state.

This has changed how I work!

Send me a copy of my responses

Submit

The Solution Process Steps

Build your own Smartsheet solution

Plan



Build



Deploy



Check Out These Sessions!

Session Title	Day	Time
Get Started with Actions and Alerts (Beginner)	Wednesday	11:00 am – 12:00 pm
Get the Most Out of Your Dashboards (Intermediate)	Wednesday	1:00 pm – 2:00 pm
Getting Started with Formulas (Beginner)	Wednesday	3:45 pm – 4:45 pm
Smartsheet Reports: Increase Transparency and Accelerate Productivity (Beginner)	Thursday	9:45 am – 10:45 am
Taking Formulas to the Next Level (Advanced)	Thursday	11:00 am – 12:00 pm

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ENGAGE '18 / Q&A



Don't forget to:

- Share your feedback in our survey in the ENGAGE app
- Stop by the Smartsheet Fundamentals II booth on the first floor
- Visit the Innovation Center for hands-on learning, support, services, swag, and more