



Collaborating with Smartsheet

Delivered February 21, 2024

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Session Objectives

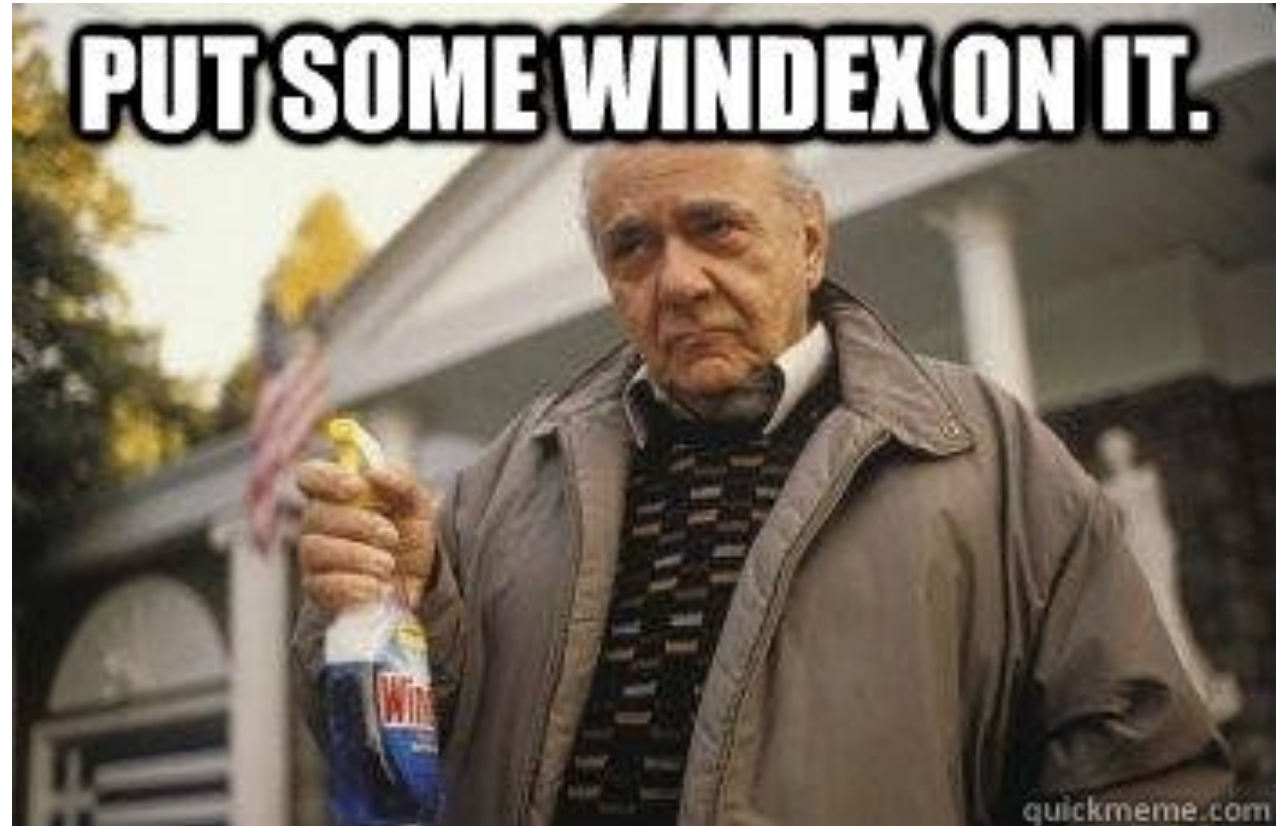
- Overview of Smartsheet
- Using Smartsheet to collect and track information
- Using Smartsheet for project management
- Pros and Cons

The screenshot displays the Smartsheet interface for a 'Strategic Plan Dashboard'. At the top, there is a search bar and the Smartsheet logo. Below this, the dashboard title 'Strategic Plan Dashboard' is centered. The main area is divided into three sections: 'Key Team Links', 'Initiative Progress', and 'Sprint Tasks'. The 'Key Team Links' section includes 'Sheet - Project Protocols' and 'Weekly Reports'. The 'Initiative Progress' section features a donut chart. The 'Sprint Tasks' section shows a Gantt chart with tasks and their durations. A table below the dashboard lists project tasks with columns for Campaign Name, Region, Status, Stakeholder, and a Gantt chart showing task progress over time.

Campaign Name	Region	Status	Stakeholder	Feb 10	Feb 17	Feb 24	Mar 3	Mar 10	Mar 17	Mar 24			
Planning Phase	Europe	Yellow	Kirk Cas	Planning									
Build Business Case	Europe	Green	Alexandr	Build Business Case									
Budget Review	Europe	Yellow	Kirk Cas	Budget Review									
Global Strategy	Europe	Red	Eliza Jor	Global Strategy									
Present to Stakeholders	Europe	Green	Kirk Cas	Present to Stakeholder									
Marketing	Asia Pacific	Yellow	June Tay	Marketing									
Product Plan	Asia Pacific	Green	Henry M	Product Plan									

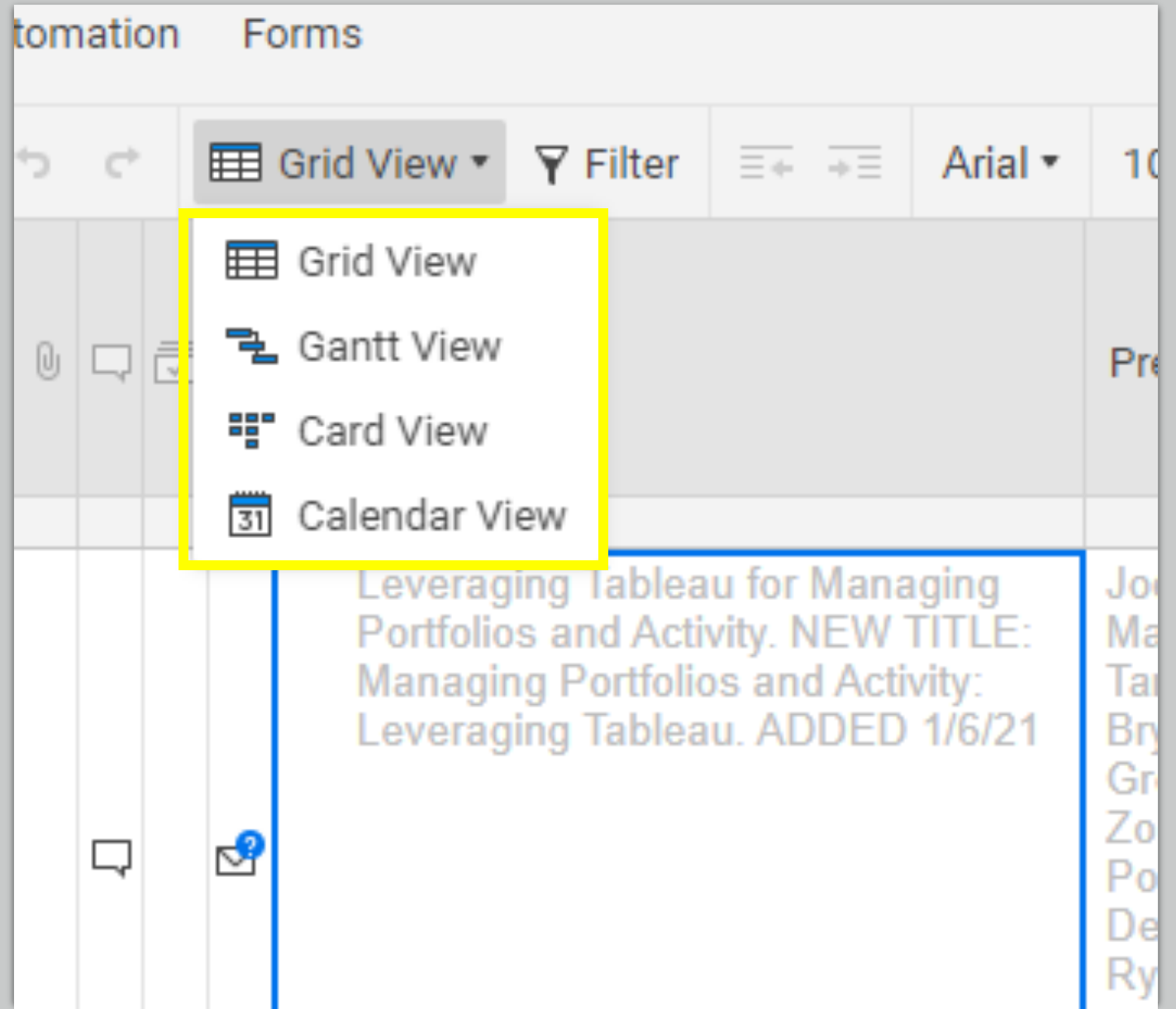
Smartsheet: What is it?

- Super-flexible cloud-based platform, where you can:
 - Plan
 - Capture
 - Manage
 - Automate
 - Report



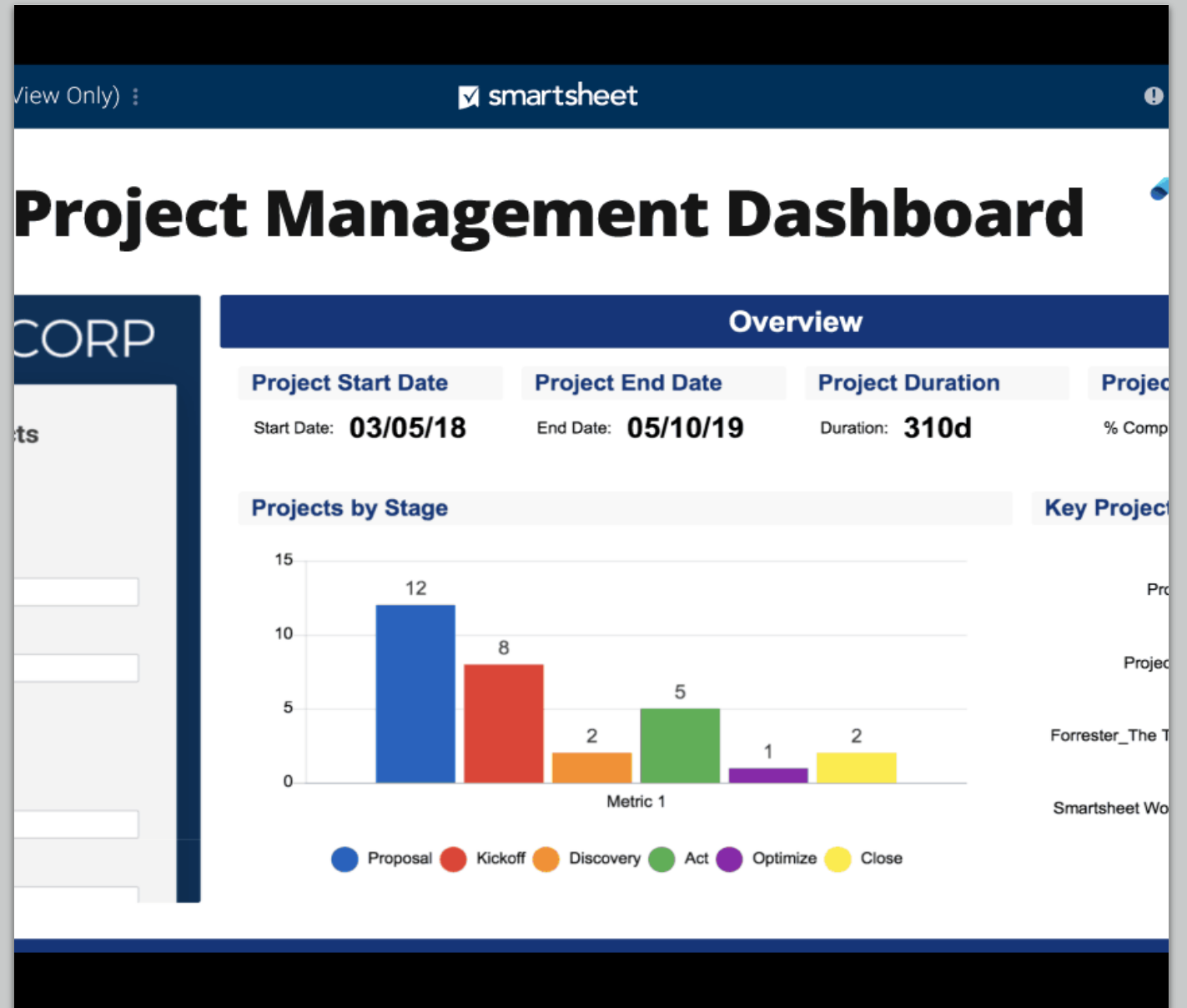
Smartsheet: What is it?

- Multiple Views
 - Grid
 - Gantt
 - Card
 - Calendar



Smartsheet: What is it?

- Reports
- Dashboards



Smartsheet: Project Management

				Task (add subtasks below and indent)	Category	Manager	Involved Staff	Links	Start	Finish	Duration	Status
1								Find tips on usir				
2												
3				HD-THEME	Program & Speakers	Ashley Privott			09/05/19	09/13/19	7d	€
4				PLAN CURRICULUM & SCHEDULE	Program & Speakers	Ashley Privott			09/05/19	11/29/19	62d	
5				Gather ideas from GOP leaders and AVPs for topics, speakers	Program & Speakers	Ashley Privott			09/05/19	09/30/19	18d	€
6				Review evaluations for ideas	Program & Speakers	Ashley Privott Tara Telfair			09/05/19	09/30/19	18d	€
7				Solicit ideas in Take 5	Program & Speakers	Marla Muntner			09/06/19	09/11/19	4d	€
8				Establish tracks and numbers of sessions for each	Program & Speakers	Ashley Privott	DS Deke-E		09/05/19	09/30/19	18d	€
9				Identify topics and presenters	Program & Speakers	Ashley Privott	DS Deke-E		10/01/19	10/24/19	18d	€
10				Build a strong opening meeting and keynote	Program & Speakers	Ashley Privott			10/01/19	10/24/19	18d	In
11				Finalize schedule	Program & Speakers	Ashley Privott	DS Deke-E		10/25/19	11/08/19	11d	€
12				Plan end-of-week celebration	Program & Speakers	Ashley Privott	BH Bina-H		11/01/19	11/29/19	24d	€
13				EVALUATION	Program & Speakers	Ashley Privott			10/16/19	11/18/19	24d	
14				Decide evaluation strategy	Program & Speakers	Ashley Privott			10/16/19	10/31/19	12d	€



PROS

CONS

PROS

- Super flexible
- Easy to collaborate
- Automated notifications and reminders
- UVA license includes Premium Add-ons
- Templates
- Learning resources and Help



PROS

CONS

CONS

- Cost
- Limited Integrations
- Data Sensitivity

Resources

- [UVA ITS](#) – to request a Smartsheet license
- [Smartsheet Video Tutorials](#)
- [Smartsheet's Project Management Guide](#)
- [Sharing Permissions Matrix](#)

Questions?

“Raise your hand”

OR

Use the CHAT

