Hello!

Megan Faykosh

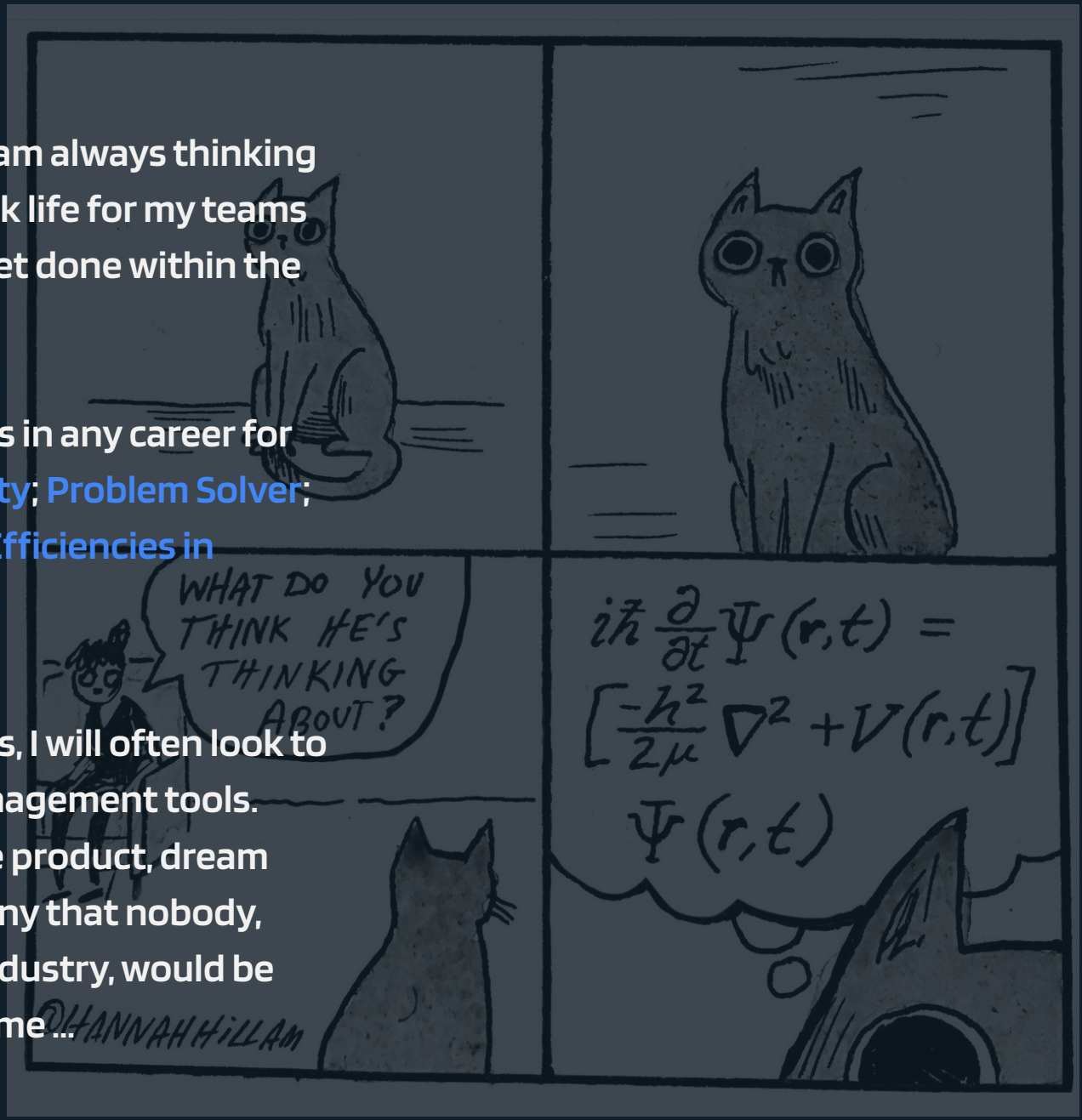
Product School -May 2021

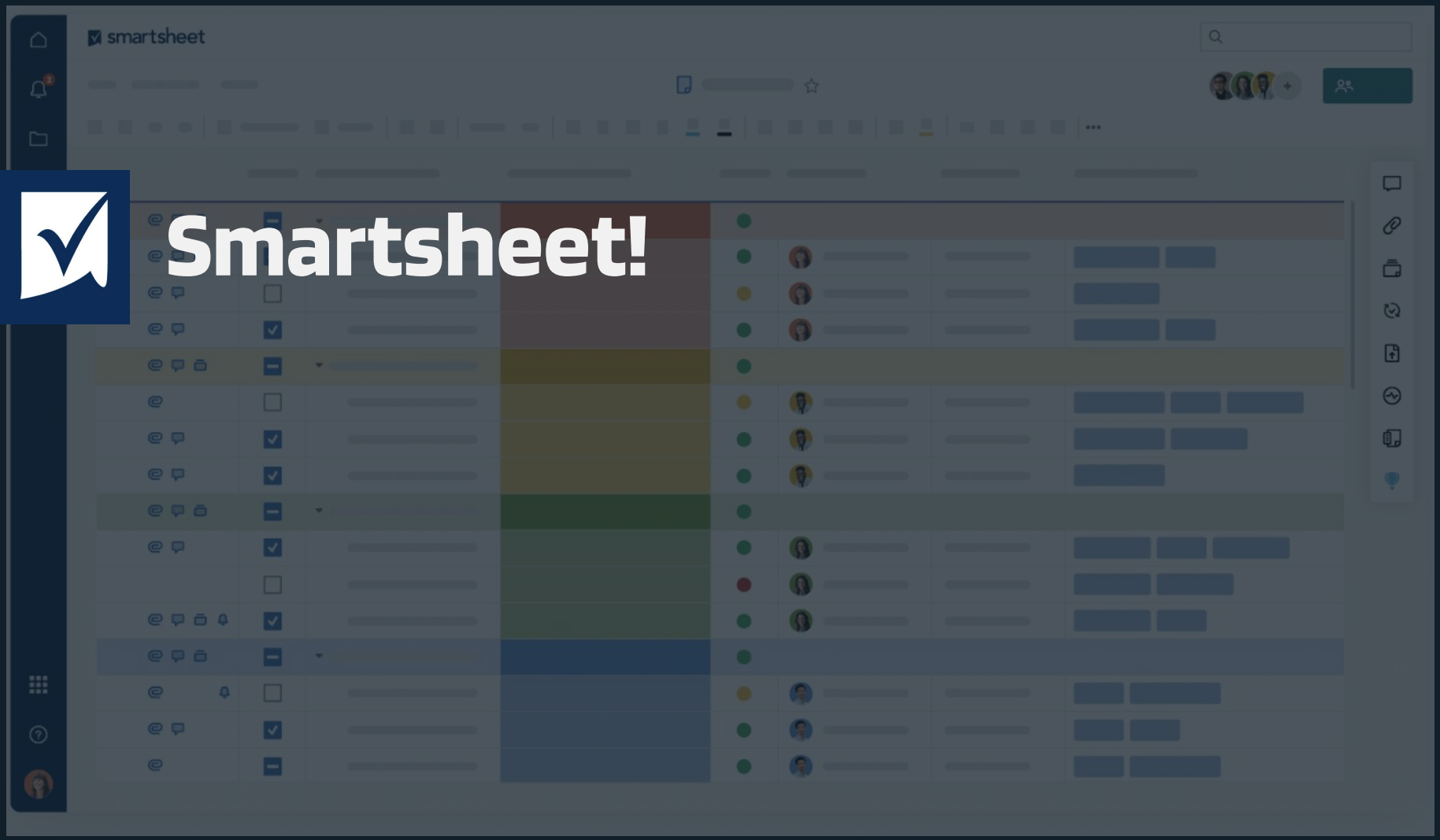
Final Project

As a Project Manager, I am always thinking of ways to improve work life for my teams and how the projects get done within the companies I work for.

The keywords and goals in any career for me are – Project Visibility; Problem Solver; Organized; Analytical; Efficiencies in process

To solve these problems, I will often look to collaborative work management tools. Specifically, my favorite product, dream company, and a company that nobody, who knows me in my industry, would be surprised to hear from me ...




smartsheet
Smartsheet!

Smartsheet

Who is Smartsheet?

Smartsheet

Smartsheet was founded in 2005

Headquarters in Bellevue, Washington

With offices in Boston, London, Edinburgh, and Sydney

Approximately 2,100 employees across the globe

Smartsheet

Their Core Value:
Helping People Achieve More

Smartsheet

Company Values:

- Honest
- Supportive
- Driven
- Innovative
- Authentic
- Effective

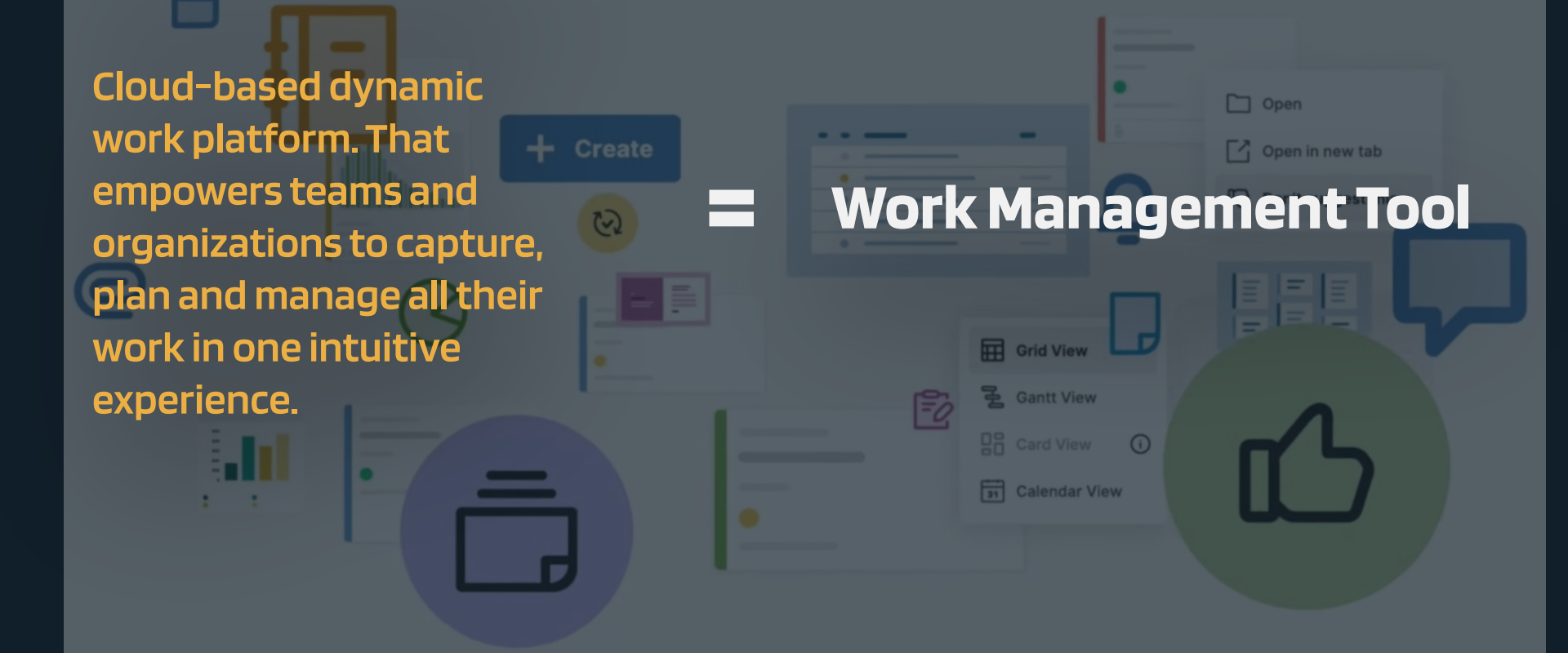
Smartsheet

What is Smartsheet?

Smartsheet

What is Smartsheet?

Cloud-based dynamic work platform. That empowers teams and organizations to capture, plan and manage all their work in one intuitive experience.



= Work Management Tool

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Technical and Societal Trends

Technical trends:

Need for work tool & platform consolidation.

- Increase of various work tools resulting in having too many programs to work with for a single workflow.
- On the other side, you have companies with not enough workflow or collaboration tools, resulting in a lot of older technology and more manual data creation or management.

Societal trends:

The need to work together with people who don't sit in the same location as you.

- During Covid-19, Smartsheet saw an increase in users as more people found themselves working from home. As more and more companies adopt a work from home culture, having a single source of truth for all your data and workflows and being able to still have transparency and work efficiently are key to a successful team.

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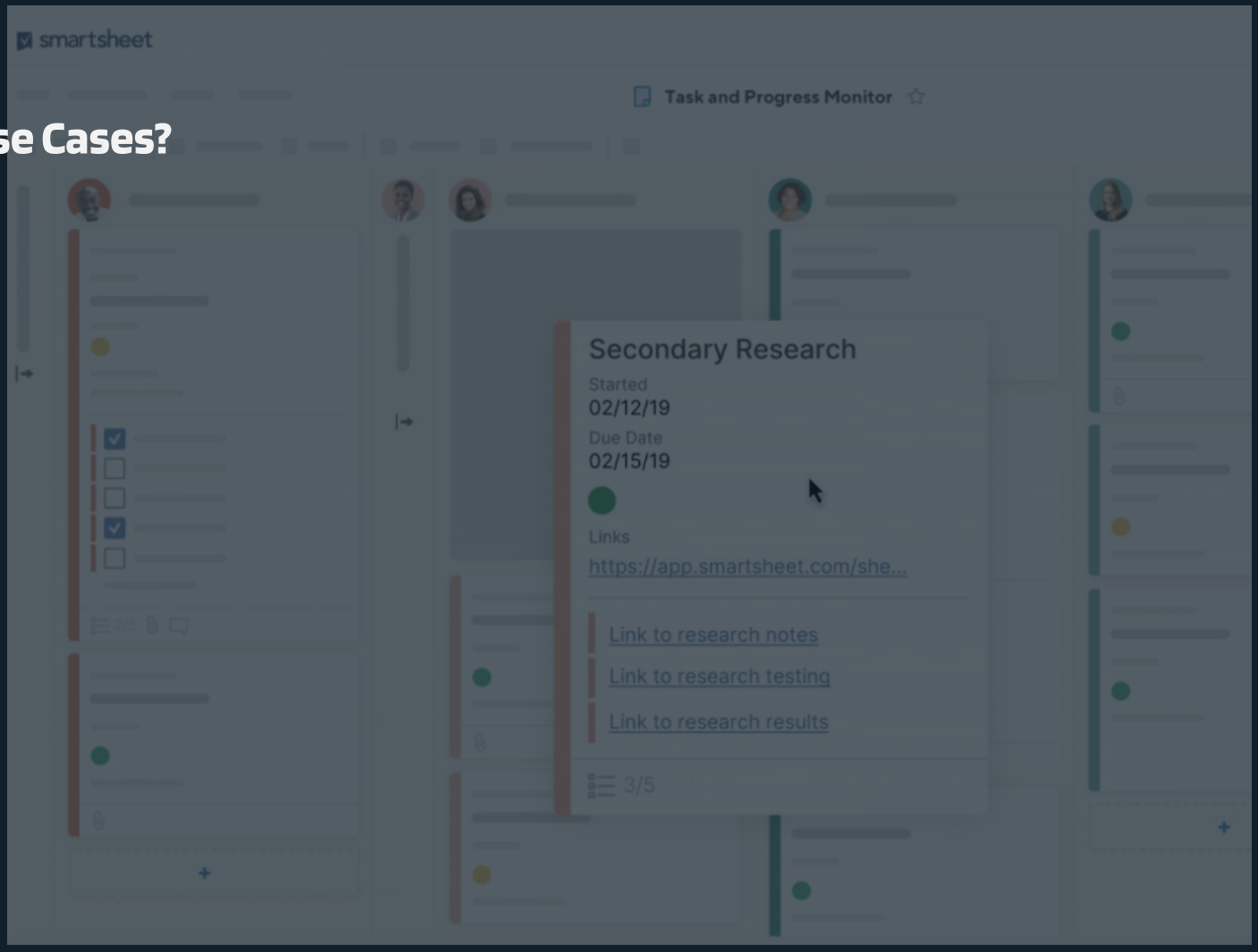
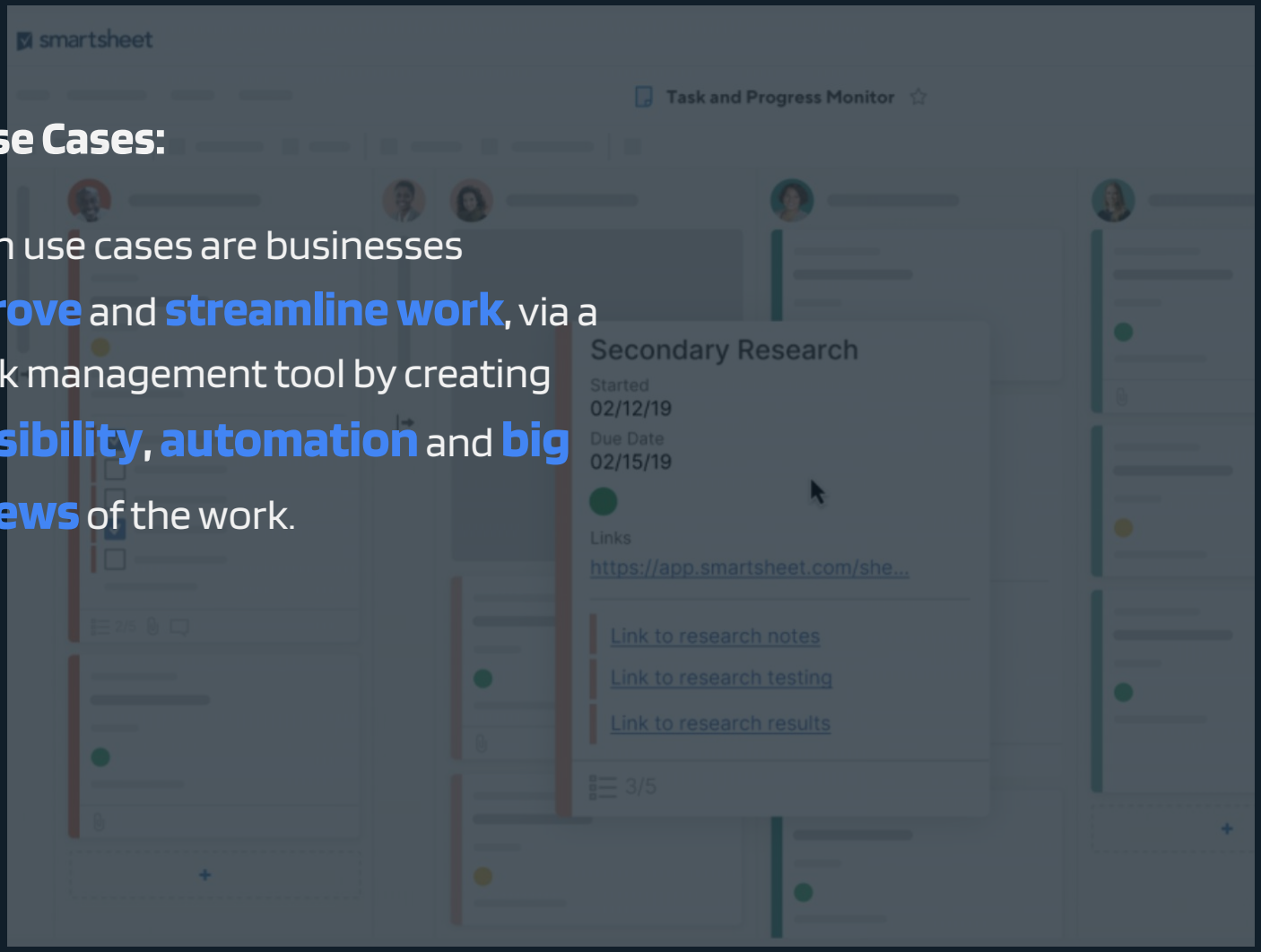
Main Product Use Cases?



Smartsheet

Main Product Use Cases:

Smartsheets main use cases are businesses **looking to improve** and **streamline work**, via a collaborative work management tool by creating more **project visibility**, **automation** and **big picture overviews** of the work.



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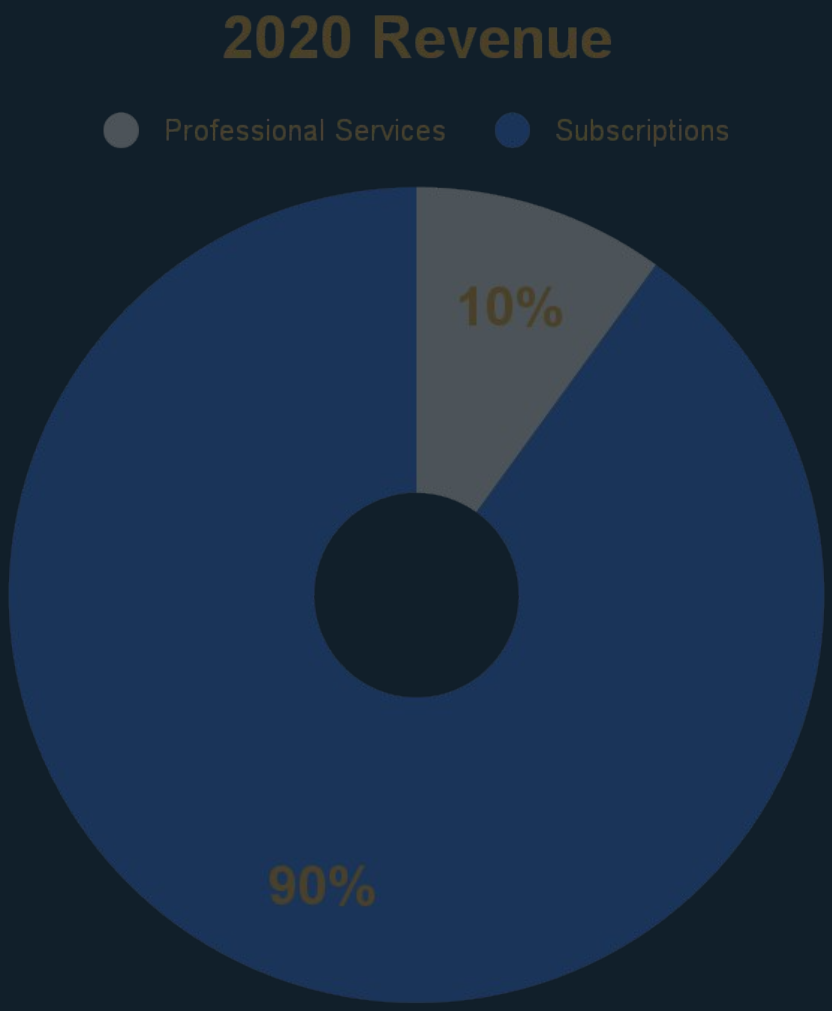
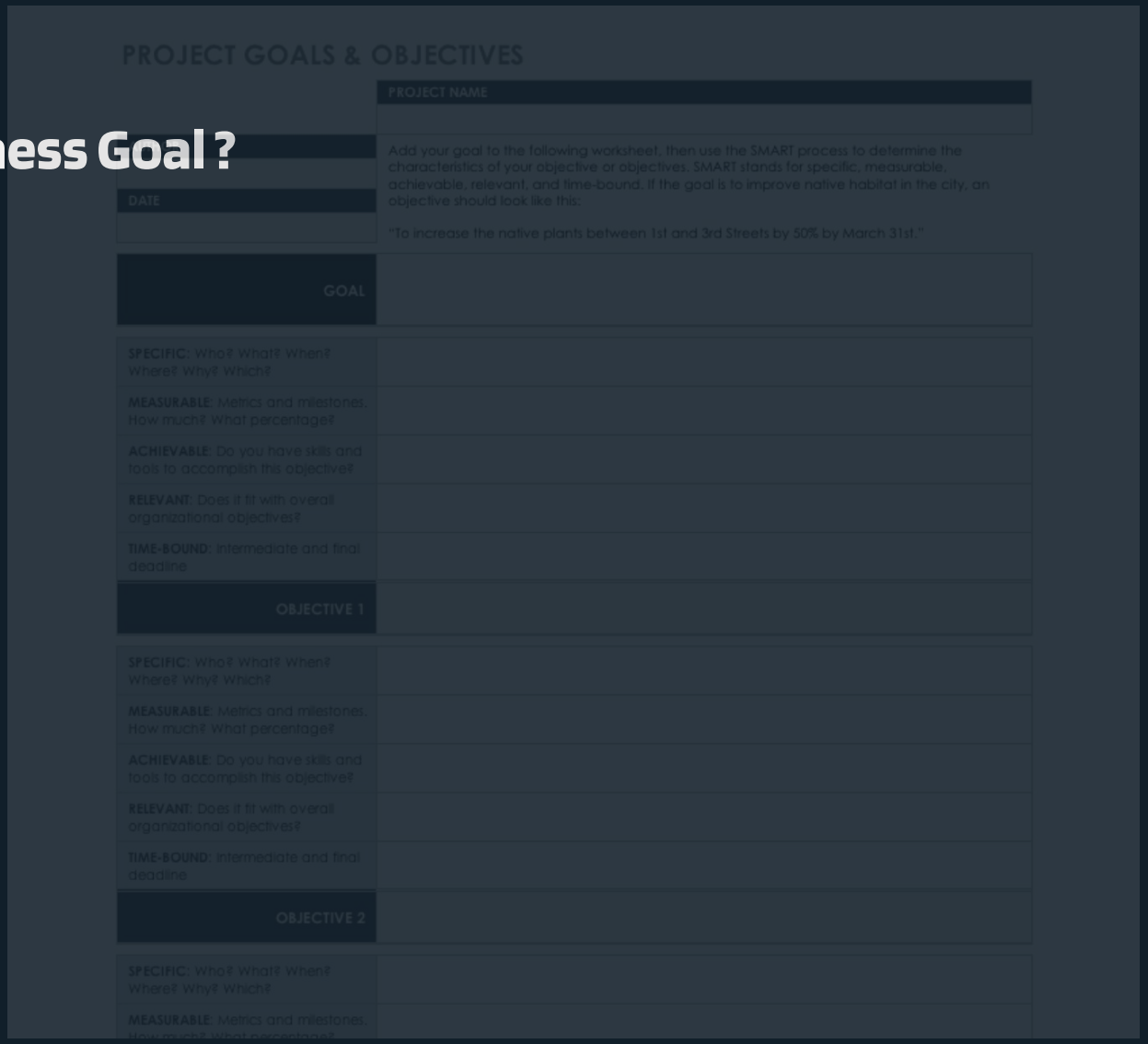
90% of Smartsheet's revenue is from their subscriptions.

- New Subscriptions & Subscription Upgrades
- Professional Services



Smartsheet

What is their Business Goal ?



PROJECT GOALS & OBJECTIVES

PROJECT NAME

DATE

Add your goal to the following worksheet, then use the SMART process to determine the characteristics of your objective or objectives. SMART stands for specific, measurable, achievable, relevant, and time-bound. If the goal is to improve native habitat in the city, an objective should look like this:

"To increase the native plants between 1st and 3rd Streets by 50% by March 31st."

GOAL

SPECIFIC: Who? What? When? Where? Why? Which?

MEASURABLE: Metrics and milestones. How much? What percentage?

ACHIEVABLE: Do you have skills and tools to accomplish this objective?

RELEVANT: Does it fit with overall organizational objectives?

TIME-BOUND: Intermediate and final deadline

OBJECTIVE 1

SPECIFIC: Who? What? When? Where? Why? Which?

MEASURABLE: Metrics and milestones. How much? What percentage?

ACHIEVABLE: Do you have skills and tools to accomplish this objective?

RELEVANT: Does it fit with overall organizational objectives?

TIME-BOUND: Intermediate and final deadline

OBJECTIVE 2

SPECIFIC: Who? What? When? Where? Why? Which?

MEASURABLE: Metrics and milestones. How much? What percentage?

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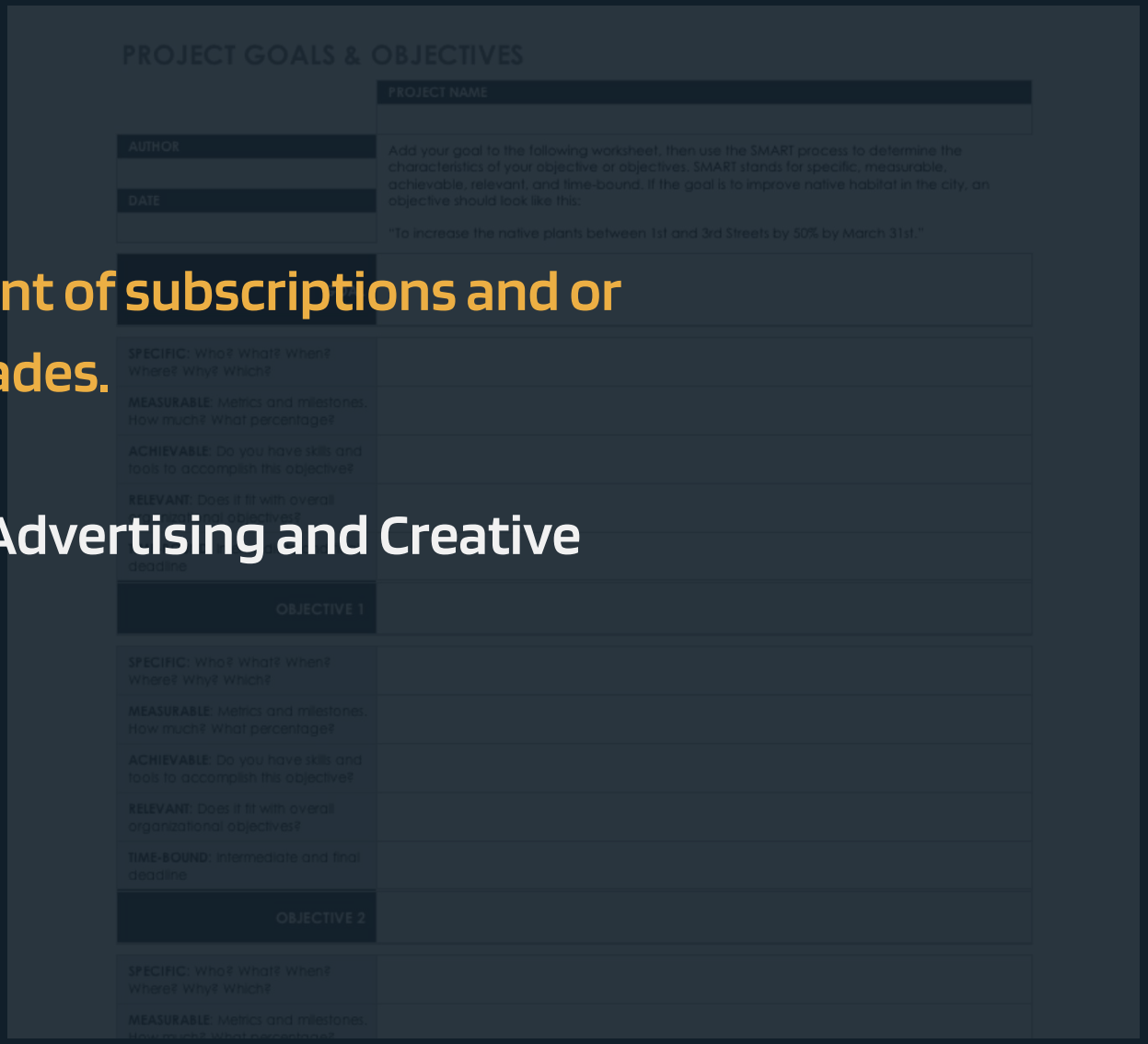
Business Goal

Increase the amount of subscriptions and or subscription upgrades.

Specifically in the Advertising and Creative industries.



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In the Advertising & Creative industry, the most common feedback heard is that Smartsheet is

- Rather intimidating
- Overwhelmed by the capabilities
- Don't know where to get started or even how they can use it
- Not enough time to explore it

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The result:

- Agencies will usually turn to a **more simplified** and/or **less robust** and/or familiar work tools.

asana

Smartsheet

User Personas & Scenarios

USER PERSONA

OCCUPATION: Director of Project Management & Operations
AGE: 45
STATUS: Married, 3 kids

ABOUT:
Jane, Creative Agency Project Manager: Leads and manages a small and very busy project management team. She's a great leader and really looks out for her team and wishes that they had better workflows and tools to lighten up the teams work loads and create more visibility. Jane has reviewed Smartsheet in the past, loved it, but struggles with finding time in her work day to sort through all the potential uses and/or even think about how to implement it in her agency.

INTERESTS
- Yoga
- Reading
- Coffee by day- Wine by night
- Cabin time with the family

TECHNOLOGY
- iPhone
- MacBook Air
- iPad
- Zoom
- Messaging apps (iMessage, WhatsApp)

PAINS:
- Too much time spent entering data into multiple places.
- Lack of project visibility and a collective process - everyone is doing their own thing.
- No available time in a work day input existing documents into Smartsheet
- Overwhelmed by all the capabilities and no time to sit down and go in depth with Smartsheet.

GAINS:
- Time freed up to spent on work
- Fewer emails!
- A single source of truth
- Visibility!
- A standardized project template system
- Easier onboarding experience
- Better planning (resources especially)
- Better work-life balance for the project management teams.

PRODUCTS USED

G Suite, AtTask, workfront, smartsheet, Office 365, project, Excel

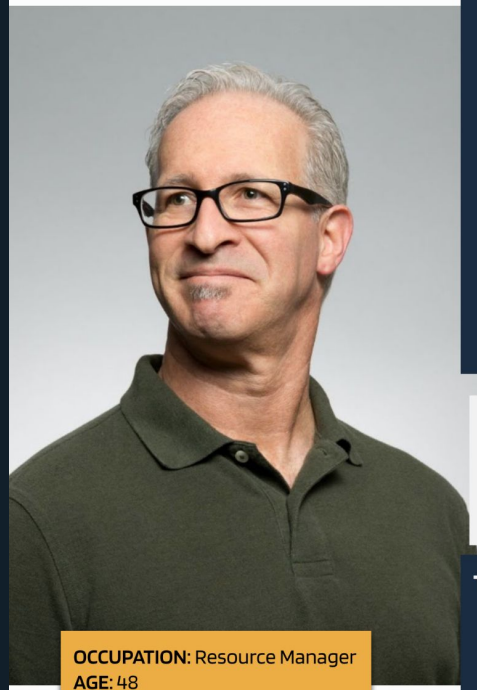
Returning User

- **Too Busy**
- Overwhelmed
- Wants to standardize project process
- Better Planning
- Less Human Error

Smartsheet

User Personas & Scenarios

USER PERSONA



OCCUPATION: Resource Manager
AGE: 48
STATUS: Divorced, 2 teenage Children

ABOUT:

Mark, Creative Resource Manager:
As an agency creative resource manager and his care for the creative teams is often compared to that of a mother bear protecting her cubs. Mark needs to have a full picture of the incoming work, work in progress, and efforts needed for all of it. Currently all the creative assignments are allocated as they come in and although Mark keeps an excel spreadsheet of the agency's work, knowing timelines, creative needs and efforts, and being able to plan is not happening. He knows of allocation programs and has used them in the past, but finds them confusing and challenging to setup and therefore tends to default to his ways - manually entering data into an excel spreadsheet kept on his desktop.

INTERESTS

- Running
- Biking
- Cooking
- Live music

TECHNOLOGY

- iPhone
- MacBook Pro (work)
- PC- windows 10 (home)
- iPad
- Zoom
- Messaging apps (iMessage)

PAINS:

- Manual input is time consuming and prone to human errors.
- Resource & Project reporting is only as good as the information provided/available.
- Freelance needs are hard to plan for.
- Creative & Developer resources are often working overtime because of the lack of assignment visibility.
- Hard to be prepared for rush/urgent resource needs.

GAINS:

- Collaborative resource management
- Easy implementation and start up
- Birds-eye view of all resource allocations and future needs
- Less manual input = time back in a work day
- Ability to be more proactive and less reactive.
- Overall a better work life balance for the teams.

PRODUCTS USED

project

ORACLE

workamajig

New User

- **Does not know where to start**
- Unfamiliar with Product
- **Full Resource visibility**
- Less manual input
- Better Planning
- Less Human Error

Smartsheet

User Personas & Scenarios

USER PERSONA

OCCUPATION: Social Strategist
AGE: 25
STATUS: Single

ABOUT:

Ashley, Social Content Manager:
Young and eager professional working at her first creative agency. This was a dream job for Ashley and therefore she just goes with the current process and does not complain. While in college, Ashley used content calendars in Google Sheets for her social content management and Trello at her internship. However the agency she's at hands her creative decks with the assets and copy flattened in the file. This causes her to spend 2x-3x more time to deliver or post the final social, because she has to retype the post copy and often chase down the final file to post.

INTERESTS

- Travel
- Documentaries
- Music
- Biking

TECHNOLOGY

- iPhone
- MacBook Air
- iPad
- Zoom
- Messaging apps (iMessage, WhatsApp)

PAINS:

- Difficulty with post visibility
- Frantically pushing out promoted posts at the last minute.
- Social posting process delayed by 1-2, sometime more days because of missing content or content not built to specs
- Working behind office hours because assets are received late in the day.
- Not enough time in her day to for actual social Strategy planning

GAINS:

- Mental sanity!
- Fully detailed out Content documents and calendars.
- Ability to set reminders for asset & copy due dates.
- Central point to find platform specs and requirements.
- Collaborative & live document- single version and source of truth
- Overall happiness in her role.

PRODUCTS USED

asana Trello G Suite

New User

- **Unaware of the solutions available**
- Overwhelmed by current process
- **More collaboration**
- Ability to Plan vs react
- Organization!

Smartsheet

User Personas & Scenarios

USER PERSONA

OCCUPATION: Production Studio Manager
AGE: 36
STATUS: Single

ABOUT:

Ben, Production Studio Manager: Production Manager for a creative agency external production house. Ben manages full production team that focused on print , digital, photography, video and sound production. His studio supports the work for mid-sized creative agencies in town. Ben is an easy-going and creative personality, but since working from home, his team hasn't been the most organized. Incoming projects get buried in their inboxes and/or slip through the cracks thus causing a lot of need for rushing and moving around other work. In the office, they used a white board for project tracking with weekly stand ups on Mondays and he then had status calls with their vendors. A few of his partners use collaboration documents in Smartsheet and because he's familiar with it, he has considered implementing it at his company.

INTERESTS

- Outdoor adventures
- Photography/Videography
- Music
- His dog
- Craft beer

TECHNOLOGY

- iPhone
- MacBook Pro
- iPad
- Zoom
- Messaging apps (iMessage, WhatsApp)

PAINS:

- Tracking project intakes
- Multiple of projects with a lot of moving parts is exhausting to manually track every day.
- Team availability and time management.
- The thought of researching project management tools and implementing them sounds painful and mind numbing.

GAINS:

- Ability to manage projects and workloads better.
- Better intake process.
- Better collaboration and openness with partners.
- Smoother quote & invoicing process
- Easily locate estimates, notes, emails, and other important project information.
- Live and single document for all partners, vendors, and freelance help.
- Dropbox integration for easy proof & rough cut reviews.

PRODUCTS USED

smartsheet, HIGHTAIL, G Suite, Dropbox, Trello

Existing/Upgraded User

- **Project intake process**
- Help managing teams availability
- **Transparency** with external partners
- Estimation & Financial tracking
- **Dropbox Integration**

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What's the Solution to Solve the Problem ?

Smartsheet

Solution to Solve the Problem

Make Smartsheet **easier** to get started, **appear less intimidating** and/or overwhelming to busy agency users.

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Goal

Acquiring new user subscriptions
(Advertising & Creative)

Solutions

- New Category in Solution Center
  - Ad & Creative Focused Templates
  - Relevant Add-Ons
- Agency Starter Package
  - Core + Add-On subscriptions
    10,000 ft, Brandfolder, Calendar

Smartsheet

Opportunity Hypothesis

New Category for Advertising and Creative in the platform solution center

- templates and template sets are Advertising and Creative focused and optional and/or suggested add-on features will also be listed.

Agency Starter Package

- Package will allow for quick startup and implementation and include valuable add-on products in the subscription cost.

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Opportunity Hypothesis

New Category for Advertising and Creative in the platform solution center

Agency Starter Package
- Could be solved in Marketing & Sales

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What does this look like?

1. New Category for Advertising and Creative will be added into the platform's solution center.
2. That category will pull together all Advertising and Creative relevant templates, template sets, app integrations, and add-ons.

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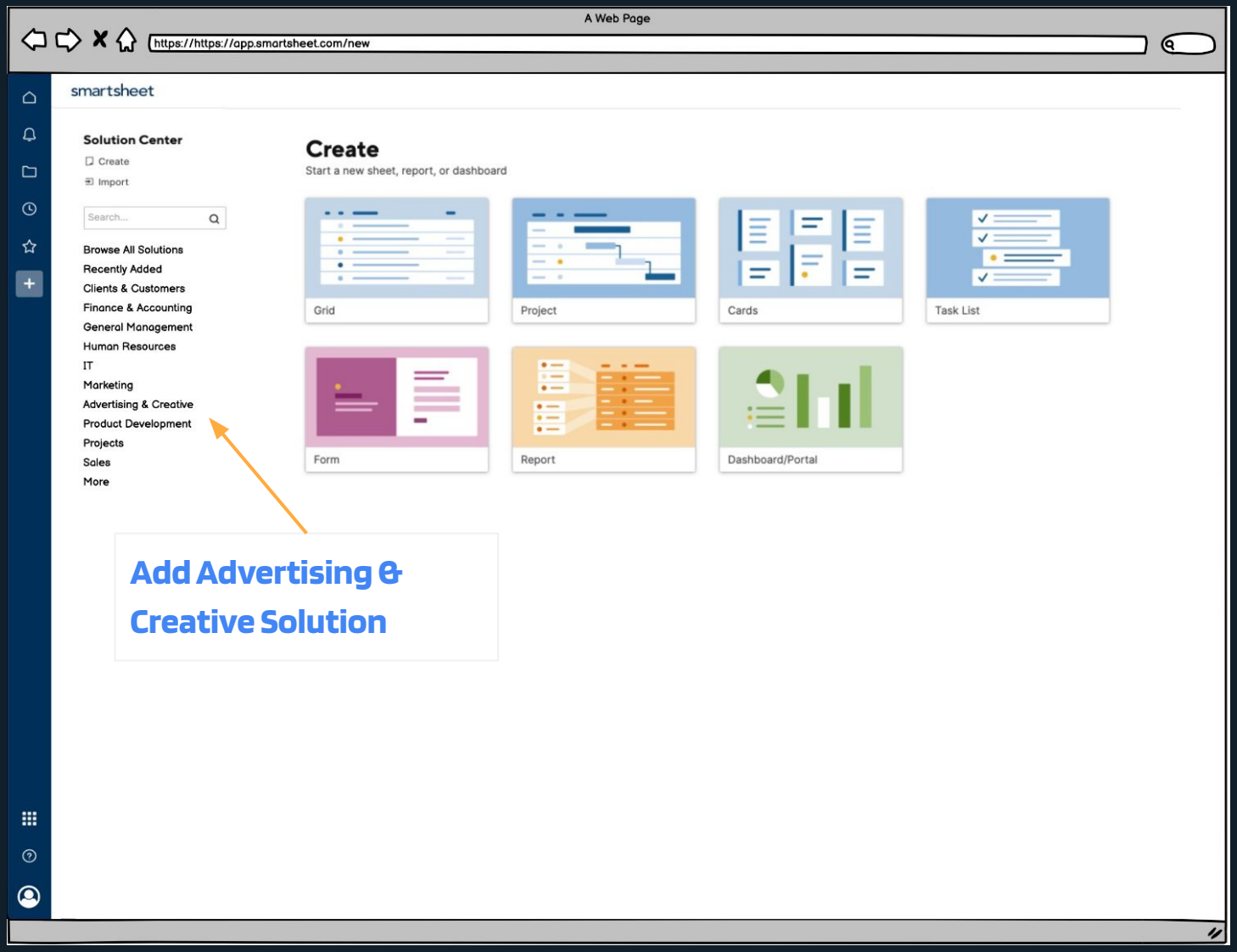
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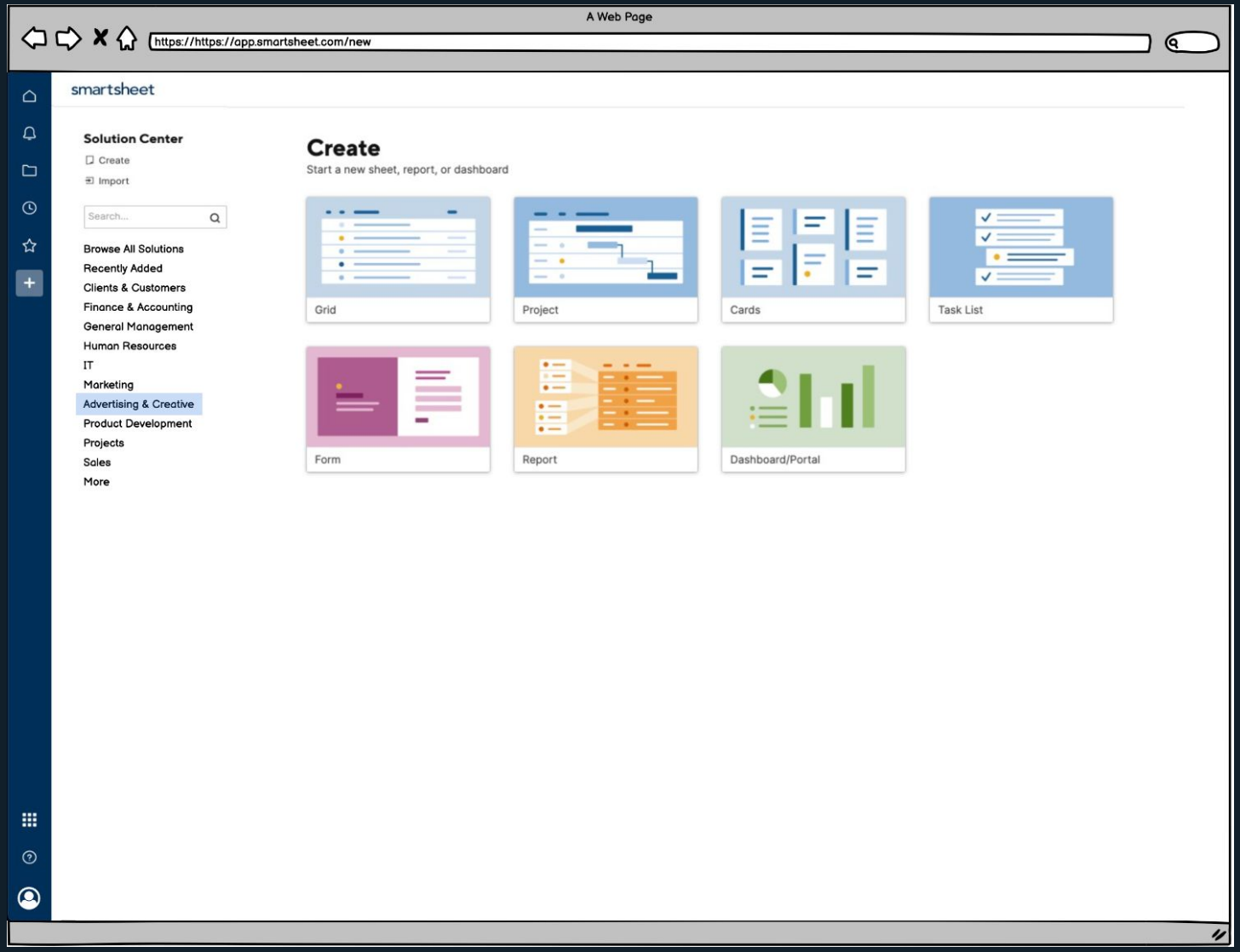
Solution Center
Create
Import
Search...
Browse All Solutions
Recently Added
Clients & Customers
Finance & Accounting
General Management
Human Resources
IT
Marketing
Advertising & Creative
Product Development
Projects
Sales
More
Create
Start a new sheet, report, or dashboard
Grid
Project
Cards
Task List
Form
Report
Dashboard/Portal
Add Advertising & Creative Solution

Smartsheet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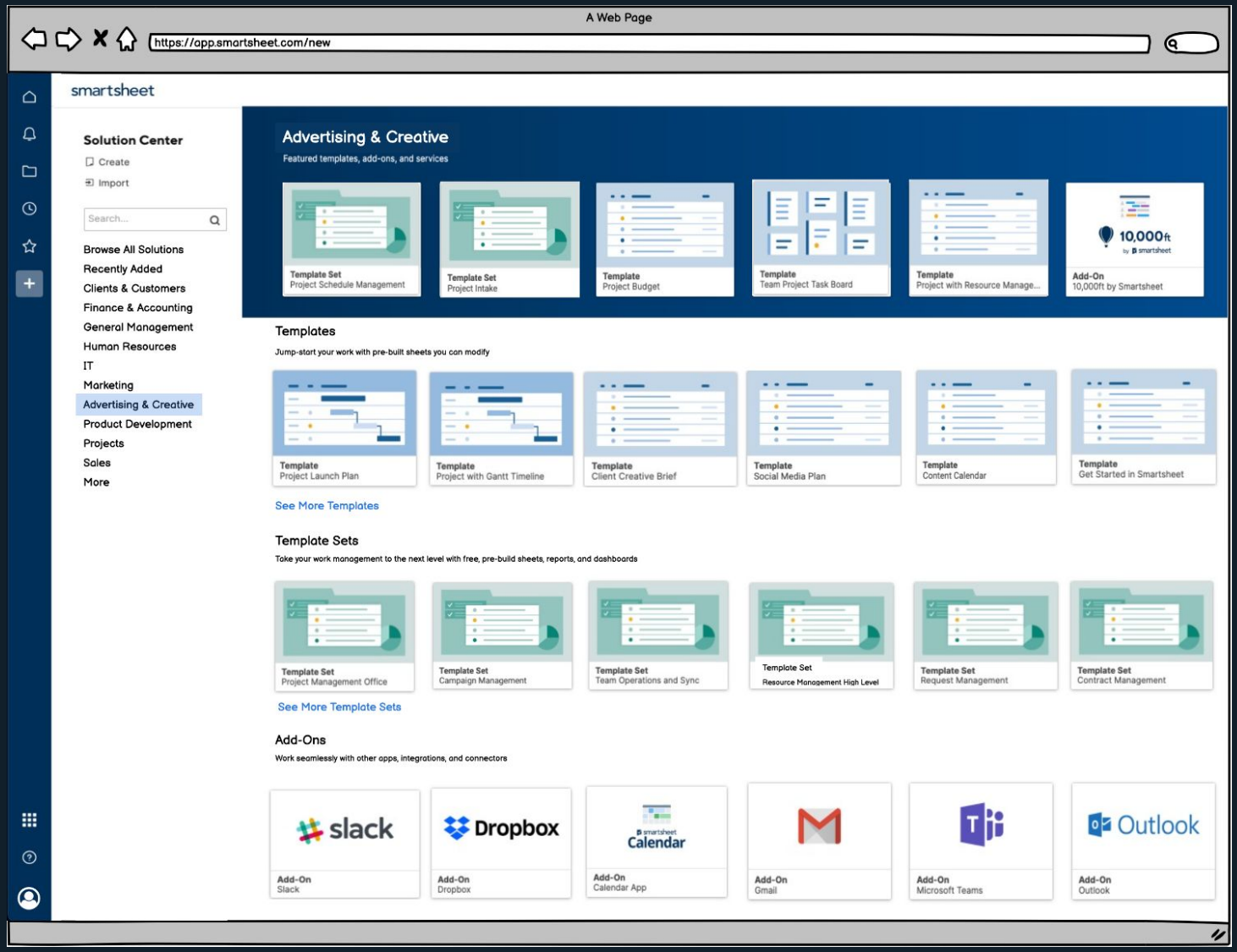
Solution Center
Create
Import
Search...
Browse All Solutions
Recently Added
Clients & Customers
Finance & Accounting
General Management
Human Resources
IT
Marketing
Advertising & Creative
Product Development
Projects
Sales
More
Create
Start a new sheet, report, or dashboard
Grid
Project
Cards
Task List
Form
Report
Dashboard/Portal

Smartsheet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General Management
Human Resources
IT
Marketing
Advertising & Creative
Product Development
Projects
Sales
More
Advertising & Creative
Featured templates, add-ons, and services
Template Set
Project Schedule Management
Template Set
Project Intake
Template
Project Budget
Template
Team Project Task Board
Template
Project with Resource Manage...
Add-On
10,000ft by Smartsheet
Templates
Jump-start your work with pre-built sheets you can modify
Template
Project Launch Plan
Template
Project with Gantt Timeline
Template
Client Creative Brief
Template
Social Media Plan
Template
Content Calendar
Template
Get Started in Smartsheet
See More Templates
Template Sets
Take your work management to the next level with free, pre-build sheets, reports, and dashboards
Template Set
Project Management Office
Template Set
Campaign Management
Template Set
Team Operations and Sync
Template Set
Resource Management High Level
Template Set
Request Management
Template Set
Contract Management
See More Template Sets
Add-Ons
Work seamlessly with other apps, integrations, and connectors
Add-On
Slack
Add-On
Dropbox
Add-On
Calendar App
Add-On
Gmail
Add-On
Microsoft Teams
Add-On
Outlook

Smartsheet

Pre- Launch GTM Plan:

- Internal share out and launch of the new feature will occur two weeks before release to allow any new templates to be tested as well as address any bugs.

- Sales teams to become familiar with the new user category, target market, use cases and solutions to common industry work management problems.

- Connect with enterprise tool and app partners, like Dropbox, Box, Slack, Salesforce, etc and have those companies feature Smartsheet's new feature.

Smartsheet

Potential Messaging to the Advertising and Creative Users

(Recent release message)

We've reimagined the design of Smartsheet to help you and your team get more done, with less noise and a more beautiful, delightful experience -

+

Now with an advertising and creative focused solution center, agencies can get started quicker on Smartsheet.

Smartsheet

Launch Week GTM Plan:

- Offer short 30 minute webinars to share the new feature(s)
- Track user downloads
- Track number of new inquiries and subscription upgrades
- Email to existing or past users in the Marketing industry

Smartsheet

Post-Launch

- Website paid promotion to have Smartsheet come up as the first option when a search for project management tools or other relating key words are used.
- Follow up with sales teams and find out what is working and not working.
- Digital ad buys with Ad Age, Egoist and other advertising and creative focused news platforms.
- Continue to track the metrics- downloads, visits to site, new inquiries, demo requests, etc

Smartsheet

Conclusion

New Category for Advertising & Creative in the Solution Center = Increased Subscriptions in the Advertising & Creative Industry

Thank You!