





Empowering the Modern PMO

James Ferrier, Manager EMEA Solutions Engineering

15th June 2023

 smartsheet

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Agenda

1

**Modern PMO
Challenges**

2

**Modern PMO
Technology**

3

**Stories of
Success**

4

Q&A

5

Thanks!





SCAN ME

1

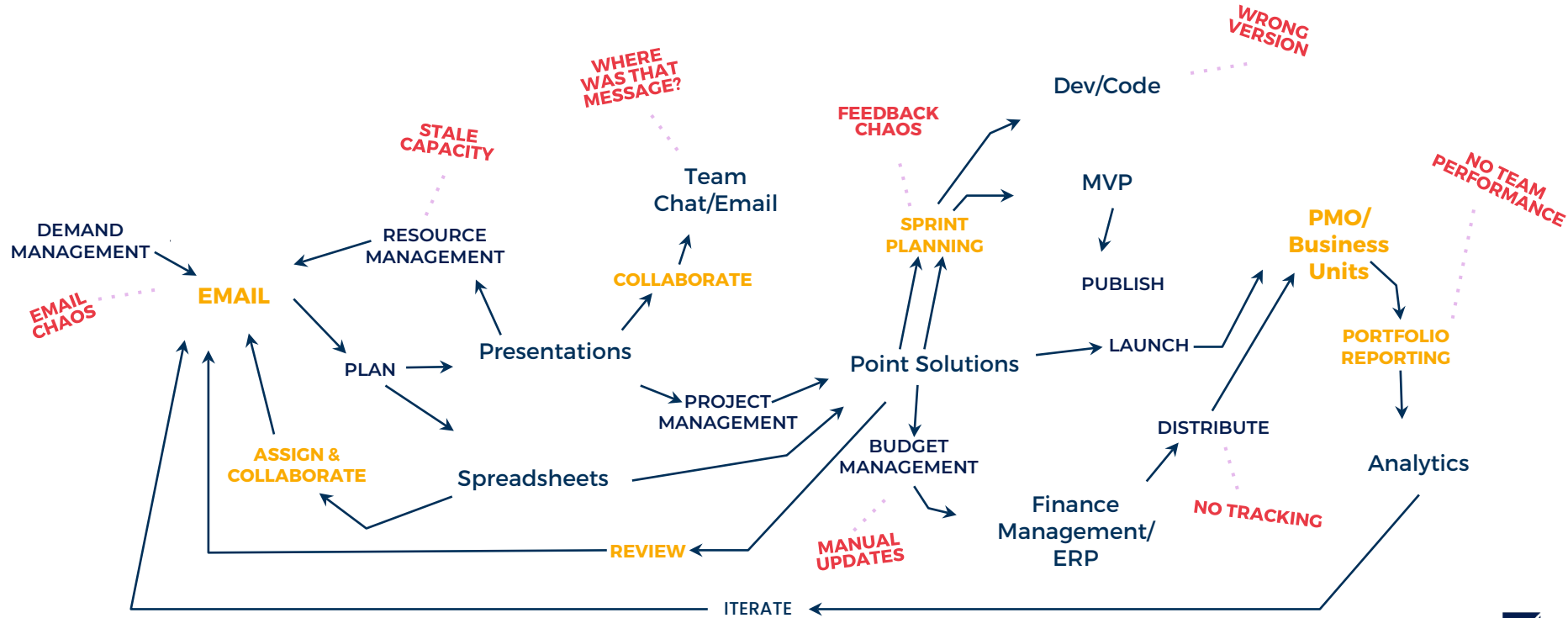


Project and Portfolio Management Challenges



Current Situation

Many teams still work like this...



PMO's are struggling with...



FLEXIBILITY

... inflexibility. They need a solution that accommodates the **the way they work, our people, processes,** and their unique use cases.



VISIBILITY

... limited visibility across projects. They are **looking for a 'single source of truth'** to rely on.



RESOURCE MANAGEMENT

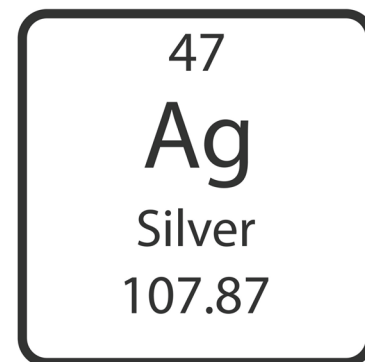
... collecting accurate resource data, **allocating the right people to projects,** and planning for capacity across portfolio(s).



PORTFOLIO REPORTING

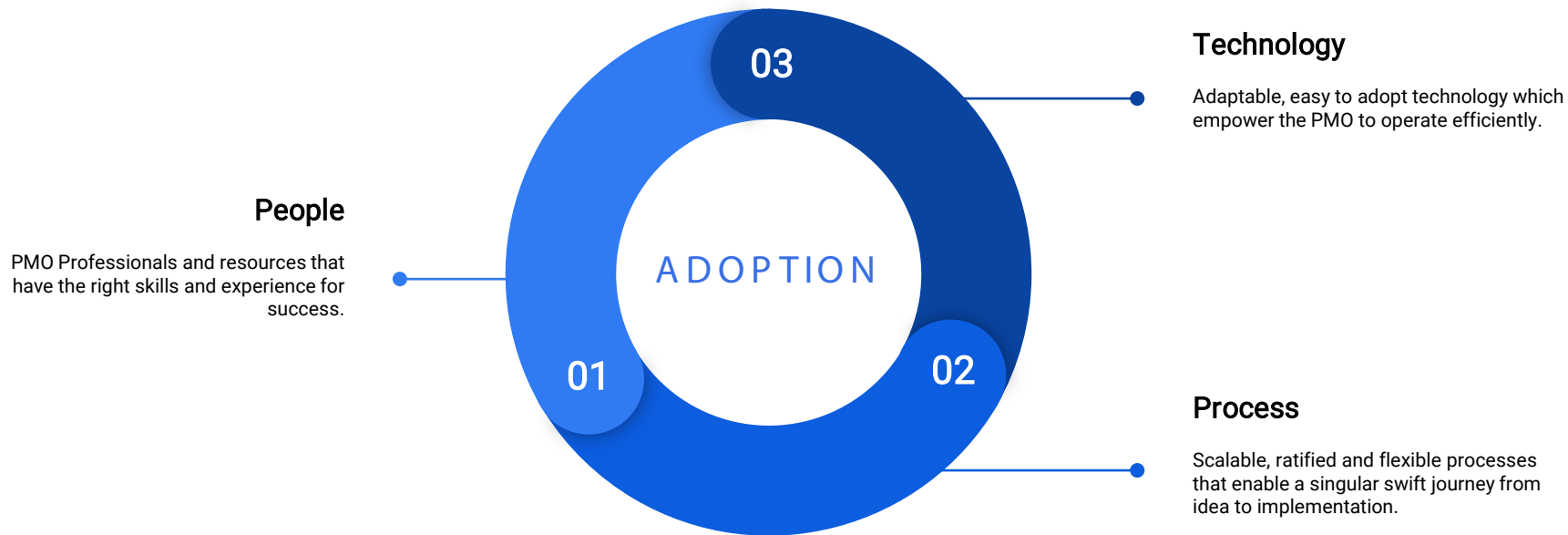
... the need to **communicate benefits to all stakeholders** – from business leaders to individual contributors.





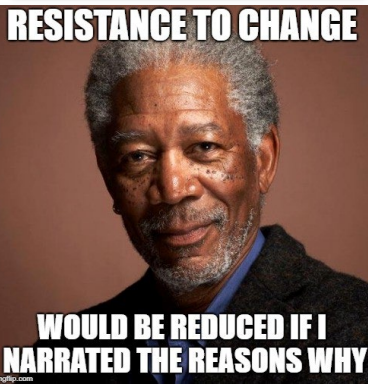
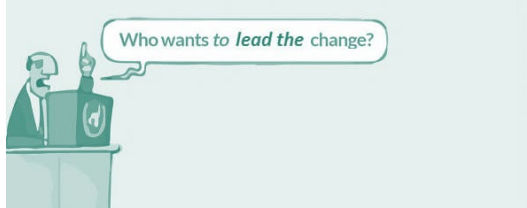
Three Pillars

Support each other



Change Management Reality


Humans don't like change!



Modern vs Traditional PPM Technology

Modern PPM

Bottoms up, flexible approach to portfolio management that starts with collaborative work management



**Looking
for the same
thing.**

Traditional PPM

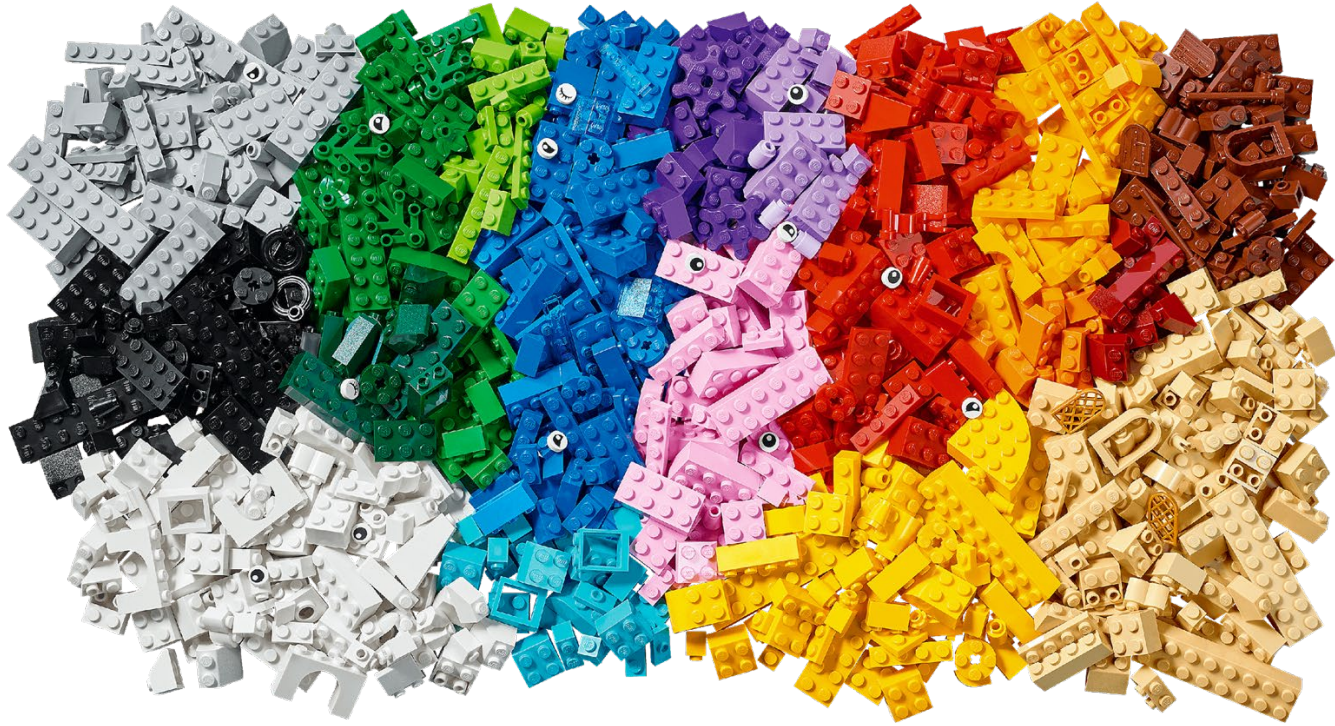
Top-down, rigid approach to portfolio management that struggles with lack of adoption

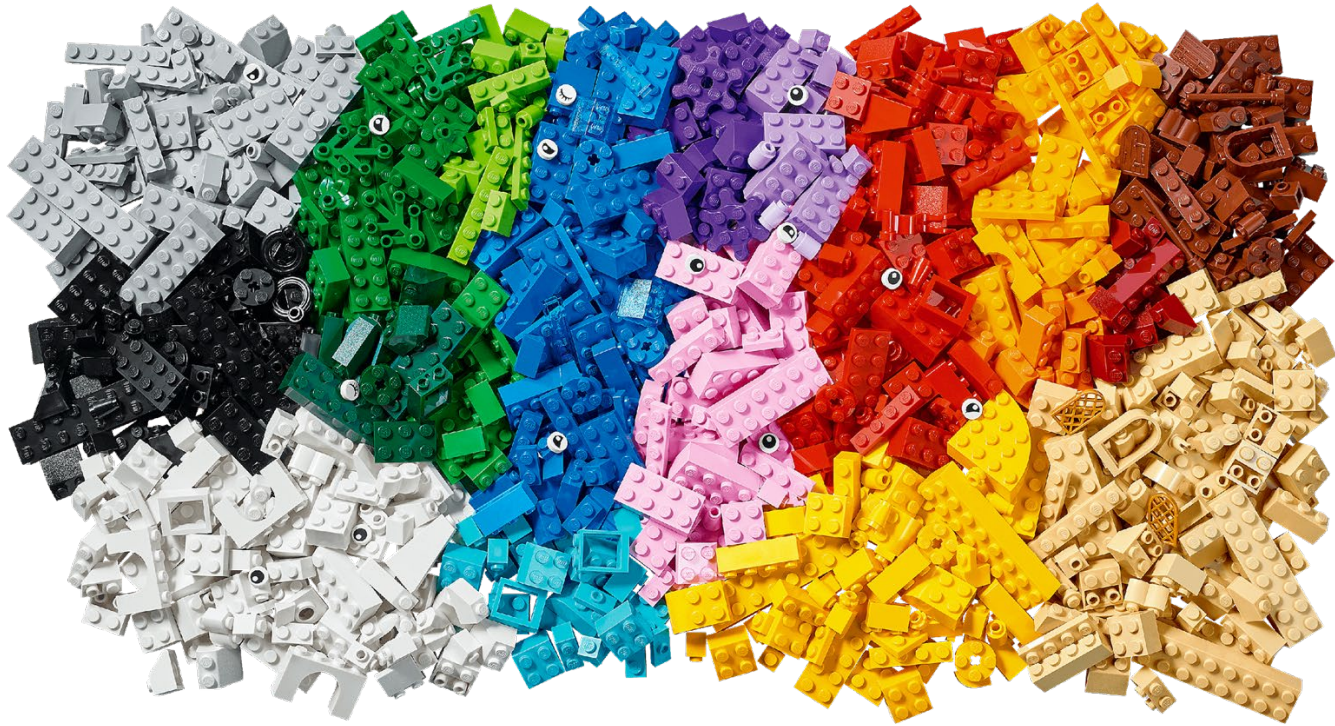
2

Modern PMO Technology

The building blocks









How can Smartsheet support the Modern PMO?



Strategic Planning



Demand Intake



Portfolio Prioritization



Project Sourcing & Planning



Project / Work Execution



Portfolio Reporting

GLOBAL PROCESS **SCALABILITY** + TEAM **AUTONOMY**

Microsoft 365 Google Workspace # slack servicenow **INTEGRATIONS** okta salesforce + tableau Jira Adobe

Unified Workflows

Data Aggregation at Scale

Frictionless Change Management

User-Driven Innovation





The Full Scale LEGO[®]
McLaren Senna
A 1:1 model replica made
of 467,854 LEGO[®] bricks

467,854

5000

Maturity

Start with the Core disciplines and grow from there



**Strategic
Planning**



**Demand
Intake**



**Portfolio
Prioritization**



**Project
Sourcing &
Planning**



**Project / Work
Execution**



**Portfolio
Reporting**



How can Smartsheet support the Modern PMO?



Strategic Planning



Demand Intake



Portfolio Prioritization



Project Sourcing & Planning



Project / Work Execution



Portfolio Reporting

GLOBAL PROCESS **SCALABILITY** + TEAM **AUTONOMY**

Microsoft 365 Google Workspace # slack servicenow **INTEGRATIONS** okta salesforce + tableau Jira Adobe

Unified Workflows

Data Aggregation at Scale

Frictionless Change Management

User-Driven Innovation



3

Stories of Success

See how your peers use Smartsheet





Industry
Manufacturing

Organization size
Enterprise (10,000+ employees)

Region
EMEA

Oerlikon achieves complete portfolio visibility with Smartsheet

100%
standardization

across all IT projects results in comprehensive visibility and transparency

“All information around a project status and budget is consolidated from start to finish in Smartsheet. This gives us a **comprehensive view and maximum transparency across all IT-based initiatives and projects globally.**”

Mandy Aeschlimann

Head of Global SAP Management & SAP IT Program Manager,
Oerlikon IT Solutions



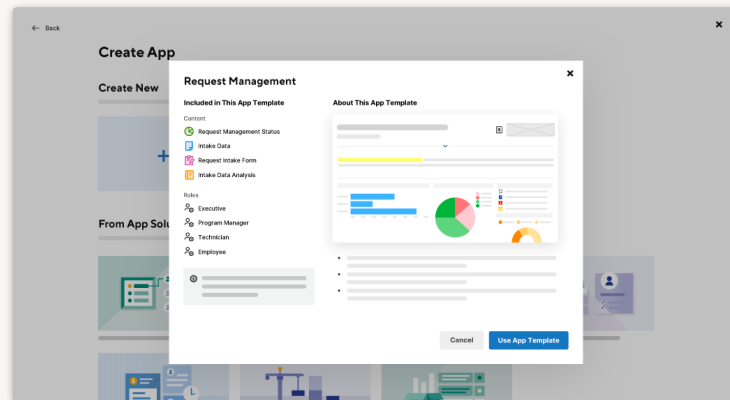
Demand Intake



Streamline demand intake and automate approval workflow

- Accurately capture **incoming work/project requests even via 3rd party tools like ServiceNow and Jira**
- Stay on top of all incoming requests and approval status with the intake portal
- Gather all the right data during the intake process
- Use simple intake sheets to **standardize profile data** for every project

Smartsheet enables **effective planning and transparency in prioritization.**



New Project Submission

Project Name

Function

Start Date

Project

File Upload

Drag and drop files here or [browse files](#)

[Privacy Notice](#) | [Report Abuse](#)



 **Data Shuttle**



Smartsheet Dynamic View

My Project Submissions

Filter

RAG	Approved	ID	Country	Project Name	Start Date
● Live	Live	5108389	Germany	Project Adeo Zeta	08/03/21
● New	New		France	Project Alpha	08/03/21
● New	New		France	Project Alpha	08/03/21
● Live	Live	5344250	UK	Project Spora Steria	08/03/21

Details

Data

Project Name
Project Adeo Zeta

Start Date
08/03/21

End Date
05/04/21

Time Code Type
Confirmed

smartsheet

File Automation Forms Connections Project Intake - PPM

Search...

Share

Card View Filter Off All Levels View by Approval

Uncategorized (4)

New (7)

Analogue Missions
Lori Garcia
Department 4
Standard
13/03/22

ARCTAS
Lori Garcia
Department 2
Standard
02/05/22

AIM
June Taylor
Department 5
Standard
16/03/22

AquariFinance
Henry McNeal
Department 1
Complex
07/05/22

Mars Perseverance Rover
Kirk Caskey
Department 5

Under Review (3)

Apollo
Alexandra Mattson
Department 1
Complex
09/03/22

Mars Pathfinder
Lori Garcia
Department 4
Standard
07/05/22

Aura
Alexandra Mattson
Department 2
Standard
11/02/22

Approved (58)

Magellan
Alexandra Mattson
Department 1
Standard
02/04/22

ASTRO-2
Henry McNeal
Department 4
Complex
07/04/22

Magnetospheric Multiscale (MMS)
Devon Gomez
Department 5
Complex
23/03/22

Apollo-Soyuz
Devon Gomez
Department 2
Standard
04/03/22

Hold - Need More info (2)

Compton Gamma-Ray Observatory
Kirk Caskey
Department 4
Standard
02/04/22

CubeSats
Lori Garcia
Department 2
Standard
16/03/22

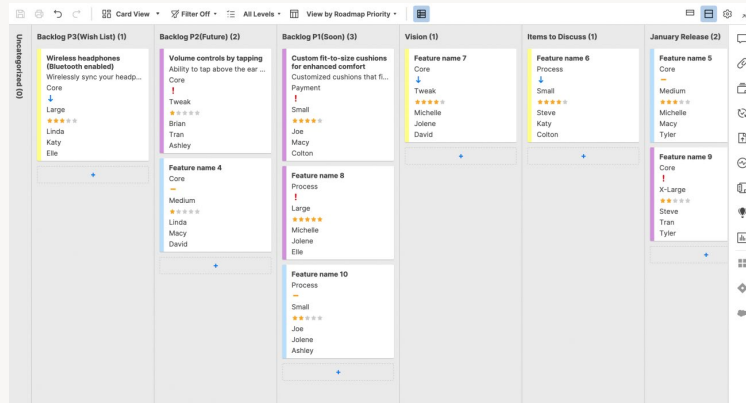
Portfolio Prioritization



Leverage a scoring model to drive portfolio prioritization

- **Align all organizational and portfolio priorities** in one place
- **Score, rank projects according to your priorities** with a scoring model driven by standardized, transparent criteria
- **Focus on what matters the most**; eliminate projects that don't align with organizational priorities

Smartsheet **helps prioritize and optimize your portfolio investments.**



smartsheet

1. Enterprise - PMO

View as

Executive

- Executive Portfolio Dashboard
- Demand Management**
- Resource Metrics
- Budget Management
- Strategic Planning
- Strategic Roadmap
- Resource Schedule
- Resource Capacity
- SOW Intake
- Project Intake Form
- My Assignments - Tasks

DEMAND MANAGEMENT

APPROVAL NEEDED

7

PROVISION READY

7

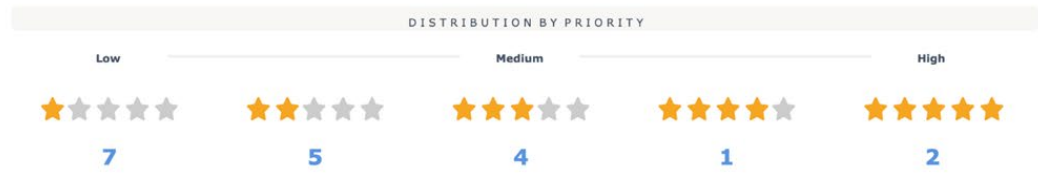
PROGRAM LEAD

June Taylor

QUICK LINKS

- PPM Intake
- Project Intake
- Intake Dashboard
- Portfolio Inventory
- My Work Portal

DEMAND TRENDS



PIPELINE

Weighted Total	Project	Start Date	Proposed Budget	Project Type	Strategic Goal	Parent	Project Lead
100%	Apollo	09/03/22	\$15,000.00	Complex	Empower Our People	HR	Alexandra Mattson
100%	CubeSats	16/03/22	\$297,985.00	Standard	Service Delivery	IT	Lori Garcia
92%	Pearson Initiative 1	13/03/22	\$125,000.00	Complex	Empower Our People	Finance	Kirk Caskey
80%	ACE	11/02/22	\$15,000.00	Complex	Broaden Awareness	Operations	Kirk Caskey
73%	Mars Pathfinder	07/05/22	\$105,000.00	Standard	Operational Excellence	Operations	Lori Garcia
70%	AIM	16/03/22	\$15,000.00	Standard	Strategic Growth	Sales	June Taylor
70%	GOES	07/05/22	\$103,000.00	Standard	Broaden Awareness	Sales	Dominick George
53%	Analogue Missions	13/03/22	\$15,000.00	Standard	Strategic Growth	Operations	Lori Garcia
53%	AquarFinance	07/05/22	\$125,000.00	Complex	Strategic Growth	HR	Henry McNeal
53%	Chandra X-Ray Observatory	04/03/22	\$58,000.00	Standard	Strategic Growth	HR	Henry McNeal



Project Name	Proposed ROI%	Proposed Return	Priority	Project Type	Weighted Total	Alignment w/ Company Goals	Market Positioning	Core Capabilities	Revenue Potential
9 Analogue Missions	75%	\$26,250.00	★★★★★	Standard	53%	6	5	5	
10 Apollo	58%	\$23,700.00	★★★★★	Complex	100%	10	10	10	
11 Apollo-Soyuz	35%	\$101,250.00	★★★★★	Standard	80%	8	8	8	
12 Aqua	73%	\$259,500.00	★★★★★	Complex	70%	7	7	7	
13 AquariFinance	57%	\$196,250.00	★★★★★	Complex	53%	6	5	5	
14 ARCTAS	16%	\$52,200.00	★★★★★	Standard	40%	2	4	6	
15 Artemis Programme (Human Spaceflight — Moon to Mars)	49%	\$14,900.00	★★★★★	Complex	100%	10	10	10	
16 ARTEMIS and THEMIS Science Missions	45%	\$65,250.00	★★★★★	Standard	80%	8	8	8	
17 ASTRO-1	11%	\$64,380.00	★★★★★	Standard	70%	7	7	7	
18 ASTRO-2	7%	\$66,323.95	★★★★★	Complex	53%	6	5	5	
19 Astro-E2 (Suzaku)	38%	\$96,579.30	★★★★★	Standard	30%	3	3	3	
20 ATTREX	13%	\$38,403.05	★★★★★	Standard	92%	9	9	10	
21 Aura	59%	\$187,596.15	★★★★★	Standard	40%	2	4	6	
22 CALIPSO	91%	\$28,650.00	★★★★★	Standard	100%	10	10	10	
23 Cassini-Huygens	45%	\$240,678.25	★★★★★	Standard	80%	8	8	8	
24 CHAMP	48%	\$281,177.80	★★★★★	Standard	70%	7	7	7	
25 Chandra X-Ray Observatory	18%	\$68,440.00	★★★★★	Standard	53%	6	5	5	
26 CINDI	74%	\$518,493.90	★★★★★	Standard	30%	3	3	3	
27 Clementine	44%	\$216,000.00	★★★★★	Standard	92%	9	9	10	
28 Cloud-Aerosol Transport System (CATS)	15%	\$135,682.75	★★★★★	Standard	40%	2	4	6	
29 Cloudsat	8%	\$75,583.80	★★★★★	Standard	100%	10	10	10	

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Industry
Non-profit

Organization size
Mid-market (200 - 1,999 employees)

Region
Global

Special Olympics builds a global community by driving visibility and collaboration

1600+
person hours
saved

a year with
automation and
templates to spin up
new projects on the
go

“We are saving time, money, and manpower. Our leaders love the dashboards... it is nice to know exactly what’s going on, without me having to be there.”

Laura Jones

Director of Project Management, Special Olympics International



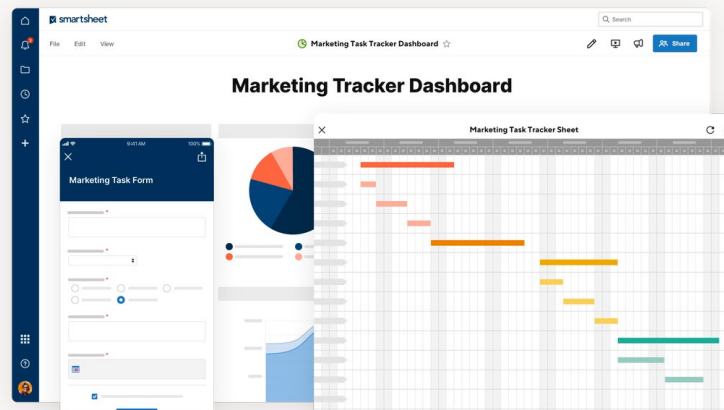
Project Work Execution



Converge teams, work, and communications on one platform

- **Effectively manage work** that is complex, cross-functional, and hard to estimate
- Ensure **alignment between the project and organizational strategy** while keeping an eye on cross-functional dependencies
- **Align teams to execute on work** through effective communication and collaboration

Smartsheet helps you **bring the best teams together, collaborate effortlessly, and execute at scale.**







What's a Blueprint?

Automate the creation of different project types

Project Type X



-  **Sheets** (Forms, Workflows, Cell links etc.)
-  **Reports** (Bi-directional & in real-time)
-  **Dashboards** (Visually display data)
-  **Folders** (Organize your work better)



Project X.1



Project X.2



Project X.3

Administration
(Multiple Blueprints possible)

Automation
(Control Center)

Result
(Projects of same type)



What's a Blueprint?

Automate the creation of different project types



Waterfall Project



Sheets (Forms, Workflows, Cell links etc.)



Reports (Bi-directional & in real-time)



Dashboards (Visually display data)



Folders (Organize your work better)



Agile Project



Sheets (Forms, Workflows, Cell links etc.)



Reports (Bi-directional & in real-time)



Dashboards (Visually display data)



Folders (Organize your work better)



Hybrid Project



Sheets (Forms, Workflows, Cell links etc.)



Reports (Bi-directional & in real-time)



Dashboards (Visually display data)



Folders (Organize your work better)



	Key Activity	Heal...	Task	Notes	Start Date	End Date	% Compl...	Status	Assigned	Allocati...	Float	Dura
1			Summary		21/11/22	10/04/23		Not Started				
20			Project Navigation					Not Started				
21			PROJECT DASHBOARD					Not Started				
22			BUDGET WORKSHEET					Not Started				
23			ISSUE TRACKER					Not Started				
24			EXTERNAL DASHBOARD					Not Started				
25			Implement AP Automation Tool					Not Started				
26			Planning									
27			Client Project Kickoff									
28			Scope & Requirements Definition									
29			Analysis									
30			Requirements Research									
31			Business stakeholder review									
32			Benefits realization review									
33			Design									
34			Design Inquiry									
35			Initial Design Concepts									
36			Design Approvals									
37			Revisions & Finalization									
38			Internal Approvals									
39			Client Announcements									

Uncategorized (19)

Story (9)

Course Catalog
As a site visitor, I can view a detailed page about each course.
Closed
PBI-00008
16/06/23
3

Course Catalog
Account Management
Closed
PBI-00012
Shirley Huson
03/06/23
2

Course Catalog
As a site visitor, I can see a list of other related course...
Closed
PBI-00016
Helen Bates
23/02/22
4

Course Creation
As an instructor, I can upload videos to be part of a course...
In Test
PBI-00034

Bug (7)

Account Management
Issue with Drop-down List
Closed
PBI-00013
Helen Bates
03/06/23

Content
As a site visitor, I can see a list of o...
Umlaut's not appearing in "Course description"
Closed
PBI-00020
Hazel Christensen
09/06/23

Content
Issue with Verdana text
In Test
PBI-00028
Shirley Huson
11/06/23

Content
I want to make a reservation thoug...
Issue with Verdana text
Open
PBI-00076
Shirley Huson

Content
As an instructor, I can create a des...
Issue with Verdana text
Open
PBI-00034

Feature (8)

Content
Course Catalog
Closed
PBI-00015
Devon Gomez
16/06/23
3

Content
Course Creation
Closed
PBI-00030
Hazel Christensen
16/06/23
1

Content
Face to face national system engine
Open
PBI-00288

SYAdmin
Account Management
Closed
PBI-00022
Tamika Marshall
11/06/23
1

Task (38)

Content
As a site visitor, I can view a detail...
Gather course information from schools
Closed
PBI-00009
Devon Gomez
03/06/23

Content
As a site visitor, I can view a detail...
Text running off Course #1...
Closed
PBI-00033
Shirley Huson
16/06/23

Content
As a site visitor, I can view a detail...
Add Hebrew support
Closed
PBI-00011
Aviv Perez
03/06/23

Account Management
Update all options into drop-down list
Closed
PBI-00014
Hazel Christensen
03/06/23



smartsheet

File Edit View

Implement AP Automation Tool - Dashboard - Interna

PROJECT DASHBOARD

PROJECT NAME: Implement AP Automation Tool

COUNTRY: Finance

PROJECT LEAD: James Ferrier

BUDGET VARIANCE: 17%

TASK STATUS

Health	Milestone/ Task
●	Planning
●	Analysis
●	Design
●	Build
●	Project Close

MBFCORP

Current Sprint Dashboard

SPRINT DASHBOARD

SPRINT GOAL: Implement a page where visitors can see details of all products.

SPRINT START: 25/08/21

SPRINT FINISH: 14/09/21

COMPLETED POINTS: 223

FORECASTED POINTS: 258

BLOCKERS: 12

KEY LINKS

- Pillar Management
- Portfolio Management
- Retrospective Dashboard
- Product Backlog
- Sprint Backlog

SPRINT BURNDOWN

HEALTH OF SPRINT



Saved Workflows

Filter by all ▾ Sort by name ▾ ↑

Popular Templates

🔍 Search...

- Alert when an assigned row changes**
 Trigger: When rows are added or changed
 Actions: Alert someone
 Recipients: Contacts in 'Assigned'
 Last modified by James Ferrier on 28 Oct 2021, 13:30
- Inactive Friday Timesheet**
 Trigger: Every week on Friday starting on 11/04/2022 at 16:00
 Actions: Alert someone
 Recipients: All Shared Users
 Last ran on 9 Jun 2023, 17:00 • Last modified by James Ferrier on 11 Jun 2023, 17:00
- Task - Behind Schedule**
 Trigger: When rows are added or changed AND when 'Health' changes to
 Actions: Request an update
 Recipients: Contacts in 'Assigned'
 Last ran on 12 Jun 2023, 09:52 • Last modified by James Ferrier on 5 Jun 2023, 17:00

Search in emails

Active ▾

42 of 285

Behind Schedule: V1 General Availability ▾ Inbox x

James Ferrier via Smartsheet <automation@smartsheet.mbcfcorp.com> to me ▾ Tue, 30 May, 16:51 (13 days ago)

Microsoft Teams

Search

Activity

Chat

James Ferrier (You)

Smartsheet 09/06

Fill your timesheet

Smartsheet Chat About

Smartsheet 27/02 17:17

Update Request

Review operational readiness is behind schedule, please update your progress or estimated completion date. Please update my online sheet.

Open Update Form

2 March

Smartsheet 02/03 16:58

Update Request

36	<input checked="" type="checkbox"/>	●
37	<input type="checkbox"/>	●
38	<input type="checkbox"/>	●
39	<input type="checkbox"/>	●
40	<input type="checkbox"/>	●
41	<input checked="" type="checkbox"/>	●
42	<input checked="" type="checkbox"/>	●
43	<input checked="" type="checkbox"/>	●
44	<input type="checkbox"/>	●

Configure test environment	03/03/23	10/03/23	100%	Complete	Devon Gomez	40%	0	6d
Build solution	13/03/23	23/03/23	0%	Not Started	Devon Gomez	20%	0	9d
Testing	24/03/23	03/04/23	0%	Not Started	Kiran Gupta	20%	0	7d





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1. Enterprise - PMO

View as
Executive

- Executive Portfolio Dashboard
- Demand Management
- Resource Metrics
- Budget Management
- Strategic Planning
- Strategic Roadmap
- Resource Schedule
- Resource Capacity
- SOW Intake
- Project Intake Form
- My Assignments - Tasks

Executive Portfolio Dashboard

smartsheet

1. Enterprise - PMO

View as
Project Manager

- My Assignments - User Portal
- My Assignments - Tasks
- Project Intake Form
- Resource - Time Entry
- Assigned Tasks
- Assigned Issues
- Resource - Time Entry

My Assignments - User Portal

smartsheet

1. Enterprise - PMO

View as
Workstream Resource

- My Assignments - Tasks
- Assigned Tasks
- Assigned Issues
- Resource - Time Entry

Assigned Tasks

smartsheet

Task	Assigned	Sheet Name	Health	% Complete	Start Date	End Date	Status
Total							
In Progress							
1	James Ferrier	Gemini - Plan	●	50%	27/06/22	22/07/22	In Prog
2	James Ferrier	Geotail - Plan (WBS)	●	50%	13/05/22	02/06/22	In Prog
Not Started							
3	James Ferrier	Dragonfly - Plan	●	0%	29/11/22	02/01/23	Not Sta
4							
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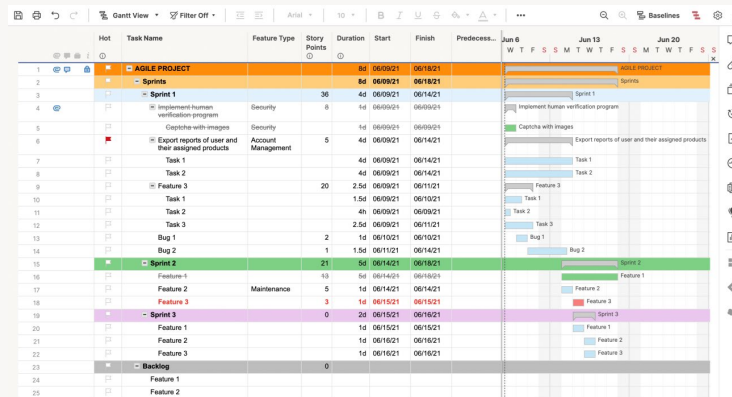
Project Sourcing & Planning

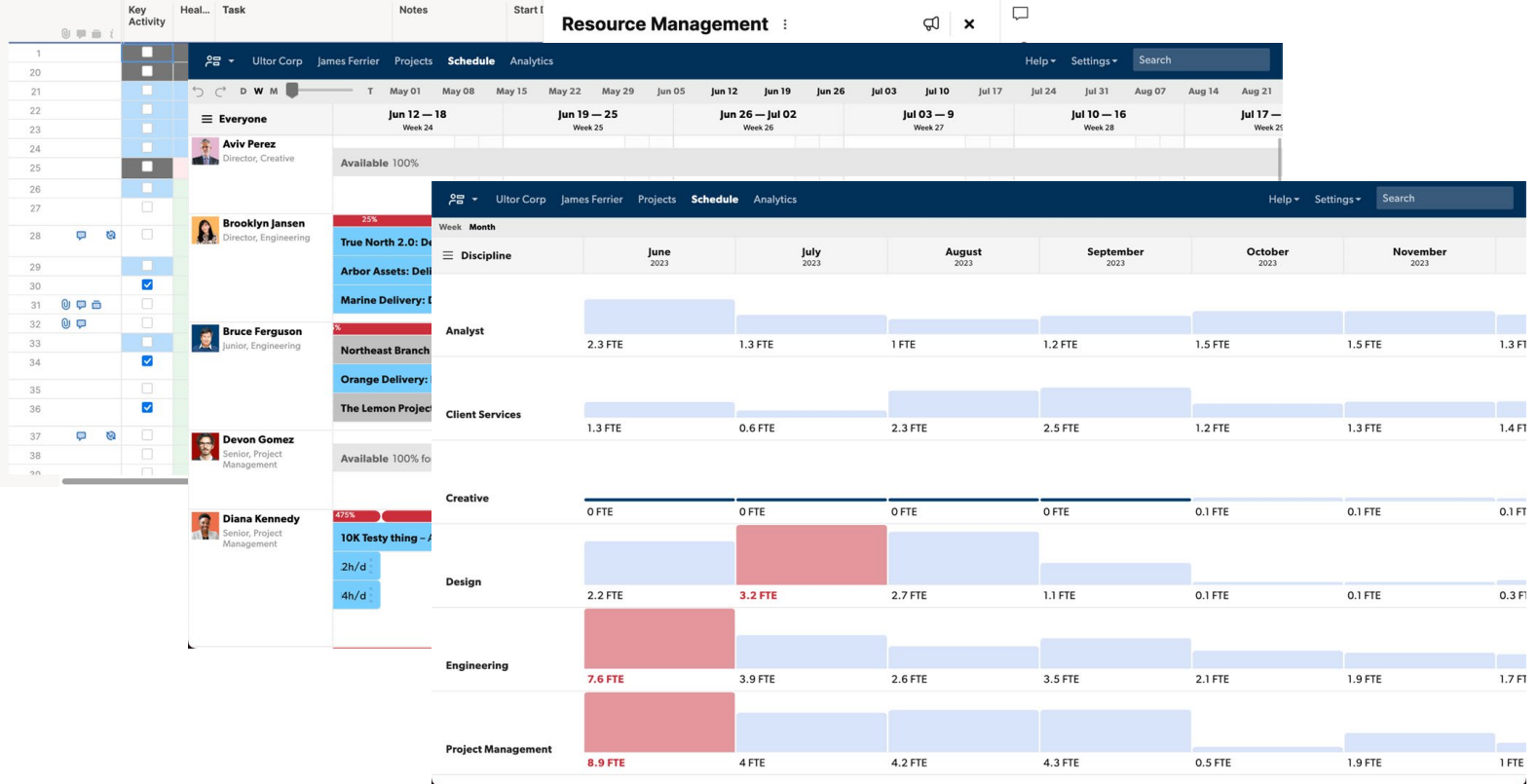


Bring the best teams together to deliver on scope, time, budget

- Plan, manage, and visualize tasks within your agile / waterfall / hybrid projects
- Support the ability to **make great resourcing decisions**
- Share with key stakeholders to keep everyone in sync
- Identify the **impact of project dependencies** and rapidly recover from setbacks

Manage a diverse range of projects. **Drive efficiencies and get more done.**







Industry
Technology

Organization size
Enterprise (10,000+ employees)

Region
North America

Cisco streamlines work and jumpstarts productivity with Smartsheet

4,000
person hours
saved

a year with
automation and
purpose-built
solutions suited to
its unique needs

“Everything is on Smartsheet now... **When we automated our Smartsheet solution with the API, it was a game changer.**”

Jessika Thompson

Project Manager and Solutions Architect, Public Sector Strategic Initiatives and Delivery Enablement (STRIDE), Cisco Systems



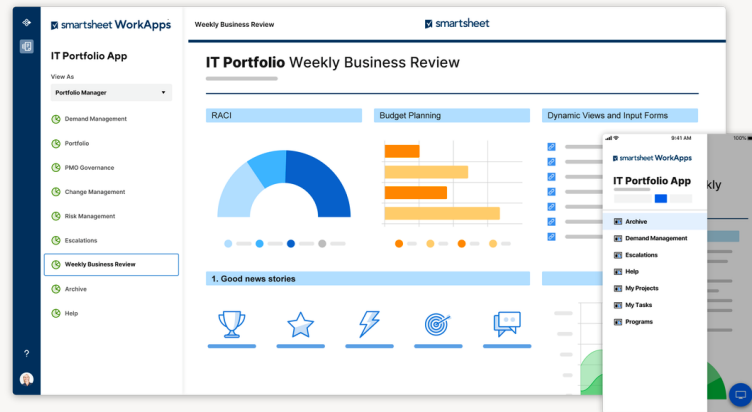
Portfolio Reporting



Demonstrate alignment between work and strategic goals


- Automate and report on portfolios and projects with minimal effort. Remove manual collation and reporting
- Ensure real-time view of progress across projects, programs, and portfolios
- Show alignment between individual / team work and strategic organizational goals
- Reduce portfolio-wide risk and resource visibility

Smartsheet drives organization-wide visibility and transparency with cross-project tracking and centralized reporting.





Q&A

 smartsheet

A woman with long dark hair and glasses is sitting at a wooden desk, typing on a laptop. She is wearing a dark long-sleeved top. To her right, a man with short dark hair and glasses is also sitting at the desk, talking on a headset. He is wearing a blue t-shirt. The desk is cluttered with laptops, a water bottle, and a small potted plant. The background shows a wooden wall and other people working in a bright, modern office environment.

Thank you.

 smartsheet