

Russ Consulting Limited

Smartsheet Platinum Aligned Partner

G-CLOUD 15 – Service Definition

Russ Consulting Limited is a Smartsheet Aligned Partner providing its customers with access to a wide range of Smartsheet Licenses and applications.

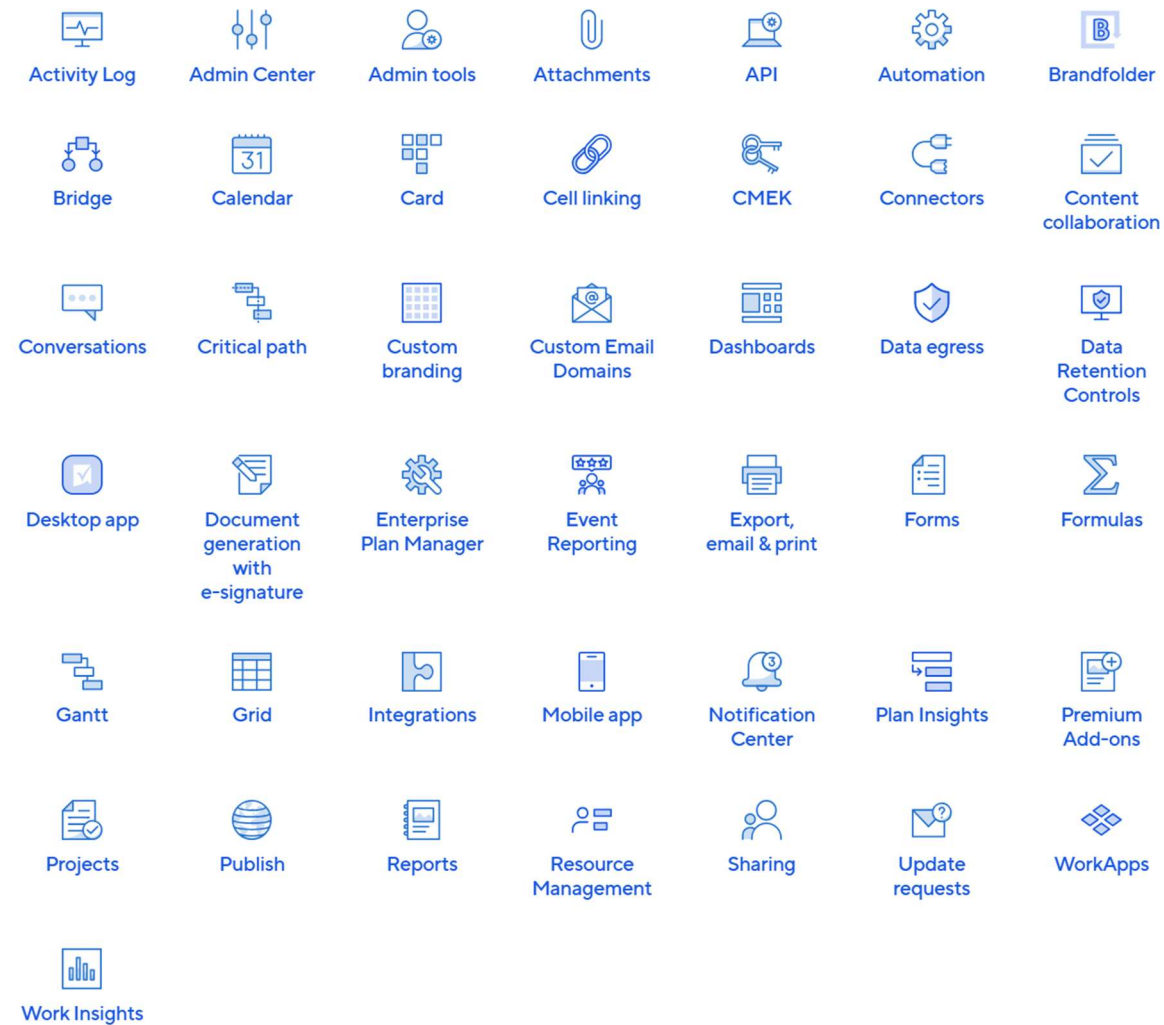
Our role as a company is to ensure that we provide our customers with a solution model that is specifically designed to address a set of unique business requirements and to help our customers better understand, prioritise, manage, deliver, and report on work.

Russ Consulting Ltd has provided Smartsheet products to customer in both the Public and Private Sector.

The pages that follow, will give you a better understanding of what we provide covering the basic functions of Core Smartsheet Licenses as well as some of the more advanced premium products. These pages should be seen as an introduction to what is offered.

CORE LICENSES AND PREMIUM FEATURES

Smartsheet Licenses provide a wealth of capability and are the building blocks from which you can build great things within your organisation. (SEE BELOW)

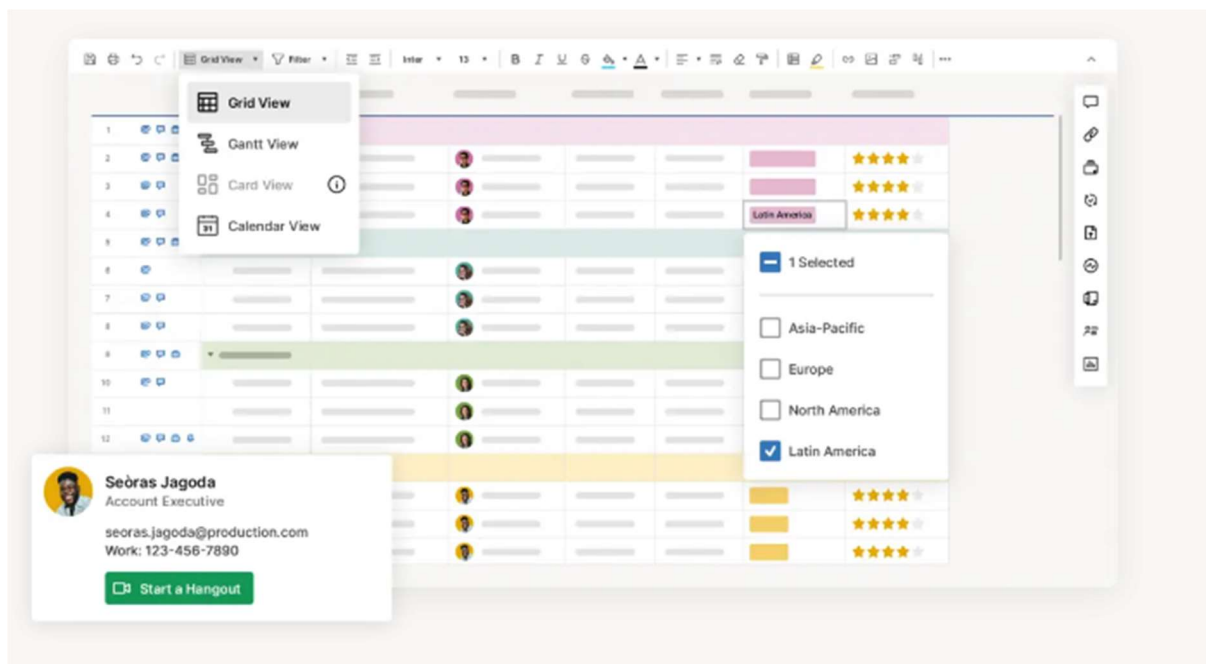


The following are just a few of the CORE features that customers become very familiar with described in a little more detail.

GRID VIEW

A familiar place for your team to capture, track, and collaborate on work.

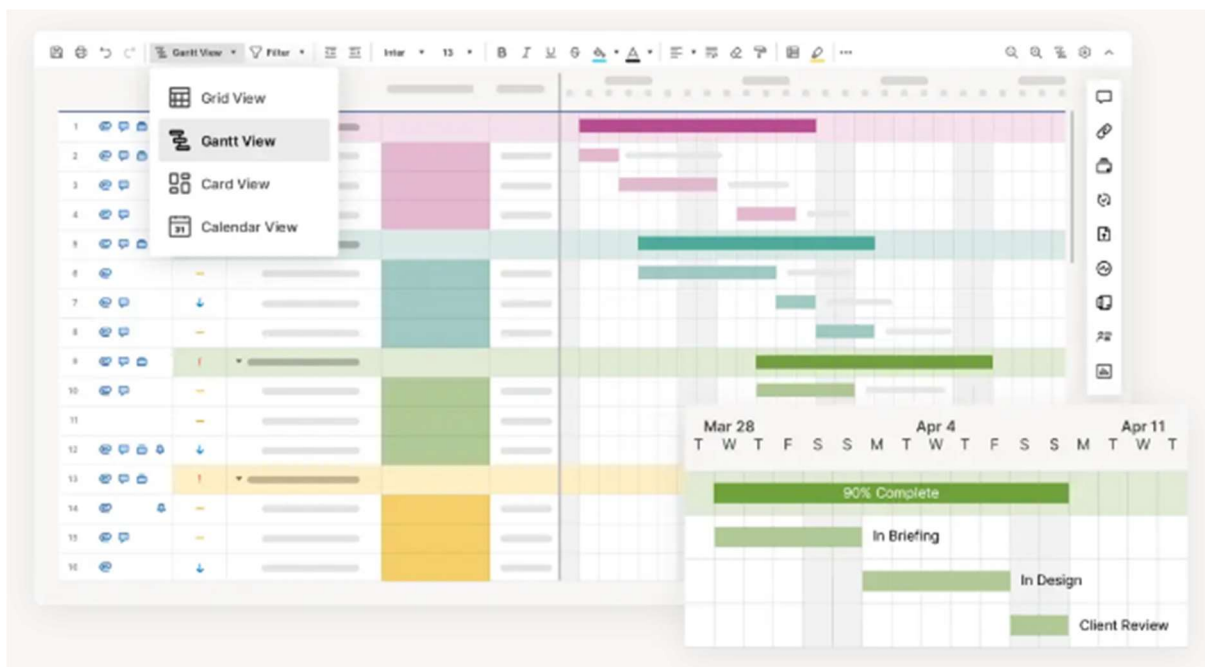
- Familiar, flexible view is easy to customize with multiple column types, including symbol, date, contacts, and more.
- Keep project materials together by attaching documents directly to a sheet.
- Easily set up automation rules within any sheet to prompt updates and keep tasks on track.
- Use powerful row hierarchy, conditional formatting, and formulas to visually and automatically organize information.
- Ideal for managing projects, tracking client feedback, event planning, managing audit and compliance, due diligence lists, and more.



GANTT VIEW

Transform task lists into timelines to track project dependencies.

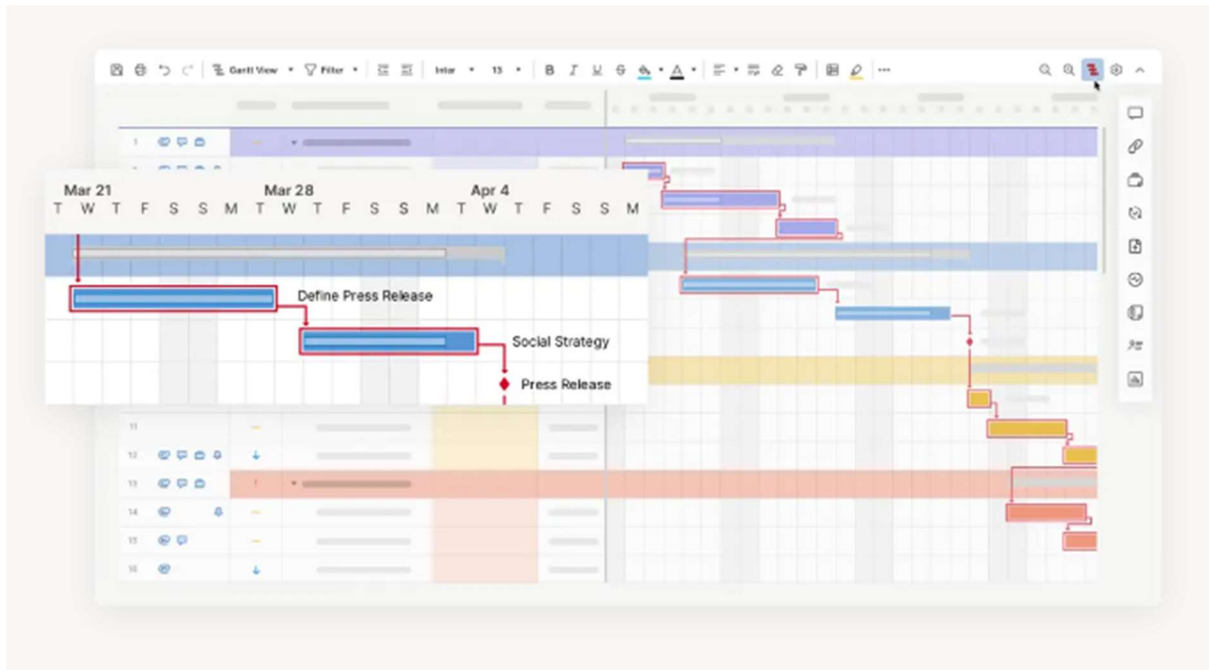
- Set up a Gantt chart with dependencies and a predecessor column to create a Critical Path.
- Drag and drop to adjust start or end dates, or to build dependencies between tasks.
- Establish baselines to track variance over the course of the project.
- Quickly highlight the key tasks in your project timeline Critical Path, and see at a glance which tasks are affecting the project's completion date.
- Ideal for project management resources to visually track the duration of and relationships between tasks in a project.



CRITICAL PATH

See all the tasks that directly impact your project completion date.

- Set up a Gantt chart with dependencies and predecessor columns to create a critical path.
- Filter sheets to see only tasks in the critical path.
- Share crucial elements of your timeline as a PDF to keep stakeholders and leaders apprised of project status.



ATTACH FILES

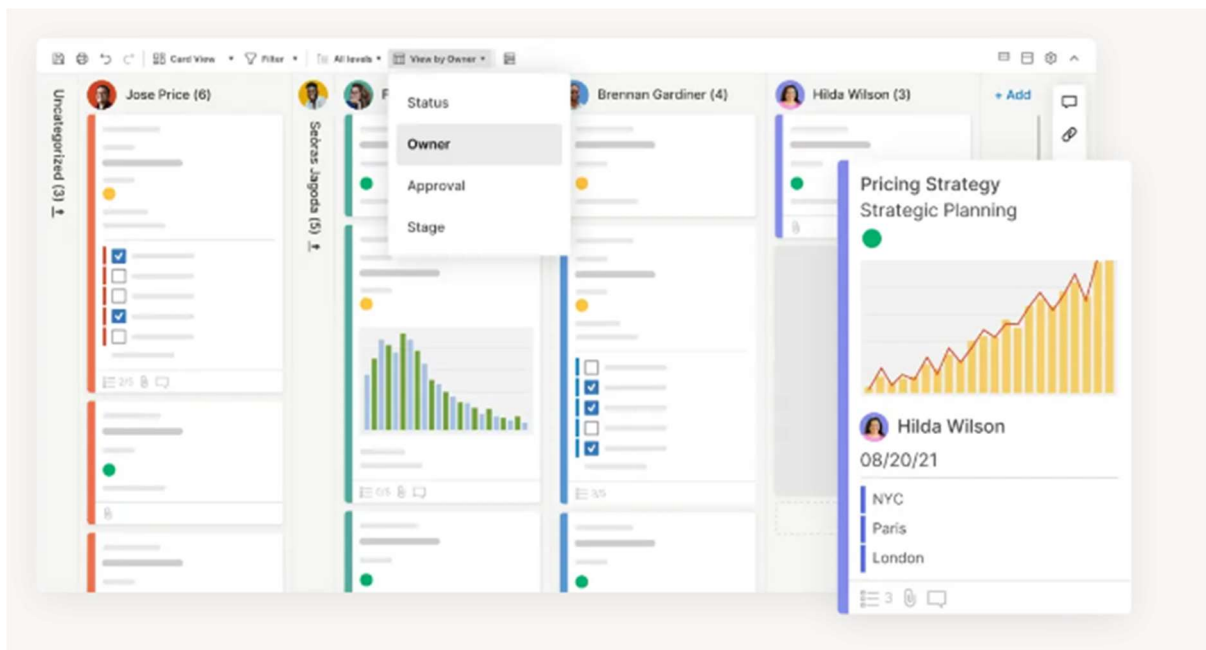
Keep information in one centralized place

- Upload almost any file type, including .jpg, .png, .gif, .pdf, .docx, .pptx, .xlsx and more.
- Attach content from Brandfolder, Google Drive, Dropbox, OneDrive and more.
- Add up to 100 files simultaneously.
- Attach files to individual rows to keep information in context, or attach them to the entire sheet.

CARD VIEW

Visualize and prioritize work as drag-and-drop cards.

- Drag and drop cards between lanes to quickly update the changing status of work.
- Align the team on priority by dragging cards within a lane to save card ranking – without affecting the order of the underlying data in grid view.
- Update cards with custom fields, images, and color coding to focus your team’s attention on what matters most.
- Filter cards and lanes to easily see the flow of work from multiple perspectives.
- Ideal for agile development, request management, and creative use cases.



CELL LINKING

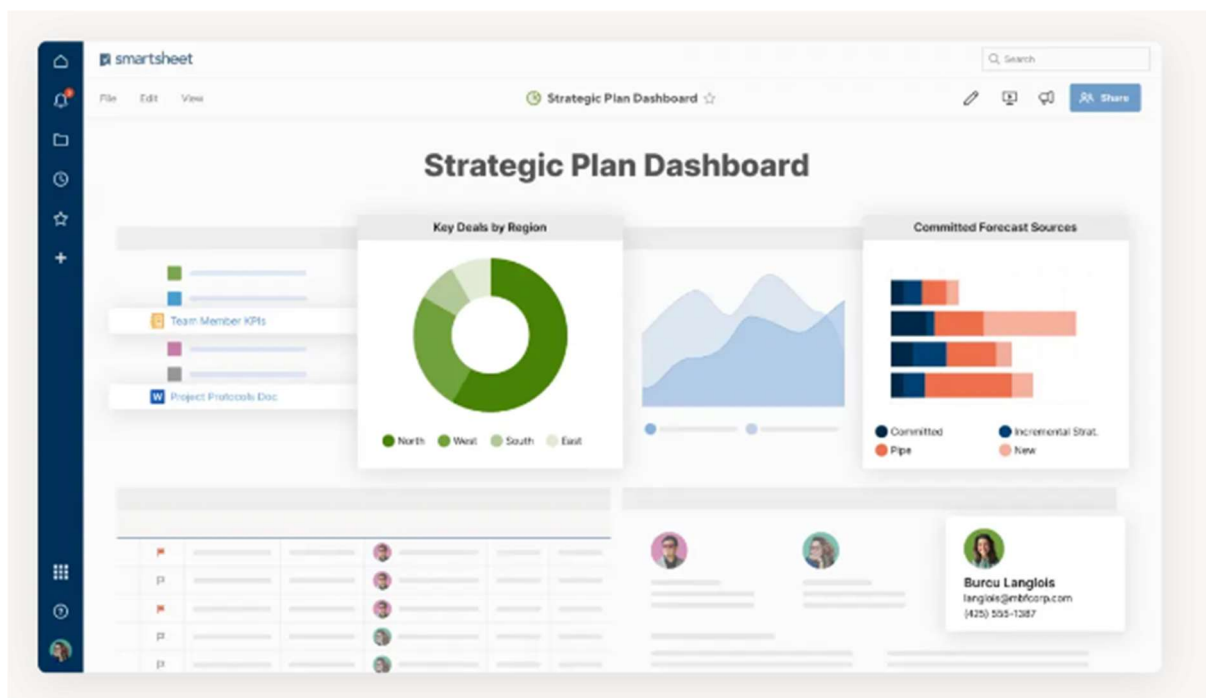
Connect projects, and automatically reference cell values between sheets.

- Share real-time information across sheets while controlling access to the underlying data.
- Pull specific values from one sheet into a read-only format in another sheet.
- Easily track cross-project date dependencies.
- Consolidate information from multiple sheets into a roll-up sheet.

DASHBOARDS

Centralize, organize and present valuable information on a customizable canvas.

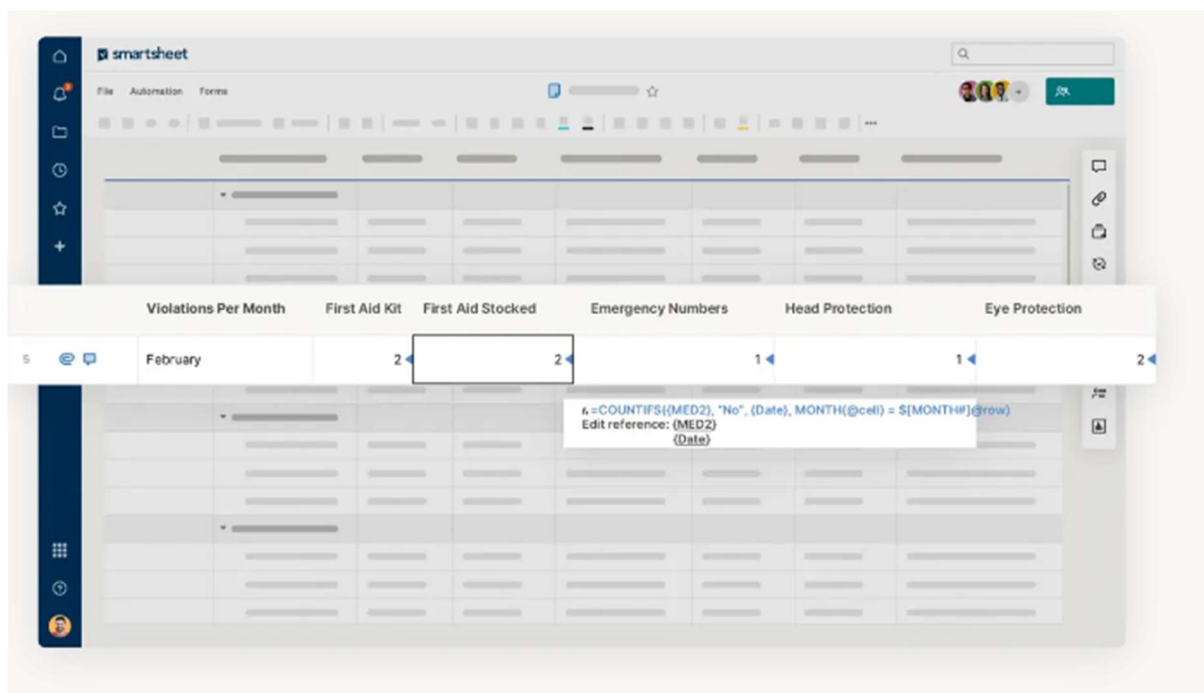
- Use widgets to showcase sheets, reports, charts, forms, and even content from other places like Google Docs, Tableau, Power BI, YouTube and more.
- Keep stakeholders informed by providing real-time visibility into project statuses and performance.
- Curate and publish essential resources for an internal or external audience.
- Share key information with different audiences, without having to provide any access to underlying sheets or assets.
- Infuse your style into a dashboard or customize the look and feel to align with your company's brand.



FORMULAS

Power your process with functions that calculate, gather, and automate data.

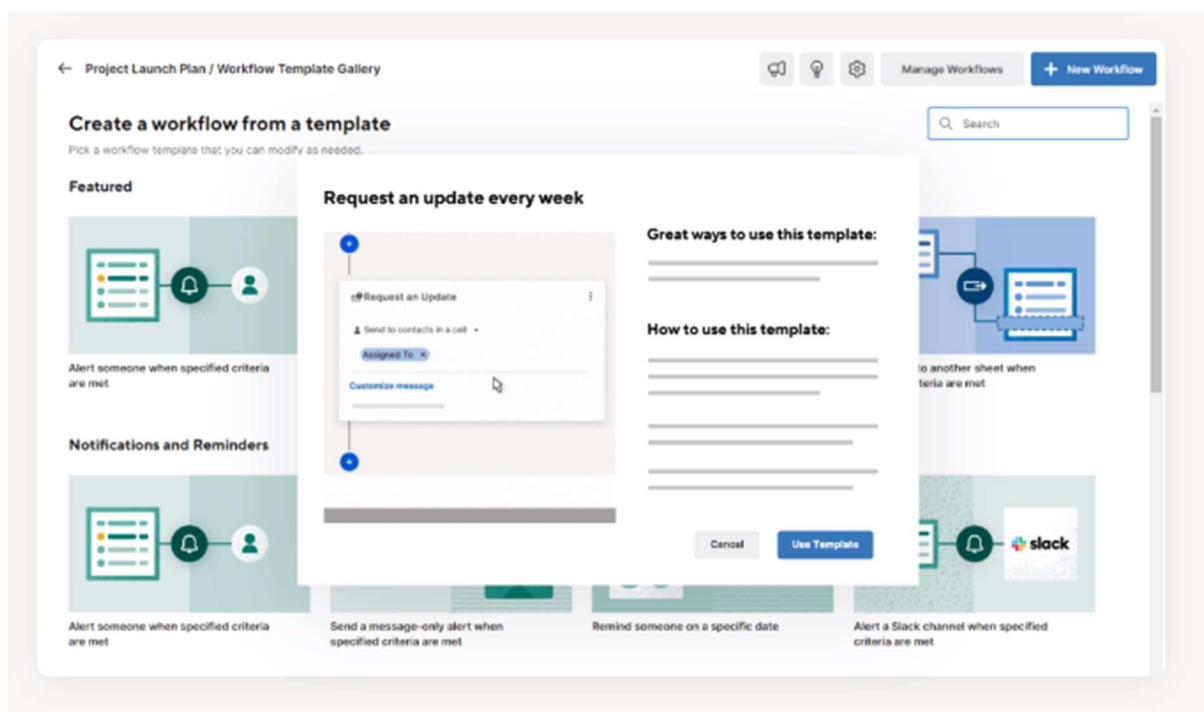
- Choose from 80+ functions in formulas to answer questions like:
 - Is my task at risk?
 - What is the budget by project phase?
 - What department is this requestor in?
 - How many contracts expire this year?
 - What was our revenue last month?
- Quickly and easily reference other sheets in your formulas with cross-sheet formulas.
- Use formulas and conditional formatting together to easily spot trends and at-risk tasks.
- Trigger automations with calculated values.
- AI capability to assist in writing formulas.



AUTOMATION

Save time and eliminate repetitive, manual tasks with no-code automated workflows.

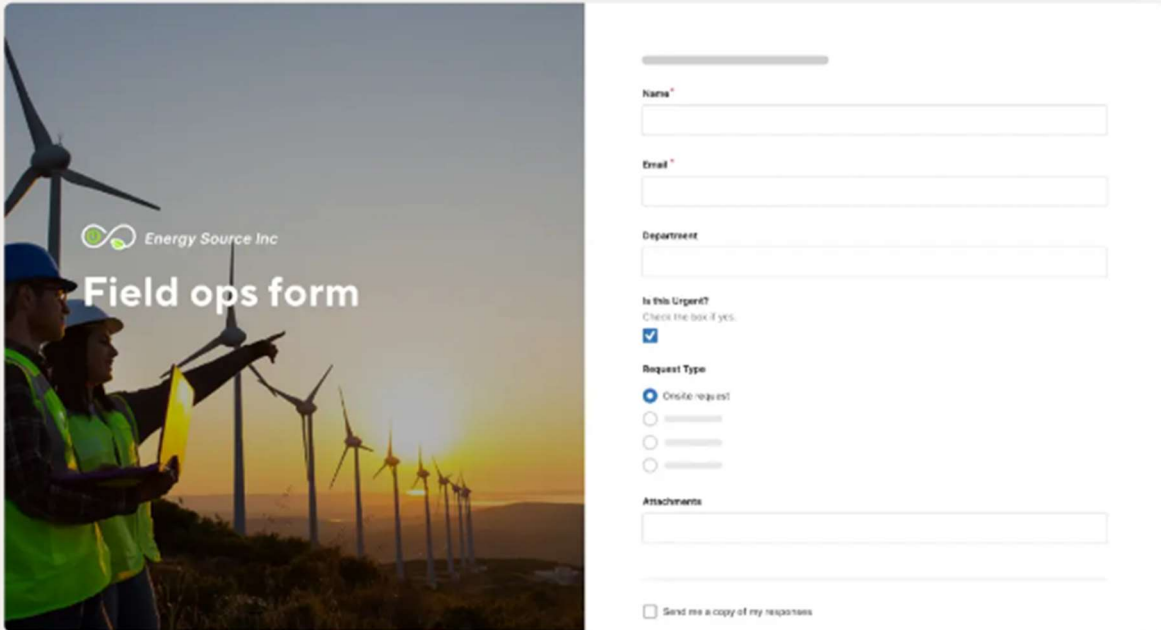
- Leverage our collection of pre-built workflow templates to create weekly status requests, due date reminders, and more, or set up your own custom workflow.
- Create one-time/recurring workflows combining multiple actions and conditional paths.
- View and respond to update and approval requests from the desktop/mobile app, email, or messaging apps like Microsoft Teams and, Slack.
- Automate with confidence and insight into workflow status and last run date.



FORMS

Easily collect and act on error-free, consistent data from internal and external stakeholders.

- Quickly create branded forms that automatically map to the columns in your sheets.
- Ask the right people the right questions with conditional logic in forms.
- Ensure data integrity with data validation.
- Provide easy access by embedding forms on dashboards and websites, or by sharing a unique link.
- Submit information, photos, and files from any location using forms in the Smartsheet mobile app, even in no to low connectivity.
- Ideal for request management, fieldwork, event registration, customer feedback, and more.



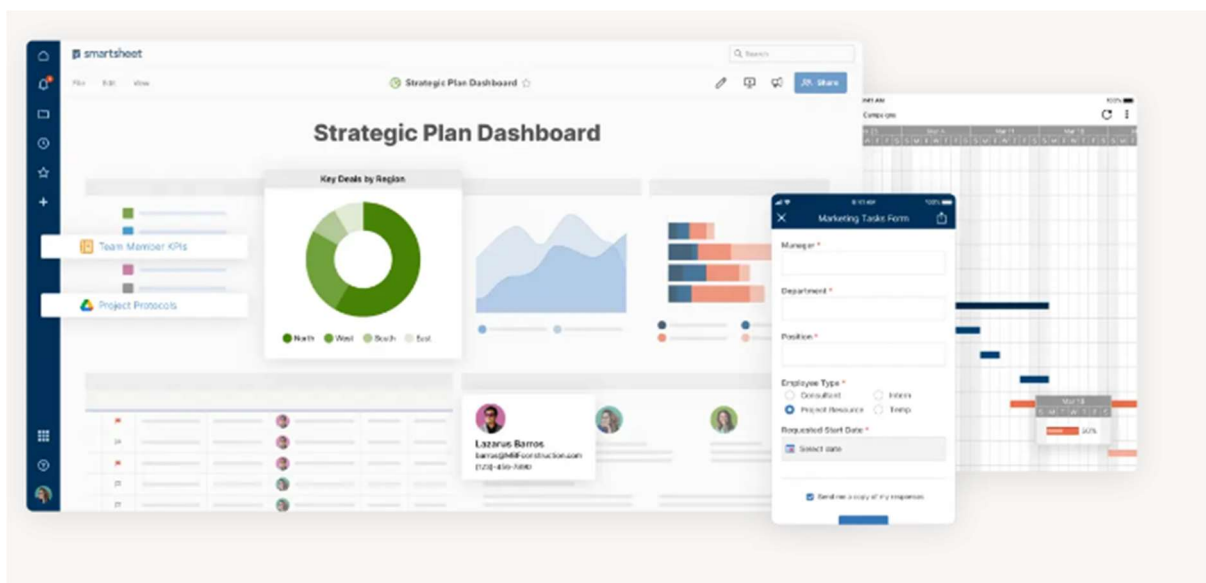
The screenshot displays a Smartsheet form titled "Field ops form" for "Energy Source Inc". The form is embedded on a website with a background image of wind turbines. The form fields are as follows:

- Name ***: A text input field.
- Email ***: A text input field.
- Department**: A text input field.
- Is this Urgent?**: A checkbox labeled "Check the box if yes." which is checked.
- Request Type**: A dropdown menu with "Onsite request" selected.
- Attachments**: A text input field for file uploads.
- Send me a copy of my responses**: A checkbox at the bottom of the form.

PROJECTS

Empower your teams to execute together with speed and accountability, driving to successful outcomes, faster.

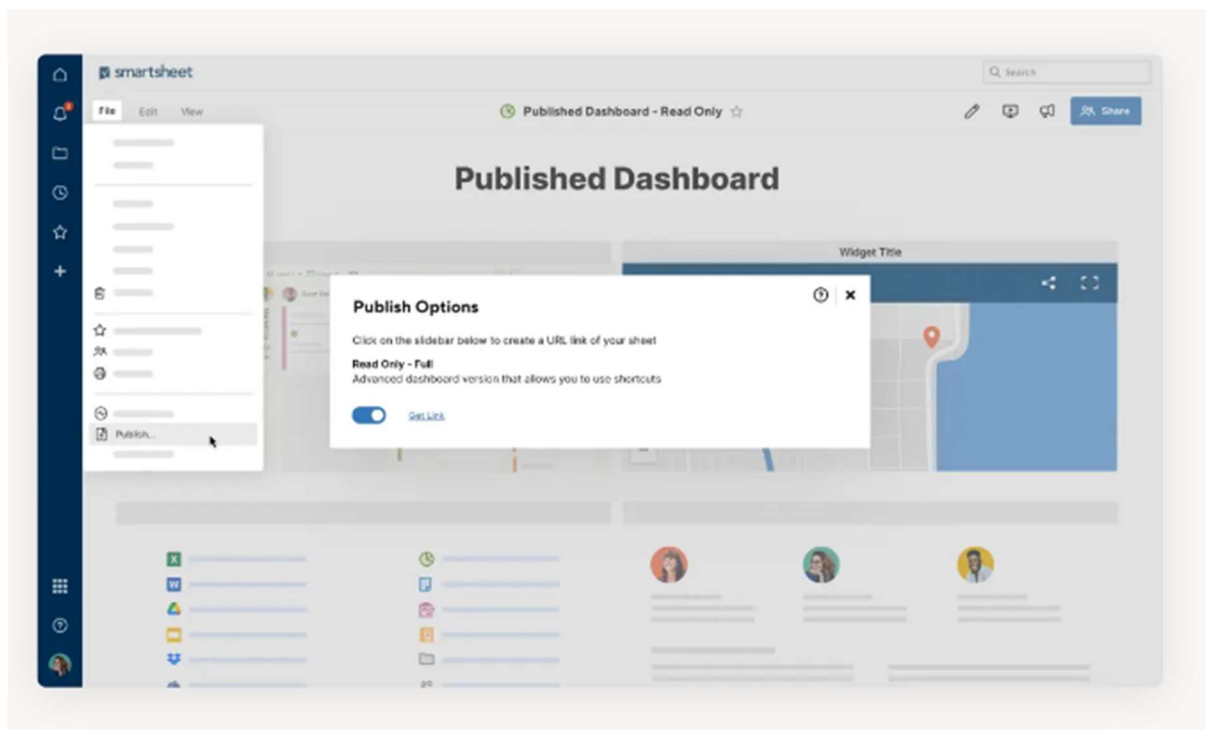
- Visualize tasks how you want by easily switching between grid, card, Gantt, and calendar views of the same data.
- Keep everyone on the same page by attaching files from Google Drive, OneDrive, Dropbox, and more.
- Streamline work and reduce the number of meetings by sending automated update and approval requests.
- Communicate with the right stakeholders about specific work items using comments and @mentions.
- Control access with intuitive and secure permission controls.
- Ideal for waterfall and agile projects, product launches, sprint planning, events, and more.



PUBLISH

Publish a sheet, report, or dashboard for frictionless sharing.

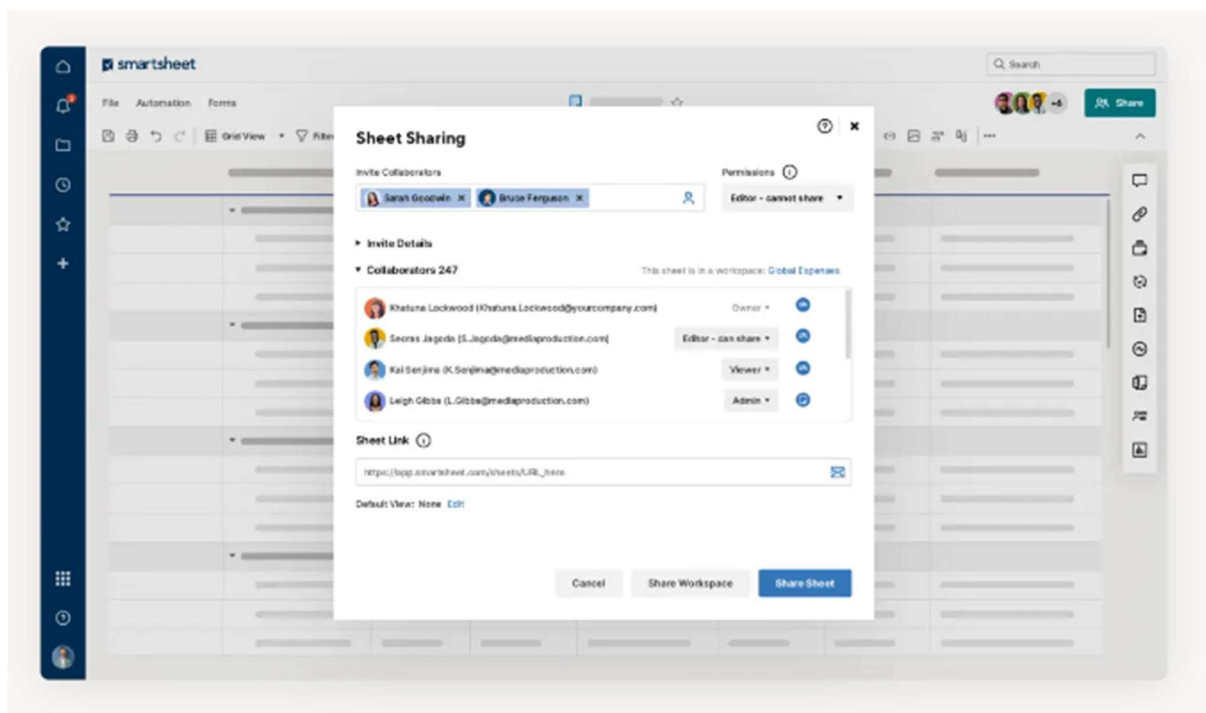
- Generate a unique URL that anyone can access without logging into Smartsheet.
- Use access control options to control who can access the link.
- Set default view to grid, Gantt, card or calendar views.
- Embed an iframe code within the source code of a website to display a sheet or report.
- Published items are dynamic, so they always display current data.
- Publish a Smartsheet calendar to iCal to enable anyone to add dates from their sheet to a non-Smartsheet calendar.



SHARING

Make the latest version of your work available to your collaborators.

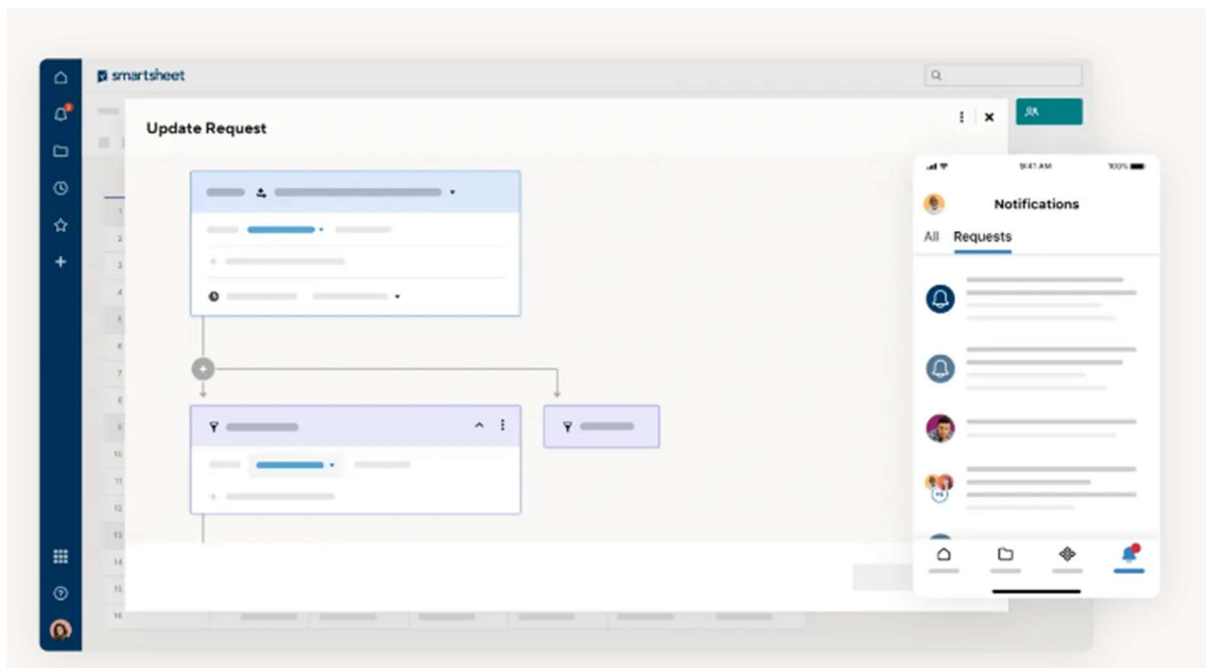
- Share with collaborators inside and outside of your business — whether they have a Smartsheet account or not.
- Control what each shared user can do with your Smartsheet item by setting their permissions as Owner, Admin, Editor, Commenter, or Viewer.
- Share published Smartsheet items so collaborators or end-users can view the item without logging into Smartsheet.



UPDATE REQUESTS

Any user can set up automated requests that are triggered by preset rules.

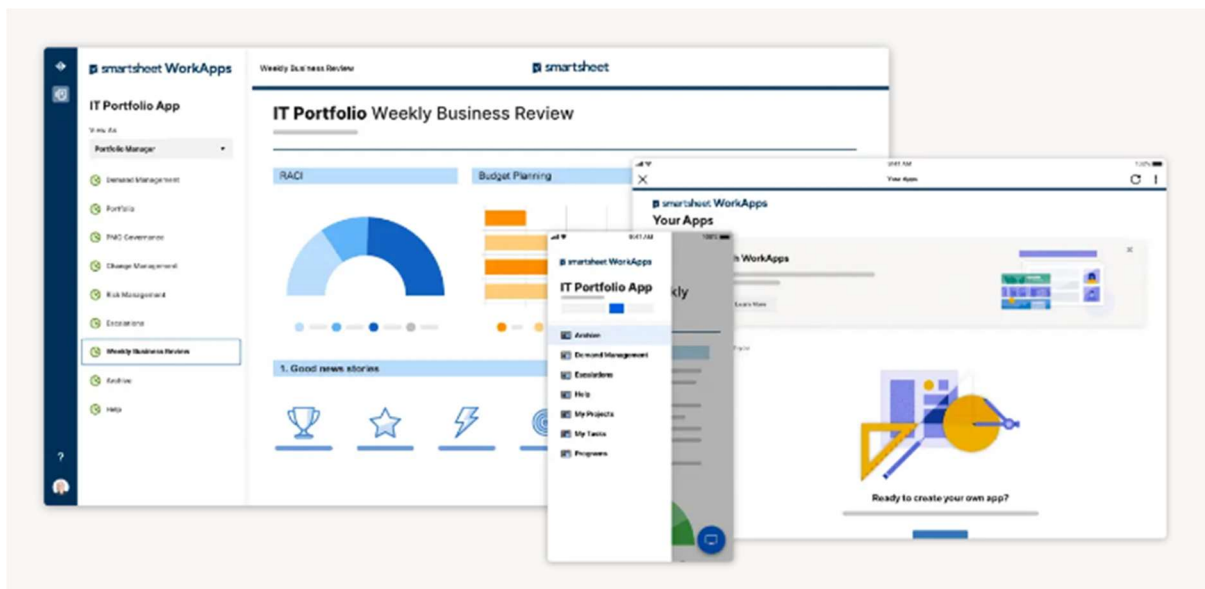
- Send update requests to get updated by any collaborator on key rows — whether they have a Smartsheet account or not.
- Choose which columns you want collaborators to see.
- Send requests once, or set up recurring requests.
- Stakeholders can easily respond on any device using a simple form to add or change information.



WORKAPPS

Build and manage apps unique to each stakeholder's view to simplify collaboration.

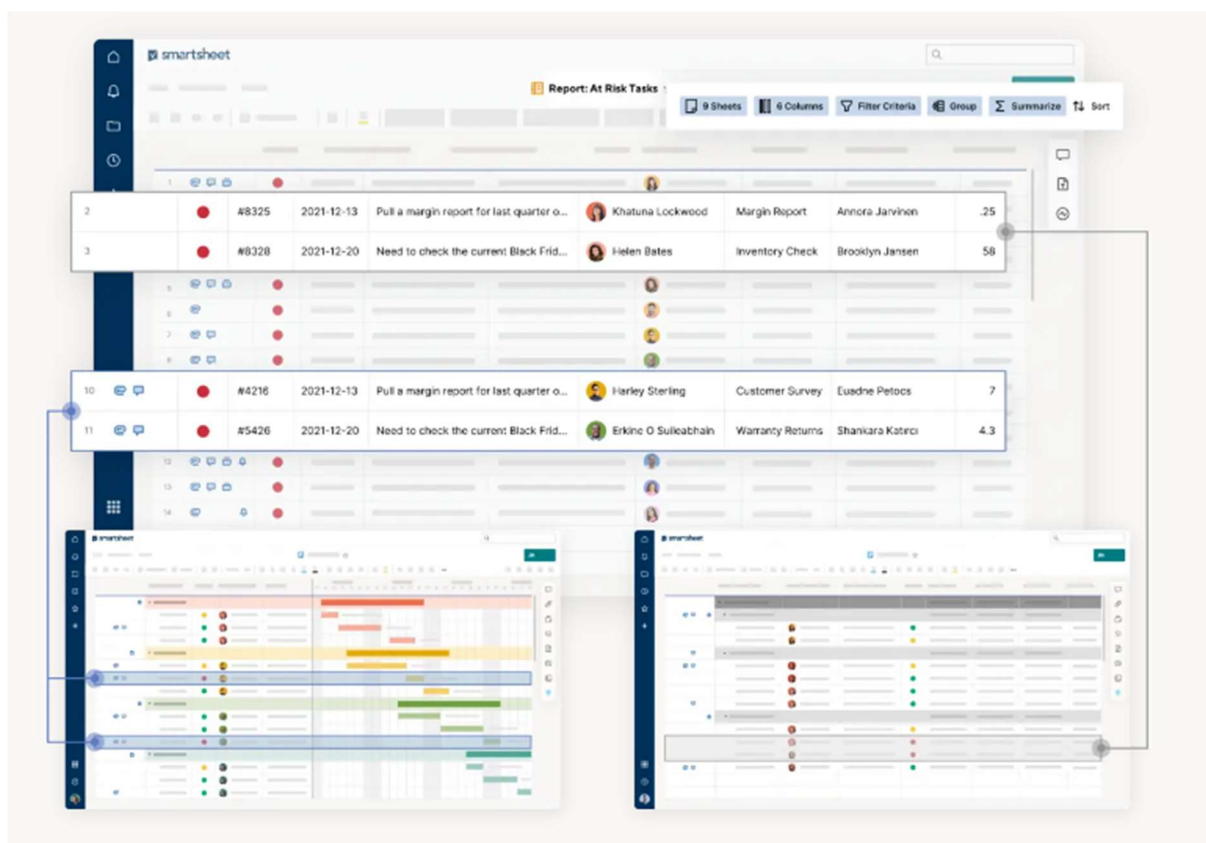
- Build, manage, and share an app in minutes using sheets, forms, reports, dashboards and third party content like Tableau reports, Google docs, etc.
- Tailored experiences for your team - WorkApps role-based views ensure stakeholders quickly find and focus on what matters most to them for more efficient collaboration.
- Maintain security and keep stakeholders focused - teams can access content in a WorkApp without having access to the underlying sheets, etc.
- Ideal for a broad range of use cases; from IT ticketing to construction, to logistics. WorkApps keeps remote teams easily connected in the field.



REPORTS

Filter or combine sheet data to highlight what's important.

- Manage and update work across multiple sheets.
- Apply filters by sheet metadata or column values to get a curated lens of work.
- Make status updates directly from bidirectional reports that updated the source sheet as well.
- Group and summarize data by common values for quick insight, and to feed dashboard charts.
- Share, send, and publish reports to keep teams in the loop.
- Export to PDF, Excel, Google Sheets and more.
- Ideal for portfolio management, pulling all your tasks into a single list, curated working views, and more.



On the preceding pages, we have looked at some of the Core Smartsheet Capabilities we can provide through Smartsheet's Core Licenses.

Depending on your specific need, we can also offer SMARTSHEET's premium applications which work in conjunction with your CORE licenses.

The following are some of the more widely used and include:

- Control Centre
- Dynamic View
- Calendar App
- Data Shuttle
- Data Mesh
- Pivot App
- Bridge

The above applications we can provide individually or through a bundle (SMARTSHEET ADVANCE). For those organisations that have Smartsheet embedded in multiple departments, SMARTSHEET Advance can become very cost effective.

PREMIUM APPS – CONTROL CENTRE

Smartsheet Control Center

Project consistency and visibility at scale

Key Use Cases

Visibility

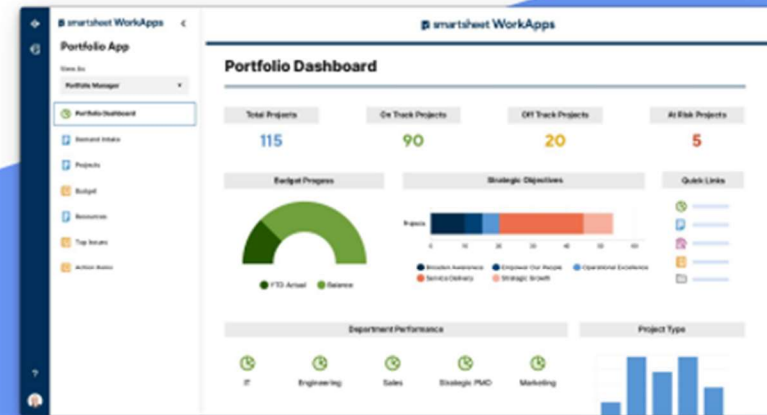
Aggregate portfolio-level reporting to help stakeholders make confident decisions on budget, risk, and resources

Consistency

Standardize projects with best practices, common metrics, and automated workflows to drive consistency in execution and reporting

Scale

Automate project creation, change management, resource plans, and project archiving to keep up with the growing demands of the business



PREMIUM APPS – DYNAMIC VIEW

Dynamic View

Manage multi-step processes by sharing only what is needed to the right people at the right time

Key Use Cases

Data Access Governance

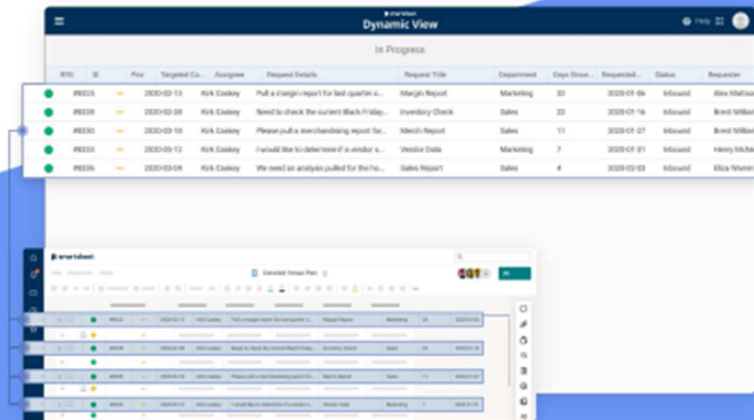
Protect sensitive information with identity or condition based access control

Simplified Views

Simplify and accelerate collaboration by emphasizing only critical, relevant information

In-Context Guidance

Lead users through multi-step process with guidance and guardrails



REQ ID	Req	Priority	Targeted Co.	Assignee	Request Details	Request Title	Department	Days Since...	Requested...	Status	Requester
REQ001	✓	High	2020-01-15	Rick Cookley	Pull a strategic report for last quarter's...	Strategic Report	Marketing	30	2020-01-06	Inbound	Alice Mathison
REQ002	✓	High	2020-01-20	Rick Cookley	Need to check the current Black Friday...	Inventory Check	Sales	20	2020-01-16	Inbound	Bob and Williams
REQ003	✓	High	2020-01-18	Rick Cookley	Please pull a new merchandising report for...	Merch Report	Sales	15	2020-01-27	Inbound	Bob and Williams
REQ004	✓	High	2020-01-12	Rick Cookley	I would like to determine if a vendor is...	Vendor State	Marketing	7	2020-01-01	Inbound	Henry McLeod
REQ005	✓	High	2020-01-08	Rick Cookley	We need an analysis pulled for the...	Sales Report	Sales	4	2020-01-03	Inbound	Erika Nelson

PREMIUM APPS – CALENDAR APP

Calendar App

Build an interactive, flexible calendar view with sharing permissions and custom details

Key Use Cases

Visualize Your Data

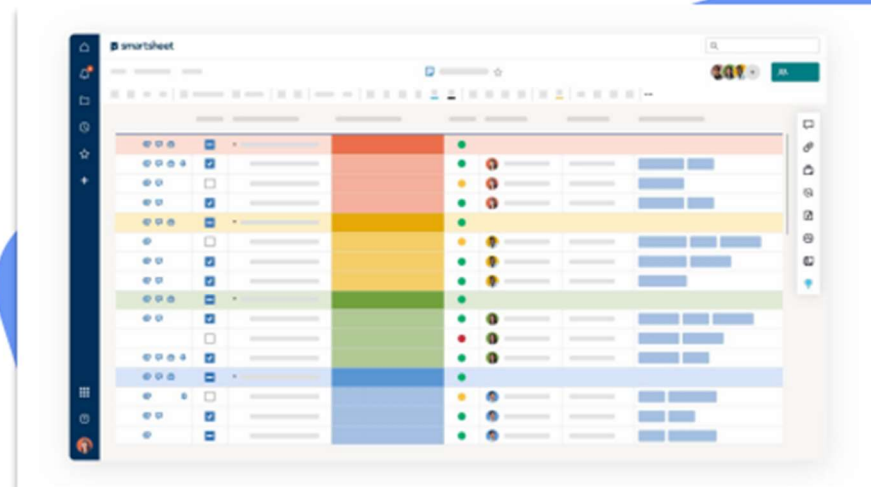
- Color-categorize your events
- Choose from 5 display styles

Create a Primary Calendar

- Combine multiple sheets into 1 primary calendar
- Create a source of truth for up-to-date information
- Provide executives an at-a-glance summary

Set Sharing Permissions

- Share your calendar
- Control who can make changes



PREMIUM APPS – DATA SHUTTLE

Data Shuttle

Connect to siloed data with Data Shuttle

Key Use Cases

Import and Export CSV and XLSX Files

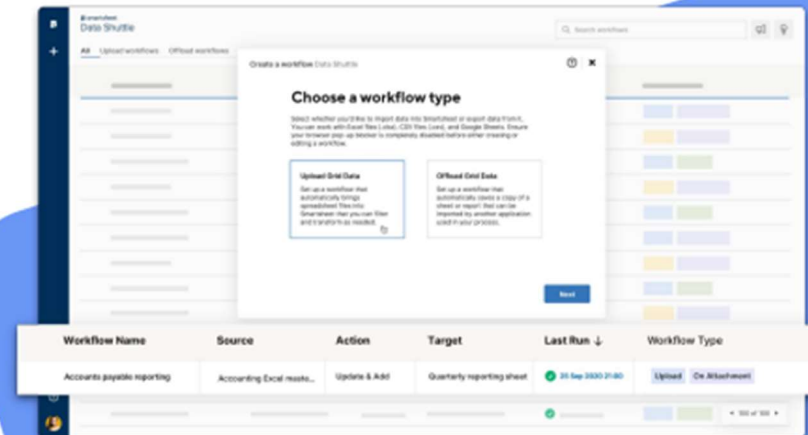
Create simple no-code connections to data exported from other systems and export information from Smartsheet to easily leverage data from other sources

Merge Changes and Custom Map Fields

Choose how you'd like to import or export data into/out of Smartsheet by customizing your mapped fields, applying filters, and specifying how data is merged

Combine Data Into a Single Source of Truth

Combine multiple data sources into a single sheet to leverage features like Smartsheet automations, reports, and dashboard



PREMIUM APPS – DATA MESH

DataMesh

Map data between large sheets and reports to eliminate typos and duplicative data entry

Key Use Cases

Lookup Functionality Without Formulas

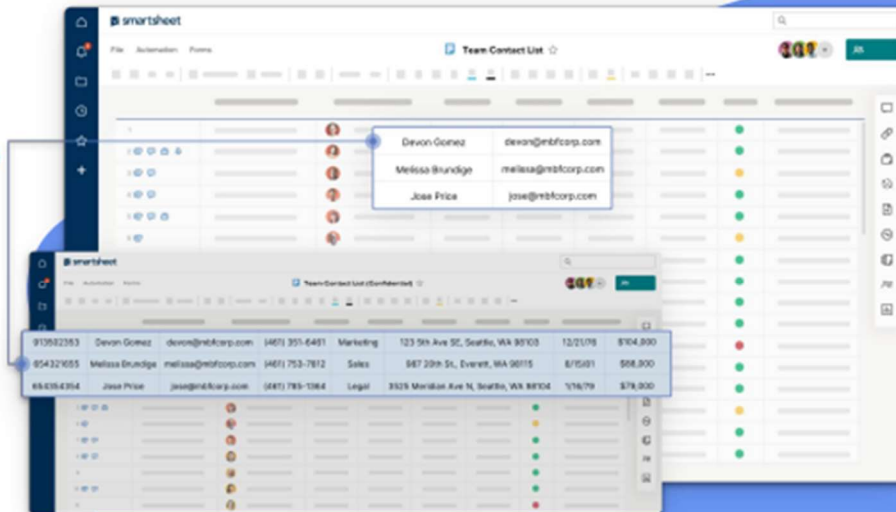
Create mappings between sheets to reduce duplicate entry of information and ensure data accuracy

Automate Adding Rows for Faster Work Execution

Automatically add new rows to the destination sheet from the source sheet

Easily Map Data from Reports to Sheets

Effortlessly create relationships between data from multiple sheets without formulas



PREMIUM APPS – PIVOT APP

Pivot App

Summarize and analyze large amounts of data to understand meaningful patterns and trends

Key Use Cases

Analyze Sales Pipelines

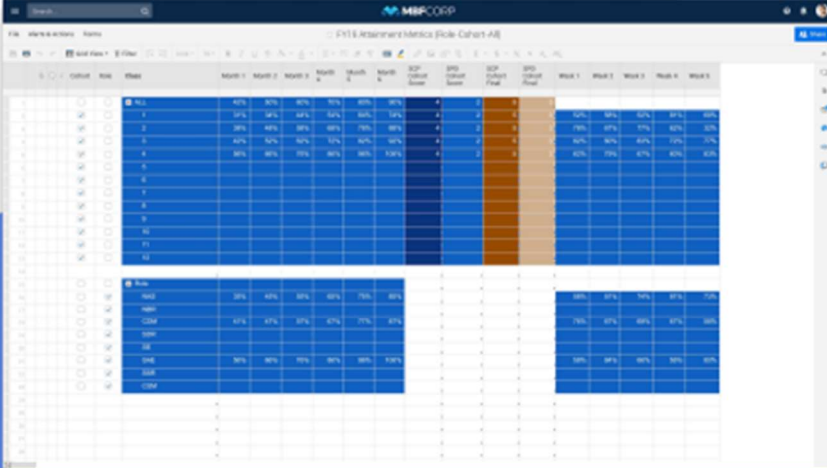
Produce monthly breakdown summary sheets

Track Performance Metrics

Aggregate numbers across sheets to track trends and opportunities without having to create formulas

Build Marketing Segmentation

Break down data to identify key segments



The screenshot displays the Pivot App interface. At the top, there's a search bar and a title bar. Below, a table is visible with columns labeled 'Month 1' through 'Month 12'. The table contains numerical data, with some rows highlighted in blue. To the right of the table, there's a summary section with a 'Total' row and columns for 'Total' and 'Average'. The interface is clean and modern, with a blue and white color scheme.

Russ Consulting Limited is also able to provide a ready build PMO solution that can be easily adapted to meet your specific needs with minimal work.

We show you how to leverage the power of Smartsheet to do exactly that.

The infographic that follows provide just one example of a PMO solution. We have others but hopefully this will give you a flavour.

PMO INFOGRAPHIC



RUSS CONSULTING LIMITED - CASE STUDY

NHS England Selects Smartsheet to Drive Digital-First Primary Care Initiatives Across Northwest Region

Smartsheet Platform Simplifies Over 87 Projects Owned by 40 Distributed Project Managers in Less than Three Weeks

December 09, 2021 04:00 AM Eastern Standard Time

LONDON--(BUSINESS WIRE)--Smartsheet (NYSE:SMAR), the enterprise platform for dynamic work, announced today that NHS England is eliminating siloed processes and streamlining digital transformation initiatives to improve patient outcomes. The new *Digital First Primary Care* program, implemented at NHS locations across the Northwest region of England, focuses on improving care pathways for the thousands of patients they serve over a five-year period.

In its second year, NHS England was tasked with allocating millions of pounds (£) for projects that continue their digital transformation initiatives. The team previously used Excel spreadsheets to manage projects and capture data and PowerPoint to report on success metrics. This method proved to be extremely labour-intensive and sometimes produced inaccurate results. Today, the NHS team uses Smartsheet's platform to drive digital-first change initiatives across services like primary care and telehealth through a centralized solution that empowers its workers to complete more projects in less time and without inaccuracies.

"The simplicity of Smartsheet made it easy for all of our project managers to onboard and understand the solution immediately," said Stewart Cooper, Senior Programme Consultant at NHS. "Smartsheet has not only made our work more rewarding, but made it easier to spot when a project is running late or is in danger so that we can identify the situation in real-time, make the necessary adjustments, and stay on track."

"All of the improvements we've made through Smartsheet empower us to do one thing: look after patients more effectively," said Dympna Wilson, Programme Manager at NHS. "Smartsheet has almost become the standard. People are saying: this is what we should *all* be using, so we look forward to seeing what else we can achieve."

NHS England partnered with Russ Consulting, a Smartsheet partner, to accelerate the rollout of the Smartsheet platform. Within three weeks, NHS England was able to stand up an approved solution that provided their team with a standardized process that reduced human error and enabled accurate real-time reporting—on a national level—for every project.

"The insights Smartsheet is enabling are critical for a public organisation like the NHS," said Chris Russ, Director of Russ Consulting. "With greater accuracy, their team was able to mitigate risk more effectively and in return drive more positive outcomes for their patients. We're excited to see the quick use and success of Smartsheet across the Northwest region, and look forward to helping other regions of the NHS achieve the same."



"It's amazing to see the impact Smartsheet has made for the NHS team in a short period of time—and that others across the NHS network are looking to replicate their successes," said Mike Arntz, Chief Revenue Officer at Smartsheet. "Our mission is to empower anyone to drive meaningful change, and by working with like-minded partners like Russ Consulting, we can assist organizations like NHS England achieve their mission of improving patient care."

Learn more about how NHS England is improving patient care [here](#).

About Smartsheet

Smartsheet (NYSE: SMAR) is the enterprise platform for dynamic work. By aligning people and technology so organizations can move faster and drive innovation, Smartsheet enables its millions of users to achieve more. Visit www.smartsheet.com to learn more.

Forward-Looking Statements

This press release contains "forward-looking" statements that are based on our management's beliefs and assumptions and on information currently available to management. Forward-looking statements include, but are not limited to, statements about Smartsheet's expectations regarding possible or assumed business strategies, channel and partner strategies, potential growth and innovation opportunities, new products, and potential market opportunities.

Forward-looking statements generally relate to future events or our future financial or operating performance. Forward-looking statements include all statements that are not historical facts and can be identified by terms such as "believe," "continue," "could," "potential," "remain," "will," "would" or similar expressions and the negatives of those terms. Forward-looking statements involve known and unknown risks, uncertainties and other factors that may cause our actual results, performance or achievements to be materially different from any future results, performance or achievements expressed or implied by the forward-looking statements. These risks include, but are not limited to, risks and uncertainties related to: our ability to achieve future growth and sustain our growth rate, our ability to attract and retain talent, our ability to attract and retain customers (including government customers) and increase sales to our customers, our ability to develop and release new products and services and to scale our platform, our ability to increase adoption of our platform through our self-service model, our ability to maintain and grow our relationships with channel and strategic partners, the highly competitive and rapidly evolving market in which we participate, our ability to identify targets for, execute on, or realize the benefits of, potential acquisitions, and our international expansion strategies. Further information on risks that could cause actual results to differ materially from forecasted results is included in our filings with the US Securities and Exchange Commission (SEC), including our Quarterly Report on Form 10-Q for the fiscal quarter ended July 31, 2021 filed with the SEC on September 8, 2021. Any forward-looking statements contained in this press release are based on assumptions that we believe to be reasonable as of this date. Except as required by law, we assume no obligation to update these forward-looking statements, or to update the reasons if actual results differ materially from those anticipated in the forward-looking statements.

Contacts

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[Tweets by @Smartsheet](#)

