Andrew Seay

Will Bachman 00:02
Hello, and welcome to Unleashed the show that explores how to thrive as an independent professional. I'm your host will Bachman. And I'm excited to be here today with Andy C, who runs see associates, we're going to talk about how to use Smartsheet on a transformation project. Andy, over to you. Let's get started.

Andrew Seay 00:23
Great. Well, first of all, thank you for having me here. Well, really appreciate the time and happy new year to you as well. Sounds like your COVID. Free makes one of us but we're on the other side of it now. So we're, we're doing pretty well. And on that note, Lynn can join us today because she is currently sick. And we're doing our best to manage childcare with with our nanny out. Since we have COVID in the house.

Will Bachman 00:47
Man, I'm sorry to hear that you've got COVID. And by the way, for listeners, this is a video enhanced episode. So if you're listening to the audio, you will get more out of it if you watch the video, because Andy's going to be sharing the screen and showing me some slides and then actually showing me smart sheets.

Andrew Seay 01:06
Exactly. So I mean, this is our standard qualification pack. I mean, just to give a quick introduction to see associates and what we do. Our firm is the two of us. That's me. So I'm Andy and then my wife Lynn, we're both McKinsey alum. I focused as the operations package she was an EMI, my background is in manufacturing. So I spent a lot of time McKinsey RTS project practice working with industrials clients and private equity. But she was McKinsey, she was focused in health care, Lindsay registered nurse, and she's got a deep background in health care, and transformation in that field as well. We are both indepen consultants based out of Dallas, we run our practice together. And I kind of speak for our team today in her absence. So if you have anything healthcare related, I would encourage you to reach out to Lynn. But if it's more focused in the world of a PE or manufacturing, I would be your person to speak with. Our practice is geared toward our firm support transformation executives who are sick and tired of using Excel to track their transformation agenda. So we've been heavily involved in transformation throughout our time both at McKinsey and as independent professionals. And one of the recurring pain points we've seen is that Excel is often used as the first line of defense to to manage project for project management or else or, or to manage a transformation agenda or evaluation agenda within the world of private equity. And in our years of working McKinsey, we saw McKinsey is wave tools. We also from learning PMI, and we wanted to avoid reinventing the wheel. So what we did was we set to figure out how we can use the existing off the shelf software, that's pretty easy to get your hands on isn't very expensive and as low or no code to use. And it kind of recreates some of the functionality that we've seen within McKinsey's WAVE tool that's used heavily in the RTS practice. And

so our approach, using these tools is to de risk the program delivery through avoid reinventing the wheel, we want to make this program management or transformation management as simple as possible. We believe in something called the Ohio principle, which is only handle at once. So we believe that the ultimate form of respect to clients is to ask them to provide data once and only once, and then have that data flow everywhere it needs to flow without worrying about translating it from one format to another. Whether it's from Excel to PowerPoint, or whether it's from quarterly to monthly or monthly to annual, we just really want people to know their data once. And then we'd like to see that data flow everywhere needs to flow. We also believe in enhanced security, the master spreadsheet world just doesn't work very well. If everyone's sharing one spreadsheet, you're often going to run into problems, because eventually somebody's going to see something that they shouldn't see. Or the have the ability to inadvertently change data that they shouldn't be changing, which is either which is generally not malicious, but it's still inconvenient when it happens. And then finally, we you know, we believe in using tools that work. We're not trying to invent tools while we're what we're working with our clients. And so we've, we know that our tool scale, we've used them a client's up to 10 billion in revenue views and with clients down to you know, two and a million in revenue. So we know these work. And we believe that your transformation is not the one where we should be taking the risk to figure out if this if this stuff works. And so I think that to kind of orient this toward the focus of today's podcast. The goal today is to show you how we can use Smartsheet and Power BI to effectively manage and run a transmission program. Well, I know this is a, an audio format, there's any questions you want to have any back and forth on this, which

Will Bachman 05:12
we know this is this is great. Let's, let's keep going. This is this is good stuff.

Andrew Seay 05:16
Excellent, great. So I'm just to tell a little bit more about how we do that about how our firm works. We, we serve clients across the full spectrum of transformation activities. But we really specialize in folk and in serving clients after their diagnostic is performed. feedback from the market is either you're going to have often a very large firm, run the diagnostic you'll have, you know, BCG, or McKinsey or Deloitte rent diagnostic, you have a list of projects, and they hand it off to you. It's like what do you do now. And that's really where we step in, will help you validate and plan your your program, getting work plans down, validating the financial impacts, build business cases. And then of course, we'll help you stand up governance to get the to get the program running, setting it up so that there's a regular cadence, everyone understands what's expected. And of course, we can be there for ongoing support as long as needed to really help you give you arms and legs to make sure the program gets done. And also provide you with like kind of the inside baseball updates that you need to know as a transformation leader, but the potential soft spots or weak points in the program. So that's what we do. Throughout the, throughout the process here, there's different milestones that we would reach in terms of designing a Smartsheet instance, and also building the Power BI dashboards that you're looking for. But we'll talk a little bit more about what that looks like here and that in a few minutes. So this is a kind of a busy slide here. But it's worth explaining. It's about as simple as we know how to make it. So our transformation management tools allow user to enter the information once and to create a full suite of program documentation. And so reading from left to right here, a project owner would enter their data into the Smartsheet platform. This is an online collaboration platform that we're going to show

everybody in a minute. It's going to look and feel a lot like populating a PowerPoint slide. But there's a lot of clever back end functionality behind it. So there's an interactive work plan. Module, there's a business case module that actually do math for you, it's actually going to format for you it will automatically update Project Health for you. So gone are the days of figuring out how to fill a cell in red, yellow, green, our tools will do that for you based on the inputs you provide. The goal here is that this will enable a typical clients who spend less time building slides. Most of us with most clients would prefer to spend time executing and getting things done than they were building slides. So Smartsheet. And the way we're going to show you is configured today really is going to enable users to enter their information and just not worry about PowerPoint slide creation, which is gonna save a lot of time. The backend that we've developed will compile all of these individual user entries, you can have an arbitrary number of, of project sheets. So I've seen up to 500 of these sheets out here, that will all be aggregated into a single database. And that database refreshes in real time, which means that there's never an issue of revision controls, and also largely eliminates the job of compiling content for presentations, you don't need to, as long as people are making their updates in the place for this, let's make them you know, you as the transformation leader have visibility to the latest and greatest information. There's never going to be a Oh, there's another version of this on my desktop, or, you know, Jim made an edit. And I wasn't aware of that it's always going to be available and visible in the database. And that database is, of course, it's going to be Power BI. And the beautiful thing about Power BI is in addition to being a great BI tool, or I guess some people don't like Microsoft as much, but it's if nothing else, a prolific BI tool. It's basically free for most users who use Microsoft email, it's free. If you have a $5 a month, Ms. 365 license you have the ability to view and interact with with dashboards and Power BI. You don't need to onboard Tableau. You don't need to figure out software licensing or get a sales rep on the line. It's free. It's it exists. And I can almost guarantee that you can do the dashboards without doing a single without picking up the phone to any software vendors.

Will Bachman 09:35
What if you're a Google, like using G Suites or Google workspace?

Andrew Seay 09:41
So that's a great question. We can share access, view only access that allows you to interact with the data from from our Microsoft accounts, that's no problem at all. The only issue would be that you could not modify the dashboards unless you have an account. I think I think the entry level for those accounts is $10 a month. So it's pretty inexpensive, even if you do need to sign up for it, but the average consumer of the tools will not need to use that it will not need to, to pick up the phone and call Power BI, or Microsoft,

Will Bachman 10:12
for listeners that are, would want to be creators of Power BI, you know, you know, listeners of the show, I know Tableau is relatively expensive, I forget, it's either 1000 or 2000, or something per license when I checked a few years ago, if you want to be more of a Power BI creator, you know how much the pricing is for that.

Andrew Seay 10:35

The Power BI the Power BI premium license is $20 a month. That's the top of the line license for an individual user. And if you're a company, like an enterprise company, enterprise user, and you want to create a premium capacity instance, I believe that the total fee is 5000 a year, but that's across the whole instance. It's not per user. Okay, cool. All right, let's keep it pretty, pretty inexpensive. And most people don't appreciate just how much access they have, with their existing Microsoft subscription. Even if you just have a personal account, you can you can get to Power BI pretty easily. Okay. And, and the real benefit of Power BI, especially relative to some of the dashboarding toolkits that are available, it really allows sec to self serve data. So that means, you know, typical client like actually just got the for the client earlier today. big multinational, you know, publicly traded company, I spoke with their finance team, and the CFO gets a pack of financial reporting, once a month, and it has every possible cut up the data all in one place. So it's got the regions cut. Each region this cut is there's a cut by region, there's a cut by function, there's a cut that's monthly, there's a cut, that's quarterly cut, that's annual cut, that's year to date, I call it the dictionary, right? If someone handed you a dictionary, yeah, all the words are in there, you can find them if you know how to use it. But it's kind of cumbersome. It's difficult to use, why not use the you know, Google, if you want to know the definition of a word, you type it into Google and it gives you the answer. That's, that's what we're aiming for Power BI, we can start with the highest level insights. And we can allow you to drill into the level of detail that you need that's relevant to you. And it presents it in a pretty nice way, I'm not going to say it's quite the same as a PowerPoint presentation. But you can actually embed a Power BI dashboard in a PowerPoint presentation and have all of the, you know, the interactiveness of Power BI but in the context of the Power BI presentation, in the context of a PowerPoint presentation. So it's gonna it's gonna be much more powerful allows you to drill in where you need to detail what kind of ignoring the stuff that's not relevant. And ultimately, if data is easier to access, easier to analyze, which should improve the decision making for leaders in your in your company, and allow you to make better decisions. It's hard to put a value on that. But I think we all understand it could be quite significant. Anything there? Well, he thinks we're worth diving into further our next step. Let's keep going with the sheet. Yeah, nice. Okay, great. So I think I've got this hyperlink out. But rather than take the risk that those links work, what I'm going to do instead is just go to Power BI. So this is obviously a demo, you'll notice that I've used Dunder Mifflin as our trial company, and all of the projects are themed based on the office. So hopefully, that's entertaining to people who are big office fans. But yeah, this is really the starting point. So for most clients, they're going to start on this page. We can build summary pages, this can all be customized to whatever degree you wish. This is what we call our standard instance. Right. So it's got the basic information that you would need in order to see what your program is set to do. And so over here on the left, we've got, we've got pages, we've got impact over time, which obviously is going to show you the debit impact of these different categories of time. We have a summary by category that shows what's forecasted versus what was targeted, right. So the forecast is actually going to reflect what we think is going to happen or what has actually happened often will make this an actual plus forecast number, the targets which were originally aiming for. And you see that we actually managed that are we reviewing that both for financial benefit and implementation costs. Over here, we've got a project health summary that shows for the subset of projects here you know, what the EBITA benefit is going to be, what the IO status is, this is our maturity scale that we use. Similar to McKinsey RTS practice, it goes lseo through L five or LC as an idea and l five is a is a fully completed project. You get initiative lead, you got the sponsor. In this case, we have work center or location, the work stream that's a part of and then of course, you've got benefits health for 21 to 22 as well as to your scheduled

periods, all of this can be cut based on whatever region is relevant to you. So if you're in charge of Akron, or if you're in charge of Albany, or your regional manager, and you've got Alberty, in Nashua, we can easily show you information that's most relevant to you. So the idea is that you kind of parse down what's it what's most useful. And you can actually, if you hover over this, you can actually copy this image and just paste into a PowerPoint presentation if you wish. Or you can just run the meeting directly out of Power BI, of course. Next, we have the the raid log, this is going to be we call this this is like unstructured work,

Will Bachman 15:42
what sounds what's raid stands for Ra id.

Andrew Seay 15:45
Yeah, so that'd be risks, assumptions, issues and decisions. Different people use RAID with different definitions attached to it. You can also include assumptions there, you can also decisions and oh, and dependencies can also be captured here, they'll begin with our AI rd. So that's why red log is convenient. We didn't have to extend the acronym too much. But the purpose behind this is you really want to like at the beginning of every project, you're getting out of a project plan, right but or milestones to kind of, you know, catalog how a project is progressing. As you go, however, there will be decisions, there will be unstructured work that arises as the project is executed. And that's the role of the raid log is to capture those items, and then bring visibility to them so that people know what what decisions issues or risks lay out there. And they can address them to ensure that the project is successful. And so obviously, we have a very short way like here, because this is just a demo. But you can imagine, as a leader, if Darryl wanted to know all read items that are assigned to him, he could he could cut this to his own name. And you can see there's an assumption here that switching to organic pulp will only increase the supply and production costs. It's just an example, we could also just for especially for senior leaders, looking at all the risks that are facing a program can be very interesting to them, you can see which risks are out there. He reports inappropriate actions taken initiative, lead documents pricing, oh, that's a reference, that's an office reference for anyone's out there. But the idea is that you can create visibility to all the risks facing the program at a glance, you can cut it different ways. And we can we can, of course by date filters on this if you were so you can see all the items that are due in the next seven days or month, or quarter, or whatever it might be. The final item that we have here, and then we'll begin to dive in a little bit is just the project milestones. So if you were interested in seeing all the, you know, all the my upcoming milestones for a specific project, you can of course, select that here and you would see this, you'd see all the upcoming milestone, but I have a revenue into Smartsheet. So the idea is that you just have visibility, I don't have a date date slicer, this, although I think a date slicer would be would be good to include here. So if you want to see the items that are overdue, you can easily see them here. If you receive the items that are on track, you can see them here. If you only want to see the items that are due in the next couple of days, you can obviously store that from from get sorted whatever way you wish. And so the way to think about this well is Power BI brings visibility, like it's a much more powerful dashboarding tool. But you might ask, you know, how do I interact with this data, if I wanted to update something you're having to do that? Well, that's where Smartsheet comes in. So let's say in this case, we wanted to see how the project is going to add a third shift to plan ops, you can see that it's running a little bit behind in terms of the financial benefits. So you might ask yourself, you know what's going on there, what needs to be done. So all I do is click here, this links out

to Smartsheet. It's all integrated. And here is the project dashboard for this project. And so you can see here with where the financial health, you know why we're showing red and Power BI. And you can see here with greater detail that this is the the business case that shows where things are going wrong, it looks like you know, it's pretty, uh, pretty much across the board under delivering. And if you want to be even more detail, you click into it further. And we've got a full detailed business case here within the spreadsheet platform that shows us what was originally committed to so here's the target, and then you also see the forecast. And so you can see here, what in what areas things have maybe fallen a little bit short of a plan and Just a bit here. So it's what we call the business case. And so the idea that this actually the core engine of it, so for a typical user, you would you would use Power BI for your reporting if your presentation development. But the your main point of information entry is going to be here within the starchy platform. So, what questions do you think naturally arise from what we just discussed?

Will Bachman 20:27
So, this is all super impressive. For someone who has not used smart sheets before. Can you tell us a little bit about know what it would take to get to the point where you can create some kind of smart sheet like this? Is there a lot of programming involved? Or is it all just kind of no code, just, you know, not much more than using Microsoft Excel? So for capable Excel, PowerPoint user that wants to learn smart sheets, walk us through a little bit of the platform and what it would take to create something like this?

Andrew Seay 21:02
Okay, sure. Smartsheet does at its core begin, when you first hear

Will Bachman 21:13
maybe you can, can you show us? Is there like a behind the scenes of this? Is this the what we're seeing? Right. So this is yeah,

Andrew Seay 21:21
let me I'll try to describe it. So this is a dashboard. Smartsheet has essentially three different types of objects, their sheets, their reports and their dashboards. Okay, this is a dashboard. So a dashboard, you can see is comprised of all kinds of different objects. If I've done my job, that's, that's invisible to the user, because only admins are, you know, can modify dashboards. So I'm a licensed user, I pay for that license, what I will do when I didn't have my clients is create this dashboard in a way that is, is really scalable. So I can create copies of this quite quite easily. And it connects everything it needs to connect to. If you are a first time user, you're much more likely to begin on a, a sheet. So let me create a sheet here. And I'm gonna

Will Bachman 22:09
say, Could you show us like the sheets behind this so we could see what one that is, looks like when it's fully built out and so forth.

Andrew Seay 22:15
Sure. So so this is a sheet that I built that I would call this the business case. And so if you were to start, you know, cell A one, it would literally just look like an Excel spreadsheet, it would just be column

one through, you know, 100. Over here on the top, you'd have your row numbers. And in that respect, it behaves a lot like Google Sheets, or it behaves a lot like Excel. Most of the code that you see here, is has language that is similar to Excel is not exactly the same as Excel, there's some features that are better. There's some sheets, or there's some, there's some features that are frustratingly not quite as good as Excel. But I would say for the most part, it keeps up with excel in the areas that are most valuable. Add, subtract, divide, multiply. That's all that's all quite simple. A few features that, you know, I found to be easy. We have column formulas. So there's, there's it's a I don't think that concept really exists in Excel, let's use a table. But this this formula that I have applied here applies to the full column, which is helpful. So if I add rows that that's, that's easy, it's easy for Smartsheet to handle a really wonderful feature of Smartsheet for those who have never really used it before is their cell history available. So very, very common, especially in the transformation program. What change, what's the source of variance? Can you can you tell me what happened, not only can I right click and see exactly, you change the information and when. But I can also highlight differences based on the last hour day three days or a custom date by choosing. So if I turn this on, and I wanted to see changes in the last hour, you can see that that is updated here. That's a interesting feature. Rows can be locked in a much less frustrating way than Excel. So I actually set up automations within this sheet to automatically walk the target row. So again, this is this is probably a much more advanced sheet than most people use. But I've got lots of attribute data that's hidden over here to the left that the average user does not know exists. And based on the IRL status of the project, what I will do is I will lock once that once the project which is L three, I will actually lock the target column because the commitment is set once the project goes out. So this baseline will never change unless someone who has admin access would would actually allow them to change it or change it themselves. So there are lots of automations available up here in the In this, you can see here. So, tell me if I'm losing people, I'm kind of going helter skelter here, because there's just a lot going on the sheet. But automations are very easy to set up in Smartsheet. Or maybe not easy, but they are. It's that easy, but it is simple. automations can be set up here, he's in the automation workflow, you can see there are a lot of really simple, like, like preset workflows. So for example, and this can be modified, of course, for any client based on what they might need. But I just mentioned it automation, right, a lock these rows after the Protect yourself, right? That's an example automation. Another automation that I might set up is when a product goes L three, it will I can actually have it trigger an approval request to an identified user. So let's see if I created a workflow. Yeah, yeah, there's a whole work or approval workflow that I can set up here to not only alert somebody but actually request an approval. And that approval request actually has sent an email to an identified person, either a soft coded value. So for example, the product sponsor, or a hard coded value, like will Bachman. So it actually sent an email with an even need to log into Smartsheet. To do it just says, approve, deny within the email, body intellectual record that person's approval within the Smartsheet platform. And then there'll be a timestamp on that as well. So you can actually see when the project was approved in bamboo, which is which is helpful. Let's see, what are some other features here that are worth discussing? Much like Excel, it's got a conditional formatting engine, it's more challenging to use. But I'm thankful to have this all set up for myself now, already, so we don't have to. The good thing about Smartsheet is if you set it up correctly, it should scale pretty well. But it took us a long time to figure out how to scale as well. So that's, these are easy to do once they're very difficult to do multiple times, unless you have this configured the way that that really makes a lot of sense. What other features are worth discussing, um, especially this one, this is a good one. So within the project plan here, you notice that I have a full interactive Gantt chart over here to the right, which is impressive,

and it works pretty well. What's interesting, it's March executive, you can actually dynamically go back and forth between get gantt and grid view. So if you find the grid view useful, you can just use the grid view. And for many instances, that's the case. But you can of course, go to the Gantt view, if needed. The Gantt view can easily be you can either zoom out or just zoom in. Or if you have more precise timeline requirements, like you wanted to see, for example, quarters instead of months, you could, you could you could do that. We just don't have that as before. Remember it's a it's neat, because it's a native workplan tool. We have the ability here to set dependencies. It's an it's a native feature. So if I said, so if I said that the dependency for 21 is row 18. I can do that. And it'll automatically set the, it'll make sure that these dates are aligned with one another. Conversely, if I, if my delivery date is delayed, let's say instead of July 26, that is August 15. You'll see that the schedule variance will the schedule variance will update accordingly.

Will Bachman 28:49
So it seems like smart sheets integrates pretty well with Power BI, the Microsoft product. It's it's it's interesting that Microsoft I mean patent smart sheets is not Microsoft, right? Or they haven't bought it yet or something.

Andrew Seay 29:04
That's correct. They're totally unrelated software companies.

Will Bachman 29:07
It's interesting that Smartsheet says a better product and then Microsoft I guess what? Microsoft Project or something, but that doesn't seem nearly as, as, as good as smart sheets. So smart sheets, you can do workflows, which are not really in Excel, I'm trying to think about the differences between Excel and smart sheets. I'm seeing like has automations which are you know, easier. It has the dashboard, which you could create an Excel but it's not really a separate, you know, object and as these workflows and it has, what so what are the sorts of things that you could do beyond that what you're doing, you're tracking transformations, what are some of the things that use cases for smart sheets that people should be thinking about?

Andrew Seay 29:56
Oh, that's a good question. I'm only really use Smartsheet through the end. context of transformation. But I'll tell you that they, that spreadsheet will tell you it's it could be used for, like a finance team to track in voices, it's generally considered like a collaboration software. So any I would characterize telling you what you could use it, you could apply it to talk to a lot of things like what could you use Excel for? Well, you could use it for almost anything, right? What what I think Smartsheet is well suited to do is to, like, it's funny, sometimes a client will come to me like, they're so proud that they put something in Smartsheet. And I'll tell them I don't really like. I mean, it's great that they put in Smartsheet. You know, it's interesting to learn how to use the software, I think that Smartsheet value lies in it's, first of all been the number one source of values effect, it's cloud based, right? You have, you can have multiple people working on the same sheet at once. And that respect, it's exactly the same as Google Sheets, right? The thing that's nice about spreadsheets, though, is that Google Sheets, most companies don't have, like, you shouldn't be working in Google Sheets, you shouldn't be because it's a, you're probably working on it on to your personal account, whether you realize it or not, you're probably

logged in under your personal account. So that's, that's a no, no, it's kind of like sending emails to people from from your personal email for work, you just shouldn't do it. So so the fact that's cloud based is great. And I think it has an advantage over Google in the sense that it's not, you very likely do not have a personal account set up in Smartsheet. That the second use the second area, I think Smartsheet has advantages. If there's any need for like collaboration with people not just working the same way, but also having a workflow set up. It's very good for that. And it's very user friendly. So I think it's got a big advantage there. And I don't know, Google Sheets product is well there. But they very well could have workflows, but I'll tell you smart sheets very much oriented around those workflows. So it's much more comparable to an Asana or Reich or something in that in that regard. I would say another critical advantage of Smartsheet is that it's so user friendly, like it's the average person can like sit down Smartsheet. And it looks and feels so much like Excel on day one that you're like you can you're willing to put one foot in front of the other and like learn how to use it in a way that I think a lot of people don't feel about some of the other project management software's.

Will Bachman 32:20
What are, what are the I mean, beyond just sitting down and playing around with it? What have you seen is some of the best ways to learn it, you've probably worked with a lot of clients who are picking it up. Is there a good course on LinkedIn premium LinkedIn learning? Or is there good training right on the smart sheets website, or what's the best way to just become aware of the stuff that you you wouldn't even know exists? Yeah.

Andrew Seay 32:46
I'm a bad person to ask about that. Because I generally don't take a lot of courses I learned by by doing it. So I will generally sign myself up to figure something out. And then I will either figure it out on my own through just experimentation. Or I have some some partners that I work with who are Smartsheet, either former smart, who are generally some former spreadsheet employees, who will help guide me through this, I also have a licensed I can call spreadsheet and have some level of support with them as well. So the spreadsheet does have a nice suite of online learning. I just, I'm reluctant to in the middle of a podcast to try finding it just because I don't I've never, I don't really use it frequently. So I would be poking around the internet trying to find it. But there is there's a lot of Smartsheet training contents out there. So it's, it's there, and it's available. And so for people who enjoy learning that way, that's that's available to them. One thing I do with all my clients is I will build them a dashboard. That includes and I will show you, but it's all client specific. So I don't want to reveal client into here and the cost. Yeah, but I create How To videos. So an example. A very common HOW TO video, let's say okay, product owners, you now you know you've reached out to which means that you need to build a business case and you need to build your project plan. Yeah, let's talk through how to do that. How do you make

Will Bachman 34:11
videos do you use loom are what do you use to make those videos?

Andrew Seay 34:14
Oh, you're so I, when Umbrex tells me a better tool, I will use it I use I will record a meeting a one person meeting in teams, which is not ideal. Doesn't work the best every time and there's just basically on editable, which is pretty annoying. I think also Windows G is that it? Yes, Windows G most people

don't know this, you actually have the ability to record short videos just by hitting Windows G this actually works extremely well. The problem is it disconnects the moment you change windows. So what which was a very disappointing outcome for me when I changed windows like 15 minutes into a training video once

Will Bachman 34:55
well the best the best tool that I'm aware of, or at least one good one is loom L O M, which makes it super easy to record your screen as well as your voice. And it puts a little circle video of your face on there that you can move that around. And you can record these videos and then it stores them in an account online immediately. You don't have to upload anything. So that that is a good tool for recording videos and sharing them either publicly or with your team.

Andrew Seay 35:24
Okay, I've got that written down. Yeah. All right. That would be helpful for me because Windows G is awesome until you have to change Windows, Windows, it stops recording and it doesn't really tell you to stop recording. I don't think so. That's quite a surprise for me when I was doing my my look back on that. That was a tough toughy. So

Will Bachman 35:41
all right. And then how did you connect the Smartsheet to Power BI? Is that Is it a quick and simple integration? Or? I'll just look off here because it's one second here. That's podcast. Very Tay right there. So so how do you connect the smart sheets to Power BI?

Andrew Seay 36:08
Great question. Um, oh, let's see here. I don't even have Power BI pulled up currently. So you know, this is a good segue to reports. So I will create a report. Let's just do that. So I'm gonna stop sharing my screen for just a moment, just because some of my client names are available in this, this navigator here. Let me create a report.

Will Bachman 36:33
And we're listening given this real time listeners. Yeah. Show you how quick is to, to do one of these.

Andrew Seay 36:41
Okay. Okay, so a reports. Alright, I'm going to start sharing my screen again. Real time we're thinking feed everybody, which is actually my favorite way to do this, because it's just so low pressure. Okay. So a report, like I mentioned, there's their sheets, their reports, and there are dashboards. A sheet is kind of like a fancy spreadsheet that's showing everybody earlier, a dashboard is a place where you put multiple objects, which could include reports, or text objects, or charts or things like that, you can put them into those into a dashboard spreadsheet. A report is what I consider probably the most interesting and value added feature within the Smartsheet platform. So what I'm going to do here is I'm going to stop sharing one more moment. Let me just get the source sheet here. Okay, so Alright, we're in business again, I will share again. Okay, so what I've done here in a report, you can select the source sheets. So it will report at it at its essence is an aggregation of many, many sheets of information into a single report. And it is filtered and aggregated based on a certain set of criteria. So here I've selected a

set of 48 sheets. And what I'm going to do here is I'm actually going to filter that so that I'm only showing items that have a sheet name that includes the word fin, forecast actual which is which is the name of the sheet. I know my business cases are on. Oops. So it has to contain fan forecast. Okay, so now you're going to see that this will parse down considerably. And then I'll set another filter condition such that I'm only going to show financial benefits. So in the primary column, I'm only going to show items that has one of his one of and I'm only going to select items that are where's it financial benefits, USD, which is the name of this Tom here. Okay, so now I should see a bunch of green. Because I have eight projects, there's only one of these, there's, although I'm pulling from 848 sheets, only eight rows across all of these sheets meet these conditions. And then what I can do is add columns. And let's just say 120 2122 inch by 23. This is a I've chosen a very bad, this is a summary row. So I probably should have chosen something different. So this is the issue of going real time. Just say I'm just gonna remove this condition for a second is actually a valuable thing to talk about. But I'm just struggling to find the right example to show everybody in the group here.

Will Bachman 39:53
But it shows you how you can really play with this tool and create things on the fly. very easily as opposed to trying to do all of this in PowerPoint. I probably spent 25% of my diamond McKinsey just updating PowerPoint slides. Yeah, yeah. Um, change one assumption. And then you have to go through a 200 page document. And thanks. Change all the numbers that that depended on manually.

Andrew Seay 40:24
Yep. Yeah, exactly. Yeah, this all shoot, let me just say due to entropy. Let's just do general info. That's actually a good one. Yeah, I know, we're going a little bit long here. But hopefully we can, we can, we can make this work. Okay. So I'm going to only show sheet names, that is one of our contains. And we'll just search for Jen. Okay. So now I'm only pulling sheet names. That's a general info. As you can see, here, I've got the product number. And then these, these columns don't exist in that data. So I'm going to just add some different columns here. And let's say I want I'll set us I will set us I want to sponsor, executive sponsor. And I wants workstream. Want to spreadsheets God's little works kind of funny that way. But what's interesting about this, okay, cool. So we've got something useful here. So this is now looking across 48 sheets. And when I set this up for clients, like these reports, ultimately end up in the hundreds and hundreds of sheets, I'm pulling from a full universe of all the data that's been created for the project. The benefit of having individual sheets is that you can individual ownership, and I'll show you how to do that in a second. But in essence, like every single object in Smartsheet, can be shared to a limited audience with different levels of permission, which means that only a specific person like for example, maybe only Jim Evans in gold has access to this sheet, she's it's her home, she can put all of her information in there, it only hurts to edit, but then we get visibility to it centrally. And then by aggregating that, so not only is it make life simpler for her, it also allows us really, really precise and accurate data control so that only she has access to it and visibility to it. We then centralize that, and then what's really cool about it, when you have the central view is I can actually update. So for example, if I wanted to update, like, Oh, I know, this project isn't, you know, procurement should actually be growth, I could actually update this and that will actually push back to her source data. So even though I have like hundreds and hundreds and hundreds of sheets of data across all programs, I can make centralized updates as needed, if required. And that can be useful in some instances. I won't do that here. But but that's that's how that would work. And the way I see Power BI, is I build reports

that are structured the way that I need them across all the sheets. And then I feed that report, which look which would look something like this into Power BI and then Power BI, this is a very database friendly format, so I can process it in Power BI. And then I set these reports up to be dynamic, such that if I were to see only products, one through eight here, and I can actually sort that's quite easily say by the primary. So you see, I've got products with rate, if I added a product nine, it would dynamically append itself to this database. So there's no need to to re aggregate. So what's nice about this is that when we get that when we get the format, right, and by the way with clients, that's that's one of the main areas I need to focus on with them is I need to make sure that we're collecting the right information here for the source data, like what are the fields information you want to collect? Once we have that right, I can go ahead and recreate copies of this arbitrary like an arbitrary number of them. And it will continue to append to the report that we build, when it depends this report, it automatically gets reflected in Power BI. So if I added, if I add a project nine to this, it would show up in Power BI within power. So it's all very scalable and easy to run once you have the design decision set. And it saves lots of time for people. Like I said, we've we've used it with a number of clients already and the responses have been quite positive, it saves quite a bit of time and it reduces a lot of the headache, especially with Excel based reporting. Okay. I mean, what else can we talk about? I mean, do you watch anything else with respect to Smartsheet? Or Power BI or

Will Bachman 44:38
smart sheets? Do you know off the top of your head? How much it costs for both the editor kind of license holder like you as well as if you're wanting to share it with with clients if they have to pay or if they get free access?

Andrew Seay 44:51
Yeah, great question. So a typical client, if they're working with our firm would probably require one Smartsheet license. Like again A full user license. And that's about $300 a year. And that's usually for the client champion, that's the person who would need that. Now, of course, the bigger the client gets, the more people need to start having the ability to free users can edit data, editing is free. So any user can go in here and type whatever they want in here, that's totally okay. It's only if you want to, if you wanted to edit a report like this, that would, that's what requires a license. So if you want that license, that's $200 a year, most of my clients allow me to handle that for them. And so you typically want one person, there's got a little bit more flexibility that's rendered out here, the basic licenses, it's free. And we can also host all this for them within our Smartsheet environment. So that's, that's, of course, the default option. If you have an enter, if the client has an enterprise plan with with Smartsheet, what we would do is transfer it, we build it in our environment, and then we transfer it to their environment, you know, during a transition here at the end of an engagement,

Will Bachman 46:00
okay, cool. This is a super powerful tool. And it looks like for consultants that are doing some kind of collaborative work that requires tracking a lot of different initiatives, maybe some workflow tool that we ought to become familiar with. So, Andy, thank you for giving us this demo. This was this was fantastic for people when they want to find your firm online or follow up with you. Where would you point them?

Andrew Seay 46:31

Great. Um, of course, LinkedIn, see associates and we're also at see associates.com. Right, which I test that way

Will Bachman 46:39

as well. Fantastic. Well, we will include that link in the show notes. Andy, thanks for joining. Thank you. Well,