# smartsheet

# New Product Development

# **Template Set Getting Started Guide**

With the New Product Development Template Set, you can organize critical components in your product release process keeping your team on target. Using the pre-built form, track and manage new product requests and see it reflected in real-time on the included dashboard.

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# **New Product Development**

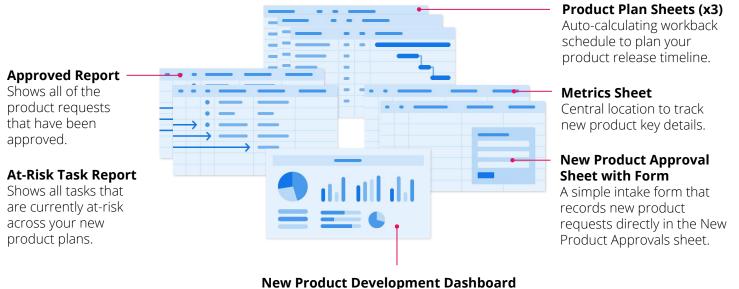
Template Set Getting Started Guide

**REQUIREMENTS:** This template set has been designed to utilize the full suite of functionality available in Smartsheet. Select plans do not have access to all premium features like Dashboards, Automated Actions, and Activity Log. If you are on a limited plan you can still use the template set however not all premium functionality will be available. <u>Click here</u> to see a list of discontinued plans.

#### Download Create New -Favorites The data will be download in the Sheets folder - look on the left Dashboards/Portals hand side under sheets. Sheets **New Product Development Template Set** Template Set

# How It Works

With the New Product Development Template Set, you can organizing critical components in your product release process keeping your team on target. Using the pre-built form, track and manage new product requests and see it reflected in real-time on the included dashboard.



Central location for your department to get status updates on all new product requests.



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# **New Product Development**

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# Set Up

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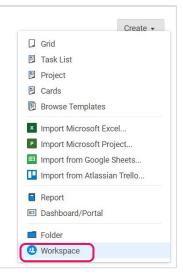
Using a <u>workspace</u> is a best practice when building a collaborative process. Workspaces allow you to centralize your work and control sharing with different stakeholders.

#### Step 1: Create a New Workspace

Open *Home*. From the home menu, click the *Create* button in the upper right hand corner. From the drop-down menu, select *Workspace*. Name the workspace.

#### Learn more:

Workspaces Overview, Workspace Sharing, Home Tab

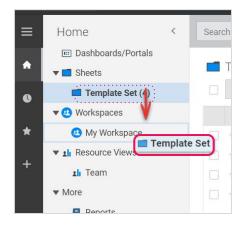


### Step 2: Drag the Files into Workspace

Select the template set folder under your *Sheets* folder. Drag and drop the folder down to the workspace you just created.

#### Learn more:

Manage Items in a Workspace (Add, Move, Remove)



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#### Step 3:

### Add Requests with the New Product Request Form

The New Product Request form is how your product management team can quickly submit new product requests. The information completed in the form will appear in the New Product Approval sheet, which tracks product requests, product approval, approval email, approval status, links to the individual product plans, and % complete. Open the New Product Approval sheet and click on Forms in the top menu to customize the form.

- A. Click on *Manage Forms* and then *Edit* to customize the existing fields. You can add or remove fields, change field titles or descriptions, and modify Form Options. Mark fields as required that you want to ensure your product team completes.
- B. Click *Save* to close the form builder and copy and save the URL displayed. Give this URL to anyone who will be submitting new product requests. You can also share it via email, hyperlink, or embed it on a website.

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i Product Name	Requester		-			/orth	Sales	Notes	
Product Name goes here	email goe	New Product Request		Form Title and Description		× 0,000		High level notes go here, addit comments go in comments col	
Product Name goes here	email goe	Proposed Product Name * {additional help text here}	- 1	New Product Request		0,000		High level notes go here, addit comments go in comments col	
Product Name goes here	email goe			Description		0,000		High level notes go here, addit comments go in comments col	
Product Name goes here	email goe	Requester *				0,000		High level notes go here, addit comments go in comments col	
Product Name goes here	email goe	{Please put your email address here}				0,000		High level notes go here, addit comments go in comments col	
Product Name goes here	email goe			Hide title and description in form		0,000		High level notes go here, addit comments go in comments col	
Product Name goes here	email goe	Brand *				0,000		High level notes go here, addit comments go in comments col	
Product Name goes here	email goe					,XXX		High level notes go here, addit comments go in comments col	
Product Name goes here	email goe	Launch Year {Example 2019}				,XXX		High level notes go here, addit comments go in comments col	
Product Name goes here	email goe	*				,XXX		High level notes go here, addit comments go in comments col	
Product Name goes here	email goe	Add Field >				,xxx		High level notes go here, addit comments go in comments col	
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Product Name goes here	email goes he				// 50	XXX,XXX	\$XXX,XXX	High level notes go here, addit comments go in comments col	

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# Customize

#### Step 4:

### Manage Requests in the New Product Approval Sheet

The New Product Approval sheet is where you track new product requests through the New Product Approval Intake Form. The sheet can be tailored for any product request, and is a great place to centralize resources and key information.

- A. The rows in this New Product Approval sheet are populated from the intake form.
- B. Customize, disable, or add conditional formatting rules by clicking on the conditional formatting button in the top toolbar.
- C. When new product requests are submitted, they will appear at the top of the sheet with a white background. Managers will need to mark *Approved* or *Declined* in this column.
- D. Once the product plan for the new product is created, use the cell link feature by right clicking on the cell to link to the appropriate product plan.
- E. Link the % Complete cell to the overall % Complete cell in the appropriate product plan sheet.

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A	i Product Name	Requester	Brand	Launch Year	Target Launch Date	Actual Launch Date	Product Type	Budget	SKU Count	Objective	Worth	Sales	Approver Email	Approval	Product Plan	% Complete	Notes
1	Product Name goes here	email goes here	MBF		01/31/19	05/13/19	Women's Apparel	\$100,000	75000	Product Objective	\$1,000,000	\$10,000,000	Lori Grimes	Approved	Product Plan Link	43%	High level notes comments go in
2	Product Name goes here	email goes here	Jones Inc.	2019	02/01/19	05/21/19	Men's Apparel	\$75,000	75000	Product Objective	\$1,000,000	\$5,000,000	Kirk Caskey	Approved	Product Plan Link		High level notes comments go in
	Product Name goes here	email goes here	Umbrella Company		03/01/19	06/14/19	Men's Apparel	\$80,000	75000	Product Objective	\$1,000,000	\$5,500,000	🌻 Brent Williams	Approved	Product Plan Link	17%	High level notes comments go in
6	Product Name goes here	email goes here	Umbrella Company	2019	03/08/19		Home	\$30,000	75000	Product Objective	\$1,000,000	\$8,000,000	🧃, Brent Williams	Approved	Product Plan Link	25%	High level notes comments go in
	Product Name goes here	email goes here	MBF		01/11/19		Children's	\$42,500	75000	Product Objective	\$1,000,000	\$9,000,000	S Lori Grimes	Approved	Product Plan Link	25%	High level note: comments go in
5	Product Name goes here	email goes here	Acme Corporation		02/24/20		Children's	\$48,000	456	Product Objective	\$800,000	\$750,000	Rexandra Mattson	Declined	Product Plan Link	50%	High level note: comments go in
	Product Name goes here	email goes here	Acme Corporation		02/24/20		Women's Apparel	\$50,000	456	Product Objective	\$800,000	\$750,000	👸 Alexandra Mattson	Approved	Product Plan Link	25%	High level notes comments go in
	Product Name goes here	email goes here	MBF		06/01/21	,	Men's Apparel	\$20,000	10000	Product Objective	\$XXX,XXX	\$1,000,000	🖞 Alexandra Mattson	Approved	Product Plan Link	0%	High level note: comments go in
P	Product Name goes here	email goes here	Jones Inc.	2019	01/04/19		Men's Apparel	\$20,000	75000	Product Objective	\$XXX,XXX	\$9,000,000	Kirk Caskey	Approved	Product Plan Link	100%	High level notes comments go in
	Product Name goes here	email goes here	Jones Inc.	2020	02/07/20		Home	\$25,500	80000	Product Objective	\$XXX,XXX	SXXX,XXX	Kirk Caskey	Declined	Product Plan Link	0%	High level note: comments go in
	Product Name goes here	email goes here	MBF	2021	05/15/21		Women's Apparel	\$29,500	500	Product Objective	SXXX,XXX	SXXXXXXX	O Lori Grimes	Submitted	Product Plan Link	0%	High level notes comments go in
	Product Name goes here	email goes here	Jones Inc.	2020	02/07/20	]	Women's Apparel	\$9,000	80150	Product Objective	\$XXX,XXX	SXXX,XXX	Kirk Caskey	Submitted	Product Plan Link	25%	High level notes comments go in
	Product Name goes here	email goes here	Umbrella Company		10/01/20		Home	\$9,900	80150	Product Objective	\$XXXX,XXXX	SXXXXXXXX	🕱 Brent Williams	Submitted	Product Plan Link	25%	High level notes comments go in
	Product Name goes here	email goes here	Umbrella Company	2020	10/30/20		Men's Apparel	\$10,900	80150	Product Objective	\$XXX,XXX	\$XXX,XXX	🎉 Brent Williams	Submitted	Product Plan Link	25%	High level notes comments go in
5	Product Name goes here	email goes here	Acme Corporation	2020	10/11/19	1	Home	\$3,550	80000	Product Objective	SXXX,XXX	SXXXXXXXX	👸 Alexandra Mattson	Submitted	Product Plan Link	0%	High level note: comments go in

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#### Step 5:

### Track Data with the Product Plan Sheets

This template set includes three Product Plan sheets. Use these sheets to track and maintain critical data about a product's release. Project sheets in Smartsheet have dependencies enabled and includes columns such as Duration, Predecessors, and % Complete. The project plan will automate your project timeline from the start date forward and will provide an estimated end date based on project tasks. You can create a separate product plan for each new product that can be tracked individually with unique attributes and contributors by right clicking on one product plan sheet in your template set and select Save as New. Then rename that sheet and go into sheet and update the inputs to map to the new product.

- A. In the Task Name column, name the project phases in the parent (light gray) rows.
- B. Use the indented grandchild (white) rows in your hierarchy, to enter tasks in the Task Name column.
- C. Starting on row 3, enter dates in the Start Date and End Date columns.
- D. The other data on your ancestor and parent rows, including Start Date, End Date, % Complete, and Duration are auto-calculated by the tasks in the children rows.
- E. Attach documents or links to webpages to the row in the Attachment (*paperclip icon*) column to keep all of your project information and resources in one place.
- F. Track the progress of your project by viewing the interactive Gantt timeline to see which tasks are complete (green), late (red), in progress (blue), or on hold (orange). Conditional formatting rules apply formatting automatically to rows or cells based on the Status column values they contain. To change the attributes of the conditional formatting, click on the Conditional Formatting icon and either Create New Rule or edit the existing rules by clicking on any of the linked parameters.

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E	🖲 🗔 🏼 At Risk	A Task Name	Status	Assigned To	Start Date	End Date	e 17 Mar 24 Mar 31 Apr 7 Apr 14 Apr 21 Apr 28 May
	8			-			
3	8	PRODUCT A		D	03/22/19	05/13/19	
2	8	B - Planning			03/22/19	04/19/19	Planning
3		Product Kickoff	Not Started	Example Nam	03/22/19	03/28/19	Product Kickoff
4	2	Activity 1	On Hold	Example Name	03/29/19	04/03/19	Activity 1
5	E	Activity 2	Complete	Example Name	04/04/19	04/12/19	
6	F	Activity 3	In Progress	Example Name	04/15/19	04/17/19	
7		Collect Deliverables	Not Started	Example Name	04/18/19	04/19/19	
8	8	- Execution			04/22/19	04/30/19	Collect Deliverables
9	E	Kickoff Activity	Not Started		04/22/19	04/22/19	
10	<b>1</b>	Phase 1	Not Started		04/23/19	04/25/19	
31	<b>F</b>	Activity 1	Not Started		04/23/19	04/23/19	Phase 1
12		Activity 2	Not Started		04/24/19	04/24/19	Activity 1

#### Learn more:

Project Management and Gantt Charts, Hierarchy: Indent or Outdent Rows, Date Column Type, Parent Rollup Functionality, Upload an Attachment, Symbols Column Type (i.e. Status symbols, Decision symbols, etc.), Using Column Symbols, Apply Formatting Automatically with Conditional Formatting Rules

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#### Step 6:

### Sheet Bonus: View or Edit Your Project Summary Data

For those with a *Business* or *Enterprise* plan, this template set utilizes the *sheet summary* feature. The New Product Approval with Form sheet and the Product Plan sheets include a pre-populated sheet summary that provides a standard, robust way to organize and report on project information in your sheet. On the New Product Approval sheet, get a snapshot of approval status, projected sales, budget information, and figures for products launched by category and quarter. On the Product Plan sheets, you can see a quick recap of budget versus actuals information. Open the sheet summary on the right panel to view or edit your project summary fields. You can use formulas and reference another summary fields.

- A. Click the sheet summary icon to expand the sheet summary. You can expand and collapse the right panel to stay in the context of your sheet or maximize your sheet real estate when you don't need to view it.
- B. To add fields, click +New Field.
- C. Name your field and select the field type: Text/Number, Contact list, Date, Dropdown list, Checkbox, or Symbols.
- A. To edit the field properties, hover over the right side of the field and click on the vertical ellipsis (<sup>‡</sup>) to open the field options dropdown menu.

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#### Step 7:

### **Adjust Duration and Predecessors**

Duration and Predecessor are two unique column types that exist in project sheets.

- A. Set the duration of each task in the Duration column.
- B. Set predecessors, or relationships between tasks, in the Predecessors column.

Start Date	End Date	% Complete	Duration	Predecess.
03/05/18	04/24/18	28%	37d	
03/05/18	04/02/18	50%	21d	
03/05/18	03/09/18	0%	5d	
03/12/18	03/15/18	30%	4d	3
03/16/18	03/26/18	100%	7d	4
03/27/18	03/29/18	75%	3d	5
03/30/18	04/02/18	0%	2d	6

#### Learn more:

Project Sheet Columns: Start Date, End Date, Duration, % Complete and Predecessors

### Step 8: Assign Tasks to Team Members

Assign tasks to individuals by adding their email addresses in the Assigned To column. A contact includes both the name and email address, which can drive delivery of automated actions, alerts, reports, and more.

A. Add contacts in the Assigned To column by individually creating a new contact, or adding an existing contact from your *Contact List*.

Task Name	Status	Assigned To
PROJECT NAME		
- Planning		
Project Kickoff	Not Started	A Example Name
Activity 1	On Hold	Example Name
Activity 2	Complete	Example Name
Activity 3	In Progress	Example Name
Collect Deliverables	Not Started	Example Name

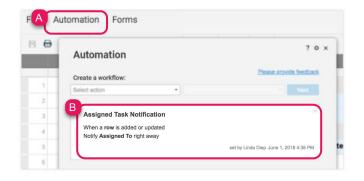
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#### Step 9:

# **Create and Adjust Alerts or Reminders**

An automated alert workflow is a great way to let your team know they have new tasks to fulfill as soon as they are assigned. An alert has been set on the project sheets to notify anyone shared to the sheet right away when a new task has been assigned to them.

- A. To edit the alert workflow, click on Automation and select Manage Workflows in the dropdown menu.
- B. Then double-click on the workflow itself in order to edit the criteria.



#### Learn more:

Save Time and Work Faster With Automated Workflows

### Step 10: Update Filters

After the task has been assigned, the task owner can update the status by selecting an option from a custom dropdown list in the Status column. If there are multiple owners, filters are an ideal way to help people cut through the noise. On the Project Plan sheet, we created a shared filter called *Tasks Assigned to Me*. Anyone viewing the sheet can select that filter and see only their assigned items.

- A. Click on the *Filter* button and select *Tasks Assigned to Me* to see tasks assigned to the current user viewing the sheet. You can also select any of the other filter options to perform other tasks.
- B. Select the *Filter Off* button in the toolbar to see all tasks. You can also create, use, or modify filters.

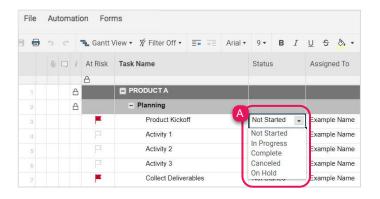
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•	B Filter Off		Assigned To
	- Planning		e e
	Project Kickoff	Not Started	Example Name
	Activity 1	On Hold	Example Name
E	Activity 2	Complete	Example Name
-	Activity 3	In Progress	Example Name
	Collect Deliverables	Not Started	Example Name

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### Step 11: Update Status

After the task has been assigned, the task owner can update the status by selecting an option from a custom dropdown list in the Status column.

A. To edit Status, click on the Status cell and select the appropriate status in the dropdown menu.



#### Learn more:

Use the Best Column Type for Your Data, Dropdown Lists

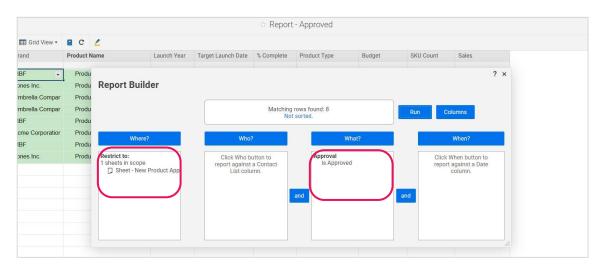
# **Project Tracking and Rollup**

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### Step 12:

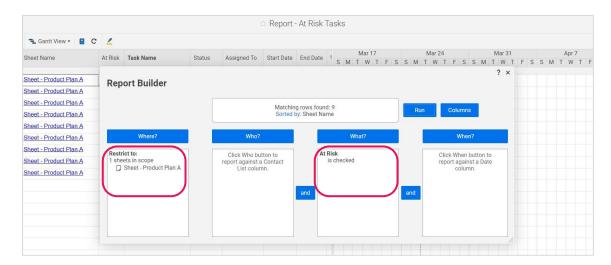
### **Approved Product Report**

The Approved Product report tracks all the approved products from the various requestors by displaying any rows where the status *is equal to Approved*, and the *Approval status is Approved*. The information in this report also appears on the Product Development Dashboard.



### Step 13: At-Risk Report

A task is automatically flagged as *At-Risk* if the status is not *Complete* and the *End Date* is in the past. The At-Risk report surfaces all at-risk tasks in one view, and also displays them on the Product Development dashboard.



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Step 14: The Metrics Sheet

The Metrics sheet is entirely driven by formulas. Linked to the New Product Approval sheet, formulas in the Metrics sheet focus on approval status, product launches, product plan status, brand categories, products by quarter, expected sales, and budget figures. Note: It is not recommended to give editor (or higher) sharing permissions to this sheet to ensure formulas stay intact.

- A. Before deleting rows from the Metrics sheet, look at how they work in the Product Development dashboard.
- B. All items in the Products column are using cross-sheet formulas.
- C. Formulas in the light gray metrics area are counting the number of products that have been Approved, Submitted and Declined for the current year.
   =COUNTIF({Approval Column}, "Approved")
- D. Formulas in the light blue metrics area are counting the number of products that have been submitted in this year, how many requests are submitted for next year and how many are submitted for the following year.

=COUNTIFS({Launch Year}, YEAR(TODAY()), {Approval Column}, "Approved") =COUNTIFS({Launch Year}, (YEAR(TODAY()) + 1), {Approval Column}, "Approved") =COUNTIFS({Launch Year}, (YEAR(TODAY()) + 2), {Approval Column}, "Approved")

- E. Formulas in the yellow status area are counting the status of products in the current year.
   =COUNTIFS({% Complete}, 0, {Launch Year}, 2019)
- F. Formulas in the light green Expected Sales and Budget for This Year's Products area are adding the sales and budget for this year. **=SUMIF({Launch Year}, 2019, {Sales})**

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0 🖵	<i>i</i> Title	Product		
/		В		
1	Metrics for Dashboard			
2	Approved		8.	C
3	Submited		5 •	_
4	Declined		2.	
5	Product Launch - This Year		5 •	
6	Product Launch - Next Year		2 •	
7	Product Launch - The Following Year		1.	_
8	Not Started		0 •	E
9	In Progress		4 •	E
10	Complete		1.	_
11	Expected Sales		\$37,500,000 •	
12	Budget for This Year's Products		\$305,000 •	

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# Step 14 (continued):

### **The Metrics Sheet**

G. Formulas in the pink section are counting the items in each department.

### =COUNTIF({Approval Sheet - Ideation Range 1}, "Women's Apparel")

H. Formulas in the 2019 Products by Quarter section are counting the number of products in each quarter of the current year. Note: These formulas are built to dynamically update the count in the current year (i.e. if current year is 2020 then the formulas will automatically update to count products by quarter in 2020) and uses January - March as quarter 1.

### =COUNTIFS({New Product Approval Sheet Range 1}, OR(IFERROR(MONTH(@cell), 0) = 1, IFERROR(MONTH(@cell), 0) = 2, IFERROR(MONTH(@cell), 0) = 3), {New Product Approval Sheet Range 1}, YEAR(@cell) = YEAR(TODAY()))

- a. Update the formula to match your fiscal year, by double-clicking to open the formula in the cell and edit the = 1, = 2, and =3 in OR(IFERROR(MONTH(@cell), 0) = 1, IFERROR(MONTH(@cell), 0) = 2, IFERROR(MONTH(@cell), 0) = 3) with the number that corresponds to the month in the quarter. The month number for January is 1 and the month number for December is 12.
- I. In the light gray Budget and Actuals areas numbers are linking to the Budget and Actuals cells in the Product Plan.

13			
14	Women's Apparel	G 4	
16	Men's Apparel	5.	
16	Home	4.	
17	Children's	24	
18			
19 💽 🛛 🖵 🚨	2019 PRODUCTS BY QUARTER		
20	Q1	H 64	
21	Q2	0.	
22	Q3	0.	
23	Q4	1.	
24		BUDGET	CTUALS
25	- TOTAL BUDGET	\$102,300	\$99,300
26	Planning	\$20,000 •	\$29,150
27	Execution	\$42,800 •	\$37,500
28	Monitoring	\$32,500 •	\$27,150
29	Closing	\$7,000 4	\$5,500

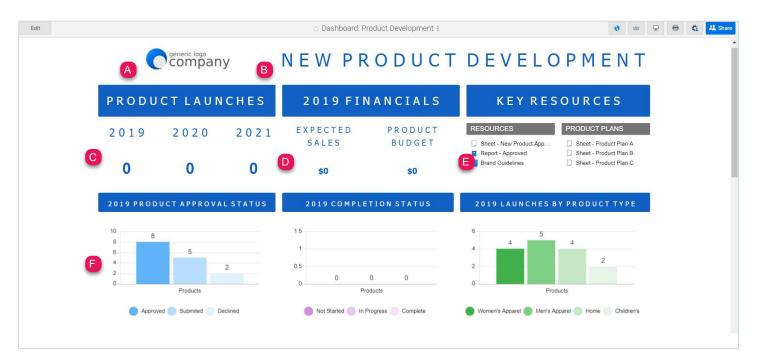
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#### Step 15:

### **Customize the Product Development Dashboard**

The New Product Development dashboard is a central location that summarizes key information you track for your product requests. Dashboards are easily customized and are made of different widgets that pull in live information from your other sheets and reports. Click *Edit* in the upper right to begin customizing your dashboard:

- A. Replace the logo placeholder with your organization's logo in the Image widget.
- B. Edit the dashboard name in the Title widget.
- C. "Product Launches" includes Metrics widgets, pulling the live data from the Product column in the *Metrics for Dashboard* section in the Metrics sheet.
- D. "2019 Financials" includes Metrics widgets, pulling the live data from the *Expected Sales* and *Budgets for This Year's Products* rows in the Metrics sheet.
- E. Attach links, files, and Smartsheet items to "Resources" and "Product Plans" in the Key Resources Shortcut widget to display important links and information.
- F. "2019 Product Approval Status", "2019 Completion Status" and "2019 Launches by Product Type" sections are all Chart widgets using information from the Metrics sheet.



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### Step 15 (continued): Customize the Product Development Dashboard

- G. The Sheet New Product Approval shows a publish sheet embedded using the Web Content Widget to display a card view of all submitted, approved and declined product requests. To view a sheet in card view, select the Card View default from the dropdown in the Publish Settings section when publishing a sheet
- H. Using the Report widget, you can display the "Approved Projects in Flight" in a report that shows all of the approved product requests.

Sheet:       New Product Approval (View Univ):       Smart Sheet:       Report Addust & Report & Report Addust & Report & R	Shet - New Product Approval (View Only):       smartsheet       Report Abus:       Help         Image: Submitted (5)       Image: Submitted (5)       Poduct Name goes here       Jones Inc.       2019-01       0////0///////////////////////////////						Dashboard	Product Develop	ment :			<ul> <li>Section 1</li> <li>Section 2</li> <li>Section</li></ul>		
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### Smartsheet

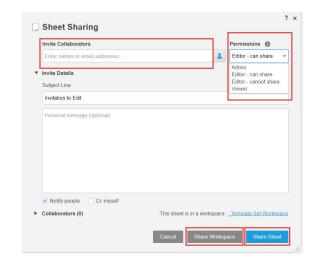
# **New Product Development**

Template Set Getting Started Guide

#### Step 16:

### Share your New Product Development Template Set

Sharing is the best way to collaborate with others involved in your new product development process. You can share your entire workspace with members of your department, or you simply share individual items within the workspace. For more information on sharing and permission levels, check out this infographic.



Learn more: Workspace Sharing

FEEDBACK: Let us know what you think of the New Product Development Template Set! Share your feedback <u>here</u>.