

Beyond Spreadsheets: Your Step-by-Step Guide to Smarter Work

Spreadsheets have been the backbone of business for decades. They're flexible, familiar, and powerful when it comes to calculations and lightweight tracking. But today's work environment is more complex than ever. Teams are distributed across time zones, projects involve more stakeholders, and decisions need to happen faster with better data. It's no surprise that 89% of professionals are using more than one platform to manage work, a clear sign that while spreadsheets are useful, they also introduce challenges: duplicate information, unnoticed errors, and slower collaboration.

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That's where intelligent work management platforms, like Smartsheet, come in. They don't replace spreadsheets, they build on them. These tools bring structure, automation, and visibility to the complex and interconnected work that spreadsheets weren't designed to handle, so teams can spend less time formatting and chasing updates, and more time driving impact.

This guide will help you create a plan for a smarter way of working. Learn how to pilot, measure, and scale an intelligent work management platform with confidence.

Drawing on findings from our research, you'll learn how to pilot an intelligent work management platform with minimal disruption, measure its impact with clear metrics, and manage the change so your team feels confident, not overwhelmed. By the end, you'll have a simple roadmap to test, prove, and scale a smarter way of working.

Pilot with purpose

Start small with just one workflow.



Track what matters

Measure value added as you pilot the platform.



Support the shift

Share results and small wins often.



Scale step by step

Layer in more workflows as confidence grows.

STEP 1: PILOT WITH PURPOSE

The best way to move beyond spreadsheets is by starting small. A focused pilot project gives your team the chance to experience the benefits of an intelligent work management platform without disrupting everything at once (and before you sign on the dotted line if you're trialing a new product). Follow this checklist to pilot with purpose:

☐ Choose the right workflow

Start with one high-friction process where spreadsheets cause the most pain. This could be your project intake process, budget tracking, or status reporting. Keep it small with just one workflow and one team for 30–60 days.

☐ Set clear objectives

Define what success means before you begin the pilot. Ask “what would success look like if this workflow ran better?” Be sure the objectives you set are measurable so you can clearly track the pilot's impact. Some common pilot goals include saving time, improving visibility, faster reporting, and eliminating duplicate work.

☐ Involve the right people

Include a mix of power users and team members who feel the pain of spreadsheets most. These are the people who will gain the greatest benefit from change and deliver the clearest feedback on what works and what doesn't. The right mix of participants ensures you're not only testing functionality, but also gauging how different roles adapt to a new way of working.

☐ Monitor success metrics

During the pilot, use the [multi-category KPIs template](#) to monitor key indicators that show whether the platform is delivering value: ease of use, integrations, and early signs of ROI (hours saved, fewer errors, faster reporting). Checking in regularly on these metrics also empowers you to make adjustments during the pilot as needed, and gives you data to share with stakeholders when it's time to evaluate next steps.

Get started with these easy-to-use templates

Not sure where to start your pilot? Pick a workflow you already manage in spreadsheets and try it in Smartsheet. These ready-to-use templates make it easy to test what's possible when your work is more connected and automated.

Project Planning Template

Project Tracking Template

Project Intake Template

Budget Tracking Template

Want expert help to make your pilot a success?

Talk to a Smartsheet advisor who can help you choose the right workflow, build your pilot, and measure results.

Contact us

STEP 2: TRACK WHAT MATTERS

A pilot will only prove the value of a tool if you can measure the results. Before you kick off the pilot, decide on a set of metrics that matter most to your team and stakeholders. Collect baseline data from your current spreadsheet workflows, such as how much time updates take, or how often errors occur, so you have clear points of comparison.

Be prepared to share the results of your comparison. Build a before-and-after dashboard with data visualizations to show improvements like time saved or reduction in errors. Share your results broadly to collect buy-in and build momentum for broader adoption.

Start with simple, measurable indicators like time saved, number of clicks to share updates, and error reduction to clearly show what's changing. When you can visualize those improvements in a before-and-after dashboard, it's easier to show how small process upgrades translate into real impact.



STEP 3: SUPPORT THE SHIFT

Resistance to change is natural and something you can anticipate, both during your pilot and later, as adoption expands when the pilot is successful. Follow these tips to make the transition feel easy, low risk, and rewarding from the start.



Involve champions

Identify a pilot champion who can collect feedback, share small wins, and encourage adoption across the team. Their advocacy and feedback will help others see the value faster.



Share small wins

Don't wait until the pilot ends to show results. Highlight quick wins as soon as you begin seeing them, like hours saved, faster updates, and fewer duplicates and errors. Visible progress encourages perseverance.



Keep it simple

Use pre-built templates and short training sessions to help your team feel confident and at ease about using the new platform. The more familiar the interface and workflow feels, the less resistance you'll face.



Communicate

Regularly share progress with stakeholders, including screenshots or dashboards that demonstrate impact. Transparency builds trust for adoption and scaling.

Additional resources

Change takes more than new tools, it takes people, communication, and a clear plan. Whether you're piloting a new platform or scaling it across the organization, these resources can help you navigate the human side of transformation with confidence.

[Navigating Change Management in 2025](#)

Key research insights on how organizations are adapting to rapid change.

[Putting People at the Center of Change](#)

Guidance for creating alignment, trust, and buy-in during transitions.

[Free Change Management Strategy Templates](#)

Practical templates to plan, communicate, and execute your change initiatives.

CONCLUSION

From pilot to proof

A successful pilot is more than just a test, it's proof that your team can work smarter. By starting small, tracking results, and easing into change, you'll build a foundation for scaling beyond spreadsheets.

Pilot with purpose



Track what matters



Support the shift



Scale step by step

Ready to start your pilot?

A single workflow is enough to start proving the value of an intelligent work management platform. Participating in a trial builds confidence, helps your team get comfortable, and makes success measurable from day one.

Take the next step—[start your free 30-day Smartsheet trial](#) and see how much easier it is to manage, automate, and scale your work compared to a spreadsheet.

Get expert help.
Our Smartsheet
advisors can help you
design and launch a
successful pilot.

Contact us



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