

How SoftwareX leverages the flexibility of the Smartsheet platform to help a diverse set of customers thrive

With deep Smartsheet expertise, SoftwareX, a top-tier Platinum Smartsheet Aligned Solutions Partner, helps teams work smarter, automate faster, and gain visibility—using the Smartsheet platform’s extensive range of features and integrations.

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Andrew Rustemeyer,
CEO of SoftwareX

**Partner Profile:**

SoftwareX

Headquarters:

Bellevue, Washington

Website:

smartsheet.com/marketplace/partners/softwarex

**Smartsheet Aligned
Partner Tier & Type:**

Platinum Solution Partner

Certified employees:

8

Total certifications earned:

37

Smartsheet Aligned

SoftwareX is a team of former Smartsheet employees and power users—people who know the platform inside and out and bring hands-on, practical expertise to every project. Since 2020, they've helped businesses rethink how they work—and make the most of Smartsheet. "It's all about helping customers create structure around their work and adopt a more collaborative work management methodology," shares Andrew Rustemeyer, Chief Executive Officer at SoftwareX. "Smartsheet is the platform that brings that methodology to life."

Smartsheet as a versatile and scalable foundation

SoftwareX has been all-in on Smartsheet since day one—and for good reason. "Over the years, I've realized Smartsheet isn't just a 'nice-to-have' tool," says Rustemeyer. "For many organizations, it's become a long-term necessity. That makes it a solid foundation for us to build our business on."

The team was also drawn to Smartsheet's versatility. "It works across industries—healthcare, finance, retail—for everything from portfolio management to onboarding to emissions tracking," explains Dan Morales, Product Manager at SoftwareX. "And it's incredibly flexible. Right now, everyone's looking for ways to work smarter and automate faster. Smartsheet lets teams bring their ideas to life—without writing a line of code."

Receiving support, giving back

As SoftwareX scaled its Smartsheet practice and added 30 more employees, the Aligned partner program played a key role in supporting its growth. Having certifications helped validate the team's expertise, and market development funds (MDFs) opened the door to new marketing opportunities. "The MDFs have really helped us get more creative," says Rustemeyer. "They've given us room to test new ideas and explore programs we might not have tried otherwise." Over time, SoftwareX grew into being a Platinum Partner and Smartsheet's 2024 Americas Partner of the Year, with eight employees and 37 certifications among them.

With growth came innovation. SoftwareX has built new products that extend the power of Smartsheet for others. Their Unite integration hub makes it easy for teams to connect Smartsheet with major systems like NetSuite, Workday, GitHub, Xero, Azure DevOps, and more—helping customers unify workflows across their tech stack. They also developed Heimdall, a data leak prevention (DLP) solution built specifically for Smartsheet, giving organizations the tools to classify sensitive data, manage risks, and automate response actions with confidence.

Streamlining onboarding across 2 countries

Today, SoftwareX creates a lasting impact for dozens of businesses, such as a leading US-based company that supports pharmaceutical and biotech firms with research and commercial services.



Services offered

- Custom integrations
- Implementation services
- Resource management
- Solution building
- Technical support

Smartsheet Aligned

“The company needed a new solution to manage employee onboarding and offboarding across 22 countries in EMEA—one that could handle the unique requirements of each location,” recalls Rustemeyer. That meant customizing the process to match different legal steps, languages, and documentation depending on where each employee was based.

SoftwareX built a tailored Smartsheet solution using advanced API integrations and a two-blueprint system that automatically displays the right tasks and information based on an employee’s country and language. The setup includes localized dashboards and automated workflows. The company also uses Smartsheet Control Center to automatically launch projects once profiles are approved, and Dynamic Views, which allow stakeholders to focus only on the tasks that matter to them. The result is a scalable, automated system that delivers stronger visibility, clearer reporting, and greater efficiency.

Rethinking project management

This leading pharmacology consulting company also partnered with SoftwareX to improve customer onboarding and project handoffs within its Deployment Solutions team. To do that, SoftwareX built a customized project portfolio management (PPM) tool using Smartsheet, designed to run multiple project plans from a single Control Center blueprint. “The system automatically filters out irrelevant tasks based on project type, which helps reduce clutter and makes execution simpler,” explains Rustemeyer. “With Smartsheet’s dashboards and async collaboration features, cross-functional teams work more efficiently, handoffs to Customer Services are smoother, and the entire account activation process is easier to manage.” The solution supports the full customer lifecycle and gives teams real-time visibility into every stage through dynamic portfolio dashboards.

That success led to a third major project—this time focused on helping the Integrated Project Planning (IPP) team bring more structure to how they manage internal initiatives. The goal was to give both project managers and executives a clear, shared view of key projects. SoftwareX delivered a solution powered by Smartsheet Control Center and Dynamic View, with intuitive dashboards and portfolio-level visibility. “With Smartsheet, we’ve helped the company accelerate internal projects, improve visibility, and bring more structure and consistency to high-priority work,” says Morales.

Stronger together

This kind of transformation shows what’s possible when the right partner teams up with the right platform. “The consulting company is one of those rare stories where a customer made incredible progress, fast,” he says. “We helped them work through a complex, company-wide shift—something many large organizations find tough—and come out stronger. Smartsheet’s flexibility and ability to integrate made it all possible. With Smartsheet, we have the kind of partnership where both sides make each other stronger.”



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CEO of SoftwareX