Unified Value Plan

Generate meaningful value across your entire business ecosystem.

The **Unified Value Plan** is the ultimate Smartsheet engagement for enterprises ready to make Smartsheet a core, organization-wide capability. It goes far beyond implementation — delivering a fully governed, strategically aligned, and self-sufficient Smartsheet enterprise operating model.

Why Choose the Unified Value Plan?

Includes the Premier Value Plan +

√ **Deploy complex, integrated solutions**

We support multiple solution builds, advance configurations, and seamless integration support for external systems like ERP, CRM, and HCM, Smartsheet becomes the connective tissue that ties your entire technology ecosystem together.

√ **Maintain platform health over time**

Regular solution health check audits keep your Smartsheet environment optimized, compliant, and aligned with best practices — so performance never falls behind as your usage grows.

√ **Prevent platform sprawl**

An enterprise Governance Framework covering security settings, workspace hierarchy standards, and global naming conventions gives your organization the guardrails it needs to scale Smartsheet in a controlled and compliant way.

√ **Build a self-sufficient organization**

A formal Center of Excellence (CoE) establishes clear internal ownership and accountability, ensuring there are always dedicated people championing, governing, and evolving Smartsheet as your business needs change.

Plan Benefits

- Deploy integrated solutions
- Maintain platform health
- Prevent platform sprawl
- Build internal self-sufficiency

Delivery Timeline

- Up to 12 months

High-level Plan Summary

- Solution Strategy & Design Workshop
- Support for up to 5 solution implementations
- Advance Features Configuration
- Establish a Smartsheet Center of Excellence
- Integration Planning
- Governance Framework
- Technical Health Checks

Meet your tailored team of experts — You're in good hands

Strategic Engagement Managers
Develops a strategic plan and orchestrates the execution to help you achieve the outcomes you seek. As the engagement lead, they are your main point of contact.

Technical Architects
Provides technical expertise and guidance vital to successfully designing, deploying, and adopting Smartsheet Solutions.

Expert Trainers
Subject matter experts, and qualified instructors that deliver training, onboarding, and guided implementations.

Smartsheet Consultants
Experienced, collaborative work management advisors who partner with you to identify business challenges and implement solutions grounded in deployment best practices, aligned outcomes, and proven methodologies to address your most critical work management needs.

> *We are taking 5G broadband into other communities, and it is because of the solution implementation we did with Smartsheet Professional Services. They were the driving force behind this market expansion.*
>
> **SENIOR PROJECT MANAGER, TELECOMMUNICATIONS**
> **Learn more**

Why work with Smartsheet Professional Services?

Return on your investment
Uncover ways to get more return out of your technology investment.

In-depth platform expertise
Our services combine best-in-class advisory support with in-depth platform expertise & a proven proprietary methodology.

Happy customers
Industry-leading 4.7 CSAT Score & 23,000+ successful global engagements.

Faster adoption
Enable end users on business critical solutions quickly and effectively.

Unified Value Plan: Key Goals and Deliverables

Establish a centralized operating model and align with enterprise strategic goals

Strategic Alignment & Use Case Prioritization	Align Smartsheet with cross-functional KPIs and improve existing business processes.	• Up to Three (3) Strategy & Design Workshops • Enterprise Roadmap • Solution Design Document (SDD)

Deploy highly complex solutions with integrations

Solution Implementation	• Configure a functional, scalable solution based on Smartsheet best practices. • Standard sheet automations (e.g. Alerts, Reminders) and AI Configurations. • Set up automatic reminders and notifications.	• Up to five (5) functional solution builds or up to two medium complexity solutions, or a single high complexity solution
Advance Configurations	Configuration of additional capabilities within existing solution(s) to support further customization.	• Configuration of (5+) Advance Capabilities or connectors • Implementation of Smartsheet Resource Management for complex capacity planning
Integration Planning & Support	Strategic architecture planning for connecting Smartsheet to external systems of record (e.g., ERP, CRM or HCM) using standard Smartsheet Connectors.	Integration Planning
Data Migration Planning & Support	• Develop and document data migration strategy. • Support the data migration process by completing migration examples, answering questions, and providing training. • Support to help customers strategize and migrate legacy data to the new environment.	Advisory services for data migration strategy & execution

Ensure enterprise-wide self-sufficiency, shifting organizational culture, and formalizing internal Smartsheet expertise

Change Management Strategy	Development of an organization-focused change management plan, including persona mapping, stakeholder communication strategy, and adoption barrier mitigation.	• Persona mapping • Stakeholder communication strategy • Adoption barrier mitigation
Center of Excellence (Process)	Establish a formal internal CoE, defining internal user groups and formalizing the onboarding process so the customer can independently scale Smartsheet usage over time.	Stand Up Formal Internal Center of Excellence (CoE)
Enterprise Enablement	Building lasting, self-sufficient Smartsheet expertise within your organization to reduce dependency on external support, accelerate adoption, and build a culture of continuous learning.	• Tailored learning program

Provide continuous oversight to prevent platform sprawl and ensure technical health

Governance Framework (Enterprise)	Delivery of a formal operating model including security settings oversight, workspace hierarchy standards, and global naming conventions.	• Security settings oversight • Workspace hierarchy standards • Global naming conventions
Solution Health Check Audits	Optimize performance and ensure compliance with platform best practices.	Up to two (2) solution audits of newly deployed solutions
Executive SteerCo Reporting	Regular reporting on achieved milestones, realized value, and future growth opportunities.	Establish regular executive meeting cadence

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