

LIVE WEBINAR SERIES

Claude × Smartsheet

Session 5: Running it at portfolio scale, unattended

From one sheet to a whole portfolio, and from a chat to a process that runs itself.

1 Intro to Claude

2 What good looks like

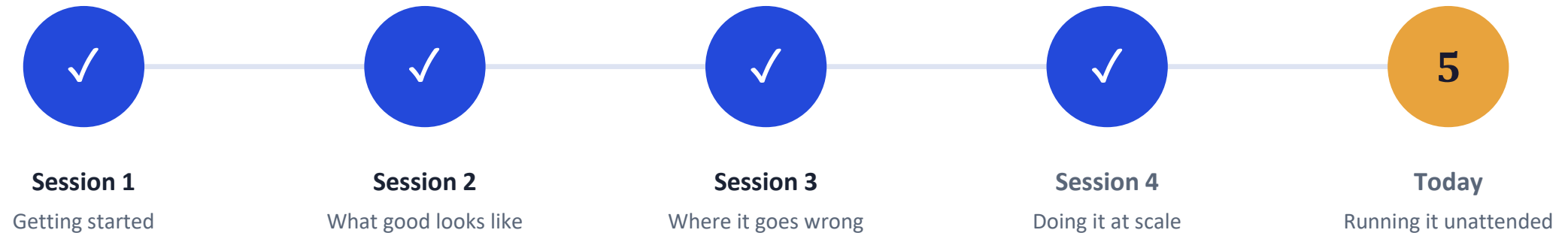
3 Where it goes wrong

4 Doing it at scale

5 Running it unattended

Where we are in the journey

You've done it at scale. Today: running it at portfolio scale, unattended.



The final session. Today it runs itself.

A quick refresher

First, the three ideas from last week, then we make it run on its own.

1

One prompt, a whole routine

Scan, cite, summarize, checkpoint, log, a real weekly status workflow.

2

It's a designed system

Structure, citation discipline, a checkpoint, and a place to log, by design.

3

Honest about the work

It breaks without expertise; someone has to build and maintain it.

The takeaway: It looks like one prompt. It's a designed system.

How Claude Works

Four pieces that turn a conversation into repeatable work.

1

Claude Chat

Talk to Claude. Ask questions and work back-and-forth.

2

Claude Project

Give the work a home. Instructions, knowledge, files, and standards.

3

Claude Cowork

Give Claude the job. Claude carries out multi-step work.

4

Schedule

Tell it when to start. The job begins automatically.

● LIVE

The routine already works.

Now let's remove the manual start.

The workflow itself is not new. What changes today is how broadly it runs, and who has to start it.

How an unattended run actually works

1

Schedule

The routine starts automatically.

2

Run

Claude performs the defined work.

3

Apply Boundaries

It acts only where the rules clearly authorize it.

4

Complete or escalate

It completes deterministic work; ambiguous items are flagged.

5

Log

The run and any changes are recorded.

6

Repeat

Same rules, same process, every scheduled run.

A dependable automation is not one that never fails. It is one that fails visibly and safely.

What changes with Cowork?

Before

Person starts the routine
Claude runs the routine
Person reviews

With Cowork

Schedule starts the routine
Claude performs the authorized work
Claude escalates only when it reaches a
decision boundary

The takeaway: The workflow did not change. Who starts it changed.

Before we let it run alone



The guardrails

- What can it read?
- What can it write?
- What can it send?
- What can it decide without us?
- When must it stop?
- Who gets alerted?
- Where is the run logged?

Unattended starts with boundaries.

What it takes to run unattended

Running on a schedule raises the bar. These four keep it trustworthy; governing usage keeps it affordable.



Drift detection

When a sheet's structure changes, the routine notices and stops. It doesn't guess.



Defined decision boundaries

Claude completes actions that are explicitly authorized and escalates decisions requiring judgment.



A full audit trail

Every run logged and dated, so the process is reviewable and trusted.



A named owner

Someone watches the schedule, the failures, and the edge cases over time.

Smartsheet now ships native Claude Code agents too. Making them safe to run unattended, and knowing when reach is worth crossing the tenant boundary, is the judgment we bring.

Running AI you can account for

1**Predictable cost**

Know what AI costs before the invoice, not after, scoped to value.

2**Attributable usage**

Who ran what, on which data, is logged, like every other system.

3**No duplicated spend**

Common questions become reusable workflows, not re-bought ten different ways.

THE REVEAL

The execution is unattended. The boundaries are designed.

A scheduled routine can complete clearly authorized work on its own and escalate only when it reaches a decision boundary.

What we built today:

A scheduled routine that starts on its own, completes clearly authorized work, logs what it did, and escalates instead of guessing when it reaches a decision boundary.

YOUR MOVE

Let's build the one that runs itself.

Bring one recurring report and your messiest multi-sheet workspace. We'll design the portfolio roll-up and wire it to run on a schedule, with your checkpoint.

Or drop your questions in the chat and we'll scope it live.

Book a build session →

