

DigitalRadius

TOP 10 USE CASES FOR SMARTSHEET IN BIOPHARMA

Ander Tallet
Founder & CEO



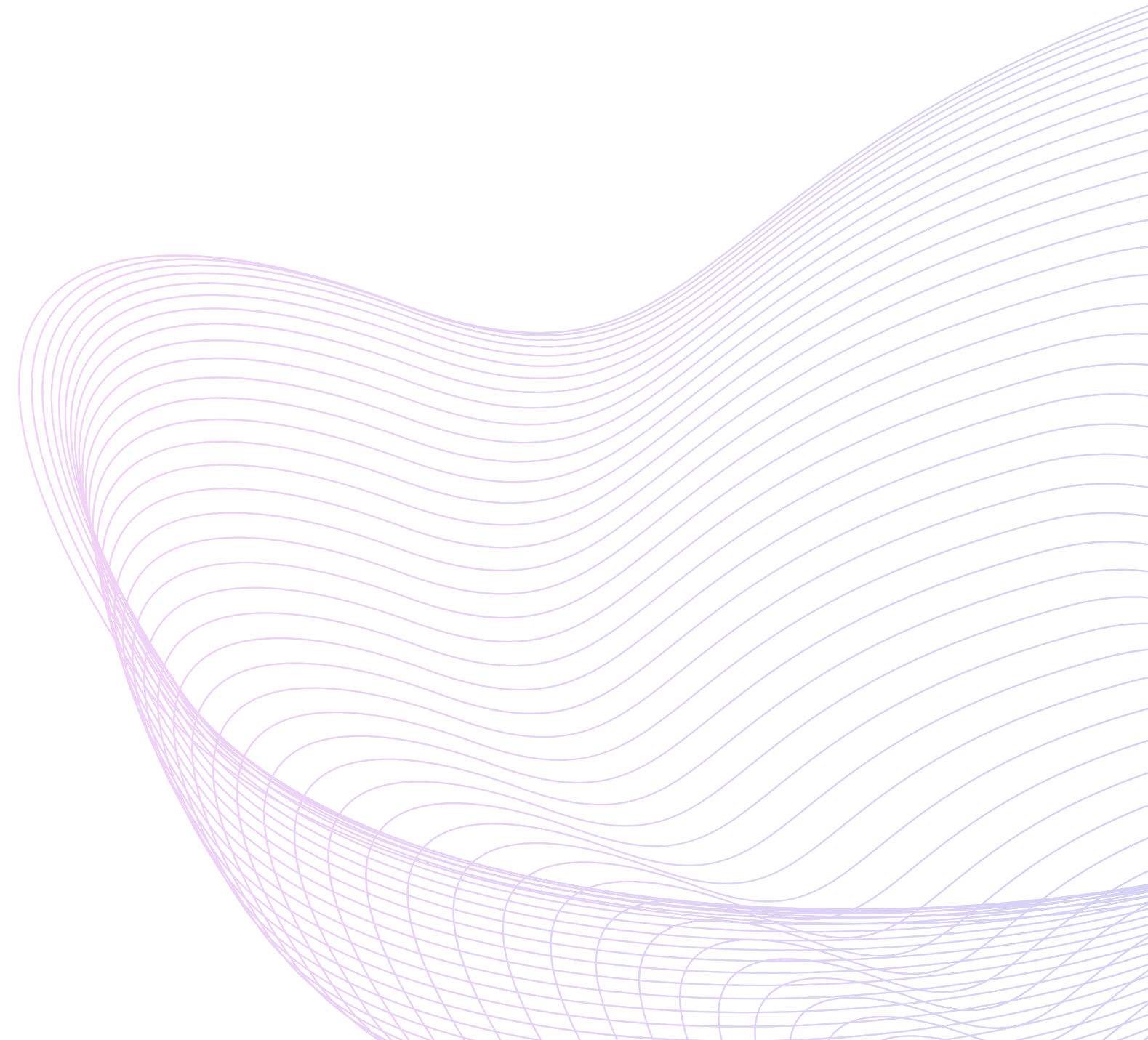
Agenda

1 Meet Ander Tallett

2 Our Company

3 Top 10 Use Cases

4 Q&A





Ander Tallett
Founder & CEO

- **6 years at Moderna as VP Business Systems & Finance Transformation**
- **Head of Enterprise Systems at Resilience**
- **Managing Partner at Block Mill Capital**
- **Chief Strategy Officer at Science Exchange**
- **SAP Innovation Award Winner**
- **Advisor role at multiple SaaS companies and VC firms**

Our Company



Our Team



Jess Tobin
COO



Chancellor Corbett
Account Executive



Scott Parmley
Principal Smartsheet
Architect



Brian Connell
Principal Smartsheet
Architect



Ben Hetter
Smartsheet Developer



Jacob Wehmann
Smartsheet Developer

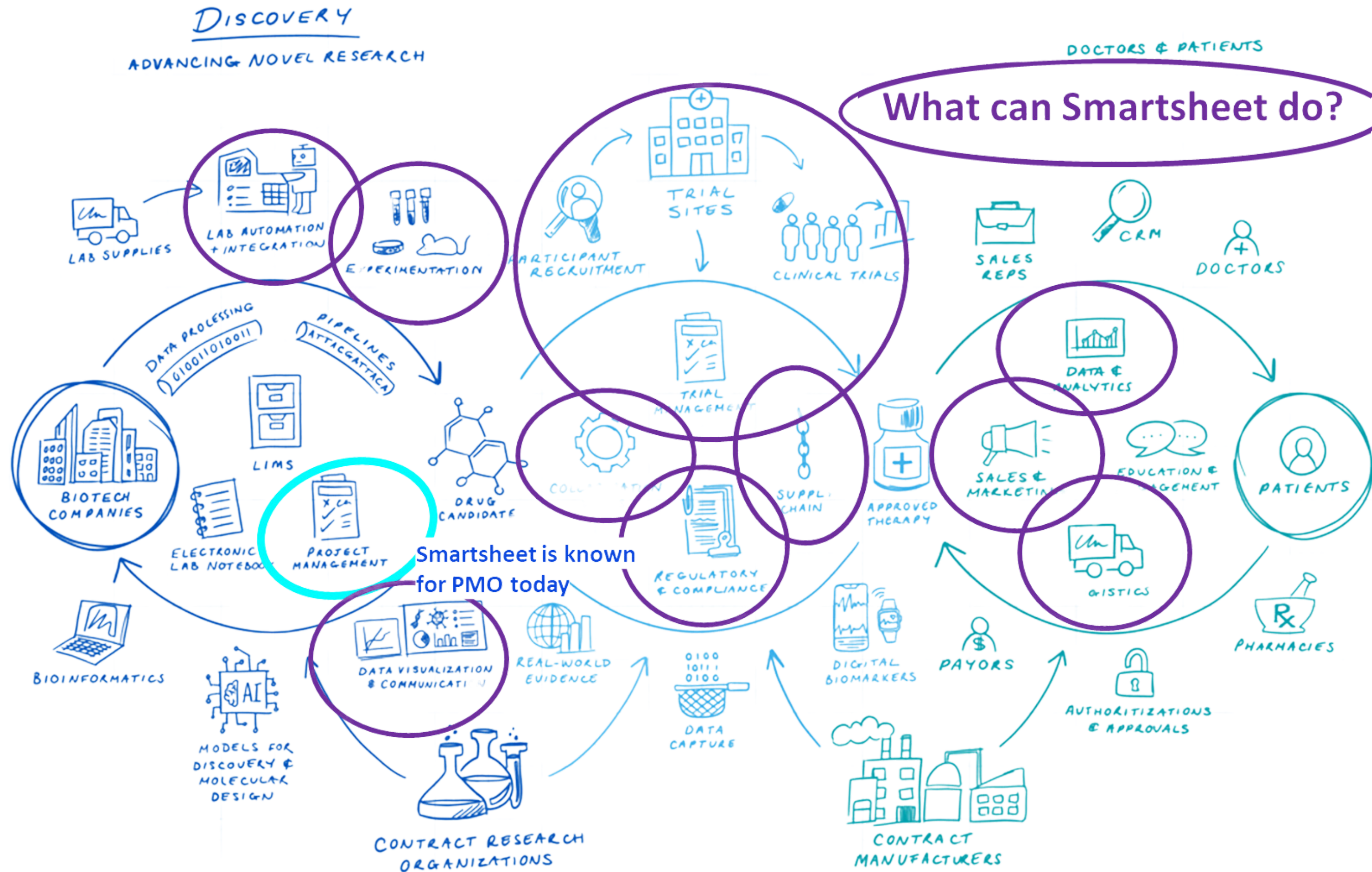


Aleya Chester
Smartsheet Developer

Our Clients



The Biopharma Landscape





The Top 10 Use Cases for Smartsheet in Biopharma

#1



CLINSHEETS
BY DIGITALRADIUS

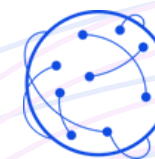


Clinical Project Management and Clinical Single Source of Truth

Manage your clinical trials, understand your portfolio, collaborate on action items, communicate changes, and create a Single Source of Truth (SSoT) for your Clinical teams.

Key Features:

- Intake and Approval
- Detailed clinical timelines
- Site enrollment tracking
- Access controls
- Role based actions
- Show summary portfolio data
- Integrate with budget and planning tools
- Manage Clinical inventory
- Track Manufacturing lots and batches
- Issue Tracker
- Key Reports and Metrics



Project Dashboard

PROJECT STATUS REPORT

PROJECT NAME: **R&D - 1001** | START DATE: **03/15/23** | STATUS: **In Progress**

PRINCIPAL SCIENTIST: **Scott Parmely** | PROPOSED END DATE: **07/20/23** | HEALTH: **Green**

PROGRAM: **SCALE** | PROJECTED END DATE: **04/30/23** | TASKS AT RISK: **15**

TOOL KIT

- Plan
- RAID Log
- Budget

PROJECT PLAN

Activities to Next Project Milestone

TASK	#	Status	2023		
			Q1	Q2	Q3
Project Plan	1	In Progress	█		
Project Kick-off	1.1				
Proposal	1.2				
ProtoCo Approval	1.2.7				
Discovery	1.3				
Establish In Vitro Assays	1.3.1				
In Vitro Screening	1.3.2				
Lead ID	1.3.8				
Lead Optimization	1.4				
In Vitro Potency	1.4.2				
In Vitro Characterization	1.4.3				
In Vivo Efficacy	1.4.4				
In Vivo PK (2 species)	1.4.5				
Non-GLP Tox Studies	1.4.15				
Human Dose Prediction	1.4.16				
Development Candidate Approval	1.4.18				

PROJECT TEAM

Role	Name
Project Manager	Julia Scott
Principal Investigator	Jason Anderson
Clinical Research Coordinator	Vadim Sapiro
Medical Writer	Dan Coleman
Research Pharmacist	Mary Wilson
Regulatory Affairs Manager	Talia Karchem

TASK STATUS

Text: █ (Not Started) █ (In Progress) █ (Complete)

Legend: ● Not Started ● In Progress ● Complete

RAID

RAID Report

Item	#	RATING	DESCRIPTION	MITIGATION STRATEGY
Total	Count 4			
Type Risk	Count 1			
Equipment shipping delay	R-104	!	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Dignissim convallis aenean et tortor at risus viverra.	Cursus vitae congue mauris rhonc Suspendisse ultrices gravida dicta fusce ut placerat orci. Egestas cor quisque egestas diam in arcu. Vivv mauris in aliquam sem. Scelerisiqu purus semper eget dula. Aliquam t mi in nulla posuere sollicitudin alit ultrices.

RAID ITEMS

Risk	5
Action	5
Issue	3
Decision	1

Portfolio Summary

CLINICAL TRIALS SUMMARY

PORTFOLIO OWNER: Ernest Washington

ACTIVE PROJECTS: 17 | **AT RISK PROJECTS: 1**

PROJECTS BY PHASE

Drug Discovery	2
Precinical	5
IND Application	1
CD: Phase 1	3
CD: Phase 2	2
CD: Phase 3	3

CURRENT PROJECTS

Project Health	Project ID	Project Link	Project Description	Date Approved	Project Stage	Expected Start	Expected Finish	Principal Scientist
●	RAID.1001	RAID.1001 - Clinical Project Toolkit	This clinical trial will compare the effects of an exercise intervention versus no intervention on quality of life in breast cancer survivors.	03/13/23	Clinical	12/16/22	03/31/23	
●	RAID.1002	RAID.1002 - Clinical Project Toolkit	This trial aims to assess the safety and effectiveness of a new device for the treatment of obstructive sleep apnea.	03/13/23	Clinical	12/16/22	03/31/23	
●	RAID.1003	RAID.1003 - Clinical Project Toolkit	This trial will investigate the impact of a mindfulness-based stress reduction intervention on chronic pain in older adults.	03/13/23	Clinical	12/16/22	03/31/23	
●	RAID.1005	RAID.1005 - Clinical Project Toolkit	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Curabitur	03/13/23	Clinical	12/16/22	03/31/23	

FDA REGULATORY

RAID

RAID Report

Item	#	RATING	DESCRIPTION	MITIGATION STRATEGY
Total	Count 4			
Type Risk	Count 1			
Equipment shipping delay	R-104	!	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Dignissim convallis aenean et tortor at risus viverra.	Cursus vitae congue mauris rhonc Suspendisse ultrices gravida dicta fusce ut placerat orci. Egestas cor quisque egestas diam in arcu. Vivv mauris in aliquam sem. Scelerisiqu purus semper eget dula. Aliquam t mi in nulla posuere sollicitudin alit ultrices.

RAID ITEMS

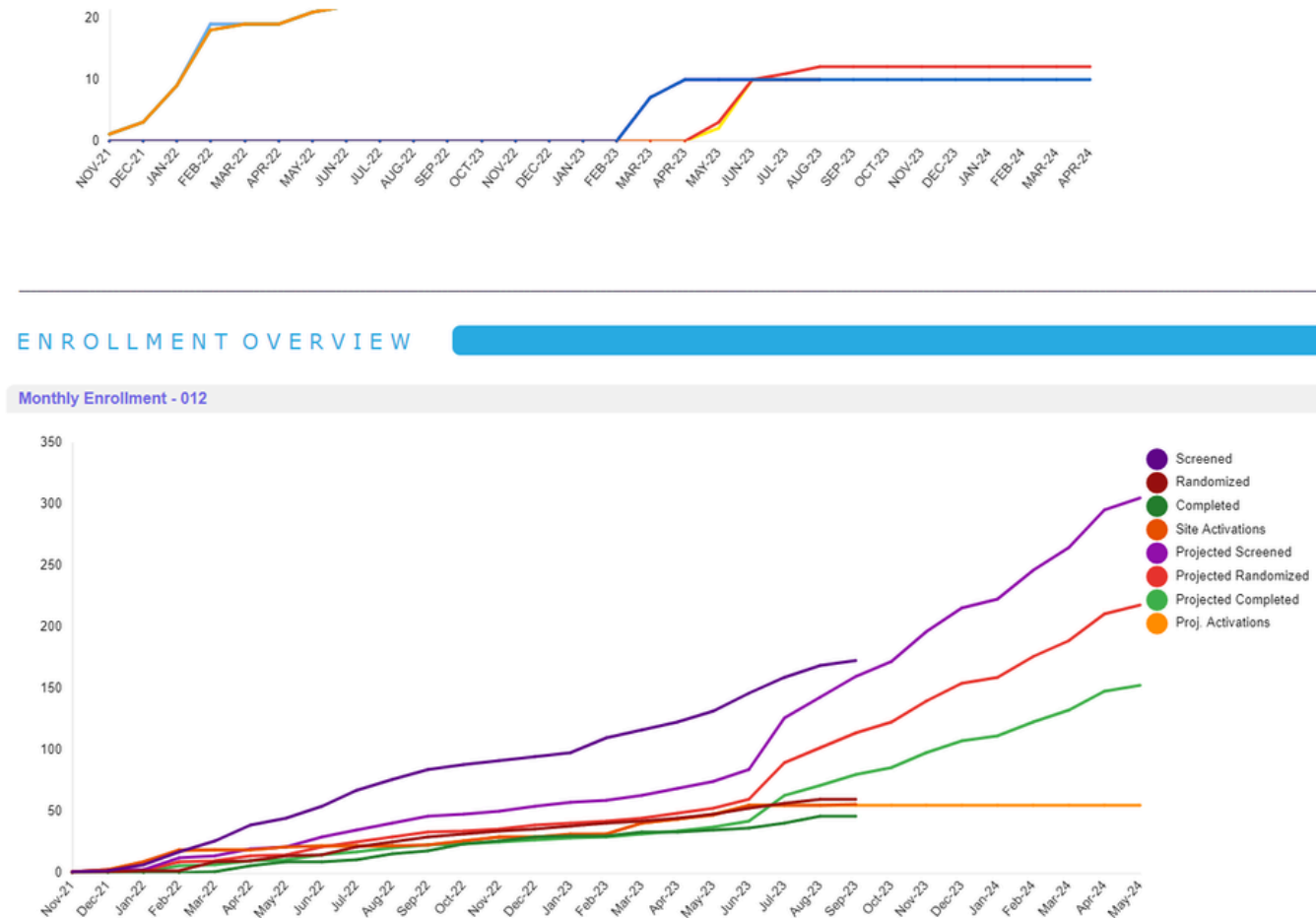
Risk	5
Action	5
Issue	3
Decision	1

REGULATORY TASKS

Application Status	Submission Date	Days Since Submission	IND Approval Date	Submission Date	Days Since Submission	NDA Approval Date
Approved	03/15/23	34	03/16/23	03/14/23	34	03/24/23
Not Started						

New Features

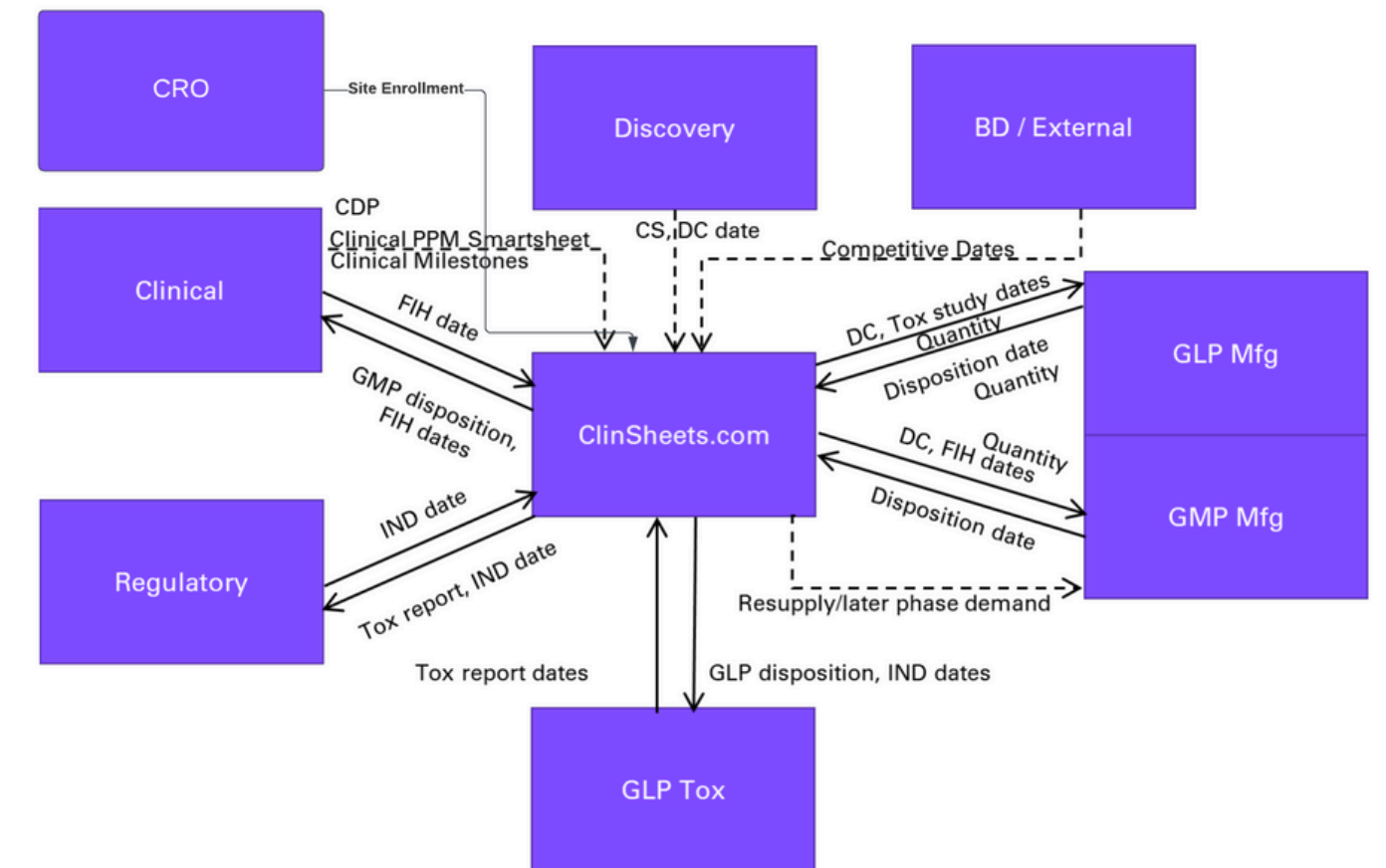
Site Enrollment



Track Site Enrollment with Real Time Integration

- Plan vs Actuals broken down by site
- Integration into Supply Chain calculations
- Key milestones
- Fully validated Deviation Tracker (optional)

Clinical SSoT Integrations



Leverage ClinSheets as a Single Source of Truth

- CRO, Regulatory, and GMP/GLP Integrations
- Single entry on key dates, date changes, and status
- Notifications and updates of changes to affected parties
- Integration with ERP for Budget, FP&A for Planning



#2 R&D Tracking: Experiments, Projects, Assays

Overview:

Track and manage the operations of R&D including projects, experiments, and studies. A great supplement to ELN and LIMS platforms, which can be integrated, Smartsheet allows you to request, approve, and track your R&D ops including experiments, projects, assays, and small-scale lot and batch manufacturing.

Key Features:

- Request and approval process
- Dashboards and reports
- Analytics
- Notifications and reminders
- Built in communication
- Data management



#3 Manufacturing & Quality Tracking: Lots & Batches

Overview:

One of the most common biotech problem we hear from our customers: How do I track batches and lots?

DigitalRadius uses Smartsheet to build Lot & Batch Trackers for customers of various stages; before purchasing a tier 1 ERP, MES, or QMS, or supplementing gaps in those tools.

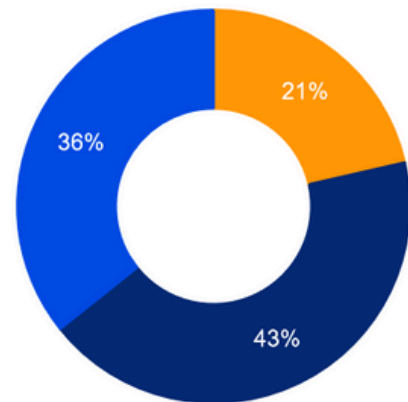
Key Features:

- Manufacturing and Quality Lot/Batch Tracking
- Integrations with data sources (e.g. QMS)
- Reporting and analytics, executive dashboards
- “One pane of glass” view of status, ops
- Status integration with Clinical PMO (optional)

Batch/Lot Quality Control Dashboard

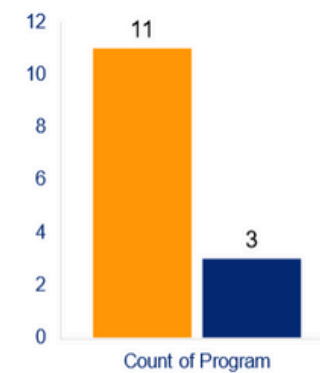


Phase Update



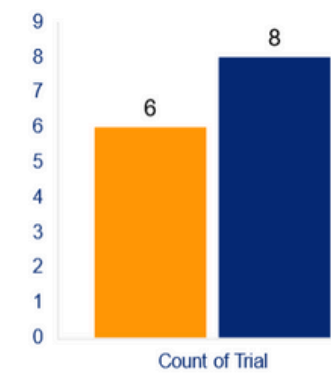
● Virus Bank Phase ● Drug Substance Phase ● Drug Product Phase

Program Breakdown



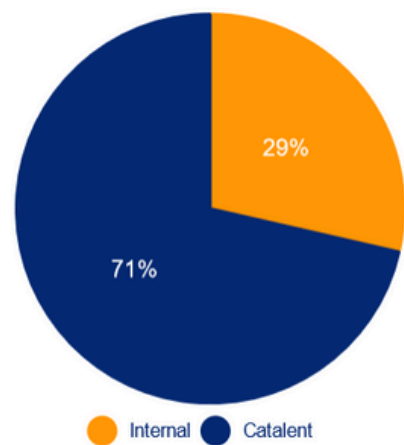
● Dolphin ● Shark

Trial Breakdown



● Bottlenose ● Orca

Performed By?



● Internal ● Catalent

Batch Records Report

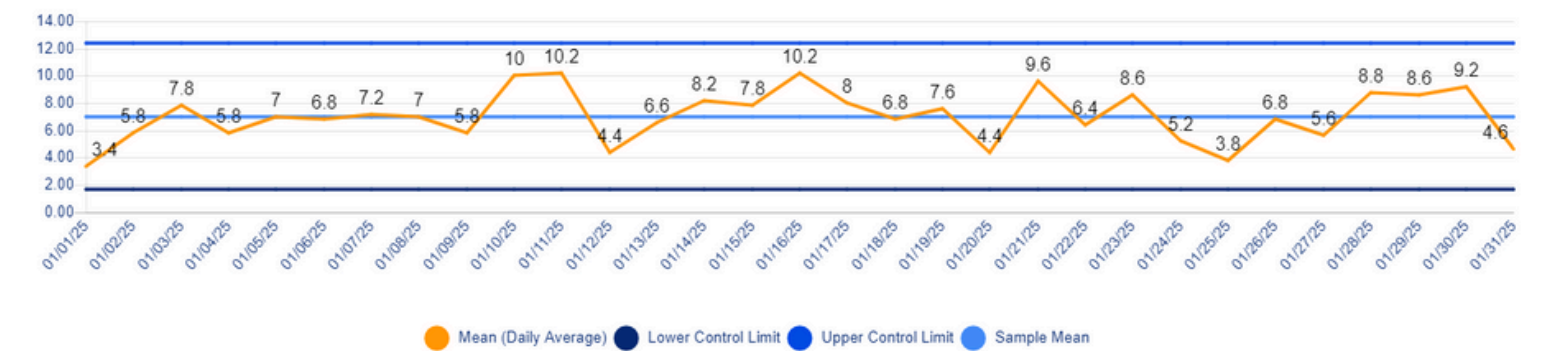
Request ID	Overall Status	Date GMP Completed	Start Date (MFG Review)	End Date (MFG Review)	Start Date (QA Review)	End Date
1023-AF940-T540	Virus Bank Phase		02/01/24	02/01/24	02/01/24	02/01/24
1023-AF941-T403	Drug Substance Phase		02/01/24	03/15/24	01/31/24	04/18/24
1023-AF942-T604	Drug Product Phase		01/15/24	02/28/24	01/31/24	04/01/24
1023-AF943-T507	Drug Substance Phase		03/10/24	04/20/24	05/25/24	No
940-AF840-T540	Virus Bank Phase		03/10/24	04/20/24	05/25/24	No
940-AF941-T403	Drug Product Phase		05/05/24	05/20/24	01/31/24	07/05/24
940-AF942-T540	Drug Substance Phase		04/15/24	05/01/24	06/08/24	01/31/24
940-AF943-T403	Drug Substance Phase		06/10/24	06/25/24	01/31/24	08/10/24
1023-AF941-T604	Drug Substance Phase		03/20/24	04/05/24	01/31/24	05/15/24
1023-AF942-T507	Drug Product Phase		02/08/24	02/22/24	01/31/24	04/05/24
1023-AF943-T540	Virus Bank Phase		01/25/24	02/08/24	01/31/24	03/25/24
940-AF840-T403	Drug Product Phase		07/15/24	07/30/24	01/31/24	09/10/24
940-AF941-T604	Drug Product Phase		09/01/24	09/15/24	01/31/24	11/01/24
940-AF942-T507	Drug Substance Phase		11/10/24	11/25/24		

1023-AF943-T540

Quality Control Dashboard



Quality Control Report



● Mean (Daily Average) ● Lower Control Limit ● Upper Control Limit ● Sample Mean

Quality Control Information

Request ID 1023-AF943-T540
Overall Status Virus Bank Phase
Program Shark
Trial Orca
Batch 1023
Lot AF943

Quality Control Report

Date	Mean (Daily Average)	Lower Control Limit	Upper Control Limit	Sample Mean
Avg 7.03226				
01/01/25	3.4	1.71	12.35	7.03226
01/02/25	5.8	1.71	12.35	7.03226
01/03/25	7.8	1.71	12.35	7.03226
01/04/25	5.8	1.71	12.35	7.03226
01/05/25	7	1.71	12.35	7.03226
01/06/25	6.8	1.71	12.35	7.03226
01/07/25	7.2	1.71	12.35	7.03226
01/08/25	7	1.71	12.35	7.03226
01/09/25	5.8	1.71	12.35	7.03226
01/10/25	10	1.71	12.35	7.03226
01/11/25	10.2	1.71	12.35	7.03226
01/12/25	4.4	1.71	12.35	7.03226

#4 Commercial & Market Access Project Tracking

Overview:

We help Commercial teams streamline the management of complex multi-stakeholder projects such as market access and product launch.

We help Commercial teams streamline the management of complex multi-stakeholder projects such as market access and product launch.

Key Features:

- Role-Based Access Controls
- Collaboration with External Agencies
- Commercial Launch Timelines
- Reporting and analytics, executive dashboards

MARKETING HOME DASHBOARD

PROJECT INITIATION

PROJECT INITIATION LINKS

- Initiate New Project
- Upload Intake Form for Proofing and Approval

AGENCY #1- QUICK LINKS

JOB LINKS

- Add New Vault Job to Project
- Update Existing Vault Job Information

WEEKLY STATUS UPDATE

- Add New Topic to Status Report
- Weekly Status Update Report
- Prep for Weekly Status Update

AGENCY #2- QUICK LINKS

JOB LINKS


- Add New Vault Job to Project
- Update Existing Vault Information
- GTM Tracker

WEEKLY STATUS UPDATE

- Add New Topic to Status Report
- Weekly Status Update Report
- Prep for Weekly Status Update

PROJECTS BY HEALTH


Total 0



● At Risk ● Complete ● On Track

PROJECTS BY COMPLETION

Total 0



● Not Started ● In Progress ● Complete

ACTIVE PROJECTS

Project Name	Project Owner (PO)	Created By
	Ben Hetter	bhetter@digitalradius.com
	Ben Hetter	bhetter@digitalradius.com
	Ben Hetter	web-form@smartsheet.com
	Ben Hetter	bhetter@digitalradius.com
	Ben Hetter	web-form@smartsheet.com
	Ben Hetter	bhetter@digitalradius.com
	Ben Hetter	web-form@smartsheet.com
	Ben Hetter	web-form@smartsheet.com

Forms Connections Dynamic View **Tracker (Job Intake Technically)** ☆

Grid View Filter Off Arial 10 B I U S A

Manual Archive Job [CAUTION]	GTM Check	Vault Code	Vault Name	Project Name	Vault Description	Brand	Customer	Channel(s)	GTM Status	Theme	Job 'In Market' From	Job 'In Market' To
<input type="checkbox"/>	<input checked="" type="checkbox"/>	CODE 1	Name	UAT Test Project 03/26	Vault Description	Brand	Patient	CRM	In-Market	Theme Test	03/29/24	04/25/24
<input type="checkbox"/>	<input checked="" type="checkbox"/>	CODE 2	Name	UAT Test Project 03/27	Vault Description	Brand	Patient	CRM	In-Market	Theme Test	03/29/24	04/25/24
<input type="checkbox"/>	<input type="checkbox"/>	CODE 3	Name	UAT Test Project 03/28	Vault Description	Brand	Patient	Website	In-Market	Theme Test	03/29/24	04/25/24
<input type="checkbox"/>	<input type="checkbox"/>	CODE 4	Name	UAT Test Project 03/29	Vault Description	Brand	Patient	Website	In-Market	Theme Test	03/29/24	04/25/24
<input type="checkbox"/>	<input checked="" type="checkbox"/>	CODE 5	Name	UAT Test Project 03/30	Ben's Vault Test 03/20	Brand	Patient	CRM	In-Market	Theme Test	03/28/24	04/25/24
<input type="checkbox"/>	<input checked="" type="checkbox"/>	CODE 6	Name	UAT Test Project 03/31	Ben's Vault Test 03/20	Brand	Patient	CRM	In-Market	Theme Test	03/28/24	04/25/24
<input type="checkbox"/>	<input checked="" type="checkbox"/>	CODE 7	Name	UAT Test Project 03/32	Ben's Vault Test 03/20	Brand	Patient	CRM	In-Market	Theme Test	03/28/24	04/25/24
<input type="checkbox"/>	<input checked="" type="checkbox"/>	CODE 8	Name	UAT Test Project 03/33	Ben's Vault Test 03/20	Brand	Patient	CRM	In-Market	Theme Test	04/18/24	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	CODE 9	Name	UAT Test Project 03/34	Ben's Vault Test 03/25	Brand	Patient	CRM	In Process	Theme	03/22/24	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	CODE 10	Name	UAT Test Project 03/35	Ben's Vault Test 03/20	Brand	Patient	CRM	In-Market	Theme Test	03/29/24	

Forms Connections Dynamic View **Project Timeline** ☆

Grid View Filter Arial 10 B I U S A

Milestone	Task Name	Status	Start	Finish	Pred	Duration	Task Health	At Risk	Assigned To	Task Notes (Risks, Actions, or Issues)
	Navigation									
	Project Information									
	Key Project Information									
	<<Project Name>>	Not Started	03/04/24	06/13/24		74d	●			
	- Agency 1	Not Started	03/07/24	06/04/24		64d	●			
	+ Project Type 1	Not Started	03/07/24	05/17/24		52d	●			
	+ Project Type 2	Not Started	03/07/24	04/26/24		37d	●			
	+ Project Type 3	Not Started	03/07/24	05/23/24		56d	●			
	+ Project Type 4	Not Started	03/07/24	05/06/24		43d	●			
	+ Project Type 5	Not Started	03/07/24	05/10/24		47d	●			
	+ Project Type 6	Not Started	03/07/24	04/24/24		35d	●			
	+ Project Type 7	Not Started	03/07/24	05/16/24		51d	●			
	+ Project Type 8	Not Started	03/07/24	03/29/24		17d	●			
	+ Project Type 9	Not Started	03/07/24	06/04/24		64d	●			
	- Agency 2	Not Started	03/04/24	06/13/24		74d	●			
	+ Project Type 1	Not Started	03/04/24	05/24/24		60d	●			
	+ Project Type 2	Not Started	03/04/24	05/08/24		48d	●			
	+ Project Type 3	Not Started	03/04/24	06/11/24		72d	●			
	+ Project Type 4	Not Started	03/04/24	05/06/24		46d	●			
	+ Project Type 5	Not Started	03/04/24	04/22/24		36d	●			
	+ Project Type 6	Not Started	03/04/24	04/23/24		37d	●			
	+ Project Type 7	Not Started	03/04/24	06/13/24		74d	●			



#5 Vendor Management

Overview:

While major platforms like Ariba and Coupa are powerful, they are also expensive and often not phase-appropriate.

Our Vendor Management solution enables automation around time consuming processes for managing RFI/RFP tracking, risk assessments, and Vendor Performance. Data no longer needs to exist in silos with integration to ERP, QMS, and CLM tools.

Key Features:

- Vendor Assessment and Approval Process
- Published 'Approved Vendor' Lists
- Customizable RFI, RFQ, RFP Processes
- Vendor Analysis
- Vendor Risk Management
- Streamlined On/Offboarding
- Integrated Stakeholder Workflows



Vendor Management [...]

View as
Business Users

- Home
- RFI / RFP Intake Form
- RFI Portal
- RFI Response Portal
- RFP Portal
- RFP Response Portal
- VMO Vendor Catalog
- New Vendor Intake
- My Vendor Requests

Home

VENDOR User Home

USER POLICY

I. Purpose

The purpose of this policy is to ensure that vendors are selected, contracted, and managed in a consistent and effective manner that meets the organization's needs w

II. Scope

This policy applies to all employees and departments within the organization that engage with vendors.

III. Vendor Selection

A. Criteria for vendor selection

- Vendors must be qualified and experienced in the products or services they offer.
- Vendors must provide references from at least three prior customers.
- Vendors must comply with all relevant laws and regulations.

B. Due diligence process

- All vendors must be vetted through a due diligence process before being approved for engagement.
- Due diligence will include review of the vendor's financial statements, legal history, and reputation in the industry.

IV. Contract Management

A. Standards for contract negotiation and management

- All contracts must be reviewed and approved by the legal and compliance departments.
- Contracts must include detailed specifications of the products or services to be provided, pricing, timelines, and performance metrics.

B. Review and approval of contracts

- All contracts must be reviewed and approved by the legal and compliance departments.
- Contracts must be signed by authorized representatives of both the organization and the vendor.

C. Monitoring contract compliance

- Vendor performance must be tracked against the performance metrics specified in the contract.
- Any deviations from the contract must be documented and addressed with the vendor.
- Vendor compliance with relevant laws and regulations must be monitored.

Vendor RFI / RFP Response Portal

VENDOR RFI / RFP Response Portal

Vendor RFI / RFP Responses

Filter Off

Request Accepted	Record Type	RFI / RFP ID	Requestor	Name
✓	RFI Response	RFL_1010	Brian Connell	iPaaS / Integratio
✓	RFI Response	RFL_1011	Brian Connell	PM tooling & reso
✓	RFP Response	RFP_1011	Brian Connell	Collaborative Wor

Details

Data Attachments (0) Comments (0)

Record Type
RFI Response

RFI / RFP ID
RFL_1010

Requestor
BC Brian Connell

Name
iPaaS / Integrations

Description
Need more info on integrations capabilities with other systems of record.

Date Required
03/31/23

Vendor Risk Assessment Summary

VENDOR Risk Assessment Summary

View as
Risk Assessment

Risk Assessment

Vendor Risk Assessment Summary

PROFILE

Veeva

Vevea Systems Inc.
www.veeva.com
SaaS

CURRENT RATINGS

Low Medium High N/A

HISTORICAL RATINGS

2023 Q1 2022 Q2 2021 Q2

High Medium Low N/A

NAVIGATION

Sheet Name	Vendor	YYYY QQ
Risk Assessment	Vevea	2023 Q1
Risk Assessment	Vevea	2022 Q2
Risk Assessment	Vevea	2021 Q2

#6 Worker On/Offboarding

Overview:

A major gap in the industry is automation around worker management, including all worker types from FTEs to Contractors, Consultants, and Service Providers.

DigitalRadius' Worker On/Offboarding solution manages everything from worker data, to stakeholder tasks, new joiner trainings, equipment and software requests.

Key Features:

- Feature parity with top tier HRIS solutions
- Workflow automation and task assignment based on Worker Type
- Stakeholder specific workflow e.g. Facilities, IT
- Automated Offboarding alerts and workflow based on worker contract end date

Worker Onboarding

View as: **Admin**

- ADMIN SUMMARY
- Onboarding Calendar
- IT SUMMARY
- FACILITIES SUMMARY
- ONBOARDING INTAKE ADMIN
- ONBOARDING ADMIN
- ALL DELAYS
- Intake: Worker Onboarding
- OFFBOARDING ADMIN
- INTAKE: Worker Onboarding

ADMIN SUMMARY




ONBOARDING STATUS

Primary	Name	Manager	Department	Location	Worker Type	Overall Status	IT Status	Facilities Status	Pre-Onboarding Requirements Complete	Confirmed Arrival	Required Trainings Complete
Total	Count 7										
Start Date	Count										
03/14/23	3										
ONB-1023	Tanminh Dam	Cheryl Miller	Technology	Boston	Consultant	●	●	●			
ONB-1030	Ian Wall	Ernest Washington	Legal	Boston	Consultant	●	●	●			
ONB-1031	Khoa Nguyen	Cheryl Miller	Technology	Cambridge	Consultant	●	●	●			
Start Date	Count										
04/11/23	2										
ONB-1024	Scott Parmely	Ernest Washington	IT	Boston	Consultant	●	●	●			
ONB-1032	Brian Connell	Ernest Washington	Legal	Remote	Consultant	●	●	N/A			
Start Date	Count										
04/18/23	2										
ONB-1026	Ally McGill	Richard Mitchell	Finance	Remote	Consultant	Not Started	Not Started	N/A			
ONB-1027	Mike Grady	Ernest Washington	IT	Waltham	Consultant	Not Started	Not Started	Not Started			


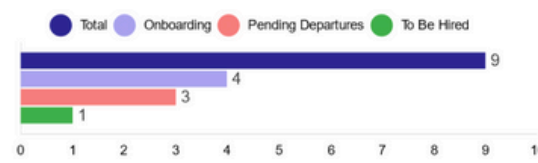
Worker Onboarding

View as: **Manager**

- MY PROFILE
- MY TEAM
- MY ONBOARDINGS
- MY TASKS
- MANAGER DELAYS
- MANAGER INCOMPLETE
- MANAGER ADMIN
- Intake: Worker Onboarding
- MANAGER OFFBOARDING
- MY TEAM PERFORMANCE
- CAREER CONVERSATIONS
- MY DOCUMENTS
- Onboarding Calendar

MY TEAM

MANAGER SUMMARY

WORKER		AGENCY	CONTRACT END DATE
Matthew Turner	BioRite	05/31/23	
William Hernandez	ConsultRiteUS	05/31/23	
Dorothy Edwards	PeopleStaffing	06/30/23	

TEAM UPDATES

MANAGER	NAME	PHOTO	WORKER TYPE	DEPARTMENT	JOB TITLE	LOCATION
Ernest Washington	Dorothy Edwards		Vendor	Finance	Financial Analyst	Cambridge
Ernest Washington	Matthew Turner		Contractor	IT	IT Director	Back Bay
Ernest Washington	William Hernandez		Consultant	Legal	Contracts Associate	Back Bay
Ernest Washington	Douglas Flores		Employee	Process Improvement	Program Manager	Waltham
Ernest Washington	Nate Howard		Employee	Legal	Contracts Associate	Cambridge
Ernest Washington	Antonio Roberts		Employee	IT	IT Analyst	Waltham
Ernest Washington	Carol Edwards		Employee	Legal	Contracts Associate	Cambridge
Ernest Washington	Nancy Davis		Employee	IT	IT Analyst	Cambridge

#7 Employee Training

Overview:

A major challenge we see our customers face is how to manage training, both GxP/Quality focused and broader company training.

Rather than incurring the high-cost of a LMS, we build custom training platforms with full automation and role-based access controls for managing assignment, reminders, workflow, and reporting.

Key Features:

- Automated Assignment based on criteria such as worker type, role, location
- Automate retraining and upskilling pathways to keep pace with industry advancements and internal promotions.
- Ensure employees continually build on their skills, aligning their growth with the organization's evolving needs.

WorkApps
Assign Trainings to My Team

Continuous Improvem...

View as: **Manager**

- My Team's Continuous Improvement
- My Team's Trainings
- Course Catalog [M]
- Assign Trainings to My Team
- My Continuous Improvement
- My Trainings

Manager Create New Assigned Training

Filter

Name	Manager Name
Amy Howard	Douglas Flores
Antonio Roberts	Ernest Washington
Brian Connell	Ernest Washington
Carol Edwards	Ernest Washington
Carol Murphy	Douglas Flores
Christopher Nelson	Douglas Flores
Deborah Smith	Douglas Flores
Dorothy Edwards	Ernest Washington
Douglas Flores	Ernest Washington
Elizabeth Jackson	Ernest Washington
Joyce Jenkins	Douglas Flores
Matthew Turner	Ernest Washington
Nancy Davis	Ernest Washington
Nate Howard	Ernest Washington
Paula Diaz	Douglas Flores
Peter Washington	Douglas Flores
William Hernandez	Ernest Washington


Details

Data

Course Title *

Change Management: Managing Organizational Change

AdobeStock_483022257.jpeg




WorkApps
My Team's Continuous Improvement
WorkApps

Continuous Improvem...

View as: **Manager**

- My Team's Continuous Improvement
- My Team's Trainings
- Course Catalog [M]
- Assign Trainings to My Team
- My Continuous Improvement
- My Trainings

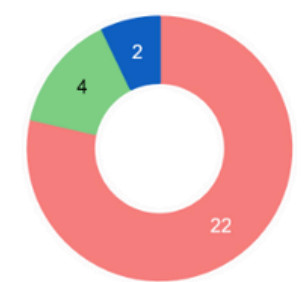


CONTINUOUS IMPROVEMENT MANAGER DASHBOARD

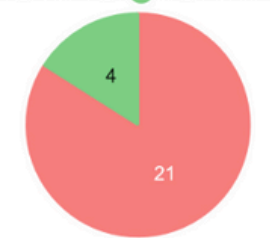
My Team

Primary	Email
Antonio Roberts	antonio.roberts@avivia.bio
Brian Connell	bconnell@avivia.bio
Carol Edwards	carol.edwards@avivia.bio
Dorothy Edwards	dorothy.edwards@avivia.bio
Douglas Flores	douglas.flores@avivia.bio
Elizabeth Jackson	elizabeth.jackson@avivia.bio

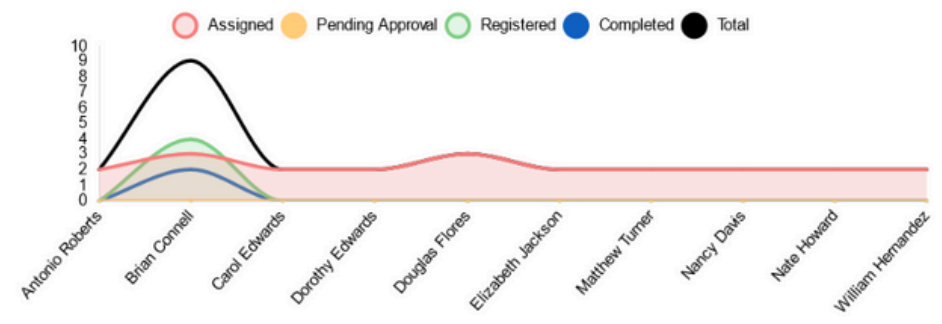
Overall Status



Open by Type



Team Metrics



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#8 Financial Solutions

Overview:

Building scalable Finance solutions is a great use case for Smartsheet and a common issue for Biopharma. Our solutions are designed to facilitate decision-making and provide a real-time overview of the financial state of programs, departments and the overall business.

Key Features:

- **Savings Tracker:** for a Sourcing team to track cost savings against baseline
- **Accruals:** To enable simplified accrual processes against service POs for the entire business
- **Invoice Aging:** Categorize outstanding invoices and track overdue invoices, including automated alerts.



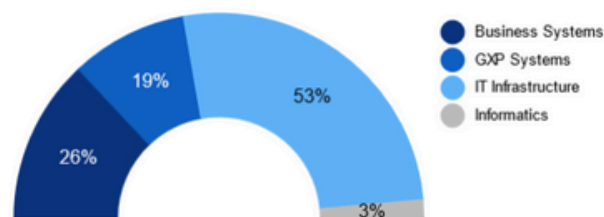
Accruals Dashboard

Accruals DASHBOARD

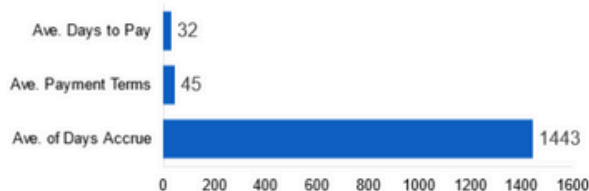


Total PO Spend	Total Invoice Amount	Amount Accrued	Percentage Accrued	Key Links
\$9,645,528.50	\$7,512,368.37	\$2,133,160.13	28.40%	Accrual Log Current Month Report

Accrued by Cost Center



Average Payment Days



Accruals per Requisitioner

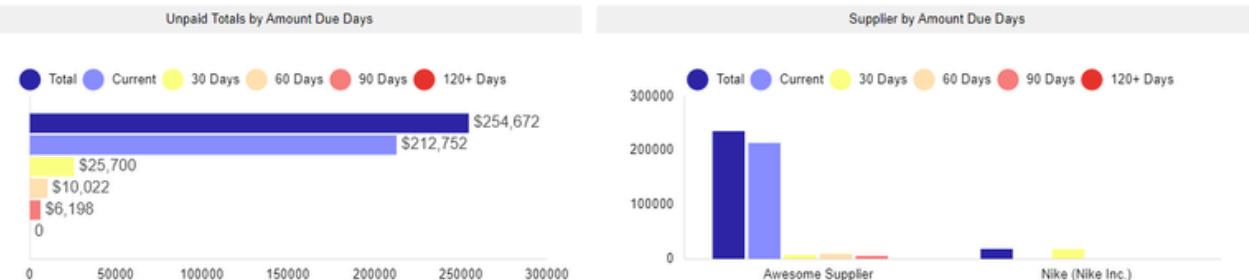
Requisitioner	Amount
AAGGARWAL	\$808,000.00
ATALLETT	\$207,727.77
DJOHNSON	\$59,999.00
EZUBEE	\$5,810.41
JWOOD	\$313,114.15
LMORITZ	\$13,915.00
MDAMIANI	\$1,858.59
MWOLF	\$333,126.00
NDONNELLY	\$98,218.92
RSMITH	\$225,000.02
TMORIN	\$65,850.00

Accrued per Supplier

Supplier	Amount
AT&T MOBILITY	\$187,593.52
Alku Technologies	\$38,160.00
Answerthink	\$12,003.52
Astrix Software Technology, Inc.	\$5,810.41
Boomi	\$2,979.00
CIT	\$77,552.04
Colligio, LLC	\$54,246.05
Comcast	\$70,684.36
Copyright Clearance Center, Inc.	\$0.00
Elsevier Customer Service Departmen	\$0.00
Gartner, Inc.	\$108,500.00
Harver	-\$28,700.00
ID Business Solutions, Inc.	\$59,999.00
KitePipe	\$20,256.50
Leaf Capital Funding	\$38,772.78
Level 3 Communications, LLC	\$205,134.55
Longford & Company, Inc.	\$100,980.75
Looker Data Sciences, Inc.	\$0.00
MISSION CLOUD SERVICES	\$16,758.20
MUSA Technology Partners, LLC	\$136,000.00
Microsoft Corporation - CDW	-\$852.49
New England Controls Inc.	\$65,850.00
Okta	\$50,880.00
Optimum Consulting, Inc.	\$162,481.00
Springer Nature Customer Service	-\$487.00
TPx Communications	\$0.00
Talent Logistics International, LLC	\$63,995.00
TeamWork	\$54,240.00
Technium	\$232,500.00
The Hackett Group, Inc.	\$98,218.92
Titan Consulting	\$44,000.00
Vevea Systems, Inc.	\$225,000.00
WestPoint Consulting, Inc.	\$91,600.00
Workday, Inc.	\$0.00

INVOICE AGING

SUMMARY DASHBOARD



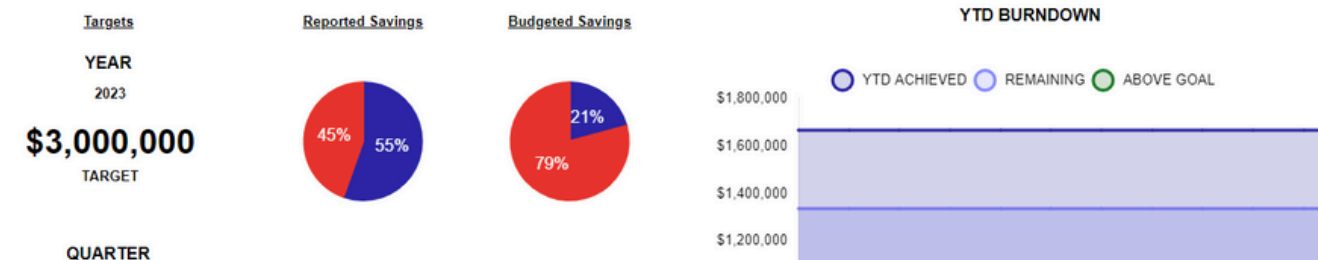
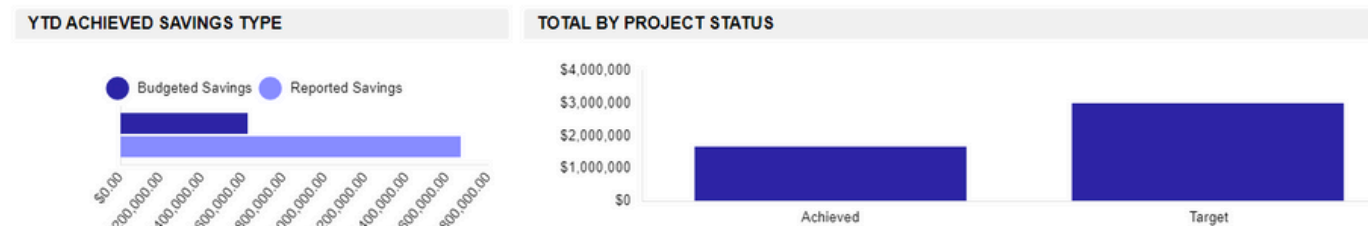
INVOICING STATUS

Export this Data

Suppliers	Invoice #	Status	Payment Term	Invoice Date	Net Due Date	Amount Due Days	Total	Current	30 Days	60 Days	90 Days	120+ Days	Supplier
Total							\$254,672	\$212,752	\$25,700	\$10,022	\$6,198	0	
Awesome Supplier							\$235,672	\$212,752	\$6,700	\$10,022	\$6,198	0	

Procurement and Strategic Sourcing Dashboard

PROCUREMENT & STRATEGIC SOURCING SAVINGS DASHBOARD





#9 Validated Trackers (e.g. Deviations)

Overview:

DigitalRadius is the first partner to build and deploy a full validated Smartsheet solution. This example was a simple deviation tracker for a Phase 1 Clinical Trial.

This can range from a simple tracking build such as below, to our more complex pre-built industry solutions such as our Quality Management solution.

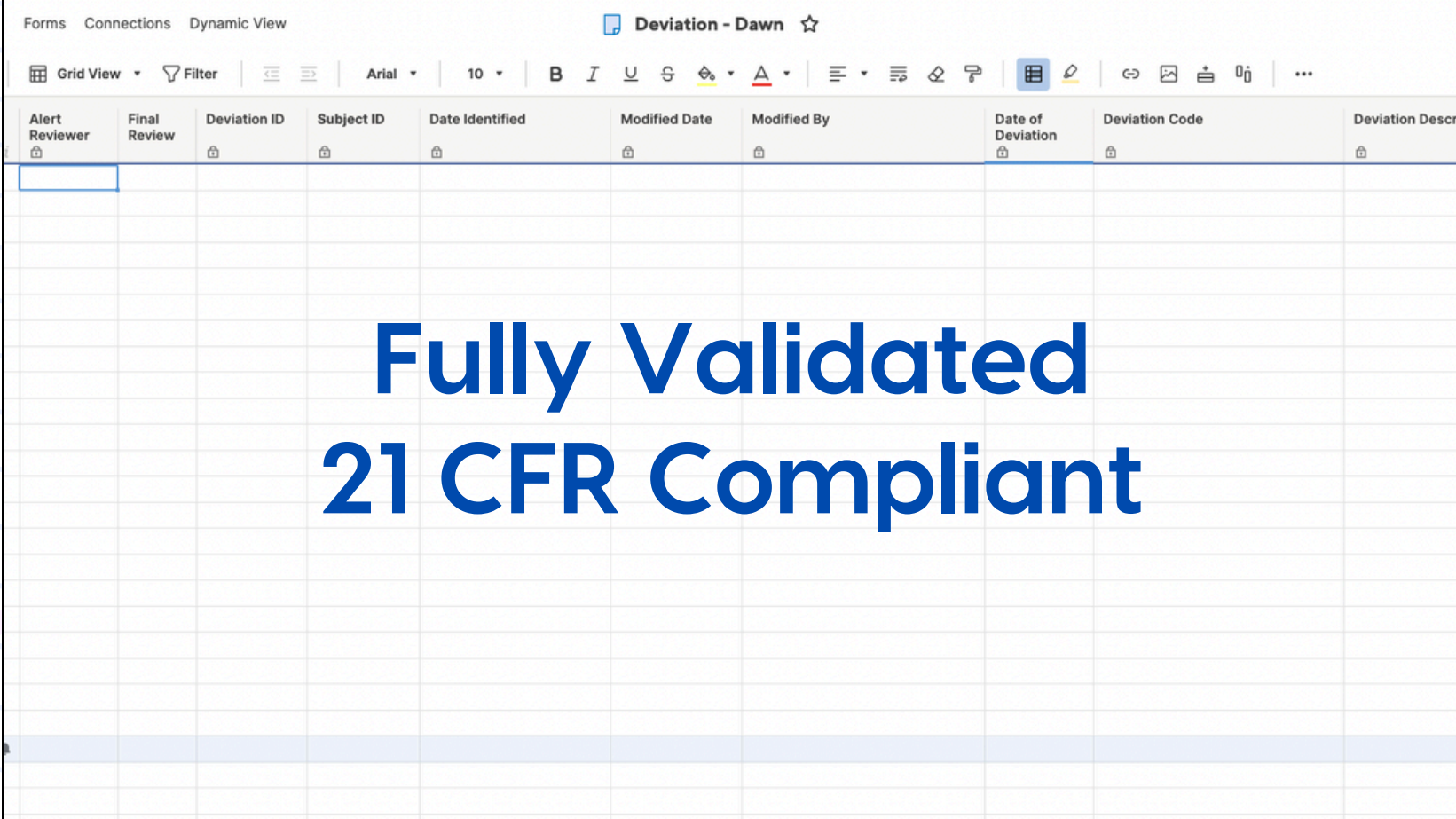
Key Features:

- Quality Management System
- Deviation and Adverse Events Management
- Product Complaints Handling
- Medical Inquiries Management
- Vendor Management
- Change Control Processes

Documentation and Management of Protocol Deviations and Violations in Clinical Trial XYZ1001: Phase 1

Table 1: Test Overview

Section	Details
Test Description	The purpose of this test is to verify the following features of the Deviation- XYZ1001: Phase 1
	- Smartsheet is available online for authenticated users.
	- Access to Smartsheet is allowed to users based on their permissions.
Overall Expected Result	Deviation - XYZ1001: Phase 1: Smartsheet has the fields as specified in the User requirements specification document and is accessible by the users.
Requirements	Related Documents: URS-Deviation- XYZ1001: Phase 1: -01.00 User Requirement Specification
Test Pre-requisites	1. Create or identify a Clinical Site Manager user with Admin privilege.
	2. Create or identify a Stat Reviewer/ Study Lead user with Editor - cannot share privilege.
	3. Create or identify a Medical Reviewer user with Editor - cannot share privilege.
Test Post-Requisites	Remove all test users from PROD environment.
Test Case Acceptance Criteria	This Test Case is successful if the observed results match the expected results. Any deviation will be documented and require further investigation. Acceptance of this Test Case may also be dependent upon the outcome of deviation investigation.



Forms Connections Dynamic View Deviation - Dawn ☆

Grid View Filter Arial 10 B I U S A

Alert Reviewer	Final Review	Deviation ID	Subject ID	Date Identified	Modified Date	Modified By	Date of Deviation	Deviation Code	Deviation Descr

Fully Validated 21 CFR Compliant

#10 Performance Management

Overview:

Move away from tracking and manual performance on Word and Excel. With Smartsheet, you can empower your employees and managers to take a collaborative approach to Performance Management with Career Conversations, Continuous Feedback and Goals Tracking.

Key Features:

- Career Conversations
- Peer and Manager Continuous Feedback
- Individual, Team, Department and Company Goals Tracking
- Automated Workflows and Reminders
- Reporting and Analytics



My Goals

View as: My Goals (Employee)

- Goals Home
- My Goals
- My Goals Archive
- Resources & Help
- New Goal

MY GOALS PERFORMANCE MANAGEMENT

My Goals Status

- Pending: 1
- Not Started: 10
- In Progress: 12
- Completed: 6

Upcoming Targets

Quarter	Count
2023 Q1	12
2023 Q2	3
2023 Q3	2
2023 Q4	5

Goals Completed

Quarter	Count
2023 Q1	6
2022 Q4	2

My Goals

Filter Off

Worker	Goal ID	Approved	Status	Title	Target Date	Progress	Latest Comment
Brian Connell	G-00012	✓	Not Started	Test goal	09/30/23	0%	TBD:
Brian Connell	G-00013	✓	Not Started	Test goal	09/30/23	0%	TBD:
Brian Connell	G-00014	✓	Not Started	Test goal	12/31/23	0%	TBD:

AviviaBio Executive Dashboard

Worker Demographics

Workforce Composition

Category	Count
Employees	254
Contractors	15
Vendors	9
Consultants	15

Employee Location

Location	Percentage
Massachusetts	21%
North Carolina	9%
New Jersey	12%
Texas	15%
Washington	9%
New Hampshire	7%
South Carolina	7%
New York	12%
California	9%

Employee by Department

Department	Count
IT	21
HR	7
Legal	12
Engineering	164
Sales	8
Finance	5
Research	9
Leadership	28

Employee by Gender

Gender	Count
Female	73
Male	182

Gender by Department

Department	Male	Female
IT	~10	~5
HR	~5	~5
Legal	~5	~5
Engineering	~140	~20
Sales	~10	~10
Finance	~5	~5
Research	~10	~10
Leadership	~5	~5

Gender by Level

Level	Male	Female
Contributor	~130	~30
First Line Management	~40	~10
Middle Management	~10	~5
Leadership	~5	~5

Employee Ethnicity

Ethnicity	Percentage
Asian	19%
Black or African American	11%
American Indian or Alaska Native	~1%
Native Hawaiian or Other Pacific Islander	~1%
White	~68%

Age Distribution

Age Group	Count
24-37	24
38-51	38
52-65	72
66-79	63
80+	54



Thank you!

Contact us!



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