

LIVE WEBINAR SERIES

Claude x Smartsheet: Getting Started

Every way to reach it, every place it plugs in, and the part that actually matters.

An introductory session

1 Intro to Claude

2 What good looks like

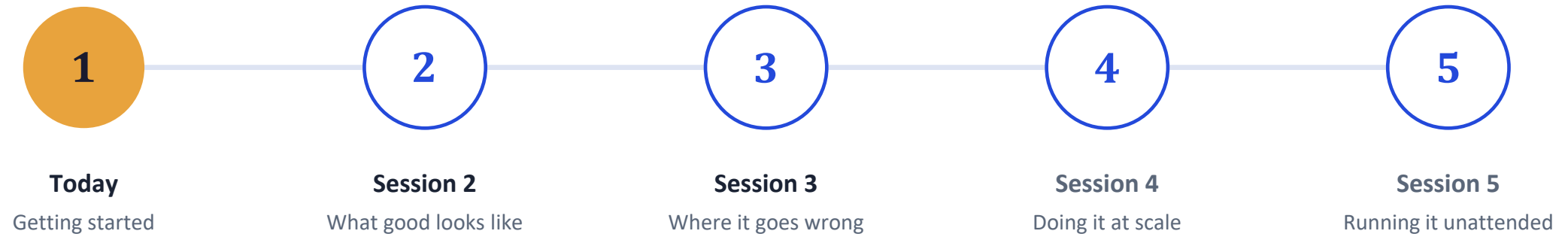
3 Where it goes wrong

4 Doing it at scale

5 Running it unattended

The journey ahead

We start here: what Claude is, every way to reach it, and the part that actually matters.



Five sessions ahead: today we get the foundation right.

THE SHIFT

This isn't just another tool. It's a new way to work.

Smartsheet now has AI built in, Smart Assist, and it's genuinely useful for what lives inside a sheet. This series is about the rest: connecting your work to everything else, and the judgment that makes it reliable.

Reach Claude wherever the work already lives

Four ways in. Pick the one closest to the task, they all reach the same model.



The app

Most people start here

Web, desktop, and mobile. The everyday home base for chat, writing, analysis, and building.



Claude in Chrome

A browser extension that reads and acts on the page you're already looking at.



Claude Code & Cowork

Agentic work from the command line or a desktop app to delegate multi-step tasks, not just answers.



The API

For when you're building Claude into your own products and workflows.

From one-off answers to standing infrastructure

Most people use Claude as one-off questions. The shift happens when Claude stops starting from scratch.



Projects

- Hold files, instructions, and history in one place
- Every chat in the project starts already knowing the background
- Set standing instructions once: tone, format, rules
- Turns scattered one-offs into a repeatable workspace



Artifacts

- Claude builds the thing, not just talks about it
- Documents, calculators, dashboards, working tools
- Edit and iterate live, side by side with the chat
- Where 'chatbot' starts to look like 'software'

The gateway to your real systems

Connectors let Claude work directly inside the tools you already run Smartsheet, HubSpot, and Gmail acting on live data instead of stale exports



This is the part most intros skip

It's the line between a chatbot and a workflow. For a Smartsheet-plus-Claude setup, this is where status reports write themselves and the CRM stays current.



Smartsheet

Read & update sheets, rows, status



CRM (Salesforce, Hubspot)

Pull and log CRM records



Email

Draft, search, triage mail



Contracts (Drive, Box, Docusign)

Reach the files that hold the truth

Your weekly status report, reworked

The roll-up you already build every week, and what changes once we connect Claude to your sheet.



Today, by hand

- Chase the team for updates over email and chat
- Copy status into a deck or doc by hand
- Reformat and reconcile the inconsistencies
- Repeat every single week



Connected to the sheet

- Claude reads the live project sheet directly
- Drafts the roll-up in your format, flags slipping items
- You review and refine it in a couple of turns
- Nothing to copy, paste, or reconcile

SMARTSHEET PLATINUM PARTNER · CLAUDE EXPERTS

We connect your sheet, shape the roll-up to your format, and set the guardrails so it works from day one, not after months of trial and error.

Hours → minutes

per weekly report

Let's connect one tool end-to-end

Do this live. One real connector beats ten slides about how connectors work.

1

**Open Settings →
Connectors**

Find the directory of available tools.

2

**Pick the tool &
connect**

Choose Smartsheet; sign in once to authorize.

3

**Confirm what it can
touch**

Review the access scope before approving.

4

Ask it to do real work

"Summarize this week's status across my project sheet."

Same tool, very different results

Access is identical. What changes the output is how it's used: context, specificity, follow-through.

A quick ask

"Write a project status update."

- No context about which project or audience
- Generic, hedge-everything output
- One shot, accept whatever comes back
- Looks plausible, adds little

Used well

Connected to the live sheet, given the audience, then refined over a few turns.

- Pulls real status from the connected system
- Framed for the exec reading it
- "Tighten this. Flag the slipping item. Add owners."
- Output you'd actually send

What Claude can and can't touch

Connecting business data raises the obvious question. **The clearer the boundaries, the faster people get comfortable.**



You grant access explicitly

Each connector is authorized by you, with a visible scope
- nothing connects automatically.



Scoped, not blanket

Access is limited to what you approve, and can be
revoked at any time.



Action vs. read

Sensitive actions such as deleting and sharing should
require a human in the loop.



Governance is a design choice

Who can connect what, and to which data, is something
you set deliberately not as an afterthought.



How this can go wrong without skilled setup

- Connected to the wrong data, or no data at all
- Trusting plausible-but-wrong output nobody checked
- One-shot prompts where the real work is iterative
- No governance; so it never gets past a pilot

We go deep on each of these

in the five-session webinar series:
what good looks like, where it breaks,
and scaling it right.

Try this this week

Four small moves that turn today into something real. Pick one and start.

1**Connect one tool**

Wire Claude into one app you use daily: your sheet, inbox, or drive.

2**Start a Project**

Set one up for a task you repeat, so Claude stops starting from scratch.

3**Refine, don't one-shot**

Take a prompt you'd normally accept and sharpen it over three turns.

4**Hand off one report**

Pick a weekly status update and let Claude draft it from the live data.

Go deeper: the live series

This was the overview. The hands-on how-to runs live: four more sessions, real demos on real sheets.

2

What good looks like

Live demos, what it actually costs to run, and the habits that make it stick.

3

Where it goes wrong

The failure modes, and how experts design around them.

4

Doing it at scale

One governed weekly workflow, running on live data.

5

Running it unattended

Portfolio roll-ups on a schedule, with your checkpoint.

Sessions run about a week apart. You'll leave each one able to put it straight to work.



Start by knowing where you stand

Tools are the easy part. What decides results is how ready your data, guardrails, and workflows are. Take the 5-minute AI-readiness scorecard to find your strongest and weakest area, then fix the weak one.

Take the readiness scorecard

