

LIVE WEBINAR SERIES

Claude × Smartsheet

Session 2: What good actually looks like

What strong Claude + Smartsheet work looks like in practice.

1 Intro to Claude

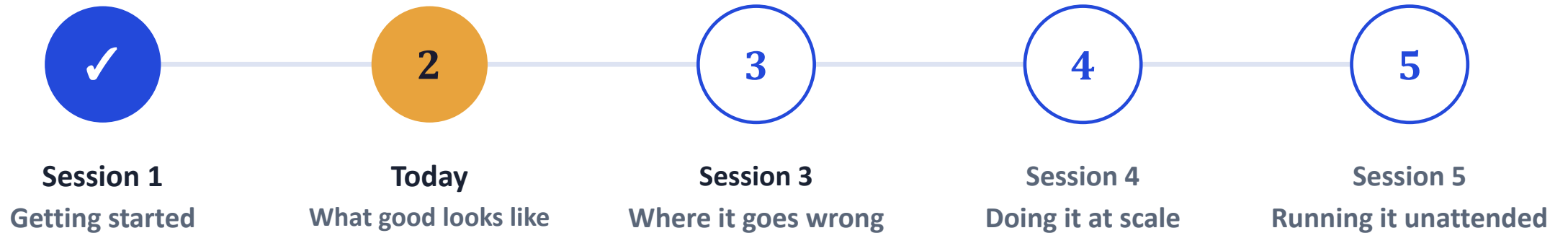
2 What good looks like

3 Where it goes wrong

4 Doing it at scale

5 Running it unattended

Where we are in the journey



Who tried last week's homework?

1**Connect one tool**

Wire Claude into a sheet,
inbox, or drive

2**Start a Project**

For a task you repeat, so it
stops starting fresh

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

Sharpen a prompt over
three turns

4**Hand off a report**

Let Claude draft a weekly
status from live data

Here's the plan for today

1**Live Working Sessions**

Verify real records, then
write back safely

2**What it costs**

Credits and usage, explained
plainly

3**Best practices**

What makes the workflow
stick

4**How we help**

From interested to up and
running

● LIVE

DEMO 1

An update lands in your inbox. Now what?

Not just “copy it into the plan.” Watch Claude confirm who sent it and what changed, before touching your sheet.

Two ways to ask the same sheet

Same data. One asks for comfort; the other asks for the truth you can act on.



Amateur prompt

"The client approved the lobby layout - update the project plan."

-> No verification, no context. Claude might update the wrong project, guess at the owner, or write before you've seen what changed.



Expert prompt

"Find the most recent email about Project123. Confirm the sender matches the project's PM - if not, ask me. Don't make any changes yet. Show me a table of the proposed updates, and separate confirmed facts from anything you're assuming."

-> Checks the sender, flags a mismatch, and waits with a clear list of proposed changes and why.

The skill is in the next question

Writing the prompt gets you started. The real work is what you do with the answer.

- 1** Each answer turns into the next question.
- 2** Every risk and decision cites a real row.
- 3** The opener gets you in; the follow-ups get you the answer.

[Switching to Claude + Smartsheet now →](#)

Smart Assist or Claude?

Smart Assist answers questions about your sheet. Claude answers questions about your business.



Where Smart Assist wins

- **In the flow**, with zero setup and no second subscription.
- Stays inside **Smartsheet security** and admin controls.
- **Smart Columns run automatically on every row** as your data changes.

→ Best when the answer lives inside one sheet.



Where Claude wins

- Reach: **joins your sheet to everything else** you've connected, like CRM, Drive, Slack, the web, or a contract.
- **Open-ended**, agentic work: it reasons, writes code, and builds.
- **Crosses boundaries Smart Assist cannot**, like “which overdue projects map to accounts that haven't renewed.”

→ **Best when the answer needs more than the sheet.**

What actually made the difference

1

Verified the source

Didn't trust who it's from at face value; checked the sender against the actual project owner.

2

Separated facts from assumptions

What was confirmed stayed separate from anything Claude inferred.

3

Proposed before it wrote

Nothing touched the sheet until Isa said go.

Don't let it copy the email. Make it check the email first.

Writing back to the sheet

Writing to a live sheet is where the guardrail matters most.



Amateur Prompt

"Update the project plan and RAID log based on this email."

Assumes Claude already knows which rows to touch, who owns them, and what counts as a risk versus a settled fact. No structure, no review step.

-> May update the wrong row, miss the RAID log, or write before anyone's reviewed it.



Expert prompt

"Using the confirmed email details, show me the exact rows you'd update in the project plan and RAID log, including any new rows for added scope. Mark anything you're not sure about instead of guessing. Wait for my OK before writing anything."

-> Produces a specific change table, flags a missing owner instead of inventing one, and holds until you approve.

The conversation continues, safely

It showed you the table. Now you correct, approve, and verify staying in control the whole way.

- 1** You correct one row: only that row changes.
- 2** Nothing is written until you say go.
- 3** After writing, it reports back and flags what it skipped.

[Switching to Claude + Smartsheet now →](#)

The expert move: a checkpoint

1**Parse the notes**

Pull out the real action items from the messy paste.

2**Show & get your OK**

Review the table before any write happens.

3**Write to the sheet**

Only after you approve, nothing before.

The amateur lets AI write straight into the live sheet. The expert builds a checkpoint.

Sorting signal from small talk

A transcript has decisions, maybe-decisions, risks, and an hour of chatter. The hard part isn't reading it, it's knowing which is which.



Amateur Prompt

"Summarize this meeting and update the project plan."

Treats every sentence as equally important, so casual or speculative comments get written in as if they were decisions.

-> Risks writing speculation into the plan as fact.



Expert prompt

"Review this meeting transcript for Project123. Separate confirmed decisions, open risks, and unresolved questions from general discussion. Propose specific updates to the project plan and RAID log, and list anything you need me to confirm, like ownership or dates, before writing."

-> Comes back with categorized changes and a short list of clarifying questions, not a wall of text.

What it actually costs to run

Two ways to access Claude and what drives the cost of each.



Per-seat plans

Claude.ai gives each person a plan with usage included. Predictable monthly cost; best for hands-on, interactive work.



Usage-based (the API)

You pay for what's processed; the text read and written. Scales with volume; best for automated, high-throughput work.



What drives the cost

Bigger sheets, longer context, and more frequent or automated runs all use more.



Keeping it in check

Scope what it reads, batch the heavy jobs, and right-size the plan to the work. Ask specific questions - vague prompts make Claude scan more of the sheet than it needs.

Match the model to the job: lighter models for routine work, top-tier for complex reasoning - we help you choose.

The habits that make it stick

The difference between a tool people try once and one they rely on.



Start with one real workflow

Pick a recurring task that's painful and well-defined



Give it context

Audience, goal, and your formats. The output is only as good as the framing.



Keep a human in the loop

Review before it writes to anything that matters.



Name an owner

Someone to tune it, watch usage, and keep it trustworthy as things change.

Where DigitalRadius comes in

A Smartsheet Platinum Partner and Claude experts: we get you from interested to running it well, without the trial-and-error.



Both sides of the stack

Deep in Smartsheet, fluent in Claude; we own the seam where the two meet and most projects break.



Best practices, embedded

The good habits and guardrails, built in from day one, not learned the hard way.



Usage that makes sense

Right-size cost to value: no surprise bills, no over-buying.

The real question isn't whether AI can help. It's whether the setup makes it last.

THE TAKEAWAY

Better questions get better answers

You can now see the gap between lazy AI use and expert AI use. That trained eye is the whole point and it's exactly what we bring to the work.

Try one this week

Pick a single move, run it on a real sheet, and bring what you find to the next session.



Interrogate your own sheet

Ask what's most likely to slip and what needs your decision and make it cite the rows.



Parse, then checkpoint

Paste messy notes; make it show a table for your OK before it writes.



Find what it can't answer

Have it tell you which questions your sheet honestly can't support yet.

The rest of the series

SESSION 3

Where it goes wrong

The failure modes and how experts design around them.

SESSION 4

Doing it at scale

One governed weekly workflow, running on live data.

SESSION 5

Running it unattended

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

YOUR TURN

Questions and one ask

Drop your messiest project-sheet headache in the chat. We'll show how we'd approach it.

Want the recording + every prompt from today? Leave your email and we'll send it.