

LIVE WEBINAR SERIES

Claude × Smartsheet

Session 4: Doing it at scale, the right way

A real workflow on live data, and what it takes to run it for real.

1 Intro to Claude

2 What good looks like

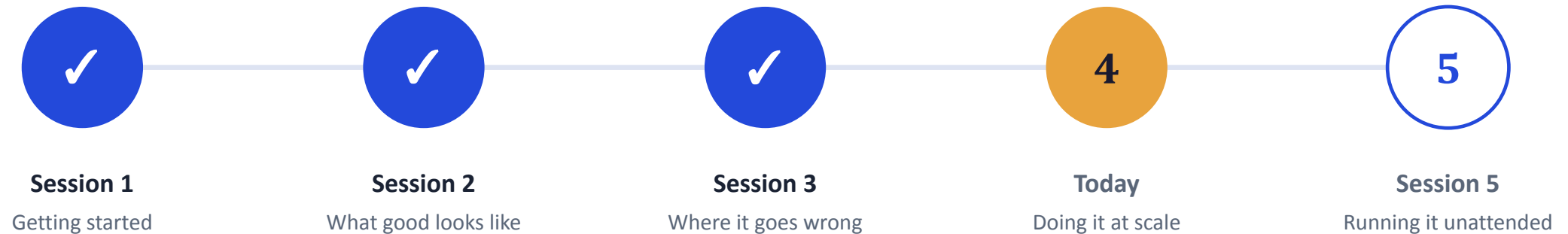
3 Where it goes wrong

4 Doing it at scale

5 Running it unattended

Where we are in the journey

You've seen what good looks like and where it breaks. Today: doing it at scale, the right way.



One session left after this. Today we make it repeatable.

A quick refresher

First, the three fixes from last week, then we run them together at scale.

1

Confident $\neq$ correct

The dangerous answer is the wrong one that sounds sure. Demand the evidence.

2

Review the difference

Never let it write blind. See current → proposed before any change lands.

3

Design for reliability

AI-ready sheets beat clever prompts; structure the data first.

The takeaway: Reliability is designed, not hoped for.



● LIVE

DEMO 1

A weekly workflow

Everything from the last three sessions, working together on live data.

One prompt kicks off the whole routine

Read it aloud once. It's a routine, not a one-off.



The flagship prompt

Run my weekly status routine on the “Q3 Delivery Plan” workspace:

1. Read every active sheet; flag items overdue, due this week, or newly blocked.
2. For each flagged item, cite the row, owner, and field values, with no inference.
3. Draft a RAG status summary for leadership: top 3 risks + a recommended decision for each.
4. List rows with missing owners or ambiguous status as data-quality issues.
5. Show me everything for review. Write nothing back and send nothing until I approve.

After I approve, add a dated note row to the “Weekly Status Log” sheet.

What you watch it do

Six deliberate steps that look like one action.

1

Scan

Read every active sheet for overdue, due-soon, and blocked items

2

Cite

Tie each flag to the row, owner, and real field values, with no inference

3

Summarize

RAG status with the top 3 risks and a recommended decision for each

4

Flag gaps

Surface missing owners and ambiguous statuses as data-quality issues

5

Checkpoint

Show everything for review, with nothing written or sent until you approve

6

Log

After approval, write a dated row to the “Weekly Status Log” sheet

THE REVEAL

It looks like one prompt. It's a designed system.

Someone built that routine, tuned it when the data changed, and owns it when it breaks. And because it's one owned routine, everyone gets the same answer, not ten people prompting the same sheet ten different ways. That work, not the prompt, is what makes it run.

WHAT WE BUILT: REPLACE WITH A REAL CLIENT EXAMPLE

e.g., "We built this exact weekly routine for a [vertical] team; their status report now takes minutes, not a morning."

What it actually took to build

Six disciplines working together, the difference between a demo and a dependable process.



Sheet structure

AI-ready columns the model can actually trust.



Citation discipline

Every claim tied to a real row value, with no inference.



Human checkpoint

Review before anything is written back or sent.



A defined routine

The same steps, run reliably, every week.



A place to log

Output recorded, so the process is auditable.



Ongoing ownership

Someone watches it, tunes it, and fixes it when it breaks.

Where it breaks without expertise

Not 'set and forget'. These are the failure points someone has to watch.



The data changes

New or renamed columns silently break the routine.



Edge cases appear

A status nobody planned for produces bad output.



No clear owner

Nobody maintains it, so it quietly drifts and decays.



Trust erodes

One unnoticed bad write and people stop relying on it.

Start with one real workflow

A Smartsheet Platinum Partner and Claude experts, in one short working session. No commitment beyond the hour.

1

Bring your real workspace

Not a demo. The sheets you actually run.

2

Pick one painful process

The recurring task that eats your week.

3

Watch it work, live

A working prototype by the end of the hour.

You leave with something real, whether or not we go further.

Want to go further? There's an advanced session

SESSION 5 · ADVANCED

Running it at portfolio scale, unattended

Roll up an entire portfolio of sheets into one leadership view, and let that routine run on a schedule, with your checkpoint. The session for teams ready to make it just happen every week.

YOUR MOVE

Let's build yours.

Book a working session. Bring one real process and we'll prototype it together.

Or drop your questions in the chat. We'll work through them live.

Book a working session →