Smartsheet for project management Professionals Training Course

Professional Development Training Course Outline

Category	Project Management	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

In today’s fast-paced business environment, effective project management is critical for organizational success. Smartsheet, a leading collaborative work management platform, empowers project managers to plan, track, automate, and report on projects efficiently while maintaining transparency across teams and stakeholders. Smartsheet for Project Management Professionals Training Course provides project management professionals with hands-on knowledge and practical skills to leverage Smartsheet’s full suite of tools, including sheets, dashboards, forms, reports, automated workflows, and integrations, to optimize project delivery and enhance team productivity.

Participants will gain in-depth understanding of how to implement Smartsheet for diverse project types, streamline communication, track milestones, and generate actionable insights. The course emphasizes real-world applications, including project portfolio management, resource allocation, risk tracking, and progress reporting. By integrating Smartsheet capabilities into everyday project management practices, professionals will be able to improve planning accuracy, accelerate decision-making, and deliver projects on time and within budget while aligning with organizational goals and KPIs.

Programme Curriculum

Smartsheet for Project Management Professionals Training Course

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Course Objectives

1. Understand Smartsheet fundamentals and project management applications.
2. Configure sheets, reports, and dashboards for project tracking.
3. Apply Gantt charts, dependencies, and critical path management in Smartsheet.
4. Design automated workflows for task assignments and approvals.
5. Track project progress using real-time dashboards and KPIs.
6. Utilize forms for data collection, issue reporting, and stakeholder input.
7. Manage resources, timelines, and workloads effectively.
8. Integrate Smartsheet with other business tools and platforms.
9. Analyze project performance and generate executive reports.
10. Collaborate with team members and stakeholders efficiently.
11. Implement risk management processes using Smartsheet tools.
12. Optimize project templates and standardize project workflows.
13. Enhance decision-making through actionable insights and reporting.

Organizational Benefits

- Improved project visibility and transparency across teams
- Faster project planning and task assignment through automation
- Enhanced collaboration and communication among stakeholders
- Real-time performance tracking and KPI monitoring
- Streamlined reporting for executive and client updates
- Efficient resource allocation and workload management
- Better risk management and issue resolution processes
- Increased adherence to project timelines and budgets
- Scalable project management processes across departments
- Optimized decision-making using integrated data analytics

Target Audiences

- Project managers and coordinators
- Program and portfolio managers
- PMO staff and project analysts
- Team leads and supervisors
- Business analysts and operational managers

- IT project professionals
- Consultants and project advisors
- Professionals seeking Smartsheet certification or skill enhancement

Course Duration: 5 days

Course Modules

Module 1: Introduction to Smartsheet for Project Management

- Overview of Smartsheet platform and features
- Key benefits for project management professionals
- Navigation, sheets, reports, and dashboards
- Understanding templates and project setup
- Collaboration and user permissions
- Case Study: Setting up a new project in Smartsheet

Module 2: Project Planning & Scheduling

- Creating project plans and task lists
- Using Gantt charts, dependencies, and milestones
- Assigning owners, priorities, and deadlines
- Tracking critical path and project timelines
- Adjusting schedules and updating tasks
- Case Study: Planning a product launch using Smartsheet

Module 3: Automation & Workflows

- Designing automated workflows for approvals and notifications
- Alerts, reminders, and recurring tasks
- Conditional automation based on project triggers
- Managing workflow templates for repeated processes
- Monitoring workflow effectiveness
- Case Study: Automating purchase request approvals in a project

Module 4: Collaboration & Communication

- Sharing sheets, dashboards, and reports with teams
- Commenting, attachments, and real-time updates
- Tracking progress and stakeholder input
- Integrating communication tools for team collaboration
- Best practices for team coordination and accountability
- Case Study: Improving cross-departmental collaboration on a campaign

Module 5: Resource & Budget Management

- Assigning resources and balancing workloads
- Tracking resource allocation and capacity
- Monitoring project budgets and financial data
- Forecasting and adjusting resource requirements
- Using forms to collect timesheets and expenses
- Case Study: Resource allocation for a multi-phase IT project

Module 6: Reporting & Dashboards

- Creating customized reports for projects and portfolios
- Building real-time dashboards with KPIs and metrics
- Using charts, graphs, and widgets to visualize data
- Filtering and summarizing project information
- Sharing dashboards with executives and clients
- Case Study: Executive dashboard for a construction project

Module 7: Risk & Issue Management

- Identifying project risks and issues
- Tracking risk mitigation actions in Smartsheet
- Assigning responsibilities and deadlines for issues
- Monitoring trends and escalation points
- Reporting risk and issue status to stakeholders
- Case Study: Managing risks during a software implementation project

Module 8: Integrations & Advanced Features

- Integrating Smartsheet with tools like Microsoft Teams, Slack, Jira, and Google Workspace
- Advanced formulas and conditional formatting
- Using cross-sheet references and linked reports
- Optimizing templates for recurring projects
- Leveraging API and connectors for automation
- Case Study: Integration of Smartsheet with an enterprise project management tool

Training Methodology

- Instructor-led presentations and platform demonstrations
- Hands-on exercises using real project scenarios
- Group activities to practice workflows and reporting

- Case study analysis and interactive discussions
- Templates and toolkits for immediate application in projects
- Continuous assessment, feedback, and Q&A sessions

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call *+254769199797*

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.
f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Online	$1,000
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

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