

THE **4** FOUR  
SCORE  
SOLUTIONS



# USER GUIDE TO:



License Management  
&

User Subscription Model (USM)  
Migration Best Practices



Smartsheet Aligned  
**PLATINUM**  
SOLUTION PARTNER

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# INTRODUCTION

Smartsheet's new User Subscription Model (USM) represents a significant shift in how user licenses are managed. For IT administrators, CIOs, and procurement leads, this change brings both opportunities and challenges in optimizing license usage and controlling costs. Under USM, organizations no longer pre-assign a fixed number of licenses to specific users. Instead, users can "try before you buy" - they start with provisional access and are only billed after demonstrating sustained usage. This approach offers greater transparency and alignment of licensing costs with actual user activity.

In this handbook, we'll explain USM fundamentals and share best practices for member management, automation, cost optimization, and a smooth migration to USM. We'll also discuss real-world challenges teams have faced during migration and how to avoid common pitfalls. Finally, we provide a next steps for professional services assistance in implementing and optimizing USM for your organization.

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# Understanding the User Subscription Model (USM)

The User Subscription Model (USM) is Smartsheet's new licensing framework designed to simplify user types and make billing more usage-based. In the legacy "Collaborator" model, only certain users needed paid licenses (primarily those creating sheets or owning assets), while many collaborators could edit or comment for free under the plan's umbrella. This old approach led to complex user categories and limited visibility into who was truly using the platform. USM was introduced to address these issues by streamlining user roles and tying licensing to real usage.

Instead of assigning licenses up front to a subset of users, anyone shared to Smartsheet with elevated permissions can begin working (provisionally), and periodic true-ups will convert heavy users into paid accounts. This means System Admins gain a new level of control and insight. They can see exactly who is using the platform and only pay for those who need full access. Key values of USM include more predictable pricing, faster onboarding of new users, easier administration with better analytics, and access to new features for licensed users.

## Paid Users

 **Members**

## Free Users

 **Guests**  
 **Viewers**

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# USM User Types and Roles

The USM simplifies user types into four distinct roles: **Members**, **Provisional Members**, **Viewers**, and **Guests**. Each role carries specific capabilities and implications for an organization's Smartsheet subscription.

Let's break it down:

## MEMBER (Paid Licensed Users)

A Member is a paid user with full Smartsheet capabilities.

### Members Can:

- Create new sheets, reports, dashboards, and workspaces.
- Edit, share, and comment on items per the plan's features.

In USM, any user (internal or external) who is granted Admin, Editor, or Commenter permissions on a sheet/workspace becomes a provisional Member and will eventually count as a paid Member unless downgraded or removed during reconciliation. Members are the only user type that incur license fees, and they enjoy all the platform's functionality (including new premium features introduced with USM).

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# USM User Types and Roles

## GUEST

### (Free External Collaborator)

A Guest is a free collaborator external to your organization.

#### **A Guest Must:**

- Not have an email domain that matches your organization's domain.

#### **Guests Can:**

- Be given limited editing or commenting permissions on shared items.

#### **Guests Cannot:**

- Create their own sheets or workspaces within your plan.

Essentially, they are external editors/commenters used for cross-company collaboration. Guests must remain external. If a person with an external email needs to become an owner or create content in your Smartsheet environment, they would have to be converted to a paid Member, with your organization effectively licensing that external user.

System Admins in USM can change an external user's status from Member to Guest if full access isn't needed – this is a key tool to control license costs for external collaborators.

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# USM User Types and Roles

## Viewer (Free Read-Only User)

A Viewer is a user (internal or external) with view-only access.

### **Viewers Can:**

- View all content that is shared with them.

### **Viewers Cannot:**

- Edit, write comments, or add data.

Under USM, internal users who are not licensed Members default to Viewer status, since internal free editors are no longer allowed as they were in the legacy model. If someone only needs to monitor dashboards or read sheet information, they can be a Viewer at no cost. System Admins can downgrade any user (internal or external) to Viewer status to remove their ability to edit/comment while keeping them in the system for visibility.

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# USM User Types and Roles

## Provisional Member (Free Trial Period User)

This isn't a permanent user type, but, rather a complimentary and temporary status that new users take on if they require higher-level access.

### **A Provisional Member Can:**

- Create new sheets, reports, dashboards, and workspaces.
- Edit, share, and comment on items per the plan's features.
- Experience full access to create and collaborate for a limited time (typically at least 30 days, without immediate billing).

During this provisional period, the user can explore Smartsheet's full capabilities. They can create sheets, edit, comment, etc. so that both the user and the System Admin can assess if they truly need a full license . Provisional users incur no cost initially, and they remain provisional for a minimum of 30 days (often up to the next quarterly true up) before the system requires reconciliation .

This "try before buy" approach is a core benefit of USM: it unlocks value quickly for users, while giving admins data to decide if the user's access should continue as paid or be limited going forward.



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# USM User Types and Roles

## Internal Users VS External Users

It's important to note the distinction between internal and external users under USM, as it affects their potential roles.

### **Internal Users:**

- Have email addresses matching your organization's domains on record for the Smartsheet plan.
- Can be Members or Viewers (since Guests by definition are external).

### **External users:**

- Must have email addresses on other domains outside of your organization.
- Can be Guests or become provisional Members and then paid Members.

In short, unlike the legacy model, external partners can become paid users on your plan if you invite them with edit permissions. We'll discuss how to manage this scenario in the best practices section to avoid "double paying" when multiple companies collaborate.

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# Legacy vs. USM

## Key Changes in License Management

The transition to USM changes several fundamental aspects of Smartsheet license management. The table below summarizes key differences between the Legacy Collaborator Model and the new USM model:

ASPECT	Legacy Collaborator Model	User Subscription Model (USM)
User Types & Roles	10+ roles with complex rules; only Licensed Users could create/own assets.	3 simplified roles: Members (paid), Guests (free external), Viewers (free).
Free Collaboration	Internal users could edit/comment for free; external users had limited free access.	Internal editors now require a license; external Guests still have free limited access.
License Assignment	Licenses manually assigned; often led to unused licenses or tracking issues.	Licenses provisionally assigned based on activity, then converted after reconciliation.
Billing & True-ups	Paid a fixed number of licenses regardless of usage; no automatic true-up.	Quarterly/monthly true-ups match license charges to real usage; dynamic and ongoing.
Admin Visibility	Admins lacked tools to track actual usage; ROI was challenging to demonstrate.	Admin Center shows user activity, roles, permissions, and supports exportable data.

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# BEST PRACTICES

## Optimizing User Management



**LEGACY  
MODEL**

**USER  
ASSESSMENT**

**OPTIMIZE  
USERS**

**USM  
ADOPTION**

Successfully managing Smartsheet licenses under USM requires proactive strategies. The following pages will outline Four Score Solution's best practices across several areas.

From monitoring usage and rightsizing members, to automating user management; from cost allocation to internal governance.

These practices will help you maximize platform usage while minimizing waste and surprises.

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# STEP 1:

## Leverage the Provisional Period & Monitor Usage

One of the biggest advantages of Smartsheet's USM is the provisional (trial) period for new users. Use this time strategically by setting clear criteria to determine who needs a full membership versus who can remain a Viewer. For example, if a provisional user creates or edits multiple items, they likely warrant being a full Member.

This is one way to maximize your ROI on Smartsheet. Make data-driven decisions by monitoring actual user activity during the provisional phase. Use the Admin Center's user reports or export user data to evaluate behavior (such as sheet creation, editing, and login frequency).

Then, align license reviews with your billing cycle. This cycle is quarterly for annual plans or monthly for monthly plans. Avoid excessive audits; focus your reviews around the true-up period to minimize churn and avoid unnecessary license charges.

**The formula for your max ROI is simple: Monitor → Evaluate → Adjust.**

- Define user criteria (e.g., editing = Member, viewing = Viewer).
- Monitor usage regularly through Admin Center or exports.
- Schedule reviews before each reconciliation window.
- Document decisions to support accountability.
- Mark true-up dates on your calendar to avoid last-minute scrambles.

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# STEP 2:

## Optimize Sharing Permissions to Control License Count

Under the USM, license costs are directly linked to how users are shared into items; therefore, every permission decision matters. A small choice, like assigning someone as an Editor instead of a Viewer, can scale into significant license spend. It is crucial to adopt a company-wide permission strategy. Start by defaulting to the least permissive access: give Viewer access first, and only elevate to Commenter or Editor if the user genuinely needs to contribute.

### Best Practice Guidelines Include:

- Default all new shares to Viewer.
- Avoid giving Admin access to external users unless absolutely necessary.
- Require a quick approval (e.g. from a team lead or admin) before assigning Editor access, especially to external collaborators.

Since every elevated permission can trigger a license charge under USM, don't assume your team understands the new licensing implications.

### Train staff to think differently about sharing:

- Viewer = free.
- Editor/Commenter = potentially paid.

Include this in onboarding materials and reinforce it during your USM rollout. When users understand the "why," they're far more likely to follow guidelines. In doing so, you protect your license pool, ensure paid Members are true contributors, and use Smartsheet's own permission system as a cost control lever.

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# STEP 3:

## Automate User Management and Lifecycle Processes

Particularly in large enterprise organizations, annual license management can be time-consuming and error-prone. The solution is automation. By integrating Smartsheet with your corporate directory via SCIM/SSO (e.g., Azure AD), you can tie user access directly to your HR systems. Directory sync also helps maintain accurate user info for reporting and security purposes, ensuring only current, authorized employees hold active licenses.

### Additional Automation Strategies Include:

- **Auto-provisioning settings:** Let internal users join your account automatically, starting their provisional period without IT bottlenecks. You can monitor new adds weekly to maintain oversight.
- **Bulk actions via Admin Center:** Use multi-select tools to downgrade or reassign licenses before reconciliation periods. While API limitations exist today, the Admin Center UI supports efficient batch management.
- **Activity monitoring:** Set up sheets or third-party tools to track trends in provisional vs. licensed users. Create alerts for unusual spikes in usage or inactivity, which can guide downgrades or further investigation.

By automating user lifecycle processes and establishing a consistent monitoring system, you reduce administrative overhead, improve security, and enforce license governance at scale. Especially during and after USM migration, these systems allow for smarter decisions and a more sustainable approach to license management.

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# STEP 4:

## Implement Chargebacks & Improve Cost Visibility

One of the most effective enterprise practices for managing Smartsheet memberships under USM is chargeback accounting. This practice involves allocating costs to the departments actually using them. USM's detailed user tracking makes this possible. With directory integration, Smartsheet can help generate Chargeback Reports that include department or cost center info. Even without automation, you can manually map users to departments and use Excel pivot tables to track usage by team.

### Steps to Implement Chargebacks:

- Sync cost center or department attributes via your directory or HR data.
- Generate or build a report showing number of Members per department.
- Share these internal billing reports with department heads to drive accountability.
- Work with your finance team to assign quarterly or annual costs per team, even if just on paper.

The real value of chargeback isn't just financial. The practice builds shared ownership, transparency & accountability. When Marketing sees their member count and budget impact, they're more likely to ask, "Do all 10 team members need full access?" It also empowers IT with data: quarterly dashboards for leadership can show current spend vs. budget, top departments by usage, and adoption trends. USM was designed to provide this kind of visibility. Use it wisely to foster smarter budgeting and tighter collaboration across your organization.

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# STEP 5:

## Advanced Tactics to Optimize Collaboration & Save Costs

Beyond the fundamentals, there are several advanced strategies to reduce license costs without limiting collaboration.

### **Smartsheet Forms:**

- Use Forms and Update Requests for users who only need to provide data occasionally. These features allow input without assigning Editor or Viewer access, which avoids triggering a provisional membership.

### **Update Requests:**

- Instead, send them Update Requests or have them complete Forms, which keeps them free and outside your member count.

### **Dynamic View:**

- This premium Smartsheet feature enables controlled editing access without giving full sheet access or incurring member charges. In particular, this is useful when working with vendors or clients who need limited interaction with your data.

### **Run Internal Reconciliation Ahead of True-up Windows:**

- Pre-review provisional users with your team & decide in advance who to license or downgrade. This avoids last-minute chaos and helps catch permission errors early.

Combining these advanced tactics with your core strategies will maximize your Smartsheet investment while maintaining seamless collaboration.



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# STEP 6:

## Governance & Communication

Effective governance and cross-functional communication are critical to long-term success under the User Subscription Model.

### To Start:

- Garner buy-in from department leaders by explaining how memberships now affect budgets, particularly with models like chargeback in place.
- Transparency is key: regularly update teams on their usage and cost breakdowns to encourage accountability.
- Consider appointing “Smartsheet Champions” within departments to coordinate user needs and align with IT policy.

### Adaption & Training Are Essential.

- Most users are accustomed to the old model where sharing was essentially free. Now, sharing has financial consequences.
- Build training that includes “USM etiquette,” emphasizing smarter sharing habits (e.g., utilize forms instead of direct sheet access).
- Provide clear do’s and don’ts so users understand when a Viewer role suffices and when elevated access is necessary.

### A Final Note:

- Formalize these changes through IT governance policies.
- Enable domain whitelisting for secure collaboration, mandate quarterly user access reviews by Group Admins, and define a process for approvals.
- Keep communication channels open to surface pain points and share solutions. Governance shouldn’t be static; as Smartsheet evolves USM, your internal practices should evolve too.

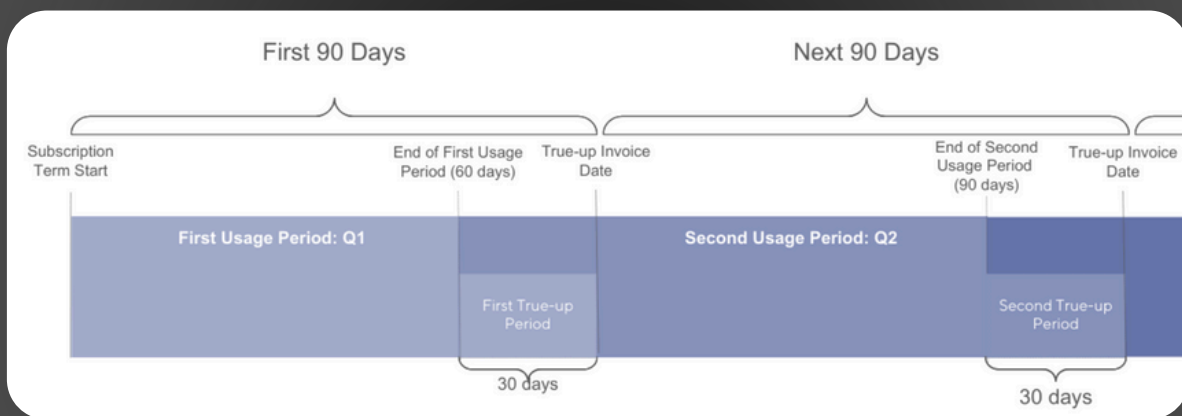
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# Navigating USM

## Migration Challenges

### Transitioning to USM - Expect the Unexpected

Migrating from the legacy model to USM is more than a technical change. It's an organization-wide change management effort. Most organizations will encounter unexpected hurdles during this shift. The goal is to anticipate as many of these hurdles as possible to mitigate any potential setbacks.



One common shock is a sudden increase in member count. Under the old model, free collaborators could edit without issue. In USM, those same users become Provisional Members who may need to convert to paid users. If unprepared, this can lead to unexpected budget spikes.

To avoid this, audit all active users and roles before migrating. Identify who is editing or commenting without a license. Downgrade them to Viewer where possible. Discuss options with your Smartsheet account manager to negotiate grace periods or flexible true-up terms. Most importantly, communicate with finance teams to set expectations and prevent budget panic.

# Navigating USM

## Migration Challenges

### Managing User Pushback

A second common challenge is internal confusion or resistance. Users who previously had editing access for free may object when they lose privileges or require a membership. Project teams might argue they can't afford to license occasional contributors. Avoid this with proactive education. Provide simple, clear communication before the migration: host info sessions, share FAQs, and explain alternatives like using Forms instead of editing sheets. Emphasize that this change is a Smartsheet-wide policy, not a company-imposed restriction.

<u>Collaboration Method</u>	<u>Key Functionality</u>	<u>User Impact</u>	<u>Best Use Cases</u>
<b>Smartsheet Forms</b>	Collect new data (rows) directly into a sheet.	Does NOT trigger Provisional Member.	Surveys, intake forms, event registration, customer feedback.
<b>Update Requests</b>	Update existing rows via a simple form.	Does NOT trigger Provisional Member.	Periodic data updates, approvals, feedback collection.
<b>Dynamic View</b>	Granular view/edit of specific data without full sheet access.	Does NOT trigger Provisional Member.	Role-specific dashboards, segmented data entry, secure request management.

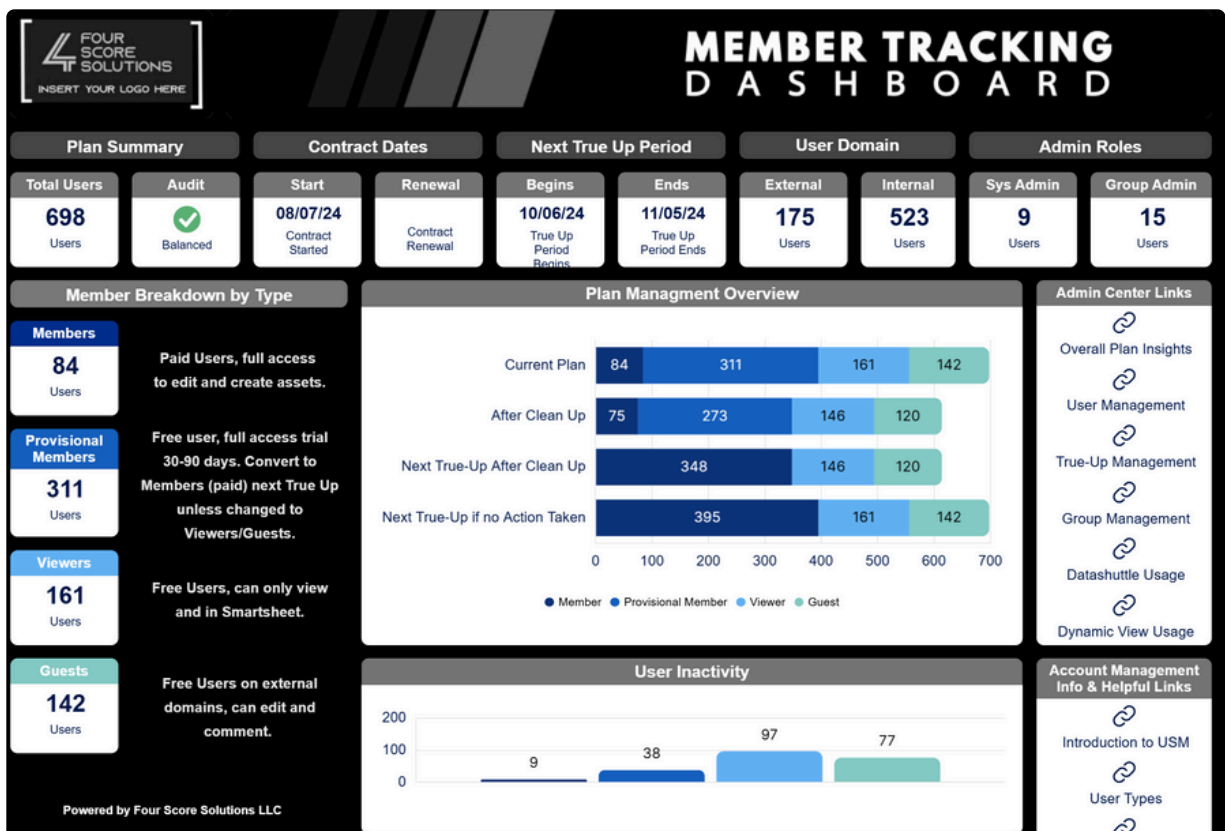
# Navigating USM

## Migration Challenges

### Avoiding Administrative Overload

Post-migration, system administrators often face an increased workload. Unlike the legacy model, USM requires ongoing oversight: monitoring provisional users, handling membership requests, and preparing for true-ups. Fortunately, a well-trained Smartsheet user can automate this process in Smartsheet.

Automate wherever possible using directory sync and auto-provisioning. Delegate tasks to trained team leads or department reps. Use the reconciliation window to batch changes and reduce one-off requests. After the first true-up cycles, the process becomes more routine.



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# Navigating USM

## Migration Challenges

### Handling Technical Setbacks

Some organizations have reported technical issues with the USM rollout. While not unexpected, these setbacks such as Admin Center glitches or reconciliation errors can be frustrating. Smartsheet has acknowledged these as known issues and paused some migrations to improve the experience.

Stay informed by checking Smartsheet forums and support channels. If possible, delay migration until known bugs are resolved. Pilot the migration with a smaller group and maintain backups of user data and permissions beforehand.

<u>Challenge</u>	<u>Solution</u>
<b>Technical glitches during migration</b>	Use official Smartsheet support channels to stay updated on known issues. Report bugs immediately with screenshots.
<b>Unexpected bugs or incomplete rollout experience</b>	Check Smartsheet Community forums for recent feedback. Delay migration if possible to benefit from ongoing refinements.
<b>Risk of data discrepancies or loss during the switch</b>	Back up critical data like user lists and sharing permissions before migrating.
<b>Rolling out across a large user base all at once</b>	Pilot the migration with a smaller subset of users (e.g., one department or region) to learn and adjust before full rollout.

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# Navigating USM

## Migration Challenges

### Managing Integration Disruptions

Custom-built tools and integrations may not function as expected under the USM framework. Automated provisioning scripts, role-based access workflows, or external management tools can break due to limited API compatibility which may disrupt onboarding and user management processes.

#### **To Start:**

- Conduct a full audit of your current Smartsheet integrations and automation scripts before migrating.
- Collaborate with Smartsheet's developer community and support team to verify which APIs remain functional and explore supported alternatives.
- Transition to Smartsheet's native solutions like directory integration via SCIM/SSO, which offer long-term stability.
- Be prepared to fall back on manual processes where needed.

#### **A Final Note:**

Build a contingency plan & assign an internal admin to manage onboarding tasks temporarily if automation fails. Stay up to date with Smartsheet's developer roadmap to anticipate restored API functions. Flexibility during this transition phase is key to avoiding disruption and maintaining continuity across your user base.

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# Navigating USM

## Migration Challenges

### Turning Migration into an Opportunity

Migrating to USM is more than a compliance step. It's a chance to elevate your organization's license management maturity. Many companies who embrace the change report increased visibility into Smartsheet usage, tighter cost control, and better user accountability when compared to the legacy model.

#### **The Key to Success:**

- Reframe the migration as a strategic project rather than a technical switch.
- Use the process to standardize governance policies, establish user roles, and implement ongoing license monitoring and review.
- Encourage a culture of continuous improvement.
- Set quarterly checkpoints to reassess license allocation and department needs.
- Empower stakeholders with usage data so they can optimize team behaviors.
- Stay engaged with Smartsheet's roadmap. The platform will continue evolving, and proactive customers will be first to benefit.

In short; treat USM as the framework for smarter, more agile collaboration rather than a finish line or an end-goal. These moves will create a living system of strong oversight as opposed to a one-time fix. When paired with best practices like automation, delegation, chargeback accounting, and communication, USM can unlock lasting efficiencies.








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# IN CONCLUSION

## The Modern Approach to License Management

### Key Takeaways:

-  Align member cost with actual user engagement.
-  Use Admin Center and SCIM tools to automate management.
-  Run internal true-up drills ahead of reconciliation.
-  Build transparency with department heads using usage reports.
-  Treat migration as the start of smarter SaaS governance.

Smartsheet's User Subscription Model (USM) represents a modern approach to user management—one that aligns cost with real collaboration and provides administrators powerful tools to oversee usage. By understanding USM's mechanics and applying the best practices covered in this guide, your organization can optimize license allocation, implement automation, and navigate migration challenges with confidence.

This proactive, informed stance allows you to avoid surprises and ensures smoother adoption across teams. We've outlined how to structure governance, implement chargeback models, and empower license champions to manage usage effectively. When embraced holistically, USM can unlock significant value.



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# NEXT STEPS

## Let's Move Your Organization In To The Future

Executing these changes can be complex, especially while balancing day-to-day responsibilities. That's where we come in. Four Score Solutions offers expert, hands-on services to help you implement USM the right way from day one.

<u>Service Offering</u>	<u>What We Deliver</u>
<b>USM Migration Planning &amp; Execution</b>	<ul style="list-style-type: none"><li>• Assess current Smartsheet license usage.</li><li>• Develop a custom migration strategy.</li><li>• Provide on-site or remote support during rollout.</li></ul>
<b>Member Optimization &amp; Automation</b>	<ul style="list-style-type: none"><li>• Implement directory sync (e.g., Azure AD + SCIM).</li><li>• Build real-time usage dashboards.</li><li>• Automate provisioning and license updates.</li><li>• Leverage our custom IT Chargeback Solution.</li></ul>
<b>Training &amp; Change Management</b>	<ul style="list-style-type: none"><li>• Deliver admin workshops on the new Admin Center.</li><li>• Train end-users on collaboration best practices.</li><li>• Supply onboarding toolkits.</li></ul>



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# LET'S CHAT



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