



# regoUniversity

NASHVILLE • 2022

## Collaborative Work Management

Your Guides:

Lynn Reling and Matthew Palicki

Sponsored by

**ValueOps**

Clarity  
Rally Software

**BROADCOM**  
SOFTWARE

# Agenda

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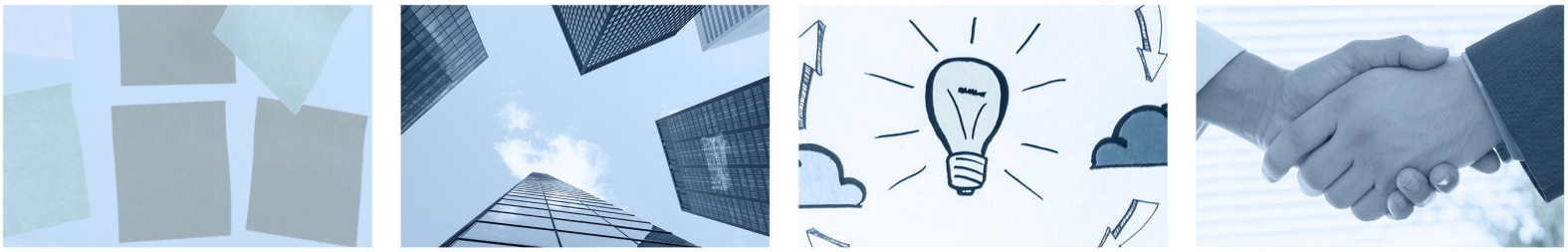
- Real Life Stories – Why this is so important
- Overview and Latest Enhancements
- Demonstration and Use Cases

# Selected Customer Reactions about Collaborative Work

- *“Don’t worry about dominating here - All large enterprises have many of these products – whether from Microsoft or Google or Atlassian – you have an advantage because you’re a system of record - if it’s simple.”*
- *“You need something so simple they would want to use it. But don’t expect to capture the entire enterprise. Other parts of the organization do provide an opportunity for expansion if it’s simple.”*
- *“One big driver is the dashboards. If you can make sense of all this data. Users can create their own dashboards in most these tools. But they struggle to pull it all together – there are many versions of the truth. Clarity has an opportunity to federate all this data so the enterprise can make sense of it.”*
- *“The Enterprise Transformation Office for example, is struggling with single source of truth. They have every flavor of CWM tool and were planning on building integrations to all of them. This will be a game changer to give them a plan to leverage a single platform and forget the whole integration thing.”*



# Clarity for Collaborative Work.



clarity

Search...

New Checklist

Meeting with Kurt Aug 9

Product Team Slide Deck Aug 5

Customer Calls to Set up Aug 1

Filtering Feature Design July 30

Smart Lists

My To Dos

All To Dos

Another smart/dynamic list?

My To Dos

Today

- Filtering UI mockups
- Update slide deck design and layout

This Week

- Complete mockups for funding to review
- Set up meeting with Mallik to review POC

Later On

- Acme Corp - Roadmapping

clarity

Search...

Monday Tuesday Wednesday Thursday Friday

1 Brian Smith 4/5 Joana Leite 3/3	2	3 Jason Garcia 2/3 Rita Leite 2/12 Kyle Martin 2/5	4	5
8	9 Rita Leite 2/12 Kyle Martin 2/5 Carmen Sanchez 1/8	10	11 Brian Smith 4/5 Joana Leite 3/3	12
15	16			
22	23			

9:00

Approve Budget for Security Project

Smart To Do

Security Project (PR1234)

Due Today

Budget Information

Updated today at 12:04pm by Shelby W.

Total Cost **\$4.2M**

OpEx **\$1.2M**

More Info...

Approve Reject



KEY WORK IS CONNECTED TO ENTERPRISE STRATEGY AND BUSINESS OBJECTIVES.



EMPLOYEES CAN ONBOARD THEMSELVES AND COLLABORATE IN ANY FORMAT – ANYTIME, ANYWHERE, WITH ANYONE.

Backlog Gates Working Signoff

Database Development Jul 30, 2021 Berry, Jason Unit and Performance Testing Mar 1, 2022 Berry, Jason Usability and User Acceptance Testing Sep 13, 2022 Stoneburg, ... User Interface Development Nov 12, 2021 Stoneburg, ...	Closing Phase Gate Complete Jan 29, 2023 Granger, Pa... Construction Phase Gate Complete Apr 23, 2022 Granger, Pa... Deployment Phase Gate Complete Oct 18, 2022 Granger, Pa... Initiating Process Complete Feb 8, 2021 Granger, Pa...	Get Signoff from Jeff Jun 15, 2022 Quinn, Randy Lean Planning meeting Feb 12, 2021 Berry, Jason Functional and System Testing Jun 29, 2022 Garcia, Alex Ops Review Approval Jan 25, 2022 Roberts, Beth	Prepare Business Case Content Jun 30, 2021 Quinn, Randy
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# Personalize Work.

Set up workspaces with **lists, calendars, boards** and more.

Keep work private until you share it.

The screenshot shows the Clarity workspace interface. On the left, there's a sidebar with a search bar and a 'New Checklist' button. Below that, a list of tasks is shown: 'Meeting with Kurt' (Aug 9), 'Product Team Slide Deck' (Aug 5), 'Customer Calls to Set up' (Aug 1), and 'Filtering Feature Design' (July 30). Underneath, there's a section for 'Smart Lists' with options like 'My To Dos', 'All To Dos', and 'Another smart/dynamic list?'. The main area displays 'My To Dos' with sections for 'Today', 'This Week', and 'Later On'. The 'Today' section includes 'Filtering UI mockups' (checked) and 'Update slide deck design and layout'. The 'This Week' section includes 'Complete mockups for funding to review' and 'Set up meeting with Mallik to review POC'. The 'Later On' section includes 'Acme Corp - Roadmapping'. On the right, a task list is shown with tags and dates: 'Project: 2020 Q4 PI Plan' (Aug 9), 'Checklist: Product Team Slide Deck' (Aug 9), 'Checklist: Meeting with Kurt' (Aug 12), 'Checklist: Filtering Feature Design' (Aug 13), and 'Checklist: Customer Calls to Set up'.

Tag work for quick roll-ups.

## Configure My Workspace

### Modules

Checklists

Smartlists

Board

Calendar

+ Add Module

Cancel

Save

Personalize your own workspace.

Share Work.

Invite anyone (inside or outside the company) to work on your to-do lists.

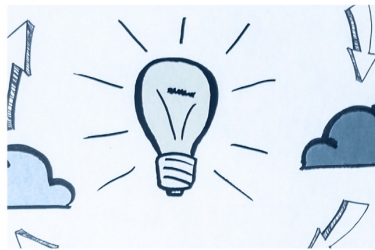
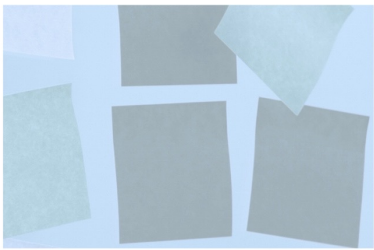
Collaborate on boards, calendars and lists.

Users self-register for fast and easy access.

Engage team members with conversations.

The screenshot displays the clarity interface with three main sections: a Kanban board on the left with columns for 'Backlog', 'Gates', and 'Working'; a calendar on the right showing tasks assigned to team members; and a 'My To Dos' list on the bottom right. The 'My To Dos' list includes items like 'Filtering UI mockups' and 'Update slide deck design and layout'.

This screenshot shows a checklist for the 'Rego Annual Users Conference' with tasks such as 'Complete Slide deck content' and 'Finalize invite list'. Below the checklist is a 'Conversations' section with a thread of messages. The messages include a thank you from Patrick Clark and a response from Debra Barry regarding the schedule.



# Automate Work.

clarity

Checklists Smartlists Board Calendar

Q Search...

New Smartlist

My To Dos

Watched Items

Team To Dos

## My To Dos

### Today

- Filtering UI Mockups
- Update slide deck design and layout

### Next 7 Days

- complete mockups for funding review
- setup meeting with Mallik to review POC

### Later

- ACME Corp - Roadmapping

## Automations

### Conditions

- Target: This To Do
- Status: = Complete

+ Add Condition

### Actions

- Notify: Mary Jackson
- Create: New To Do
- Owner: Tom Wheeler
- Watching: Current User; Mary Jackson

+ Add Action

Cancel Save

**Build simple workflow to automate basic activities.**

**If This, Then That:**  
Send alert, create new to do, change watcher, etc.

**Eliminating the mundane allows teams to focus on delivering value.**





# Enhancements in 16.0.3

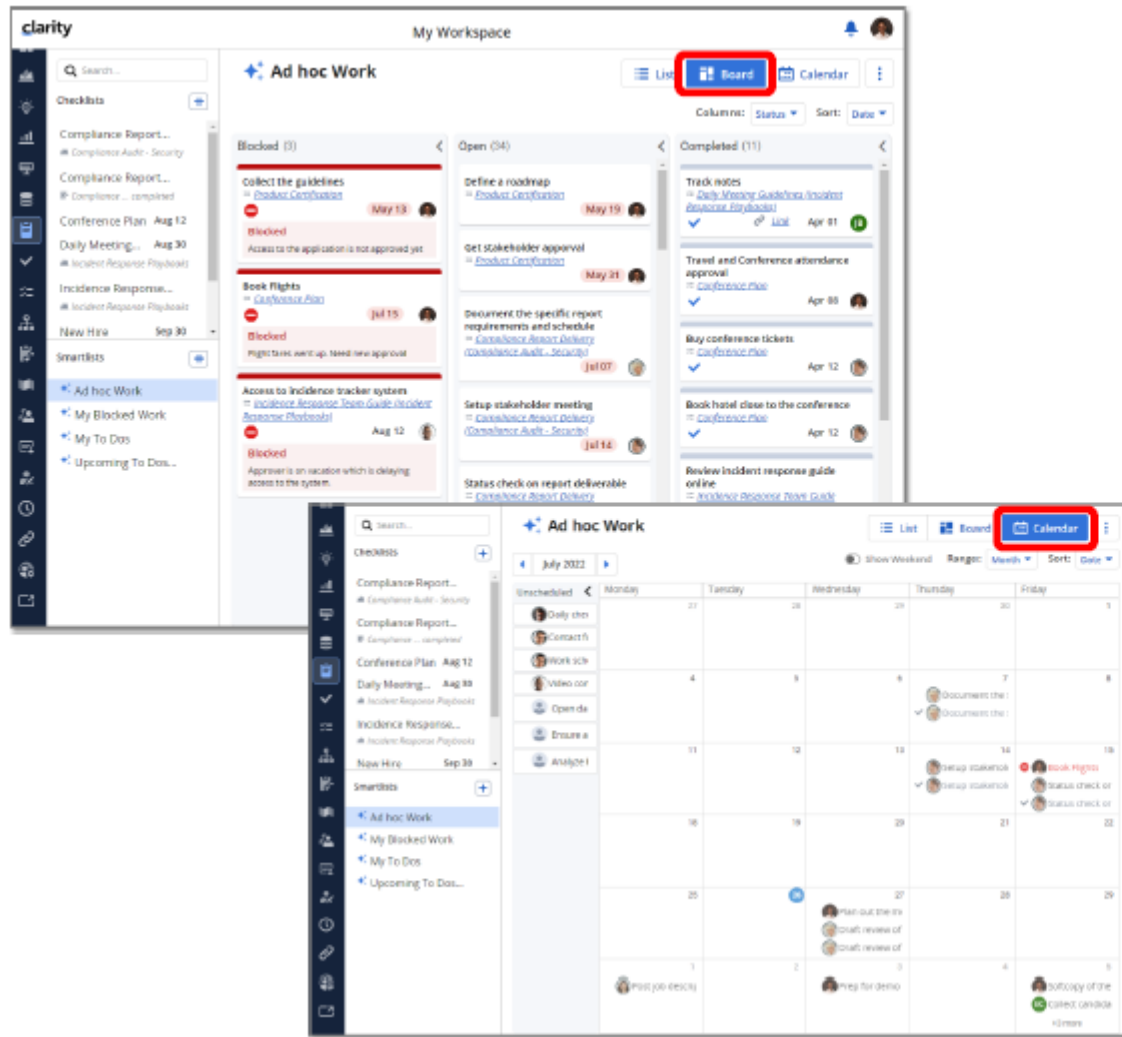




# Checklist and To Do Updates

- “To Do” table widget available in Page canvas
- Ability to see Investment and Task To Do in a single view
- Checklist Enhancements:
  - Checklist module in Agreements
  - Notification when sharing Checklists
- My Workspace Enhancements:
  - Decouple To Do and Task owner
  - Ability to view user avatar when sharing or adding owner
  - Move checklist to investment or agreement
  - Mark checklist as completed
  - Smartlist to support Board view for To Dos
  - Smartlist to support Calendar view for To Dos

# New View Options for Smartlists



- Introducing “Board” and “Calendar” view for Smartlist. This is in addition to the existing “List” view.
- Filter defined in the smartlist is shared between each view.
- Each view has their own display option.
- “To Do” can be edited within each of these views.

# Demonstration



# Questions?





# Thank You For Attending regoUniversity

## Instructions for PMI credits

- Access your account at [pmi.org](https://pmi.org)
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Provider = **Rego Consulting**
- Class Name = **regoUniversity**
- Course **Description**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**



Let us know how we can improve!  
Don't forget to fill out the class survey.



### Phone

888.813.0444



### Email

[info@regoconsulting.com](mailto:info@regoconsulting.com)



### Website

[www.regouniversity.com](http://www.regouniversity.com)