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NASHVILLE • 2022

Best Practice Use of Clarity for Demand Management

Your Guides:

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Part I: Introduction



Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself
- Business Cards



Agenda

- Rego Best Practices: Demand Management

Open Mic

- What does Demand Management mean to you?
- What do you think success looks like?
- What prevents success?

Some Rego Thoughts...

What is Success?

- ✓ Full view of pipeline
- ✓ Accurate data
- ✓ Complete data
- ✓ Demands map to strategic objectives
- ✓ Objective scoring
- ✓ No other tools used to evaluate demand (Excel, SharePoint)

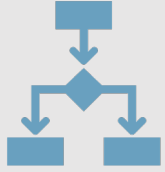
Stumbling Blocks

- ❑ Accurate financial and resource data in projects
- ❑ Goldilocks for demand – what is the right amount of data
- ❑ Business users are not in CA PPM
- ❑ Over-engineering demand process
- ❑ How do you decrement Idea demand once converted to a Project?

Rego Best Practices Demand Management



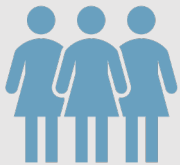
Demand Best Practices



- Define Demand for your organization
- Support the Planning business process directly in Clarity



- Think through the process to standardize forms and required data – from capturing the data to leveraging it in views, Roadmaps, Hierarchies and/or reports



- Identify and engage Users and Consumers



- Keep it simple: Understand expected business outcomes when defining required fields, and eliminate everything that isn't necessary

Gathering Demand

Think about who and how many people can submit ideas as the start of the Demand Process

Are you looking to crowdsource potential investments, or is there a more targeted base of users like Product Managers?

Crowdsourcing

- Any user can submit an Idea

Pro

- Transparent Disposition of All Ideas

Con

- Duplicate Ideas
- Frivolous Entries
- Effort to Review/Reject
- May increase license consumption

Moderated Entry

- Ideas are filtered through a control point (Production Owner / Portfolio Manager) before being created in Clarity

Pro

- Ideas are Vetted before Entry in System
- Reduced Duplication
- Reduced Effort
- Clear ownership and improved quality

Con

- Delays in Entry

Idea Data Entry Best Practices

- Keep data entry simple and focused
 - Utilize Simple “Create Screen”
 - Keep the Blueprints uncluttered
 - Define Blueprints by Idea Type (limit fields by type) and leverage Templates
- Categorize Work to Differentiate Annual Planning from Standard Idea Intake
 - This helps with Metrics and Reporting. For example: Utilize “Type” Fields (Annual Planning, Project, Application, Service, Support Project)
- Consider Project Conversion
 - Create fields that will be leveraged on Projects in the Investment object
- If using Roadmaps:
 - Use the OOTB portfolio categorization fields, goal, strategy, and OBS
 - Capture additional fields that would assist in portfolio planning (e.g., Target Start – Fiscal Year / Quarter)

Idea Financial Estimate Best Practices



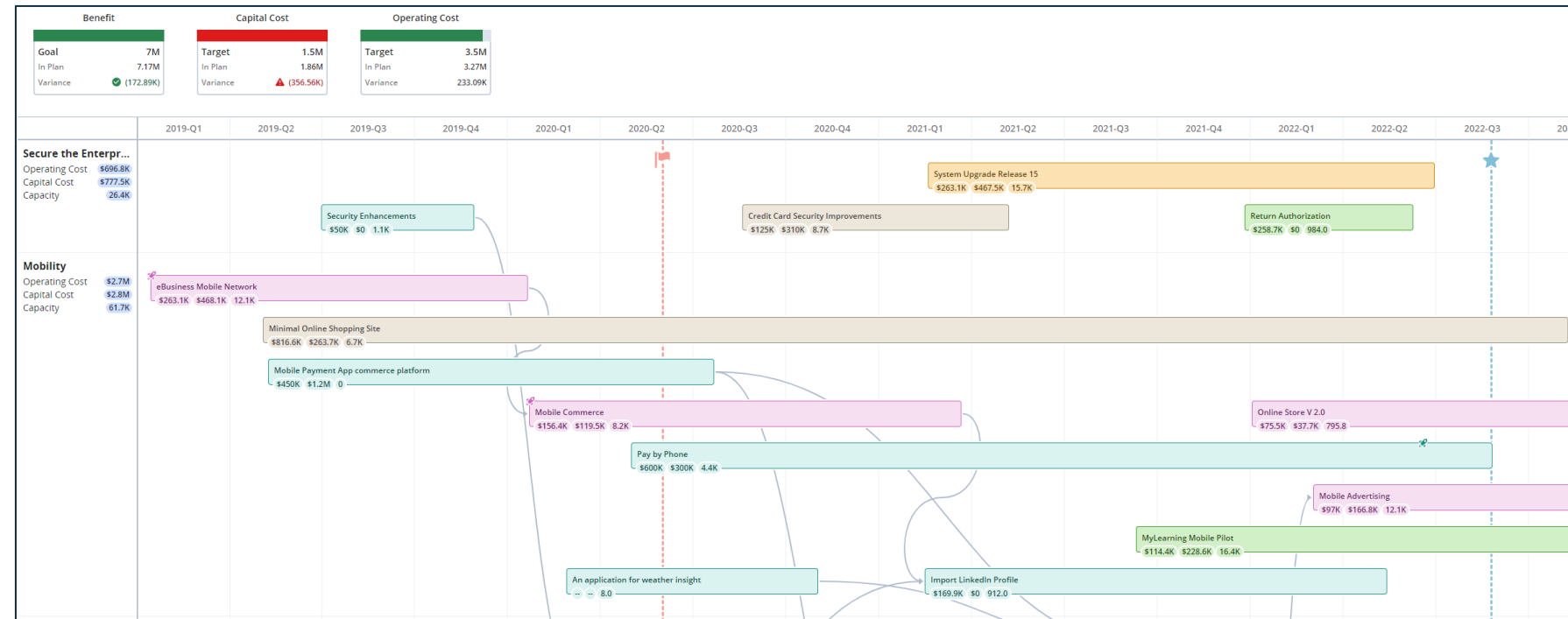
- Keep it light
 - you do not have enough information at this stage to have accurate costs
 - the estimate is typically +/- 100% at this stage
- Be consistent on the types of costs you plan to forecast (i.e. labor/non labor)
- Be consistent at the level you capture estimates
 - “T-shirt sizing” is commonly used at the Idea stage.
 - Gain agreement on standardized sizes and have them built into the system

Open Mic

- For those that have a successful implementation of demand management – what are some of your best practices? Or, what lessons have you learned that others can avoid?

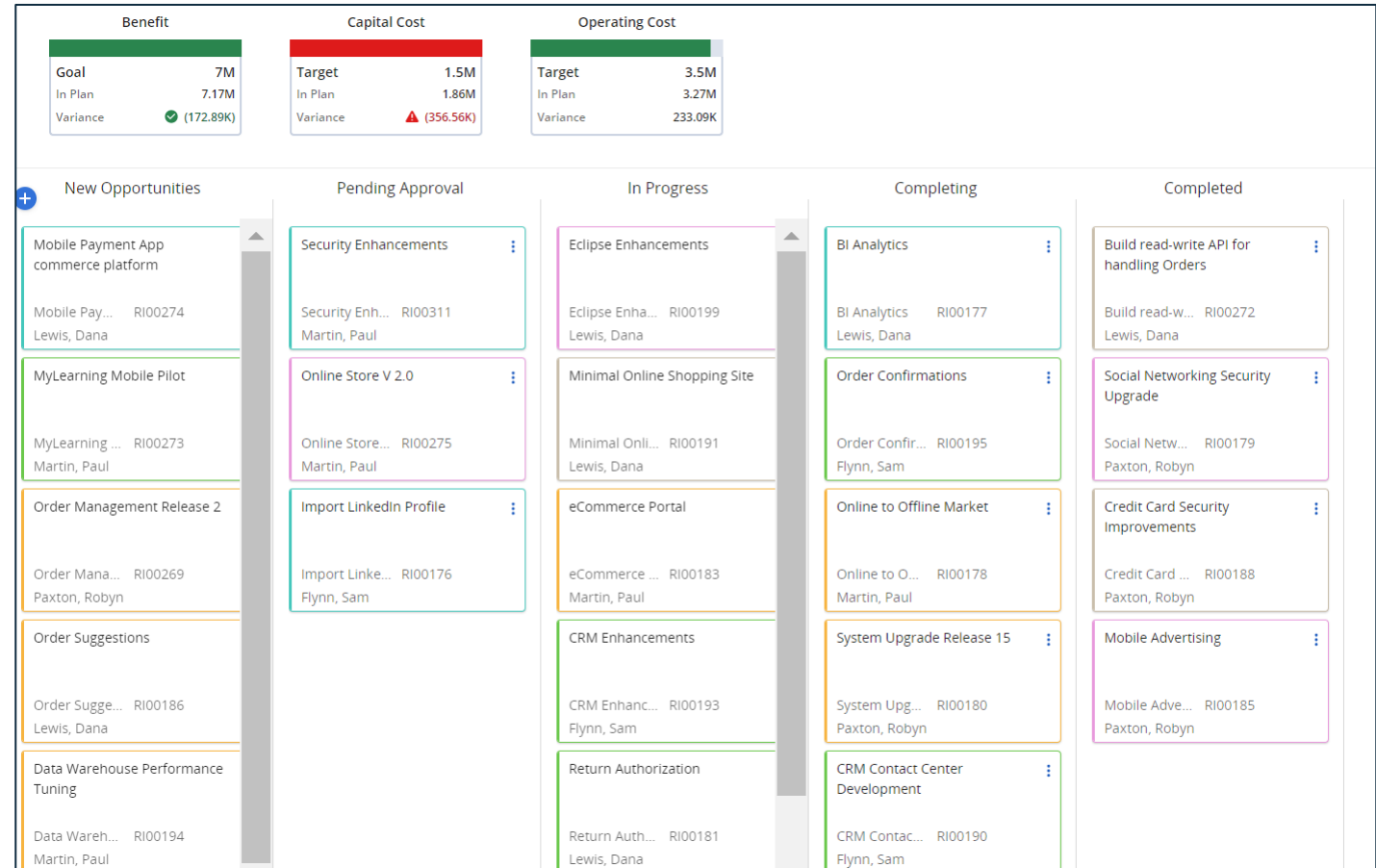
Use Roadmaps for Planning

- Ideas can be vetted against or planned with each other in the New UX Roadmap feature
- Item duration, start, and/or finish may be updated as well.
- Pull in already in-flight projects for complete planning



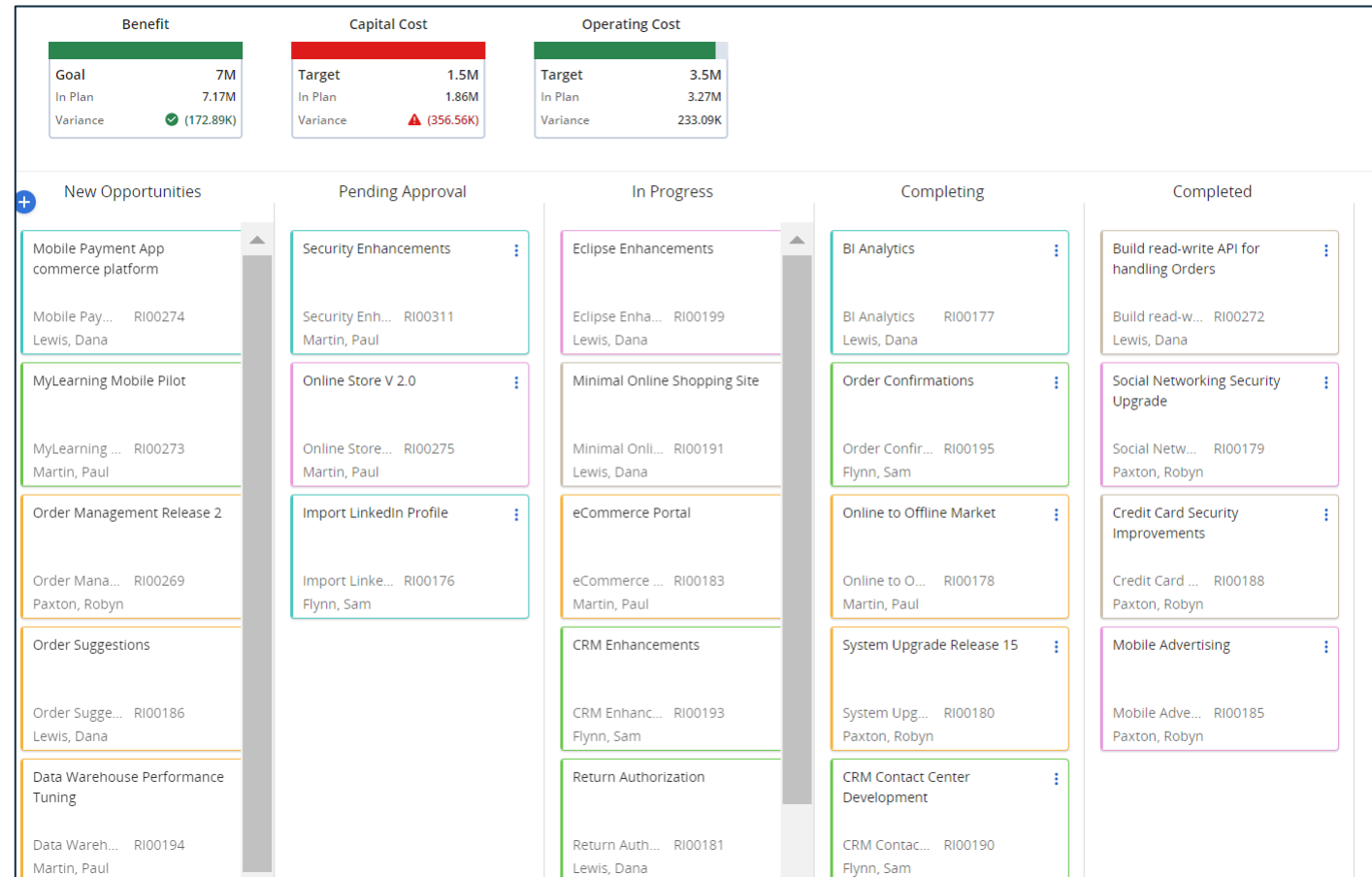
Use Roadmaps for Planning

- Utilize the Kanban board to organize and strategically plan work by dragging and dropping



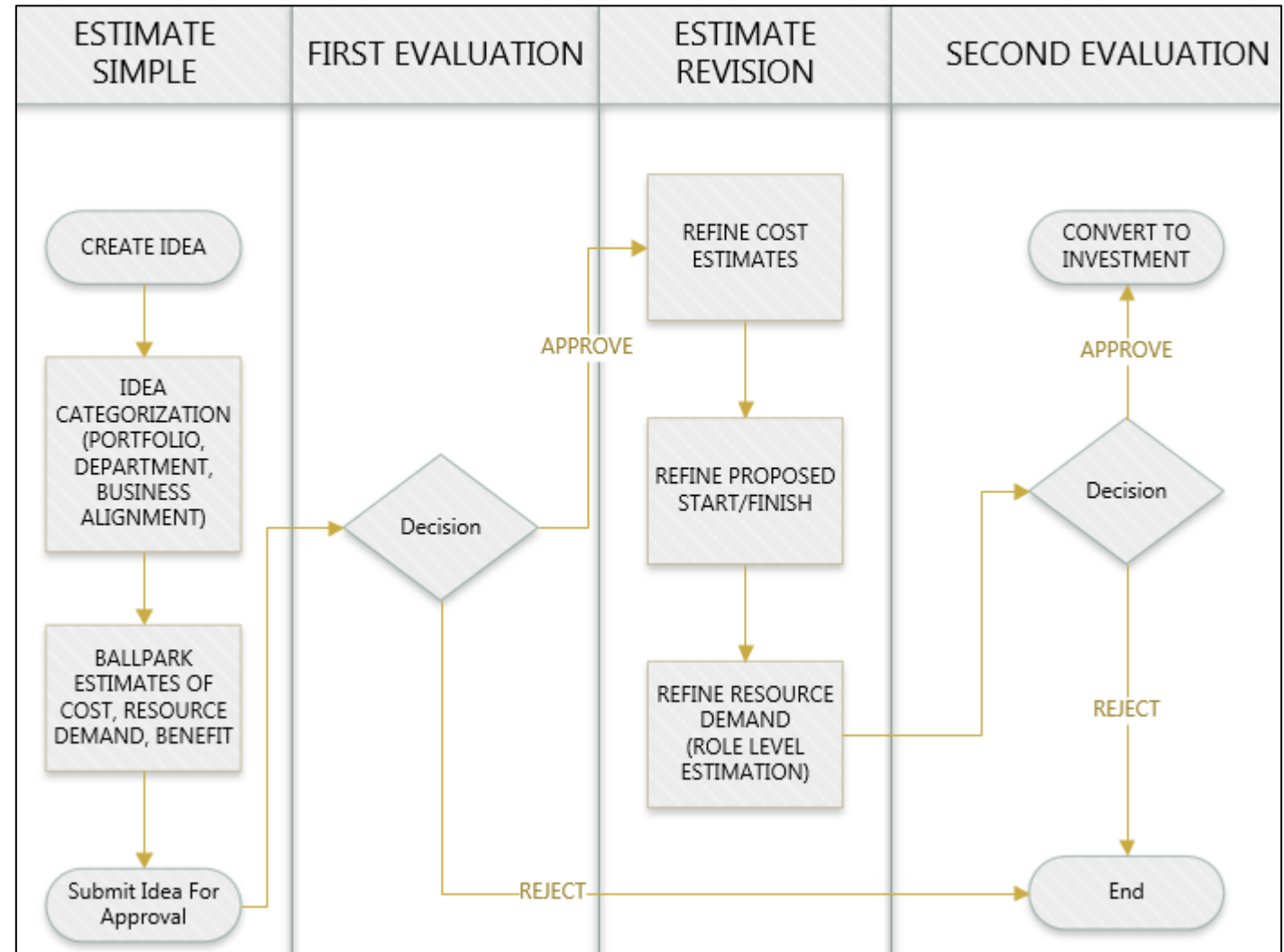
Use Roadmaps for Planning

- Use Grid View to manage work against targets
- Dynamically create and manage targets



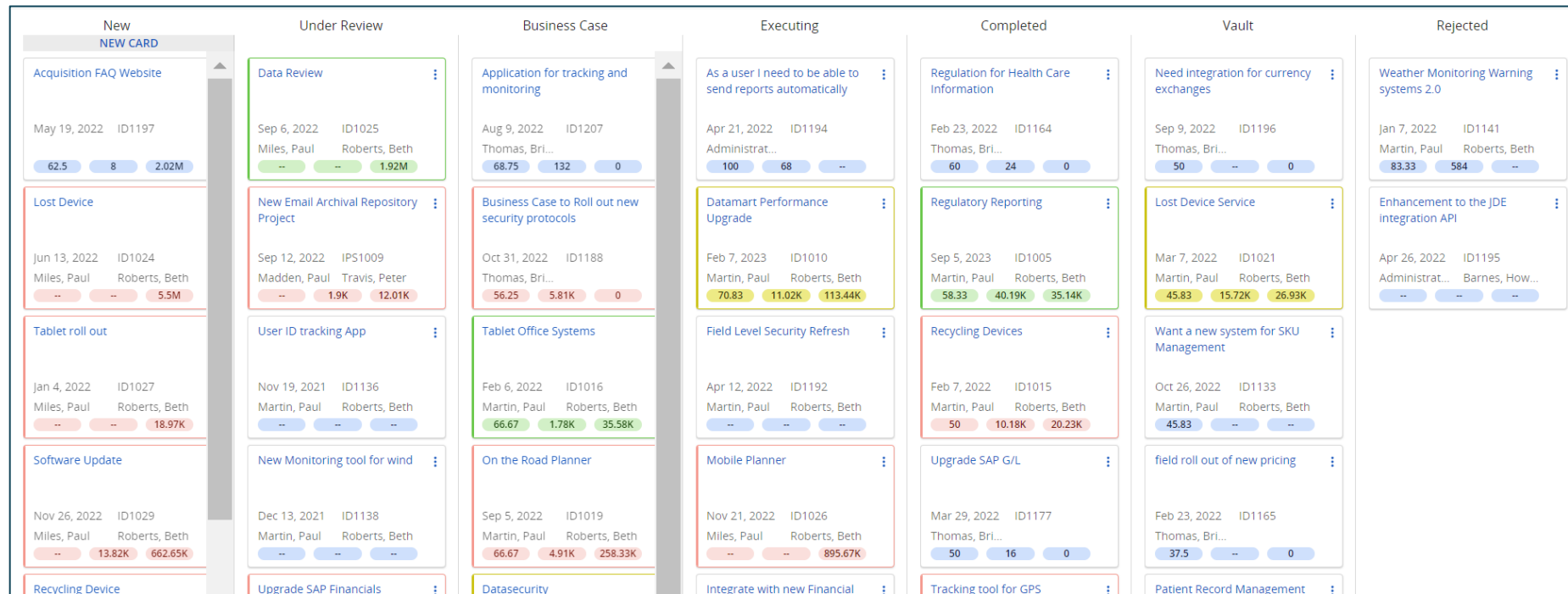
Idea Approval Best Practices

- Build a custom process to align to your organizational needs, but remember, simple approvals work best.
- Try to quickly weed out ideas that should not move forward
- When converting to a project, inactivate the idea – no duplication of financials or allocations in views and Roadmaps
- Use a template when converting to maintain consistent data among projects
- Leverage the Action Item Responder to facilitate quicker, easier workflow decisions



Idea Approval Best Practices

- Leverage Board views to visualize how Ideas are moving through the process



Rejection is Good!
Consider reporting on money not spent, or conflicts avoided

Custom Investments

- Can be leveraged to capture different types of demand
- Name investments according to your organization's terminology
- Compatible with Roadmaps
- Same as other NPIOs (non project investment objects)
- Includes *planned* simple budget financial fields on both the grid and the Details page

Questions?



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