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NASHVILLE • 2022

Best Practice Use of Clarity for Project 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

- Typical PM Activities
- Use Clarity: Get Off of Excel
- Make Information Easier to Access
- Make Flags Easy to Identify
- Simplify & Automate Reporting
- Open Discussion #3
- Work with a Regular Cadence
- Sample Schedule

Open Discussion #1

- How many of you are PMs or are a part of the PMO?
- How many projects do you (or your PMs) typically manage at one time?
- What are the most common Methodologies?
  - Waterfall
  - Agile
  - Iterative

- What are your greatest challenges to successful delivery and collaboration?

Typical PM Activities

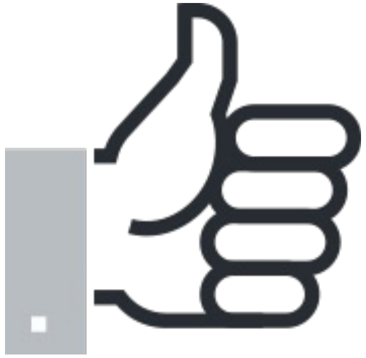
Category	Initial Set-Up	Ongoing Monitor & Control	Project Closure
General Project Management	• Create project & populate necessary data.	• Add/monitor/update risks, issues, and change requests • Create status reports (weekly/monthly)	• Set “Open for Time Entry” to no on project • Ensure all risks, issues, and changes are closed or resolved. • Complete final status report
Team Management	• Determine project work needed, estimate staffing needs and request roles or resources.	• Confirm roles filled with named resources. • View variances between planned allocation, ETCs and actual hours. • Modify resource allocations as needed.	• Set resource allocations to reflect project close date. • Set “Open for Time Entry” to no for all resources.
Task Management	• Build project schedule/WBS. • Sequence task/milestones, add dependencies, and link tasks. • Assign resources to tasks and add ETCs. • Run Auto-Schedule to identify critical path. • Set Baseline	• Update project schedule with task status (started/complete) • Monitor for proposed ETCs. Adjust ETCs as needed. • Run Auto-Schedule	• Set task/milestone status to complete. • Zero out ETCs • Close tasks for time entry • Ensure all future dates on tasks/milestones are set no later than project close date
Financial Management	• Create Cost/Budget/Benefit plans	• View project variance between budget and actuals. Introduce change requests as needed.	

Open Discussion #2

- How much time do you spend managing the data in Clarity?
- What functions seem to be cumbersome?
- Which parts of the tool make things easier?
- How do we make the cumbersome items easier?
- Suggested features to be added/removed?

Use Clarity: Transition Away from Supplemental Tools

- Use Clarity to manage all aspects of your Investments, wherever possible:
  - Issues / Risks / Change Requests
  - Use Action Items
  - Use Milestones / Tasks
  - Use Baselines
  - Use Financial Plans
  - Monitor Team Allocations/Availability



**Excel is offline, often unshared, not real-time and most critically, not centralized. Centralizing any and all of the modules above will reduce complexity and increase accuracy and ease in reporting information to all project stakeholders.*

** Eliminate multiple data entry points, improve data integrity*

** Sharepoint is often "one more place" to go to review project data.*

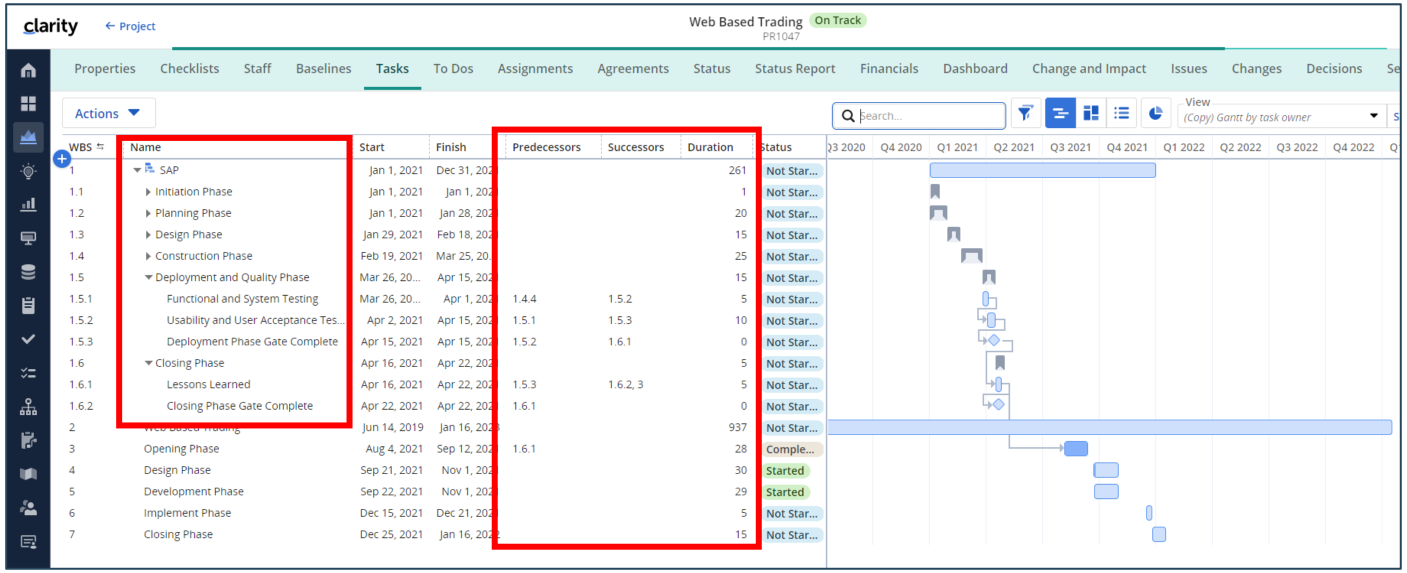
**If your stakeholder has more than one PM or set of projects, they're going to enjoy not getting emails with spreadsheets.*

Project Management in Clarity

Highlights of the Clarity Improvements

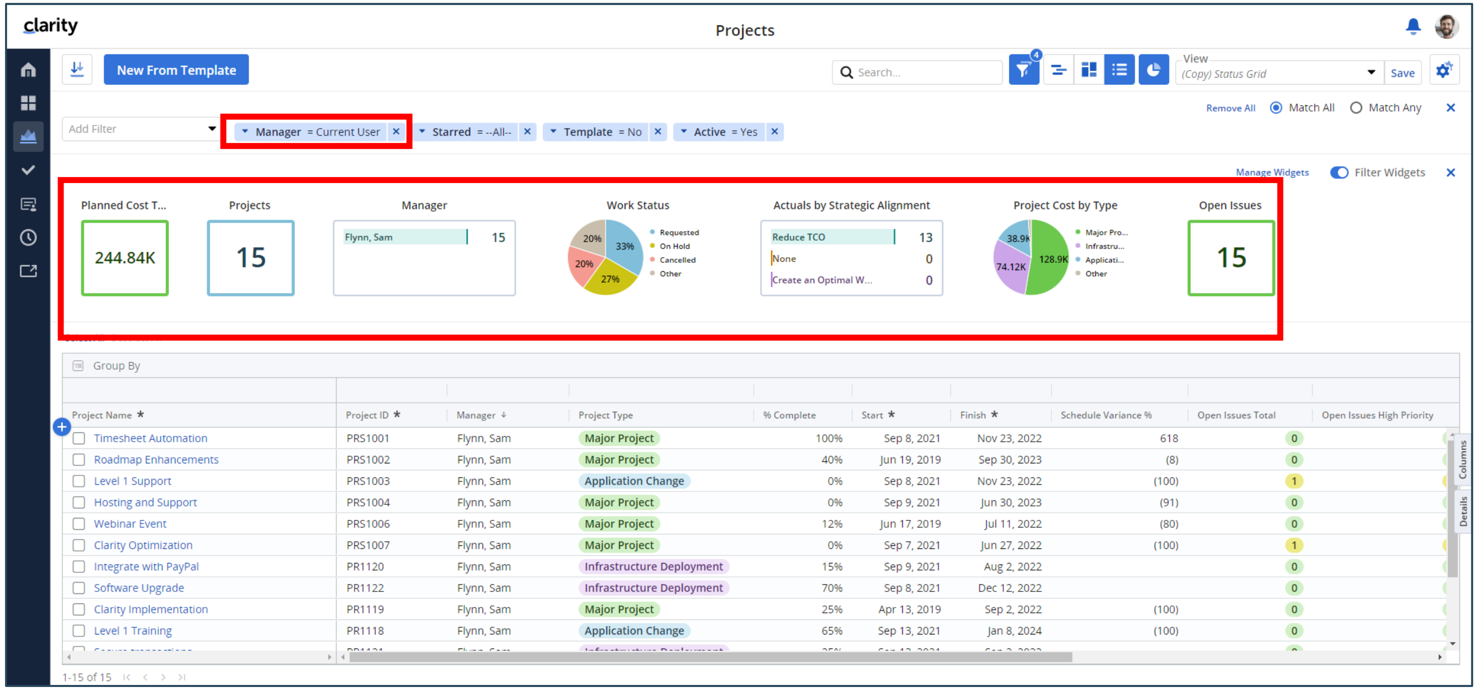
Task Improvements

- As you can in Classic, you can now add/display sub-project tasks on your Task timeline. This will assist the PM's in managing dependencies between project.
- Editable duration, predecessors, and successors
- You can now autoschedule your projects and decided to publish or discard your tentative schedule



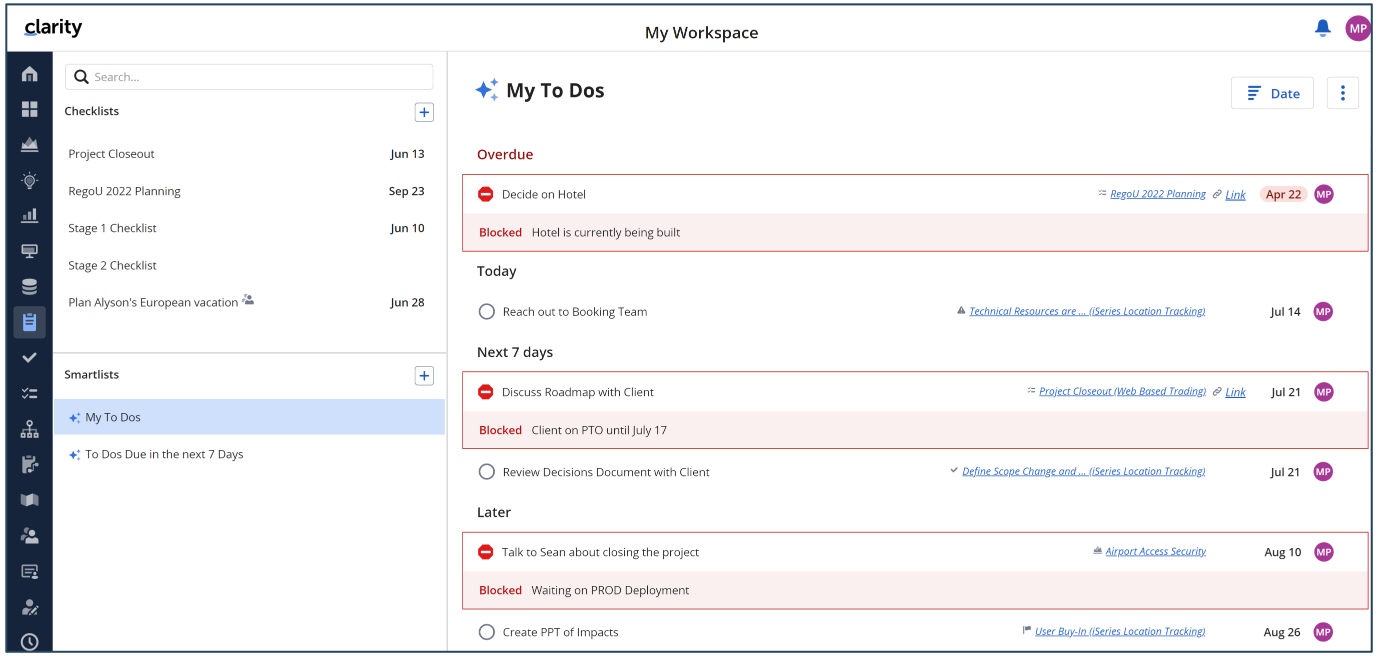
Improved Insights

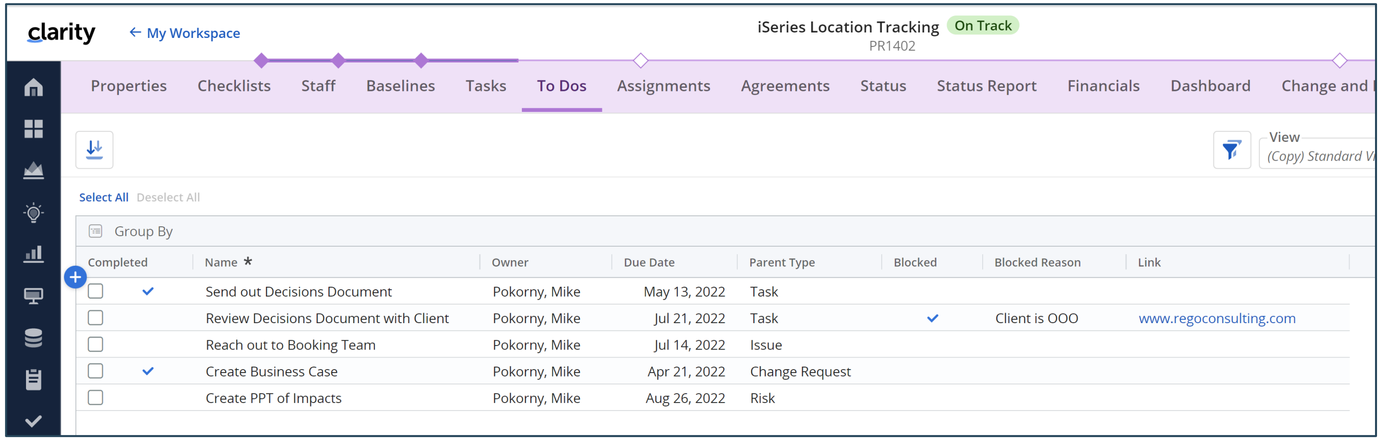
- Whether you are using Projects, Ideas, and/or Custom Investment Type to track your work, you can utilize the common Widget functionality on the Master and Sub-object grid views to get a quick insight into your work.
- These views can be created for the end users with context sensitive smart filters to show them relevant data.



To Dos, Checklists, and My Workspace

- Investment Managers can now add To Dos to Projects, Tasks, Risks, Issues, and Changes
- We can capture lower-level details by assigning owners, due dates, blockers, and blocked reasons
- This helps us track, collaborate, and report on ad hoc work that is too small of an effort for task creation





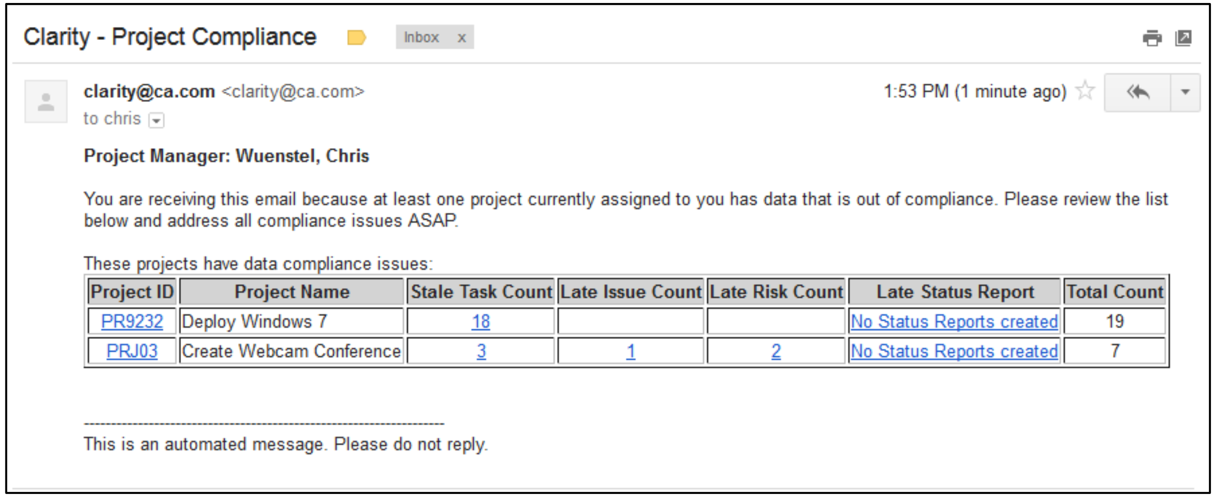
Optimize Clarity

Improve Visualization, Productivity and Classic user experience

Make Information Easier To Access

**Having your data organized, structured and current will allow for better communications and decisions.*

- Save filters and configure list views specific to you & your projects
  - Targeted information – they emphasize areas you need to manage
- Keep data current by using email reminders (e.g., regoXchange “stalkers”)



Clarity - Project Compliance Inbox x

clarity@ca.com <clarity@ca.com> 1:53 PM (1 minute ago)

to chris

Project Manager: Wuenstel, Chris

You are receiving this email because at least one project currently assigned to you has data that is out of compliance. Please review the list below and address all compliance issues ASAP.

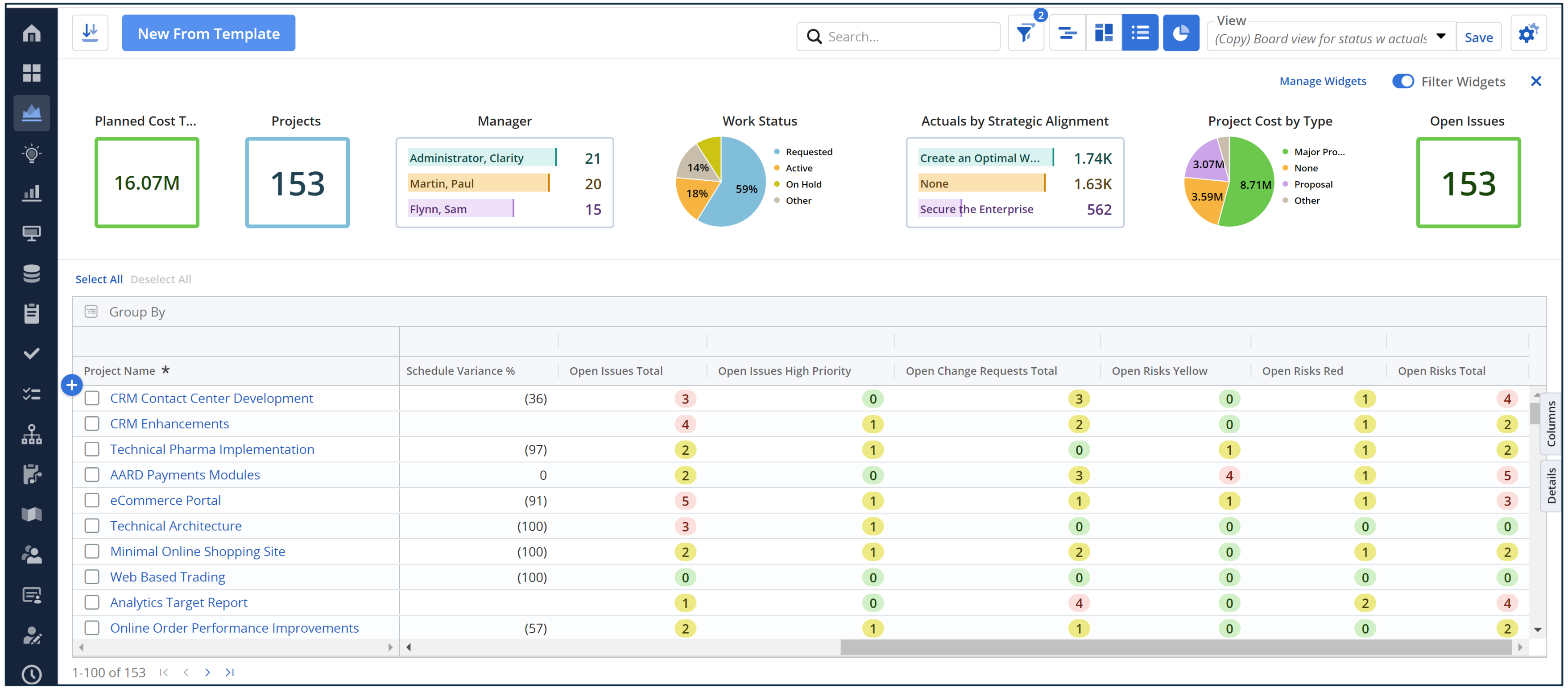
These projects have data compliance issues:

Project ID	Project Name	Stale Task Count	Late Issue Count	Late Risk Count	Late Status Report	Total Count
PR9232	Deploy Windows 7	18			No Status Reports created	19
PRJ03	Create Webcam Conference	3	1	2	No Status Reports created	7

This is an automated message. Please do not reply.

Make Flags Easy To Identify

- Use indicators to identify what needs attention - red highlights issues.
- Allows you to focus on the items putting the team, department, or company at risk.



Simplify & Automate Reporting

- Status Reports should be automated based on Clarity information you already update – no time to build a separate PowerPoint.
- Stakeholder information should be just the most important things:
  - More icons, less text.
  - Focus on key milestones, not tasks.
  - Highlight changes from last time, not everything.

**Scheduled reports or a formatted/filtered portlet will reduce the time and complexity required to compile stakeholder reports!*

Report Examples

Project Storyboard: eCommerce Portal

Project Manager	Martin, Paul	**Status Report Date**	2/3/2012
Project Type	Major Project	**Status**	Approved
Stage	Building	**Progress**	Started

Labor Hours

Baseline	3,992.00
Actuals	664.00
Estimate To Complete	3,448.00
Estimate At Completion	4,112.00
EAC to Baseline Variance	120.00
Remaining Allocation	3,612.00
Allocation to ETC Variance	164.00

Financial Performance

Planned Benefit	750,000.00
Planned Cost	646,000.00
Actual Cost	106,600.00
Estimate At Completion	664,100.00
EAC to Planned Variance	18,100.00
Planned ROI	14.82
Planned Breakeven	7/31/2012

Project Dates

	Start	Finish
Plan	10/4/2011	10/8/2012
Baseline	10/4/2011	10/6/2012
Days Late	0	2

Status Report Indicators

Overall
Schedule
Scope
Cost and Effort

Key Accomplishments

Key Accomplishments for this week:

- Resource issues resolved
- User acceptance test plan approved

Project Objective

Development of a new portal for all Online Client Services

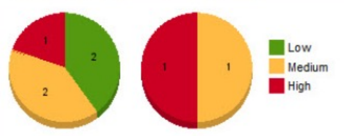
Status Report Update

There are some scope and schedule concerns. The customer steering committee is making some new recommendations at the 11th hour. Some of these recommendations are excellent suggestions and worth reviewing. If we decide to implement some of these additional suggestions, that will alter the scope of this project and will require additional funding and executive support. Resource issues are all resolved and

Upcoming Activities

The following reviews are scheduled for next week:
- User acceptance test results
- Change Requests
- Monthly Project Review

Issues by Priority **Risks by Priority**



Current Issues — More Issues...

Issue	Priority	Status	Target	Owner
Requirements are unclear		Open	2/23/2012	Morris, Tom
System architecture is non-compliant		Work in Progress	1/21/2012	Morris, Tom
Accept all possible popular pay methods		Open	2/15/2012	Hayes, Todd

Current Risks — More Risks...

Risk	Probability	Impact	Priority	Status	Target	Owner
Resource Availability				Open	2/29/2012	Thompson, Peter
Sponsorship Risk				Open	2/3/2012	Granger, Paula

Earned Value Analysis by Phase — Full Project Plan...

Phase	Start	Finish	Status	% Complete	Planned Value	Earned Value	Actual Cost	CV	SV	CPI	SPI
Planning Phase	10/4/2011	12/12/2011	Completed	100	77,200.00	77,200.00	77,200.00	0.00	0.00	1.00	1.00
Design Phase	12/12/2011	3/26/2012	Started	75	290,745.32	271,875.00	29,400.00	242,475.00	-18,870.32	9.25	0.94
Construction Phase	3/26/2012	7/19/2012	Not Started	0	0.00	0.00	0.00	0.00	0.00		
Deployment and Quality Phase	7/20/2012	9/22/2012	Not Started	0	0.00	0.00	0.00	0.00	0.00		
Closing Phase	9/24/2012	10/8/2012	Not Started	0	0.00	0.00	0.00	0.00	0.00		

KPIs by Project Type

Application Change

Project Name	Project Manager	Start Date	Finish Date	Status	Schedule	Alignment	Risk	Resource Allocations	Resource Actuals
CRM Enhancements	Reed, Henry	11/3/2011	3/5/2012					2,280.00	1,496.00
Global Expense Application	McCarthy, John	1/2/2012	2/2/2012					90.00	35.00
Global Order Processing	Granger, Paula	5/8/2012	8/17/2012					3,064.00	0.00
HR Claims Enhancement	Sutherland, Joy	2/1/2012	5/22/2012					1,600.00	0.00
Total								**7,034.00**	**1,531.00**

CRM Enhancements

Investment ID: PR1029

Milestone Timeline

Dec 18, 2018 — May 26, 2025

Overall Status	Schedule Status	Scope Status	Cost and Effort Status
→ Needs Help	↑ On Track	→ Needs Help	→ At Risk

Report Date	Investment Manager	Affected by External Factors
Oct 26, 2021	Cooper, Andy	

Effort Metrics

40% Spent

Total Effort	2,400.00
Spent	960.00
Effort Balance	1,440.00

Cost Metrics

35% Spent

Total Budget	$438,000.00
Spent	$153,600.00
Remaining Balance	$284,400.00

Upcoming Activities

Key Accomplishments

- Completed the first phase of the roll-out
- Deployed the new module at 6 our of 7 sites across the organization.

Status Report Update

Initial planning phase has been completed. The project will be a week longer than planned since we uncovered additional features/functions that we can enable via a more extensive upgrade.

Executive Summary

Issues

Name * ↑	Status *	Priority *
Advanced reporting r...	Work in Progress	Low
		Low
		High
		Medium

Risks

Name * ↑	Assigned To *	Calcu...

No Rows To Show

Changes

	Status *	Priority *	Review Date
tor, Cla...	Open	Medium	

Open Discussion #3

- How many of you have more work than hours in the day?
- What helps you make sure you get everything done?

Work With A Regular Cadence

- A predictable cadence allows the project manager to make sure they are continually focused on the right tasks at the right time.
  - Reports and portlets in Clarity are only as good as their data. It is critical that your data is always up to date. If you don't have a regular schedule for updating your projects, you risk reporting (and managing your project) on stale or inaccurate data.
- The real power of cadence is in the habits it forms.
  - Cadence encourages discipline & discipline results in predictability. A predictable cadence helps to set expectations and provides a less stressful environment.
- Set up a consistent work schedule, one that makes sense for your team.
  - Schedules are critical, without them we have a harder time committing to a task. Like exercise, managing a project takes commitment and discipline. Making a weekly chart of tasks helps encourage this discipline.

Sample Schedule

- The following is an example of a Project Manager’s weekly schedule.
  - Based on a Friday status/project team meeting.
  - Can be adjusted based on the Clarity features used.

Process	Time per Project	Sat	Sun	Mon	Tue	Wed	Thu	Fri
Team members submit their time sheet	5 min							X
Project Managers Review Pending Actuals (morning)	10 min			X				
Resource Managers Approve Timesheets (afternoon)	30 min			X				
Posted hours show up on project. PM reviews hours.	10 min				X			
Project Manager compares the planned vs actual cost to budget	30 min				X			
Project Manager updates the WBS	20 min					X		
Project Manager updates allocation for resources	10 min					X		
Project Manager reviews/updates risks, issues, changes (as needed)	30 min						X	
Project Managers Publish Status Report	20 min						X	
Weekly Team Meeting	30-60 min							X

Questions?

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- Date Started = **Today's Date**
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