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Best Practice Use of Clarity for Demand Management

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Part I: Introduction



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





• Rego Best Practices: Demand Management

Open Mic

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

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
- **D** Business users are not in Clarity
- 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 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	y user can subr	nit	an Idea
	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
- Con
- Delays in Entry
- Reduced Duplication
- Reduced Effort
- Clear ownership and improved quality

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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)

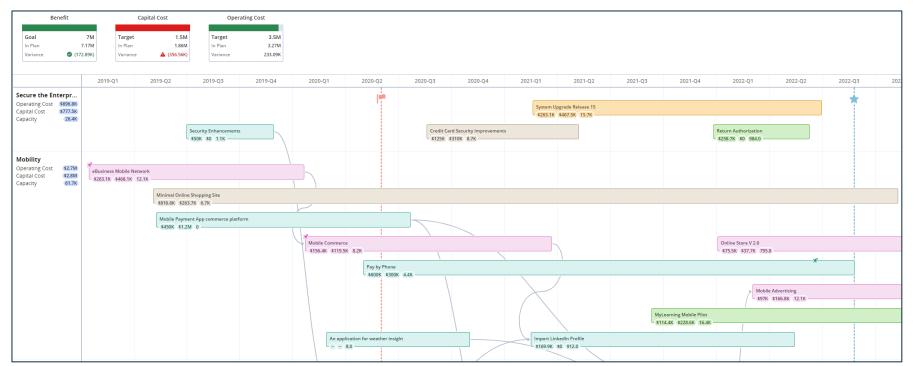
Idea Financial Estimate Best Practices

- \bigcirc
- 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 your learned that others can avoid?

- 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



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Use Roadmaps for Planning

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

Benefit	Capital Co	st	_	Operating Cost				
Goal7MIn Plan7.17MVarianceIntervention (172.89K)	Target In Plan Variance	1.5M 1.86M (356.56K)	In	arget 3.5M Plan 3.27M ariance 233.09K				
New Opportunities	Pending Ap	proval		In Progress	Completing		Completed	
Nobile Payment App commerce platform	Security Enhancer	nents	÷	Eclipse Enhancements	BI Analytics	:	Build read-write API for handling Orders	:
Nobile Pay RI00274 .ewis, Dana	Security Enh Rl Martin, Paul	00311		Eclipse Enha RI00199 Lewis, Dana	BI Analytics RI00177 Lewis, Dana		Build read-w RI00272 Lewis, Dana	
MyLearning Mobile Pilot	Online Store V 2.0		÷	Minimal Online Shopping Site	Order Confirmations	÷	Social Networking Security Upgrade	÷
MyLearning RI00273 Martin, Paul	Online Store RI Martin, Paul	00275		Minimal Onli RI00191 Lewis, Dana	Order Confir RI00195 Flynn, Sam		Social Netw Ri00179 Paxton, Robyn	
Drder Management Release 2	Import LinkedIn P	rofile	÷	eCommerce Portal	Online to Offline Market	:	Credit Card Security Improvements	:
Order Mana RI00269 Paxton, Robyn	Import Linke RI Flynn, Sam	00176		eCommerce RI00183 Martin, Paul	Online to O RI00178 Martin, Paul		Credit Card RI00188 Paxton, Robyn	
Drder Suggestions				CRM Enhancements	System Upgrade Release 15	:	Mobile Advertising	:
Order Sugge RI00186 .ewis, Dana				CRM Enhanc RI00193 Flynn, Sam	System Upg RI00180 Paxton, Robyn		Mobile Adve Ri00185 Paxton, Robyn	
Data Warehouse Performance Tuning				Return Authorization	CRM Contact Center Development	:		
Data Wareh RI00194 Aartin, Paul				Return Auth RI00181 Lewis, Dana	CRM Contac RI00190 Flynn, Sam			

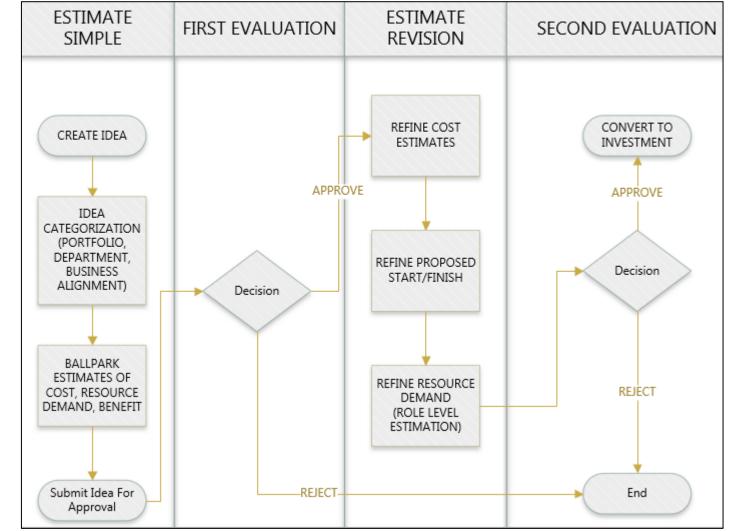
Use Roadmaps for Planning

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

Benefit	Capital Cost	Operating Cost		
Goal7MIn Plan7.17MVariance♥ (172.89K)	Target1.5MIn Plan1.86MVariance(356.56K)	Target3.5MIn Plan3.27MVariance233.09K		
New Opportunities	Pending Approval	In Progress	Completing	Completed
Mobile Payment App commerce platform	Security Enhancements	Eclipse Enhancements	BI Analytics	Build read-write API for in Andling Orders
Mobile Pay RI00274 Lewis, Dana	Security Enh Rl00311 Martin, Paul	Eclipse Enha RI00199 Lewis, Dana	BI Analytics RI00177 Lewis, Dana	Build read-w RI00272 Lewis, Dana
MyLearning Mobile Pilot	Online Store V 2.0	Minimal Online Shopping Site	Order Confirmations	Social Networking Security
MyLearning RI00273 Martin, Paul	Online Store Rl00275 Martin, Paul	Minimal Onli RI00191 Lewis, Dana	Order Confir Rl00195 Flynn, Sam	Social Netw Rl00179 Paxton, Robyn
Order Management Release 2	Import LinkedIn Profile	eCommerce Portal	Online to Offline Market	Credit Card Security Improvements
Order Mana Rl00269 Paxton, Robyn	Import Linke Rl00176 Flynn, Sam	eCommerce Rl00183 Martin, Paul	Online to O Rl00178 Martin, Paul	Credit Card RI00188 Paxton, Robyn
Order Suggestions		CRM Enhancements	System Upgrade Release 15	Mobile Advertising
Order Sugge RI00186 Lewis, Dana		CRM Enhanc RI00193 Flynn, Sam	System Upg RI00180 Paxton, Robyn	Mobile Adve RI00185 Paxton, Robyn
Data Warehouse Performance Tuning		Return Authorization	CRM Contact Center : Development	
Data Wareh RI00194 Martin, Paul		Return Auth RI00181 Lewis. Dana	CRM Contac RI00190 Flynn, Sam	

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

New NEW CARD	Under Review	Business Case	Executing	Completed	Vault	Rejected
Acquisition FAQ Website	Data Review	Application for tracking and monitoring	As a user I need to be able to send reports automatically	Regulation for Health Care : Information	Need integration for currency : exchanges	Weather Monitoring Warning systems 2.0
May 19, 2022 ID1197	Sep 6, 2022 ID1025 Miles, Paul Roberts, Beth	Aug 9, 2022 ID1207 Thomas, Bri 68.75 132 0	Apr 21, 2022 ID1194 Administrat 100 68	Feb 23, 2022 ID1164 Thomas, Bri 60 24 0	Sep 9, 2022 ID1196 Thomas, Bri 50 - 0	Jan 7, 2022 ID1141 Martin, Paul Roberts, Beth 83.33 584
Lost Device	New Email Archival Repository : Project	Business Case to Roll out new security protocols	Datamart Performance : Upgrade	Regulatory Reporting	Lost Device Service	Enhancement to the JDE integration API
Jun 13, 2022 ID1024 Miles, Paul Roberts, Beth	Sep 12, 2022 IPS1009 Madden, Paul Travis, Peter - 1.9K 12.01K	Oct 31, 2022 ID1188 Thomas, Bri 56.25 5.81K 0	Feb 7, 2023 ID1010 Martin, Paul Roberts, Beth 70.83 11.02K 113.44K	Sep 5, 2023 ID1005 Martin, Paul Roberts, Beth 58.33 40.19K 35.14K	Mar 7, 2022 ID1021 Martin, Paul Roberts, Beth 45.83 15.72K 26.93K	Apr 26, 2022 ID1195 Administrat Barnes, How
Tablet roll out	User ID tracking App	Tablet Office Systems	Field Level Security Refresh	Recycling Devices	Want a new system for SKU : Management	
Jan 4, 2022 ID1027 Miles, Paul Roberts, Beth	Nov 19, 2021 ID1136 Martin, Paul Roberts, Beth	Feb 6, 2022 ID1016 Martin, Paul Roberts, Beth 66.67 1.78K 35.58K	Apr 12, 2022 ID1192 Martin, Paul Roberts, Beth	Feb 7, 2022 ID1015 Martin, Paul Roberts, Beth 50 10.18K 20.23K	Oct 26, 2022 ID1133 Martin, Paul Roberts, Beth 45.83	
Software Update	New Monitoring tool for wind	On the Road Planner	Mobile Planner :	Upgrade SAP G/L	field roll out of new pricing	
Nov 26, 2022 ID1029 Miles, Paul Roberts, Beth 	Dec 13, 2021 ID1138 Martin, Paul Roberts, Beth	Sep 5, 2022 ID1019 Martin, Paul Roberts, Beth 66.67 4.91K 258.33K	Nov 21, 2022 ID1026 Miles, Paul Roberts, Beth	Mar 29, 2022 ID1177 Thomas, Bri 50 16 0	Feb 23, 2022 ID1165 Thomas, Bri 37.5 - 0	
Recycling Device	Upgrade SAP Financials :	Datasecurity	Integrate with new Financial	Tracking tool for GPS :	Patient Record Management :	

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

- 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?



Surveys

Please take a few moments to fill out the class survey. Your feedback is extremely important for future events.



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- Click on Visit CCR's button under the Report PDU's ٠
- 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 ۰
- Hours Completed = 1 PDU per hour of class time ٠
- Training classes = **Technical** ٠
- Click on I agree and Submit



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



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