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Collaborative Work Management

Your Guides:

Jacob Cancelliere & Wes McCoubrie

Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself
- Show or Movie to Watch on Flight

Agenda

- What is Collaborative Work Management?
- Real Life Stories – Why this is so important
- Overview and Latest Enhancements
- Value Proposition and Demonstration

What is Collaborative Work Management (CWM)?

"The CWM market consists of vendors offering task-driven team hubs that empower business users to plan, carry out and manage their work. Team hubs combine task, planning, workflow, integration and automation capabilities, with conversations, content publishing, reporting, analytics and dashboards. Products in this market are defined by their purpose (work planning and execution), by their target users (nontechnical business users) and by their broad functionality."[1]

"Key Findings

- Collaborative work management (CWM) products empower business users to plan, manage and automate common repeatable work activities.
- The level of interest in collaborative work management has been growing steadily over the last few years, with a notable rise consistent with the increase in hybrid work.
- CWM tools come with prebuilt work templates for business users engaged in agile teamwork, goal management, case management, issue tracking, strategic work planning, product management, marketing work and legal work.
- Most organizations deploy CWM tools tactically, targeting specific situations usually applicable to small groups of employees. Multiple CWM tools in the same organization are common."[2]

[1] https://www.gartner.com/reviews/market/collaborative-work-management
[2] https://www.gartner.com/en/documents/4022601

THIS!
This is why this topic is relevant to enterprises and organizations using Clarity!

Open Mic:
What are some CWM tools being used in your org today?

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."*

Different Runways for Different Solutions

Tool	Checklists and Tasks	Collaboration	Workflow	Project Management	Strategic Alignment	Resource Management	Financial Management	Portfolio Management
Asana	✓	✓	✓	✓	✓			✓
Trello	✓	✓	✓	✓				
Monday.com	✓	✓		✓				✓
MS Planner	✓	✓						
ClickUp	✓	✓	✓	✓	✓			
Clarity	✓	✓	✓	✓	✓	✓	✓	✓

Clarity entered this market in 2015 with the Modern UX and has aggressively developed capabilities matching other top solutions. Due to its robust, enterprise-level reputation, Clarity is too often overlooked as a team-centric work management tool.

Admittedly, Clarity is a blank canvas to be shaped to your use cases; other solutions templatize heavily.

Enhancements SINCE 16.0.3

Release Comparison (Notable enhancements – For reference)

Release Comparision Features

Module	Feature	Release	UI
Business Intelligence & Mobile	Mobile: My Workspace Checklists	16.1.3	Clarity
Clarity Checklists and To Dos	My Workspace: Conversation Feed Grouping	16.1.3	Clarity
Clarity Checklists and To Dos	My Workspace: Notes on To Do's	16.1.3	Clarity
Lifecycle Management (incl. Demand Mgmt)	Action Items: Option to Link to Modern UX for Process Notifications	16.1.3	Clarity
Lifecycle Management (incl. Demand Mgmt)	Notfications: To Do Owner	16.1.3	Clarity
Lifecycle Management (incl. Demand Mgmt)	Notifications to Task Assignees (with possibility to use MVLs in Blueprint Business Rules	16.1.3	Clarity
Lifecycle Management (incl. Demand Mgmt)	Notifications: Links - based on Target Object (including subobjects)	16.1.3	Clarity
Administration Enhancements	Administration - Mail Service Configuration - Removed {Beta} tag, new access right and introduced options for debug tracing and use StartTLS	16.1.2	Clarity
Advanced Visualization	Export to PDF: Non-Status Report Canvas pages	16.1.2	Clarity
Advanced Visualization	Investment Canvas: Ability to use Stock and Custom Subobjects and To Dos in table widgets	16.1.2	Clarity
Advanced Visualization	Reordering and Grouping for 'tiled' Workspaces for Custom Investments and Custom Objects	16.1.2	Clarity
Business Intelligence & Mobile	Mobile: Application Branding - Matching application colors	16.1.2	Clarity
Business Intelligence & Mobile	Mobile: Individual Users can Return a Timesheet	16.1.2	Clarity
Business Intelligence & Mobile	Mobile: Timesheet-level Notes	16.1.2	Clarity
Business Intelligence & Mobile	Mobile: User Settings page	16.1.2	Clarity
Business Intelligence & Mobile	Mobile: View future Timeperiods	16.1.2	Clarity
Lifecycle Management (incl. Demand Mgmt)	Notifications: Bell with Push Alerts	16.1.2	Clarity
Lifecycle Management (incl. Demand Mgmt)	Notifications: Library for Create and Recipients	16.1.2	Clarity
Lifecycle Management (incl. Demand Mgmt)	Notifications: Sending via Blueprint Business Rules	16.1.2	Clarity
Lifecycle Management (incl. Demand Mgmt)	Notifications: User Settings to receive notifications via Alert, Email and SMS	16.1.2	Clarity
Lifecycle Management (incl. Demand Mgmt)	Smart Automation in Business Rules: Send notifications via business rules	16.1.2	Clarity
User Productivity	Allow 'Min' and 'Max' Value Aggregations for TSV aggregations for Group By	16.1.2	Clarity
User Productivity	Canvas: Export to PDF	16.1.2	Clarity
User Productivity	Generic Board: Hide 'None' Column or Swimlane when empty	16.1.2	Clarity
User Productivity	Generic Grids: Multiple 'Group By' levels - up to 3 levels	16.1.2	Clarity
User Productivity	My Workspace: Checklists from Template & Transferring the Checklist Ownership (Co-Owners)	16.1.2	Clarity
User Productivity	Properties Module & flyout Details tab will now display an Asterisk for fields made 'required' through Blueprint Business Rules	16.1.2	Clarity
User Productivity	View Option to 'Wrap Text' now breaks in between words and wraps column header text in the generic grid	16.1.2	Clarity
User Productivity	View Options: Total Row Aggregation including Per-Period fields WITHOUT Group By	16.1.2	Clarity

Release Comparison (Notable enhancements – For reference)

Release Comparision Features

Module	Feature	Released	UI
Business Intelligence & Mobile	Mobile Action Items: Access Right - 'Mobile - Action Items - Navigate'	16.1.1	Clarity
Business Intelligence & Mobile	Mobile: Ability to enter notes at the Timesheet level	16.1.1	Clarity
Business Intelligence & Mobile	Mobile: Ability to react to Action Items submitted for approval	16.1.1	Clarity
Clarity Checklists and To Dos	My Workspace: Action Items feed	16.1.1	Clarity
Lifecycle Management (incl. Demand Mgmt)	Action Items: Assignees can Reply to Email notification	16.1.1	Clarity
Lifecycle Management (incl. Demand Mgmt)	Action Items: Library	16.1.1	Clarity
Lifecycle Management (incl. Demand Mgmt)	Action Items: Send via Business Rules	16.1.1	Clarity
Lifecycle Management (incl. Demand Mgmt)	My Workspace: Action Items feed	16.1.1	Clarity
Lifecycle Management (incl. Demand Mgmt)	Smart Automation in Blueprint Business Rules: Make record read-only or editable	16.1.1	Clarity
Lifecycle Management (incl. Demand Mgmt)	Smart Automation in Blueprint Business Rules: Allow setting a field value based on another field change	16.1.1	Clarity
Lifecycle Management (incl. Demand Mgmt)	Smart Automation in Blueprint Business Rules: Hide actions, sections, modules	16.1.1	Clarity
Lifecycle Management (incl. Demand Mgmt)	Smart Automation in Blueprint Business Rules: Make fields required	16.1.1	Clarity
Lifecycle Management (incl. Demand Mgmt)	Smart Automation in Blueprint Business Rules: Send Action Item and/or Alert	16.1.1	Clarity
Lifecycle Management (incl. Demand Mgmt)	Smart Automation in Blueprint Business Rules: Set fields on record or parent record	16.1.1	Clarity
User Productivity	Canvas Advanced Visualizations: Ability to add Visual Widgets	16.1.1	Clarity
User Productivity	Canvas Advanced Visualizations: Flexibililty with column layout	16.1.1	Clarity
User Productivity	Filtering: Exposing pre-defined 'Required' filters and allowing the user to change the criteria	16.1.1	Clarity
User Productivity	Tasks Workspace: Introducing 'Filter Groups'	16.1.1	Clarity
User Productivity	Users Settings: Manage Notifications (Alert, Email and SMS)	16.1.1	Clarity
User Productivity	Visual Widgets: Support the exposed pre-defined 'Required' filters	16.1.1	Clarity

Release Comparison (Notable enhancements – For reference)

Release Comparision Features

Module	Feature	Release	UI
Administration Enhancements	Administration, Users grid (removed Beta tag): Create users, ability to Star (favorite), introduced additional fields	16.1.0	Clarity
Administration Enhancements	Business Rules: Hide Attributes on Properties Modules	16.1.0	Clarity
Administration Enhancements	Conversations Module: Option to display a tab in the Details Flyout for Blueprint Objects	16.1.0	Clarity
Administration Enhancements	Conversations: Name and Resource ID for @mention lookup instead of Name and Role	16.1.0	Clarity
Administration Enhancements	Enable 'Canvas' Modules for Investments: Projects, Ideas and Custom Investment Types (CITs)	16.1.0	Clarity
Clarity Checklists and To Dos	My Workspace: Conversations and eMail Notifications improvements	16.1.0	Clarity
Clarity Checklists and To Dos	Visual Widgets on 'To Dos' Module in Projects, Ideas, Custom Investment Types (CITs)	16.1.0	Clarity
Lifecycle Management (incl. Demand Mgmt)	Introducing Investment 'Has Agreements' field for filtering	16.1.0	Clarity
Lifecycle Management (incl. Demand Mgmt)	Process Action Items: Ability to respond via email	16.1.0	Clarity
User Productivity	Ability to Star (favorite) records in Cost Plans, Budget Plans, Benefit Plans	16.1.0	Clarity
User Productivity	Ability to Star (favorite) records in Custom Subobjects	16.1.0	Clarity
User Productivity	Ability to Star (favorite) records in Risks, Issues, Changes	16.1.0	Clarity
User Productivity	Ability to Star (favorite) records in To Dos	16.1.0	Clarity
User Productivity	Details Fly-out: Option to display on the right or on the bottom of the page	16.1.0	Clarity
User Productivity	Grids: Column Menu Option to set the type of 'Value Aggregation' (Average, Count, Sum, Min, Max)	16.1.0	Clarity
User Productivity	Improved Usability for editing Visual Widgets: Ability to right-click on a Widget to 'Edit' or 'Remove'	16.1.0	Clarity
User Productivity	Introducing 'Filter Groups' for greater flexibility in defining Any / All filter criteria and for re-using the same field multiple times	16.1.0	Clarity
User Productivity	Investment Canvas: Ability to use Stock and Custom Subobjects and To Dos in table widgets	16.1.0	Clarity
User Productivity	Page Canvas: Add attribute support, including Rich-Text	16.1.0	Clarity
User Productivity	Saved Views: List Favorites first	16.1.0	Clarity
User Productivity	Saved Views: Renamed 'Default' to 'Recommended'	16.1.0	Clarity
User Productivity	Saved Views: Sharing via Access Groups	16.1.0	Clarity

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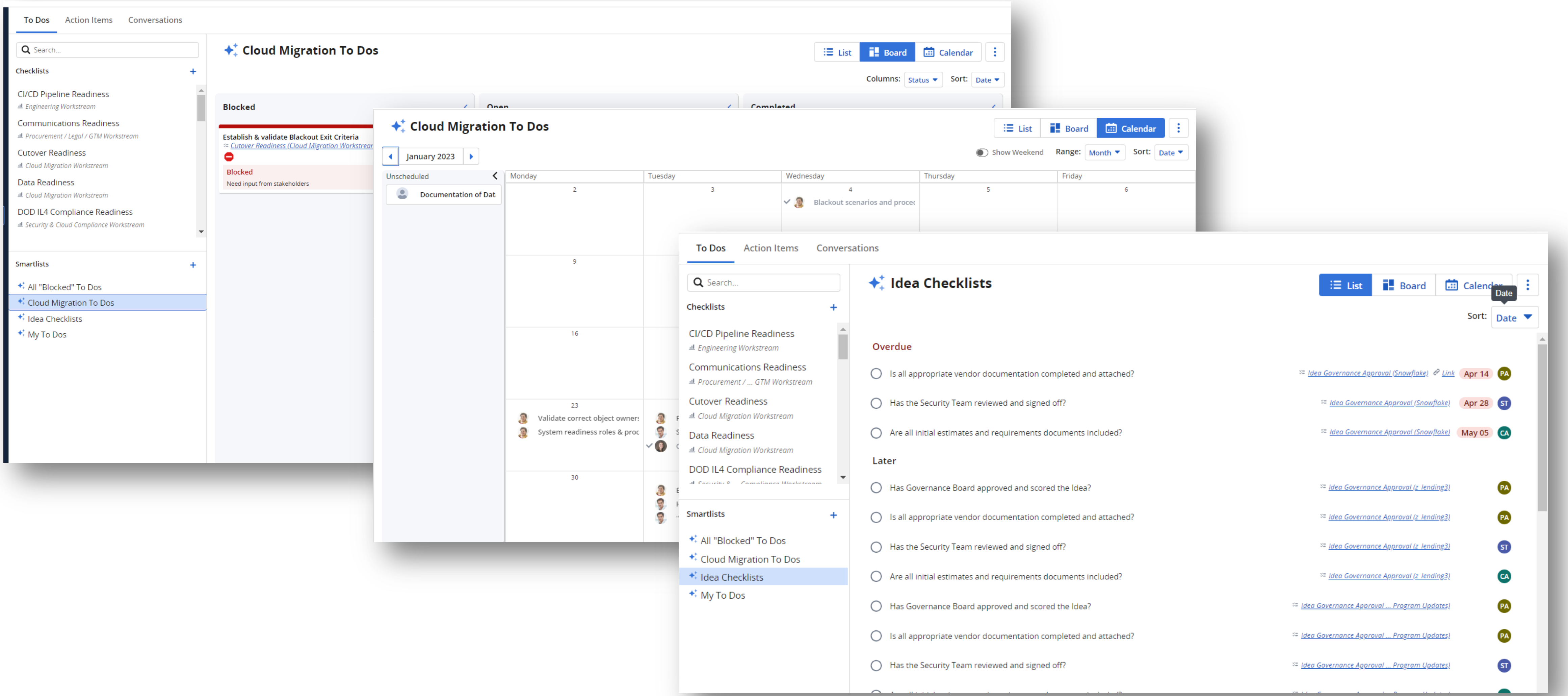
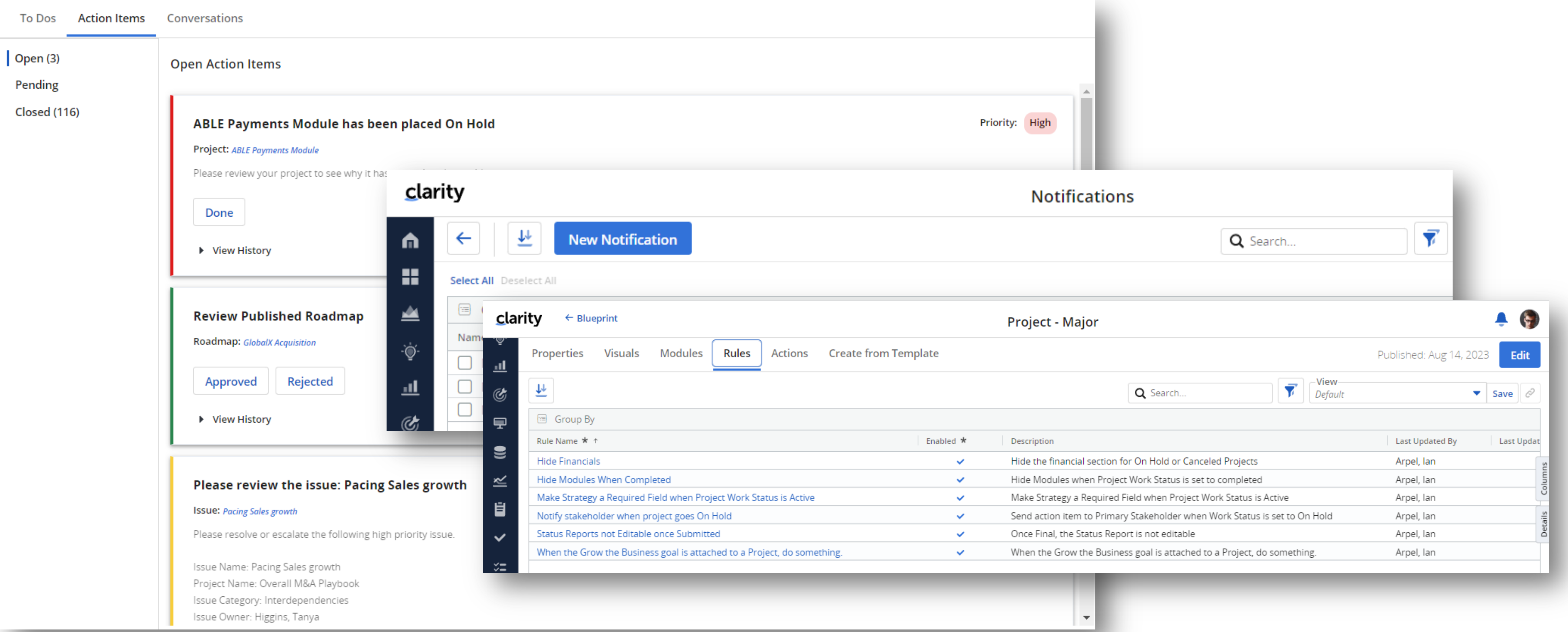
[2] https://www.gartner.com/en/documents/4022601

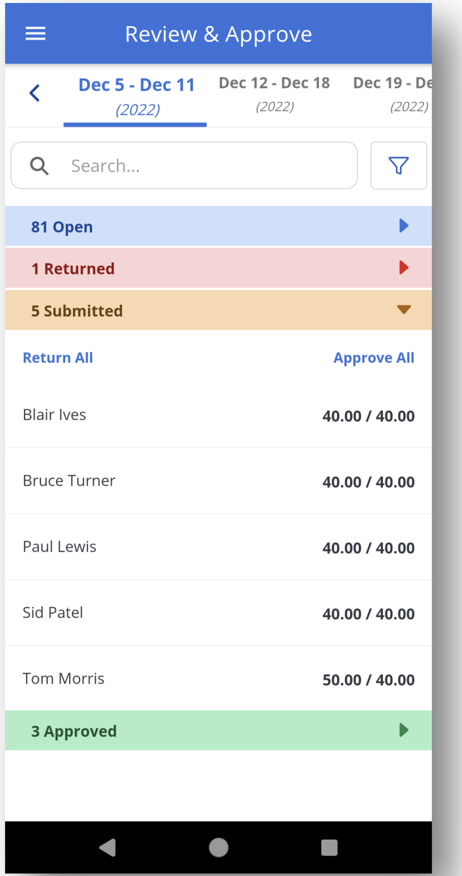
"Task-Driven Team Hubs"

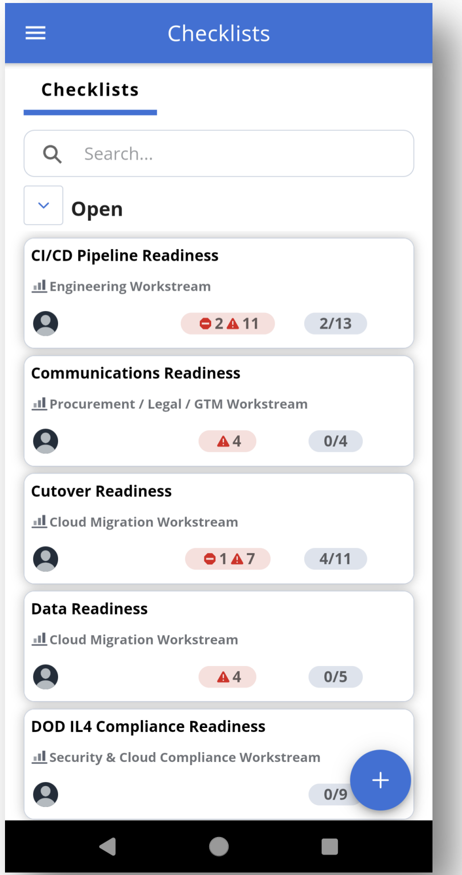


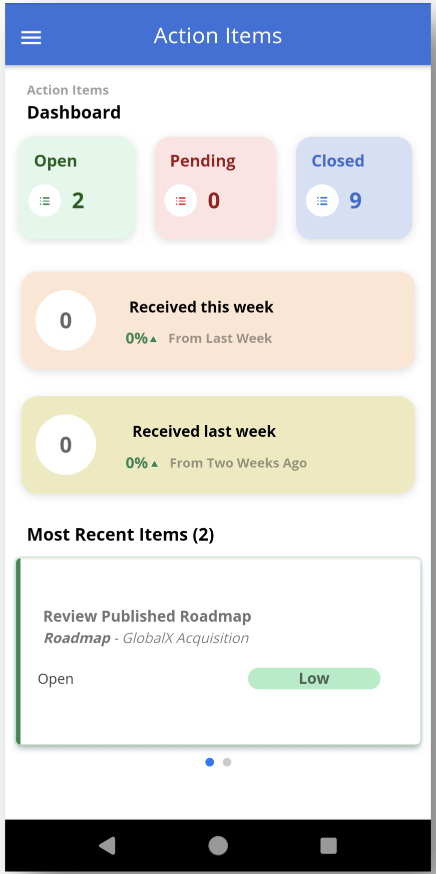
"Workflow, Integration, and Automation"



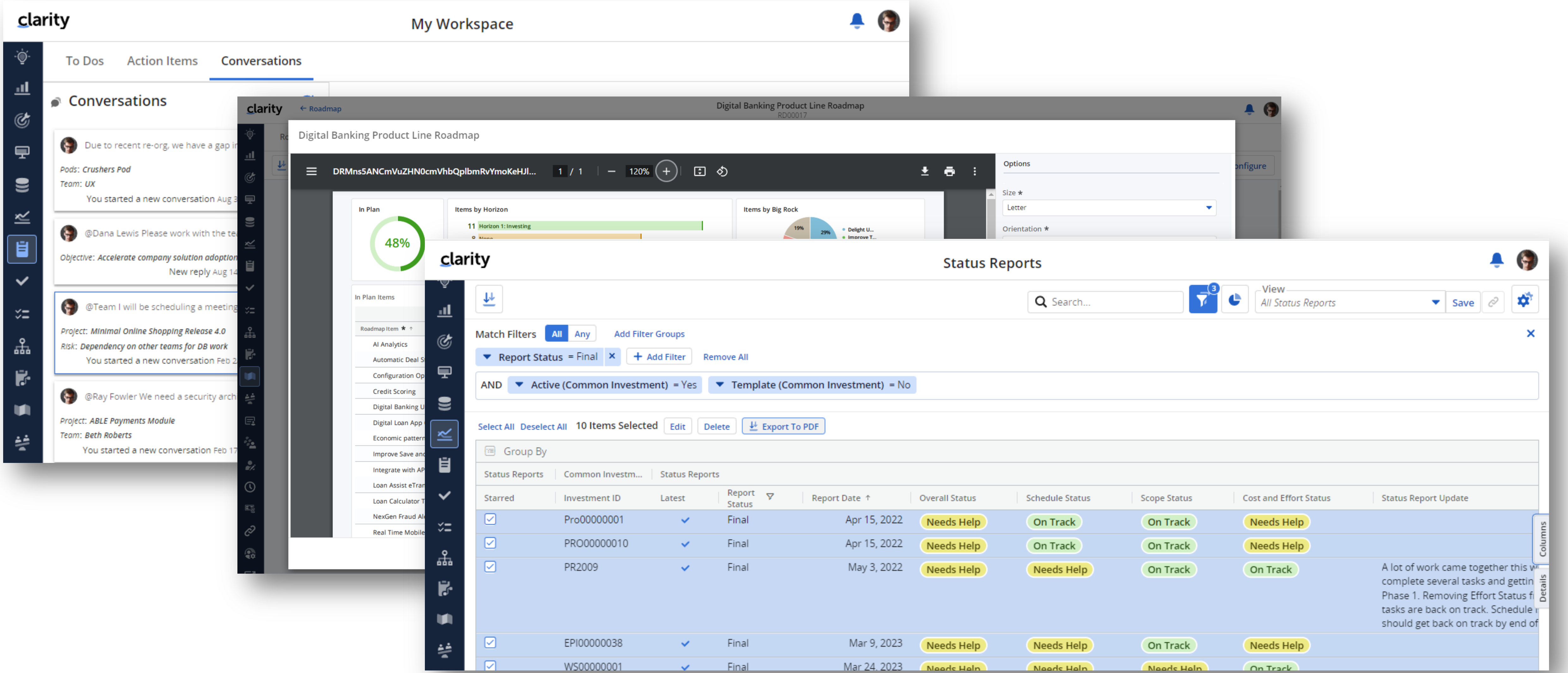
“Workflow, Integration, and Automation”



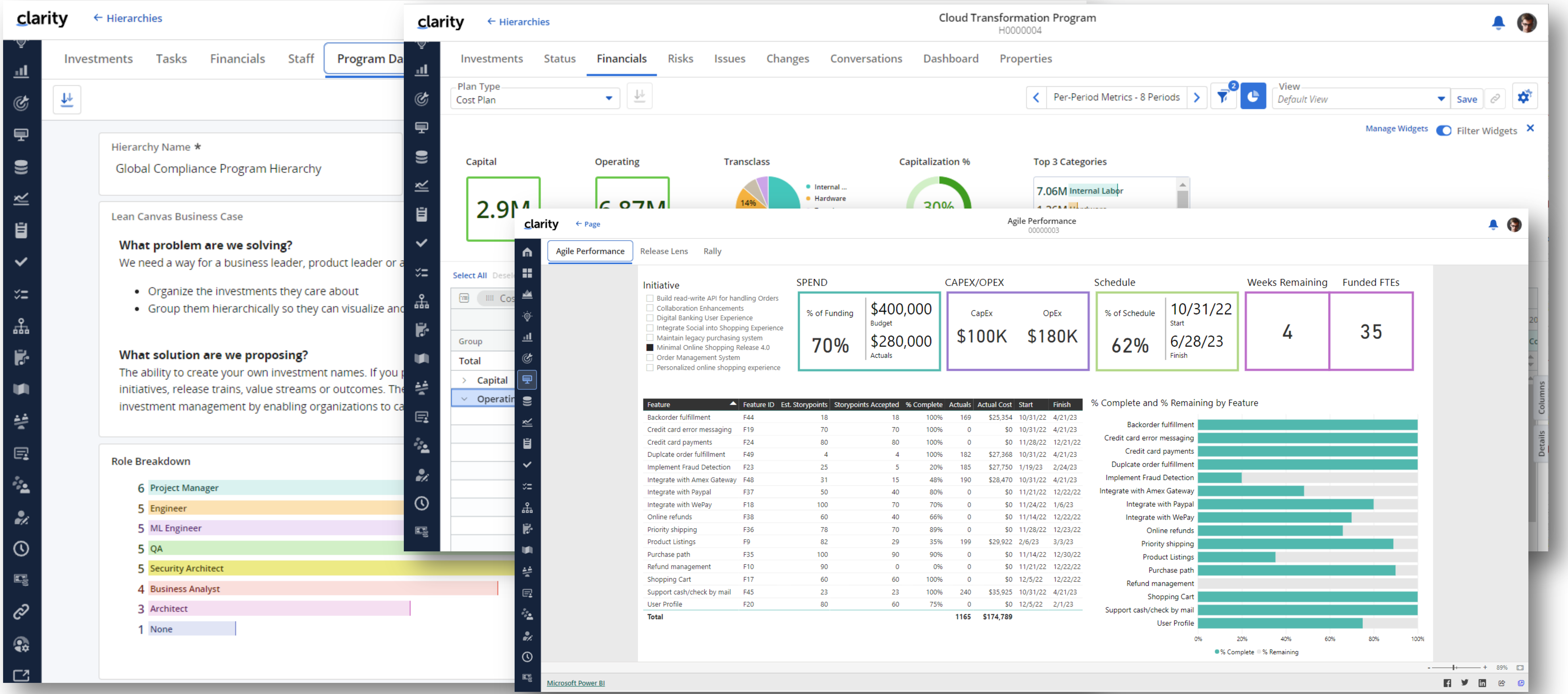




“Conversations, Content Publishing”



"Reporting, Analytics, Dashboards"



Demonstration

Questions?

Additional Resources

Product Articles / E-Books / Webinars
https://www.broadcom.com/products/software/value-stream-management/clarity
https://academy.broadcom.com/valueops/clarity
https://info.regoconsulting.com/clarity-ppm-best-practice-camp-winning-reporting-strategies
https://info.regoconsulting.com/discovering-clarity-integrations-september-2022
https://info.regoconsulting.com/top-ppm-trends-for-2023-december-2022
https://info.regoconsulting.com/clarity-survey-module-march-2023
https://info.regoconsulting.com/enhance-your-clarity-data-visualization-and-analysis-with-regos-free-clarity-bi-dashboards-22-august-2023
https://xchange.regoconsulting.com/ (NEW AND IMPROVED!!)

Books
Accelerate: Building Strategic Agility for a Faster-Moving World, John P. Kotter
Out of the Crisis, W. Edwards Deming
Value Stream Mapping: How to Visualize Work and Align Leadership for Organizational Transformation, Martin/Osterling
The 4 Disciplines of Execution, McChesney/Covey/Huling

SAFe
https://scaledagileframework.com/lean-portfolio-management/
https://scaledagileframework.com/portfolio-flow/
https://scaledagileframework.com/roadmap/
https://info.regoconsulting.com/safe-expand-to-the-value-stream-may-2022

Personal Growth
From Strength to Strength, Arthur C. Brooks
The Seven Spiritual Laws of Success, Deepak Chopra
The Last Arrow, Erwin McManus
Mindset: The New Psychology of Success, Carol S. Dweck, Ph.D.

Surveys

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

Thank You For Attending RegoUniversity

Instructions for PMI credits

- Access your account at 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
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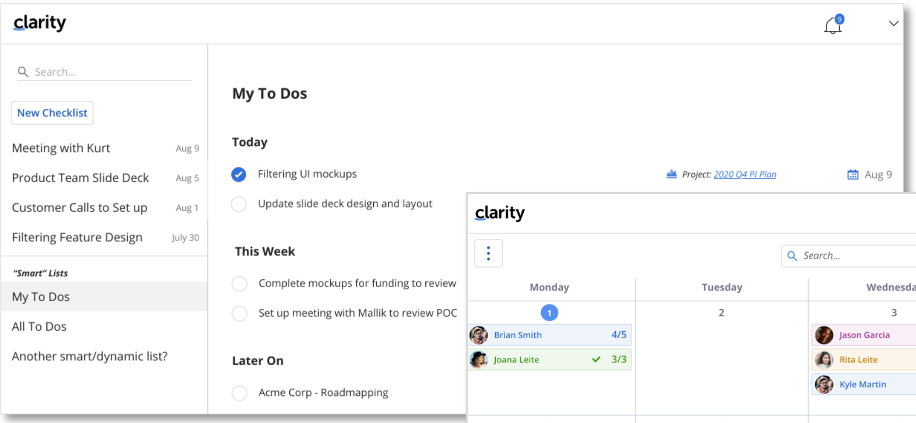
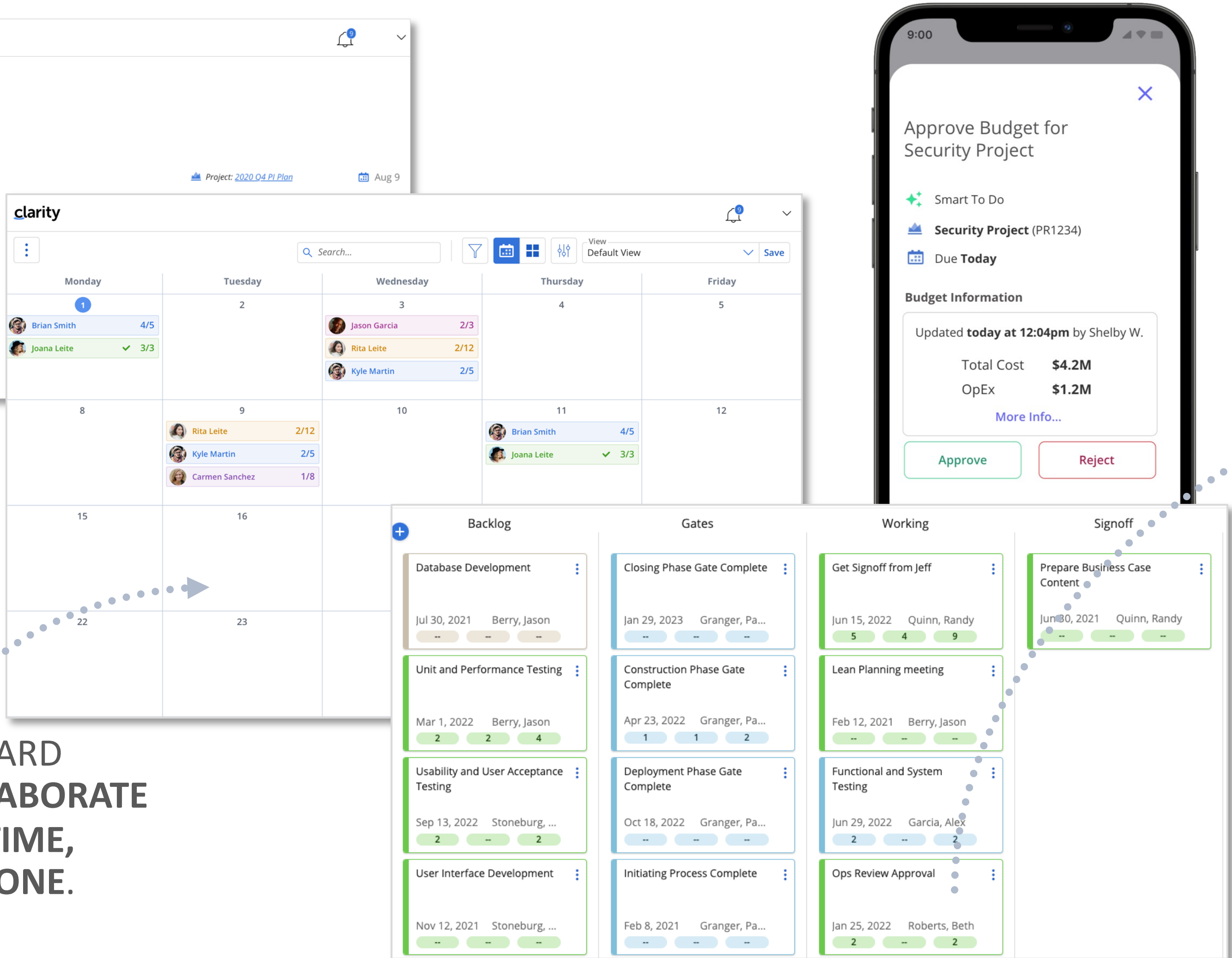
Website
www.regouniversity.com

APPENDIX

- Broadcom Slides
- New Enhancements

Clarity for Collaborative Work.





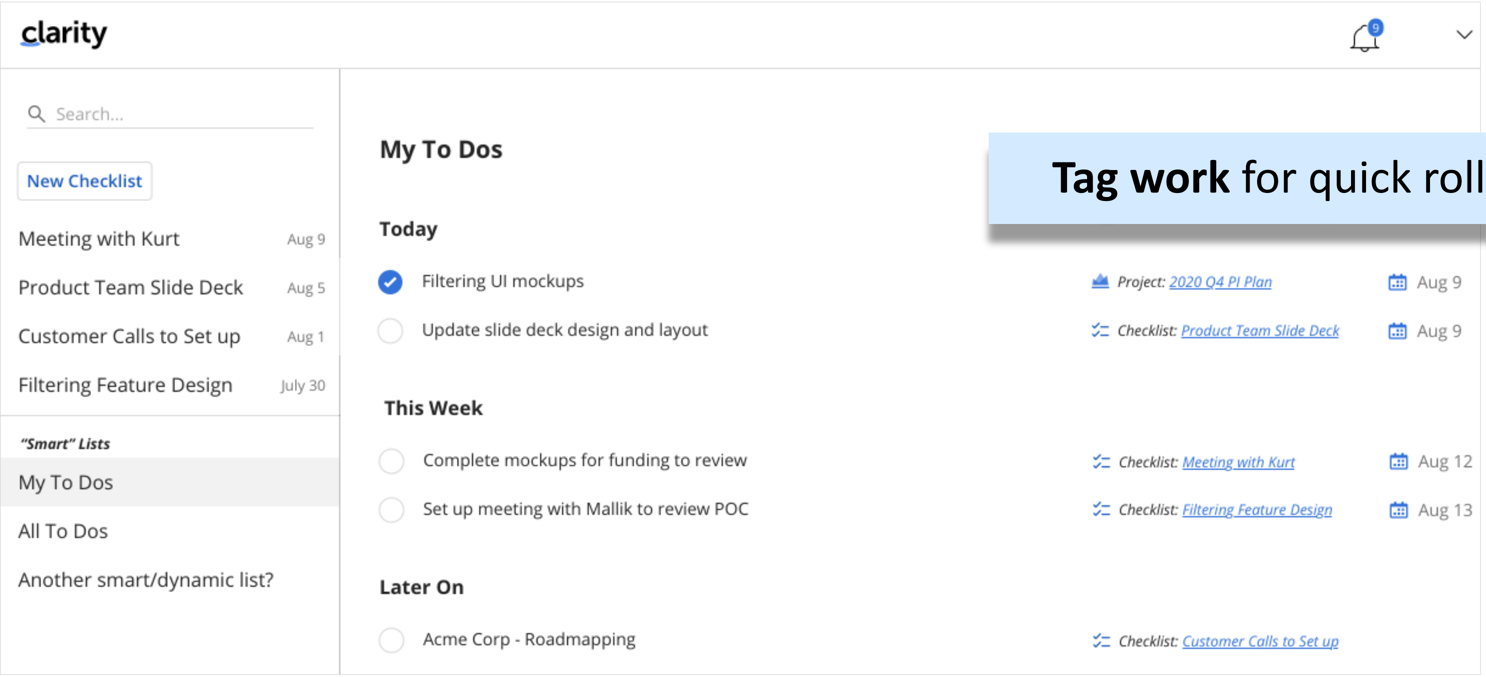
KEY WORK IS CONNECTED TO ENTERPRISE STRATEGY AND BUSINESS OBJECTIVES.

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

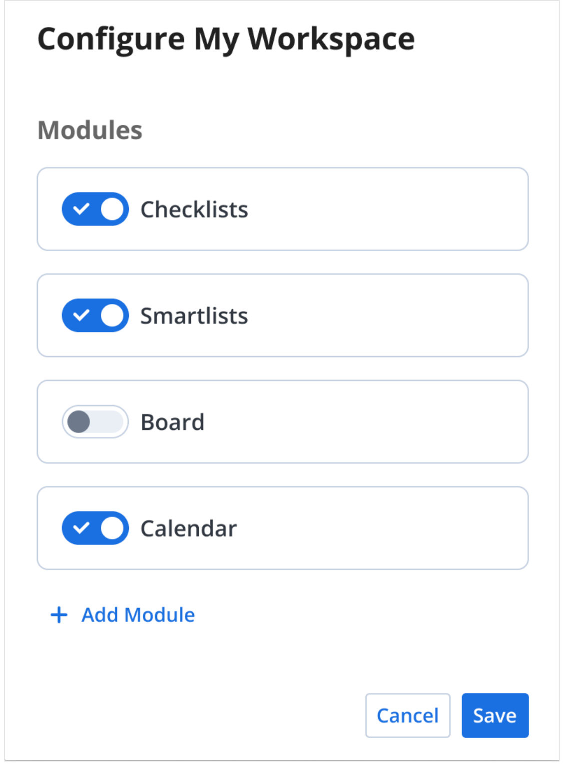
Personalize Work.

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

Keep work private until you share it.

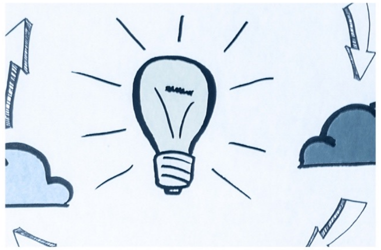


Tag work for quick roll-ups.



Personalize your own workspace.

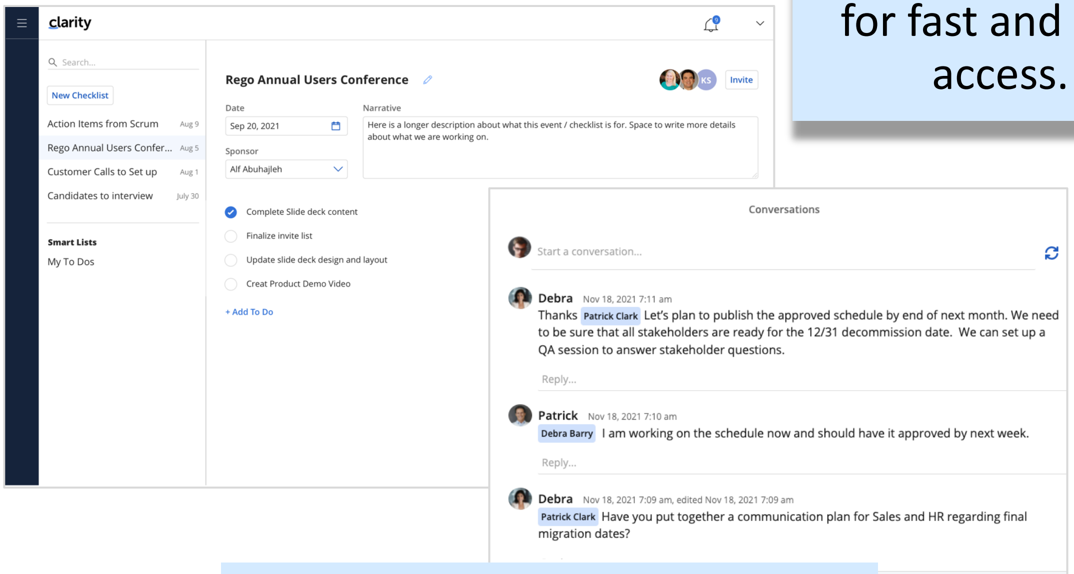





Share Work.

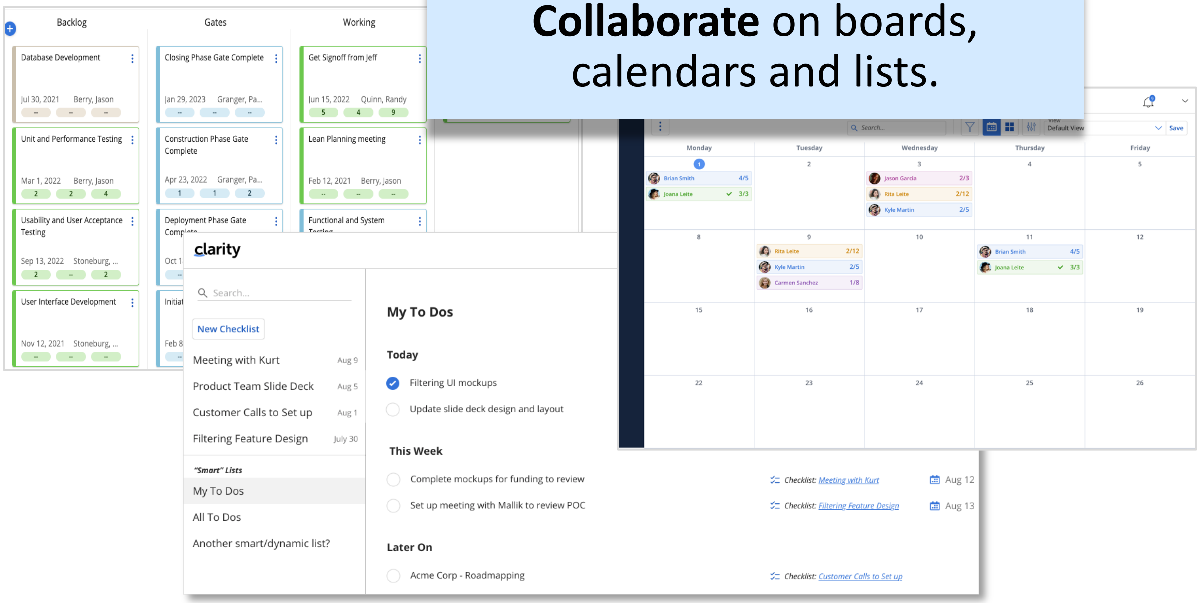
Invite anyone (inside or outside the company) to work on your to-do lists.

Users **self-register** for fast and easy access.

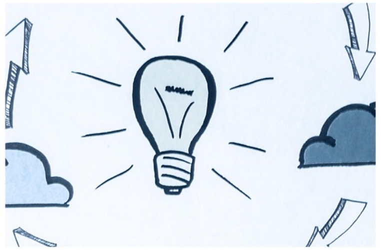


Engage team members with conversations.

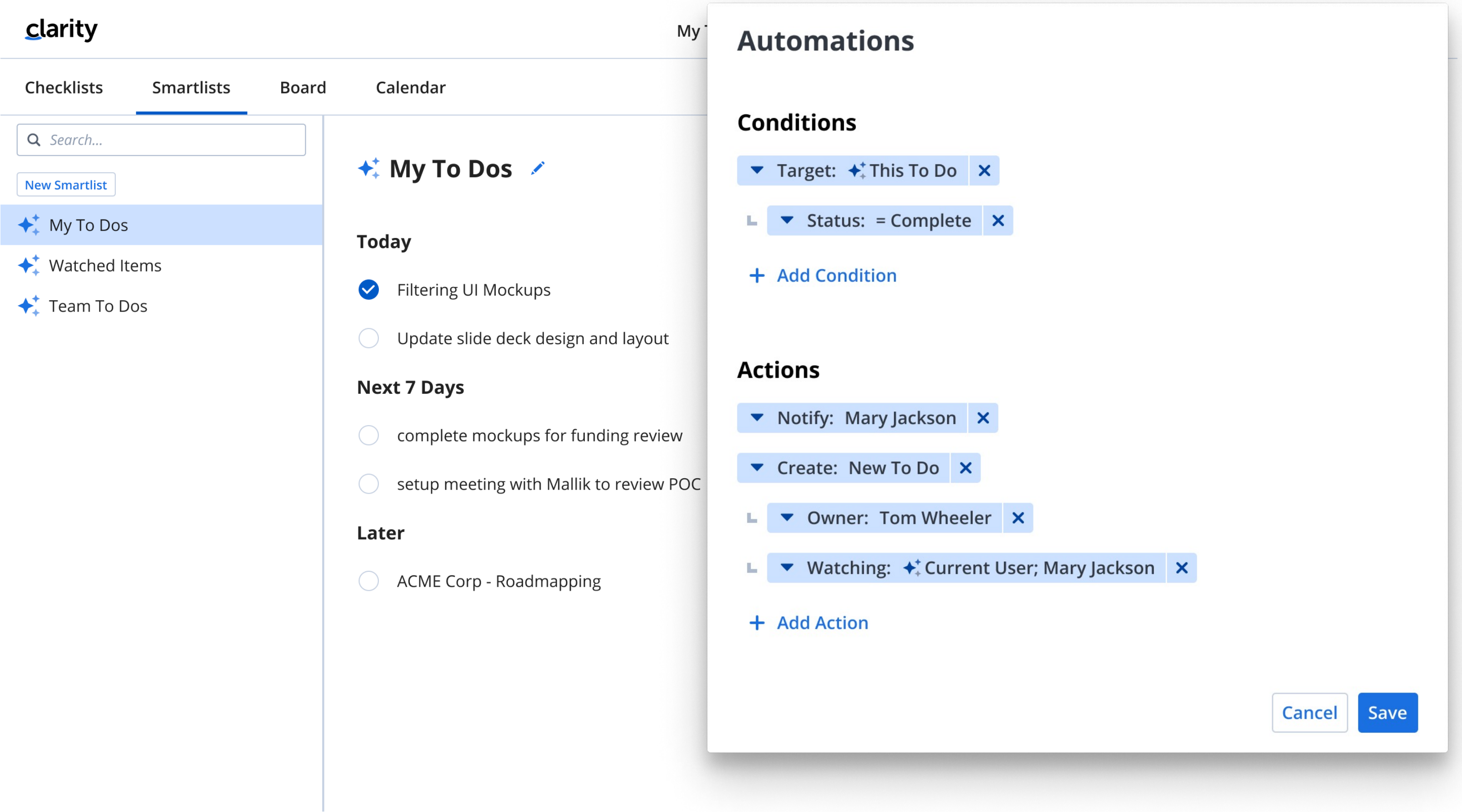
Collaborate on boards, calendars and lists.








Automate Work.



Build simple workflow to automate basic activities.

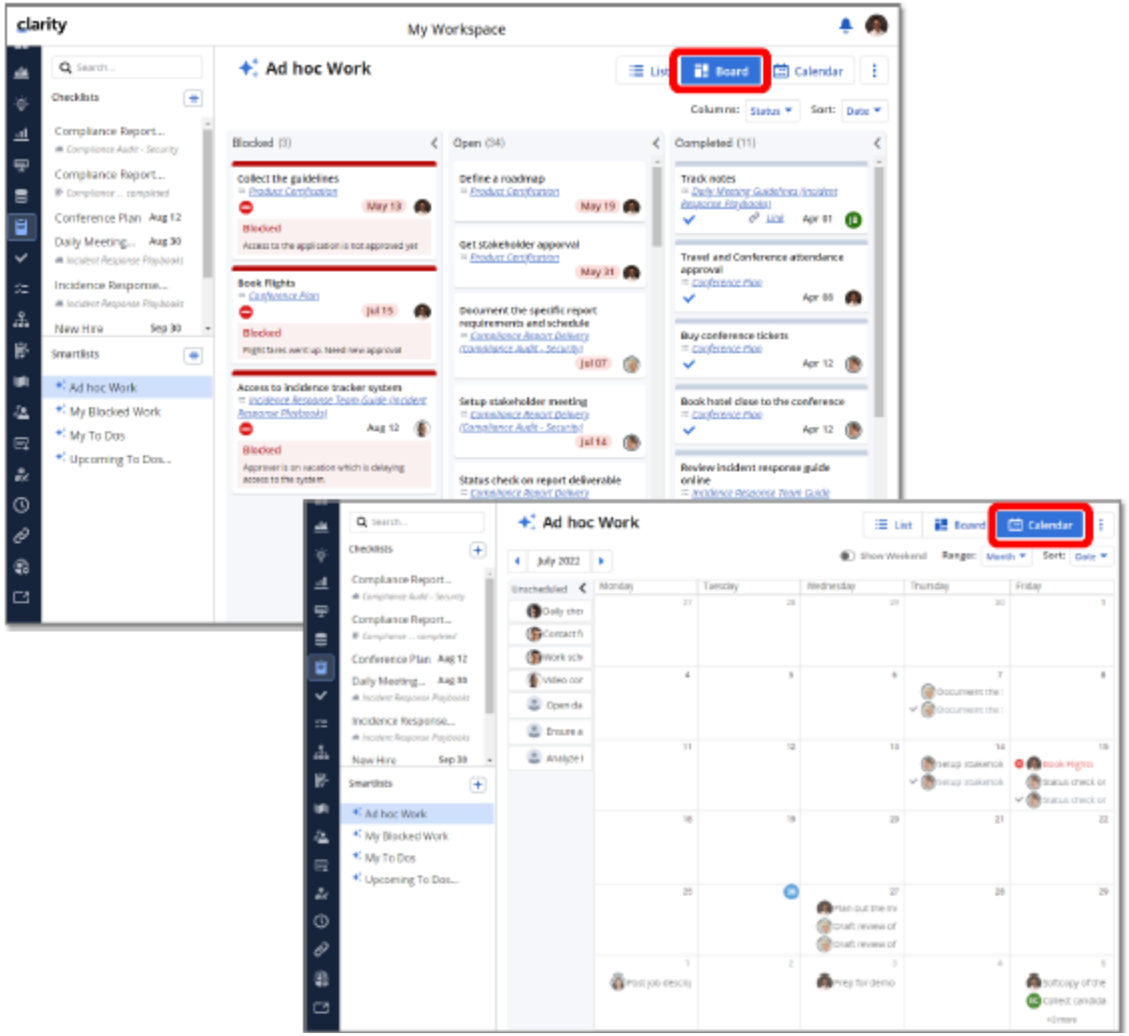
If This, Then That:
Send alert, create new to do, change watcher, etc.

Eliminating the mundane allows teams to focus on delivering value.

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.