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SAN DIEGO • 2023

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>

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 Comparison 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)	Notifications: To Do Owner	16.1.3	Clarity	
Lifecycle Management (incl. Demand Mgmt)	Notifications to Task Assignees (with possibility to use MVs 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 Comparison Features				
Module		Feature	Release	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: Flexibility 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 Comparison Features					
Module	IT	Feature	IT	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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“Key Findings

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¹ <https://www.gartner.com/reviews/market/collaborative-work-management>

² <https://www.gartner.com/en/documents/4022601>

“Task-Driven Team Hubs”

The image displays three overlapping screenshots of a project management tool interface, likely Microsoft Project or a similar application, illustrating "Task-Driven Team Hubs".

- Top Screenshot:** Shows a "Cloud Migration To Dos" task list. The left sidebar contains a "Checklists" section with items like "CI/CD Pipeline Readiness", "Communications Readiness", "Cutover Readiness", "Data Readiness", and "DOD IL4 Compliance Readiness". A "Blocked" task is highlighted with a red bar and the text "Establish & validate Blackout Exit Criteria".
- Middle Screenshot:** Shows a calendar view for January 2023. Tasks are plotted on the calendar, such as "Documentation of Dat" on Monday and "Blackout scenarios and proce" on Wednesday.
- Bottom Screenshot:** Shows an "Idea Checklists" view. It lists various tasks with associated dates and status indicators (e.g., "Apr 14 PA", "Apr 28 ST", "May 05 CA").

“Workflow, Integration, and Automation”

The screenshot displays the Clarity software interface, highlighting workflow, integration, and automation capabilities. The main view is the 'Action Items' section, which is divided into 'Open (3)', 'Pending', and 'Closed (116)' categories. The 'Open Action Items' list includes:

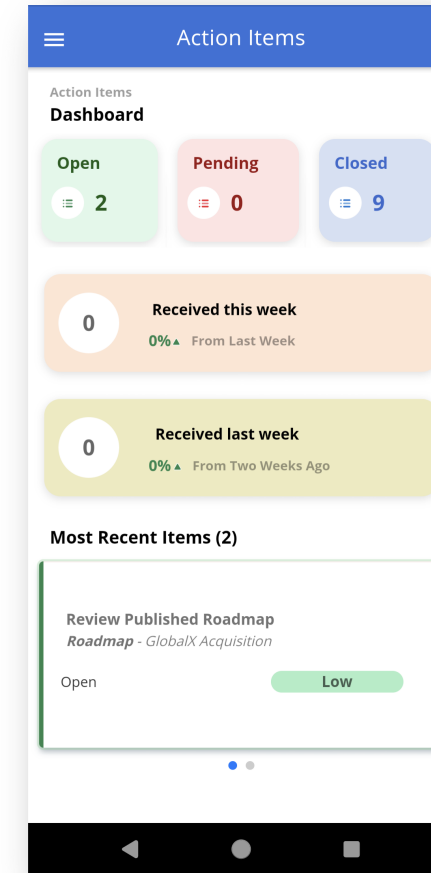
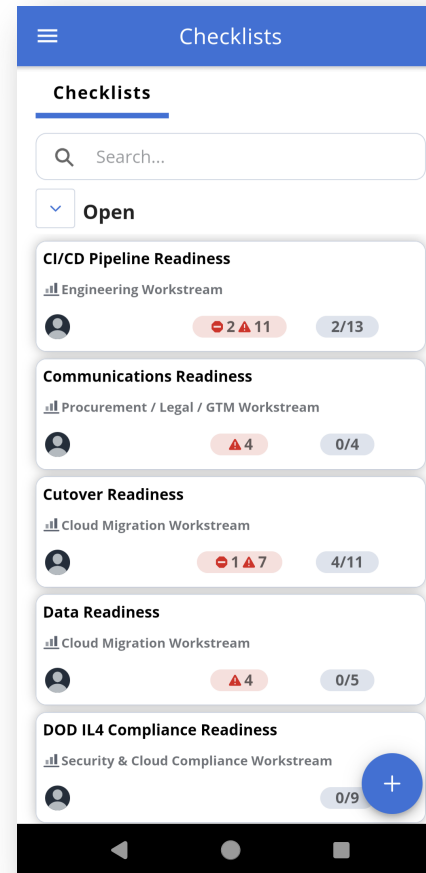
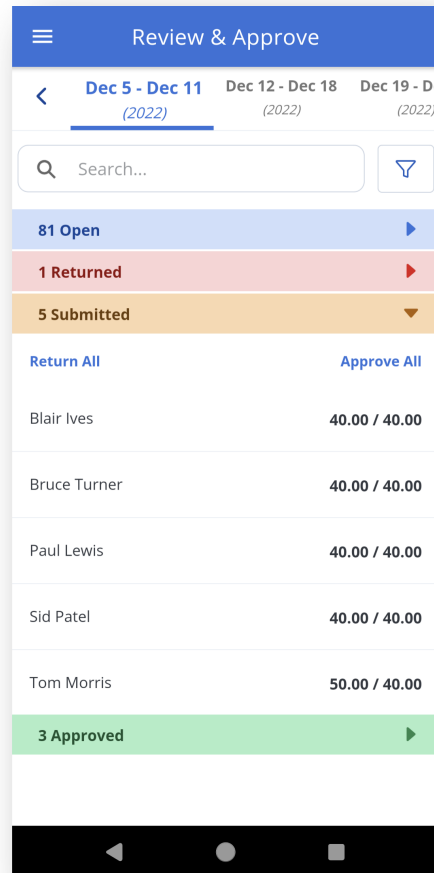
- ABLE Payments Module has been placed On Hold** (Priority: High)
 - Project: *ABLE Payments Module*
 - Please review your project to see why it has...
 - Buttons: Done, View History
- Review Published Roadmap** (Roadmap: *GlobalX Acquisition*)
 - Buttons: Approved, Rejected, View History
- Please review the issue: Pacing Sales growth** (Issue: *Pacing Sales growth*)
 - Please resolve or escalate the following high priority issue.
 - Issue Name: Pacing Sales growth
 - Project Name: Overall M&A Playbook
 - Issue Category: Interdependencies
 - Issue Owner: Higgins, Tanya

Overlaid on the main view are two other Clarity windows:

- Notifications**: A window with a search bar and a 'New Notification' button.
- Project - Major**: A window showing the 'Rules' tab for a project. It includes a table of rules:

Rule Name * ↑	Enabled *	Description	Last Updated By	Last Update
Hide Financials	✓	Hide the financial section for On Hold or Canceled Projects	Arpel, Ian	
Hide Modules When Completed	✓	Hide Modules when Project Work Status is set to completed	Arpel, Ian	
Make Strategy a Required Field when Project Work Status is Active	✓	Make Strategy a Required Field when Project Work Status is Active	Arpel, Ian	
Notify stakeholder when project goes On Hold	✓	Send action item to Primary Stakeholder when Work Status is set to On Hold	Arpel, Ian	
Status Reports not Editable once Submitted	✓	Once Final, the Status Report is not editable	Arpel, Ian	
When the Grow the Business goal is attached to a Project, do something.	✓	When the Grow the Business goal is attached to a Project, do something.	Arpel, Ian	

“Workflow, Integration, and Automation”



“Conversations, Content Publishing”

The screenshot displays the Clarity software interface, divided into two main sections: 'Conversations' and 'Status Reports'.

Conversations Section:

- My Workspace:** Shows navigation tabs for 'To Dos', 'Action Items', and 'Conversations'.
- Conversations List:** A list of conversation threads with details such as 'Due to recent re-org, we have a gap in...', 'Pods: Crushers Pod', 'Team: UX', and 'Objective: Accelerate company solution adoption'.

Status Reports Section:

- Match Filters:** Includes filters for 'Report Status = Final', 'Active (Common Investment) = Yes', and 'Template (Common Investment) = No'.
- Table:** A table with 10 items selected, showing various metrics and statuses.

Starrd	Investment ID	Latest	Report Status	Report Date	Overall Status	Schedule Status	Scope Status	Cost and Effort Status	Status Report Update
<input checked="" type="checkbox"/>	Pro00000001	✓	Final	Apr 15, 2022	Needs Help	On Track	On Track	Needs Help	
<input checked="" type="checkbox"/>	PRO00000010	✓	Final	Apr 15, 2022	Needs Help	On Track	On Track	Needs Help	
<input checked="" type="checkbox"/>	PR2009	✓	Final	May 3, 2022	Needs Help	Needs Help	On Track	On Track	A lot of work came together this week to complete several tasks and getting Phase 1. Removing Effort Status filters, tasks are back on track. Schedule should get back on track by end of
<input checked="" type="checkbox"/>	EPI00000038	✓	Final	Mar 9, 2023	Needs Help	Needs Help	On Track	Needs Help	
<input checked="" type="checkbox"/>	WS00000001	✓	Final	Mar 24, 2023	Needs Help	Needs Help	Needs Help	On Track	

“Reporting, Analytics, Dashboards”

The screenshot displays the Microsoft Clarity software interface, which is used for project reporting and analytics. It is divided into several main sections:

- Left Panel (Hierarchy):** Shows a 'Global Compliance Program Hierarchy' and a 'Lean Canvas Business Case' with the text: 'What problem are we solving? We need a way for a business leader, product leader or a...'. It lists two bullet points: 'Organize the investments they care about' and 'Group them hierarchically so they can visualize and...'. Below this, it asks 'What solution are we proposing?' and states: 'The ability to create your own investment names. If you p... initiatives, release trains, value streams or outcomes. The investment management by enabling organizations to ca...'. At the bottom, a 'Role Breakdown' shows: 6 Project Manager, 5 Engineer, 5 ML Engineer, 5 QA, 5 Security Architect, 4 Business Analyst, 3 Architect, and 1 None.
- Top Panel (Cloud Transformation Program):** Displays 'Cloud Transformation Program H0000004' with various navigation tabs like 'Investments', 'Status', 'Financials', 'Risks', 'Issues', 'Changes', 'Conversations', 'Dashboard', and 'Properties'. It includes a 'Plan Type' dropdown set to 'Cost Plan' and a 'View' dropdown set to 'Default View'.
- Dashboard (Agile Performance):** Features several key metrics:
 - Capital:** 2.9M
 - Operating:** 6.97M
 - Transclass:** 14% (with a pie chart showing 'Internal ...' and 'Hardware')
 - Capitalization %:** 30% (with a gauge chart)
 - Top 3 Categories:** 7.06M Internal Labor
- Agile Performance Summary:**
 - SPEND:** % of Funding 70%, Budget \$400,000, Actuals \$280,000.
 - CAPEX/OPEX:** CapEx \$100K, OpEx \$180K.
 - Schedule:** % of Schedule 62%, Start 10/31/22, Finish 6/28/23.
 - Weeks Remaining:** 4
 - Funded FTEs:** 35
- Feature Progress Table:**

Feature	Feature ID	Est. Storypoints	Storypoints Accepted	% Complete	Actuals	Actual Cost	Start	Finish
Backorder fulfillment	F44	18	18	100%	169	\$25,354	10/31/22	4/21/23
Credit card error messaging	F19	70	70	100%	0	\$0	10/31/22	4/21/23
Credit card payments	F24	80	80	100%	0	\$0	11/28/22	12/21/22
Duplicate order fulfillment	F49	4	4	100%	182	\$27,368	10/31/22	4/21/23
Implement Fraud Detection	F23	25	5	20%	185	\$27,750	1/19/23	2/24/23
Integrate with Amex Gateway	F48	31	15	48%	190	\$28,470	10/31/22	4/21/23
Integrate with PayPal	F37	50	40	80%	0	\$0	11/21/22	12/22/22
Integrate with WePay	F18	100	70	70%	0	\$0	11/24/22	1/6/23
Online refunds	F38	60	40	66%	0	\$0	11/14/22	12/22/22
Priority shipping	F36	78	70	89%	0	\$0	11/28/22	12/23/22
Product Listings	F9	82	29	35%	199	\$29,922	2/6/23	3/3/23
Purchase path	F35	100	90	90%	0	\$0	11/14/22	12/30/22
Refund management	F10	90	0	0%	0	\$0	11/21/22	12/22/22
Shopping Cart	F17	60	60	100%	0	\$0	12/5/22	12/22/22
Support cash/check by mail	F45	23	23	100%	240	\$35,925	10/31/22	4/21/23
User Profile	F20	80	60	75%	0	\$0	12/5/22	2/1/23
Total					1165	\$174,789		
- % Complete and % Remaining by Feature:** A horizontal bar chart showing progress for each feature, with green representing '% Complete' and grey representing '% Remaining'.

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.



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- 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**



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info@regoconsulting.com



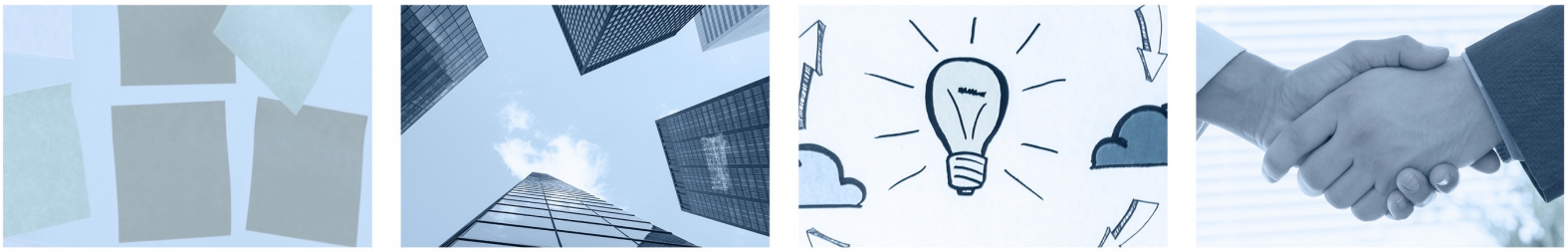
Website

www.regouniversity.com

APPENDIX

- Broadcom Slides
- New Enhancements

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...

Project: 2020 Q4 Pl Plan Aug 9

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

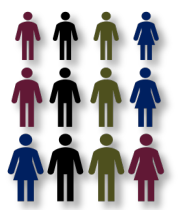
OpEx \$1.2M

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

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, ...

Gates

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...

Working

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

Signoff

Prepare Business Case Content

Jun 30, 2021 Quinn, Randy

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 items 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 for 'My To Dos', 'All To Dos', and 'Another smart/dynamic list?'. The main area is titled 'My To Dos' and is divided into three sections: 'Today', 'This Week', and 'Later On'. The 'Today' section has two items: 'Filtering UI mockups' (checked) and 'Update slide deck design and layout'. The 'This Week' section has two items: 'Complete mockups for funding to review' and 'Set up meeting with Mallik to review POC'. The 'Later On' section has one item: 'Acme Corp - Roadmapping'. On the right side of the main area, there's a project overview for '2020 Q4 PI Plan' with a list of checklists: 'Product Team Slide Deck' (Aug 9), 'Meeting with Kurt' (Aug 12), 'Filtering Feature Design' (Aug 13), and '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.

Users self-register for fast and easy access.

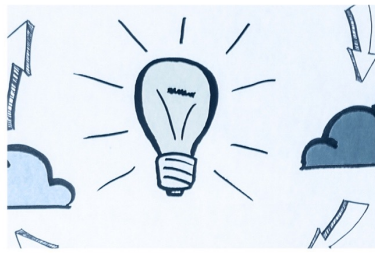
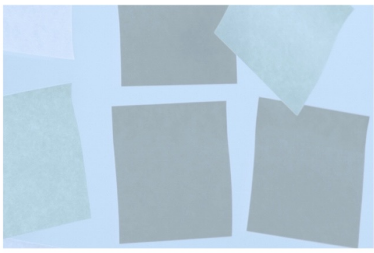
Collaborate on boards, calendars and lists.

The screenshot shows the Clarity interface with a sidebar on the left containing 'Action Items from Scrum', 'Rego Annual Users Confer...', 'Customer Calls to Set up', 'Candidates to interview', and 'Smart Lists'. The main content area displays a checklist for 'Rego Annual Users Conference' with a date of 'Sep 20, 2021' and a narrative: 'Here is a longer description about what this event / checklist is for. Space to write more details about what we are working on.' The checklist items are: 'Complete Slide deck content' (checked), 'Finalize invite list', 'Update slide deck design and layout', and 'Creat Product Demo Video'. There is an 'Add To Do' button at the bottom.

The screenshot shows a 'Conversations' section with a text input field 'Start a conversation...'. Below it is a thread of messages: 'Debra' (Nov 18, 2021 7:11 am) says 'Thanks Patrick Clark. Let's plan to publish the approved schedule by end of next month. We need to be sure that all stakeholders are ready for the 12/31 decommission date. We can set up a QA session to answer stakeholder questions.' 'Patrick' (Nov 18, 2021 7:10 am) replies 'Debra Barry I am working on the schedule now and should have it approved by next week.' 'Debra' (Nov 18, 2021 7:09 am, edited Nov 18, 2021 7:09 am) replies 'Patrick Clark Have you put together a communication plan for Sales and HR regarding final migration dates?'.

The screenshot shows three overlapping views of the Clarity interface. On the left is a Kanban board with columns 'Backlog', 'Gates', and 'Working', containing items like 'Database Development', 'Closing Phase Gate Complete', and 'Get Signoff from Jeff'. In the center is a 'My To Dos' list with items like 'Meeting with Kurt', 'Product Team Slide Deck', and 'Customer Calls to Set up'. On the right is a calendar view showing tasks assigned to team members like 'Rico Lete', 'Ayle Martin', and 'Carmen Sanchez' across various dates.

Engage team members with conversations.



Automate Work.

clarity My

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.

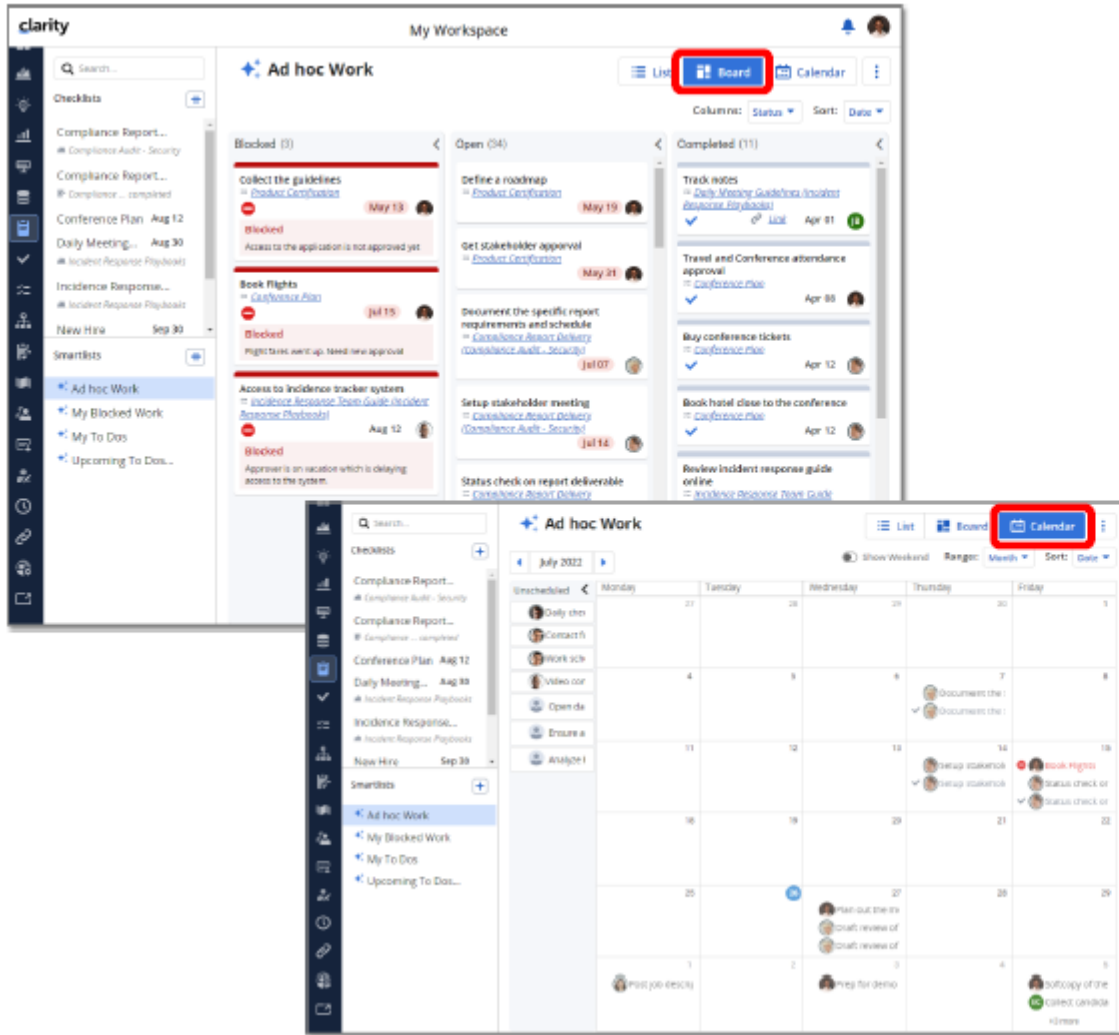
If This, Then That:
Send alert, create new to do, change watcher, etc.

Eliminating the mundane allows teams to focus on delivering value.

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.