regoUniversity

SAN DIEGO • 2023

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Drive Adoption with Modern UX Features

Your Guides:

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Agenda

- Introduction
- Checklists/To Dos
- My Work
- My Workspace
- Investment Dashboards
- Blueprints – Business Rules
- Blueprints – Action Items
- Notifications
- Roadmaps
- Hierarchies
- CITs

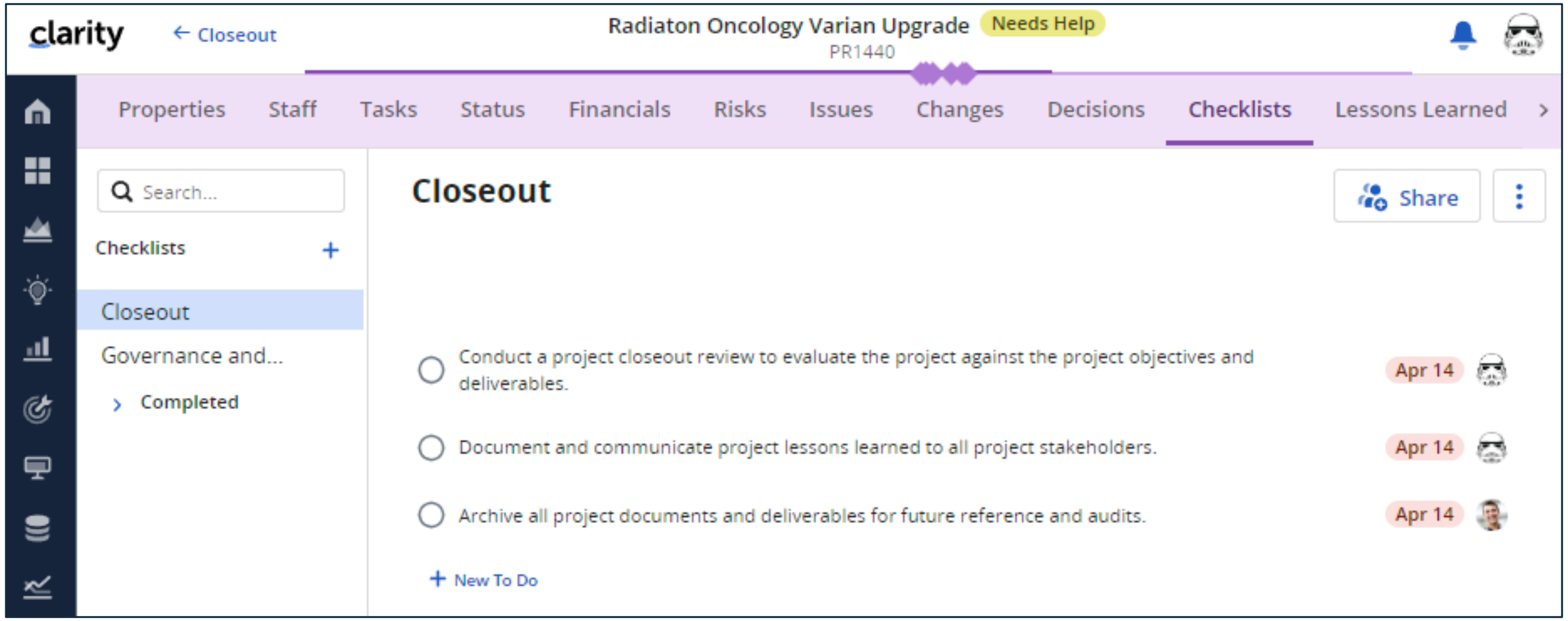
Open Mic: Aside from the common PM, RM, TM personas, what "non-traditional" use cases have you tried to solve for in Clarity? What worked well and what challenges did you face?

Introductions

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

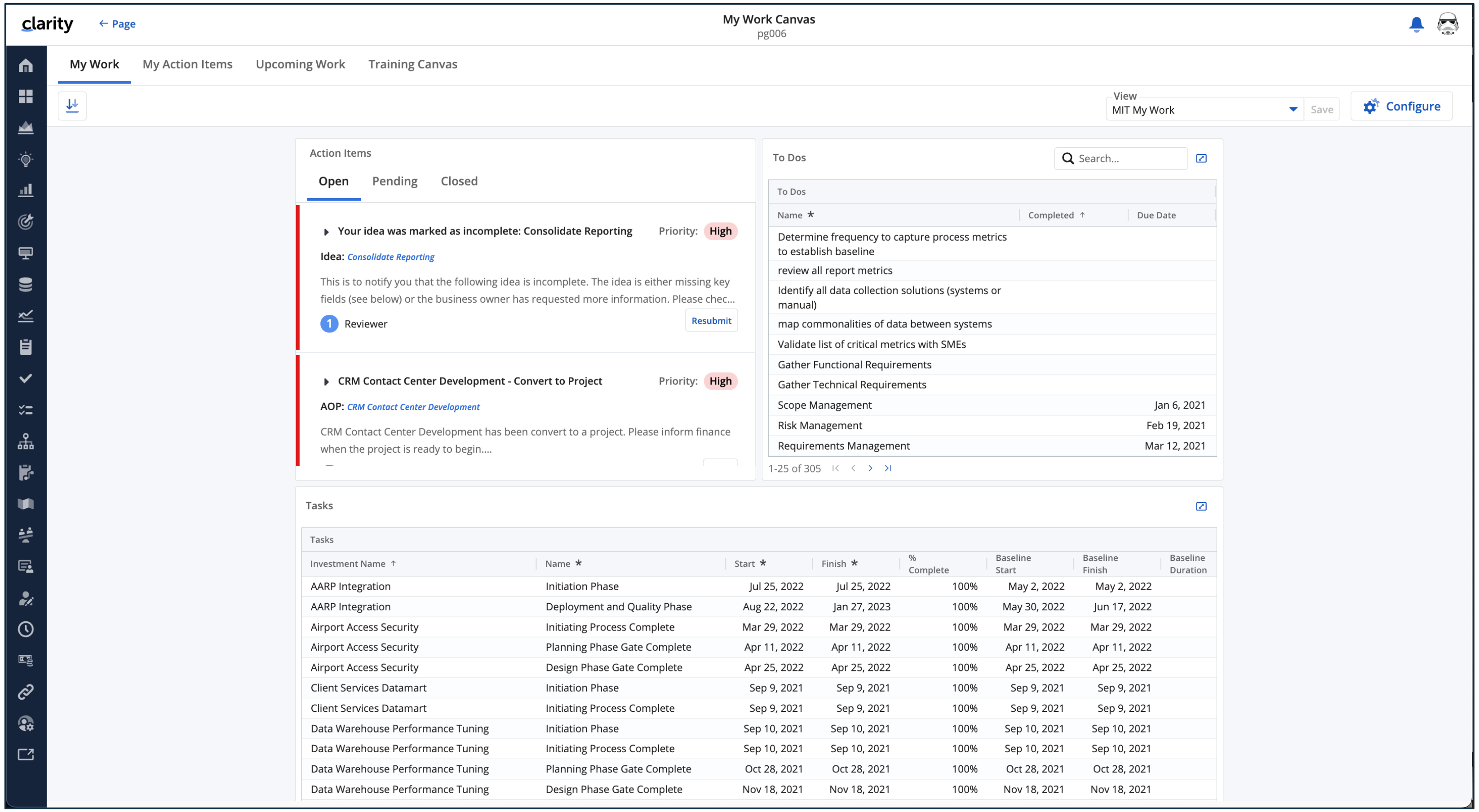
Checklists / To Dos

- Remove sticky notes, notepads, and other applications by tracking simple To Dos within Clarity.
- Examples:
  - Project Manager's Checklist
  - Checklist for Stage Gates



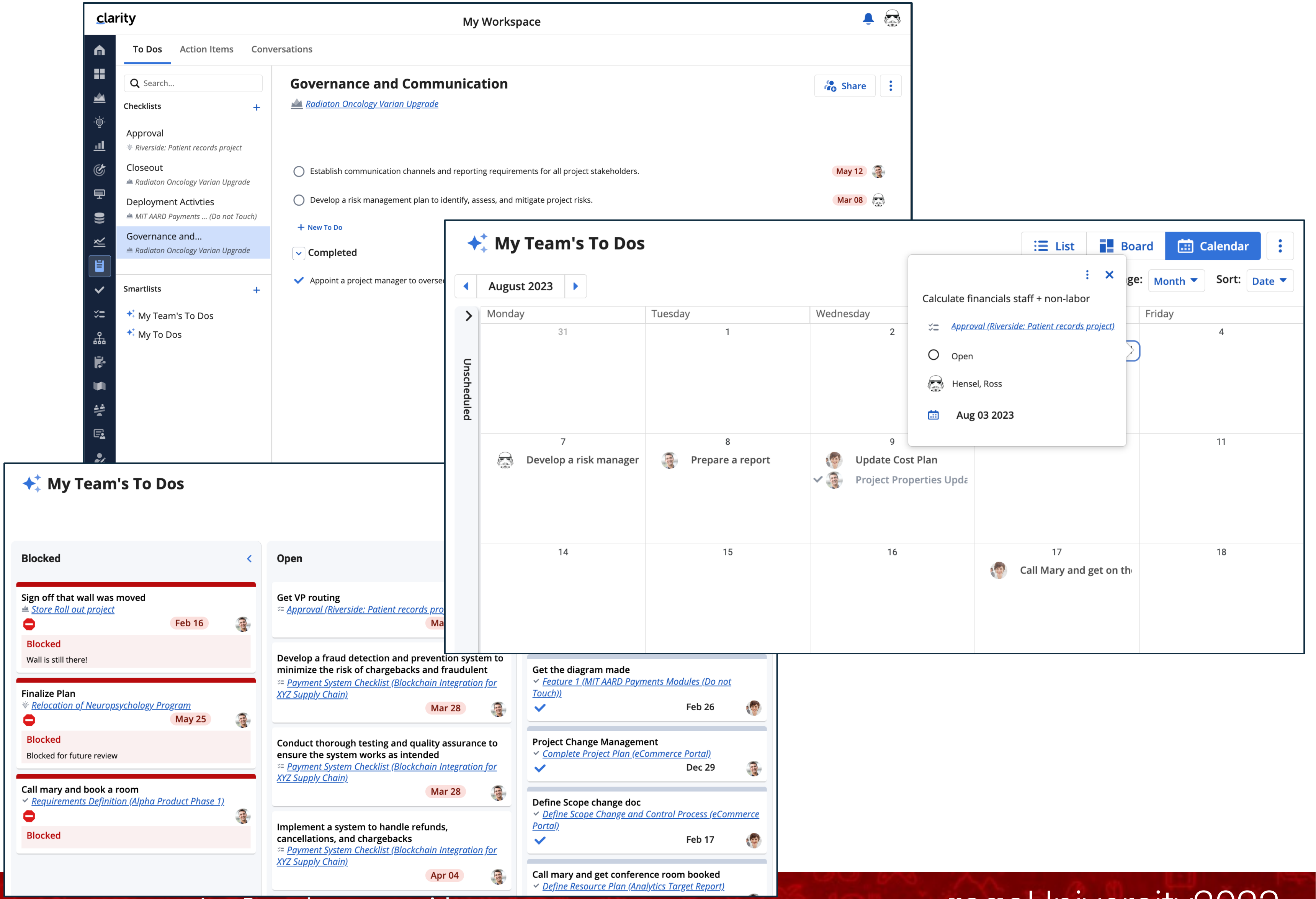
My Work Dashboard

- Avoid storing report locations and tracking in offline tools; instead, provide a single dashboard for users to view their:
  - Action Items
  - To Dos
  - Tasks
  - Risks
  - Issues
  - Changes



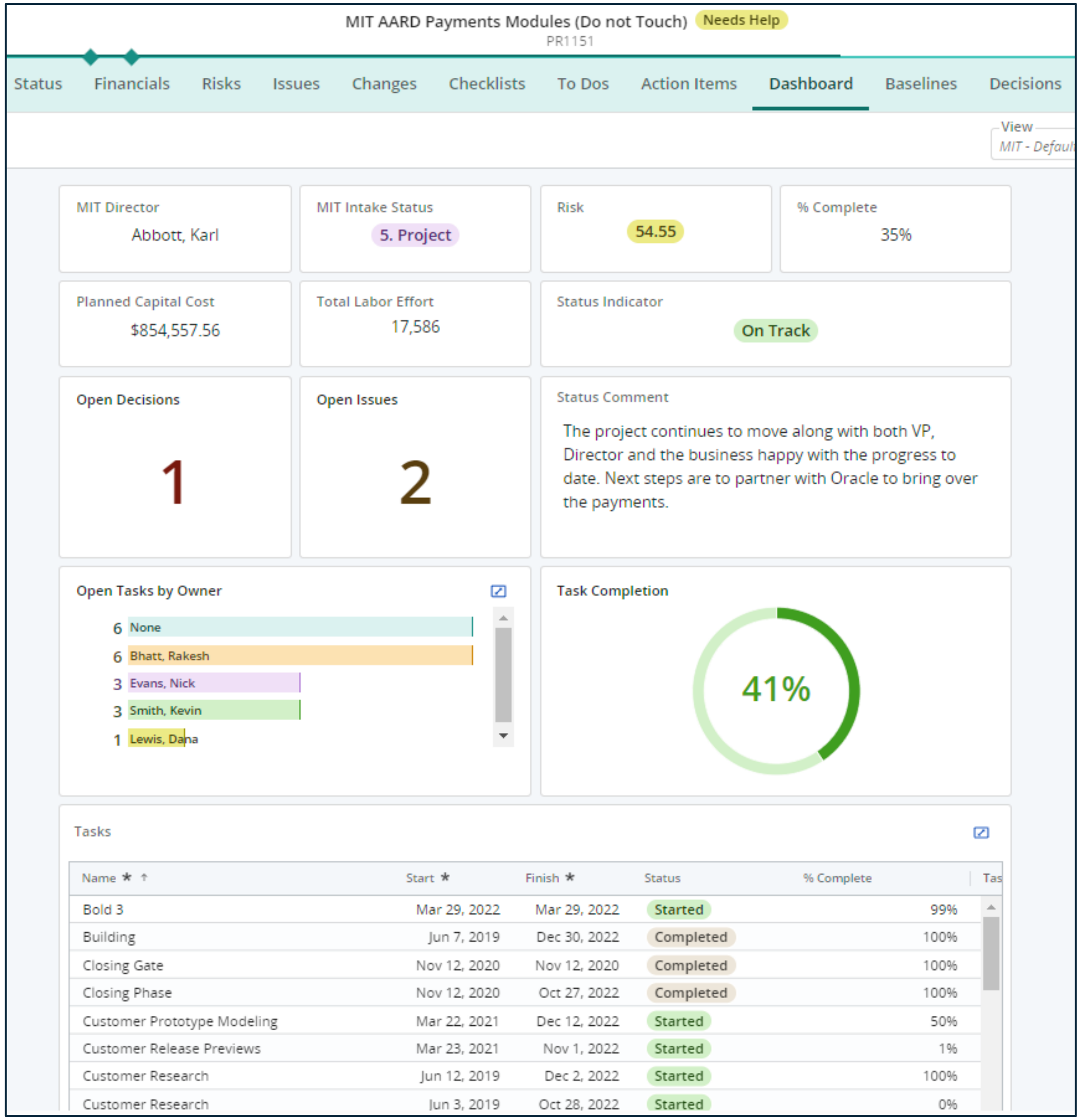
My Workspace

- Effectively manage your team's work without Slack, MS Teams and email by running your stand-up in My Workspace
- Utilize several ways to work with To Dos:
  - List View
  - Board View
  - Calendar View
- View/Triage all Action Items
- View/Reply all Conversations



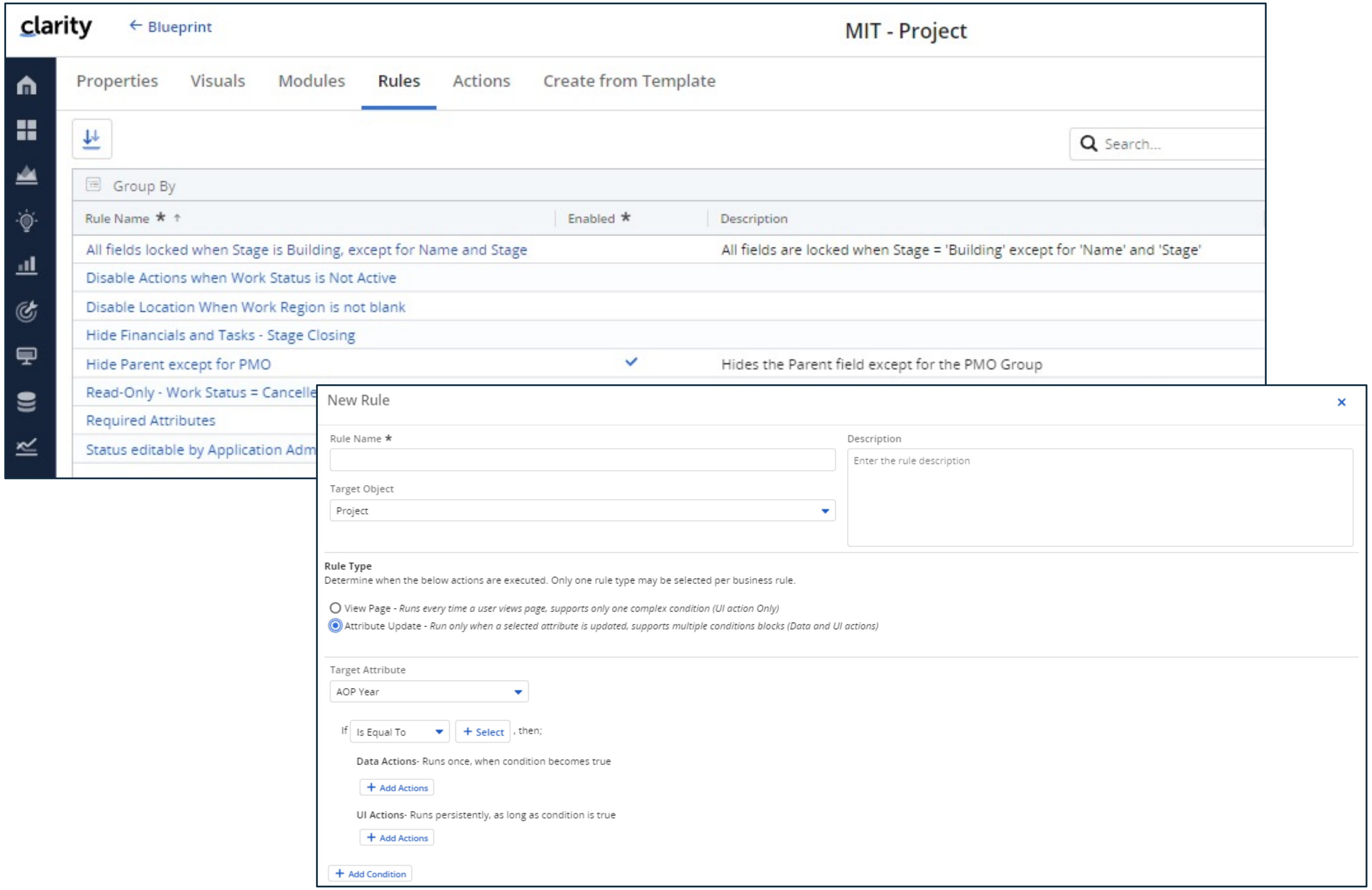
Investment Dashboards

- Save time and build a one-pager for one or many stakeholders, your manager or even a vendor utilizing Canvases/Dashboards by having several views of the relevant information.
- Create dashboards within investments to quickly display project information, key tasks, decisions, risks, issues, financials and more!
- Fully exportable
- Customize Dashboards and save them as views



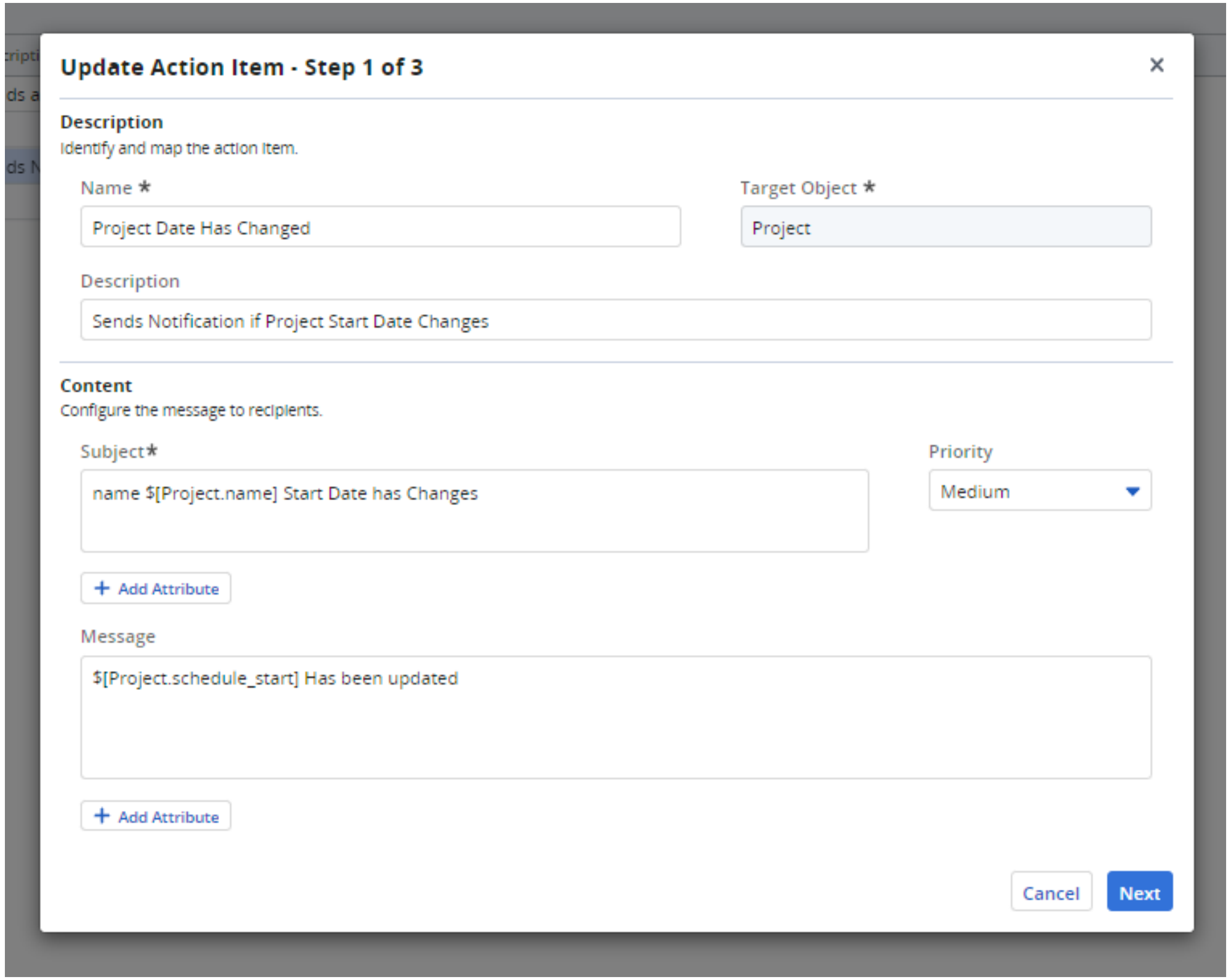
Blueprints – Business Rules

- Allow your Project Managers to only view the information critical to the project, simplify screens, build views to accommodate many methodologies, and even inform users when certain actions are taken.
- Utilize Rules to:
  - Hide Modules
  - Hide Certain Fields
  - Disable Record/Attribute Editing
  - Require Fields
  - Send Action Items
  - Set Attributes



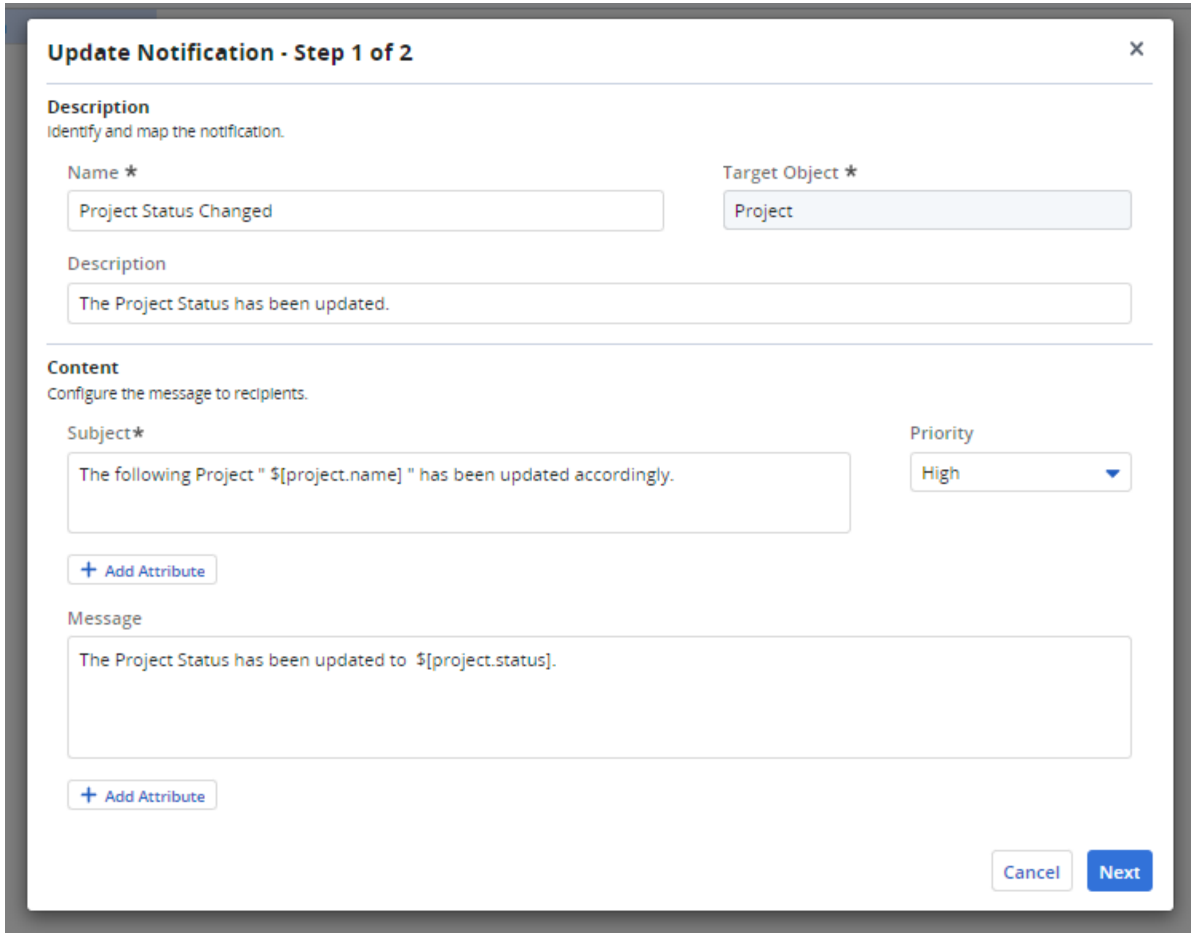
Blueprints – Action Items

- Get out of the email business! Quickly decision requests within the tool so it can be tracked consistently with auditing.
- Send action items when a party or person needs to be notified of a change.
- Examples:
  - Project Dates have changed
  - Project Stage Gate Changes
  - Project Approvals



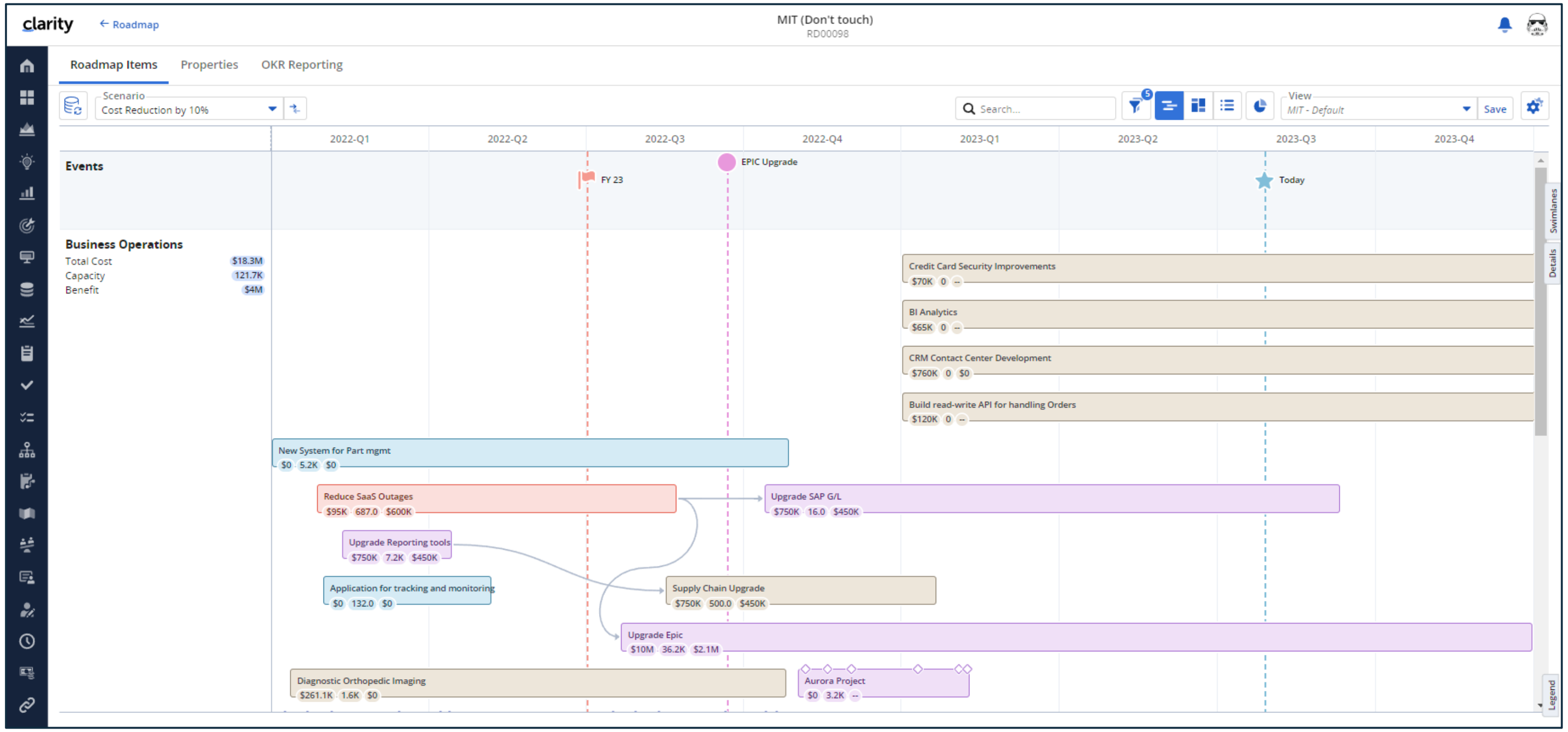
Notifications

- Stop messages floating around about status, date, or any other changes. Use notifications to keep users informed when certain key items are adjusted.
- Send notifications to selected user(s) when fields are updated.
- Examples:
  - Project has been approved
  - Project stage updated



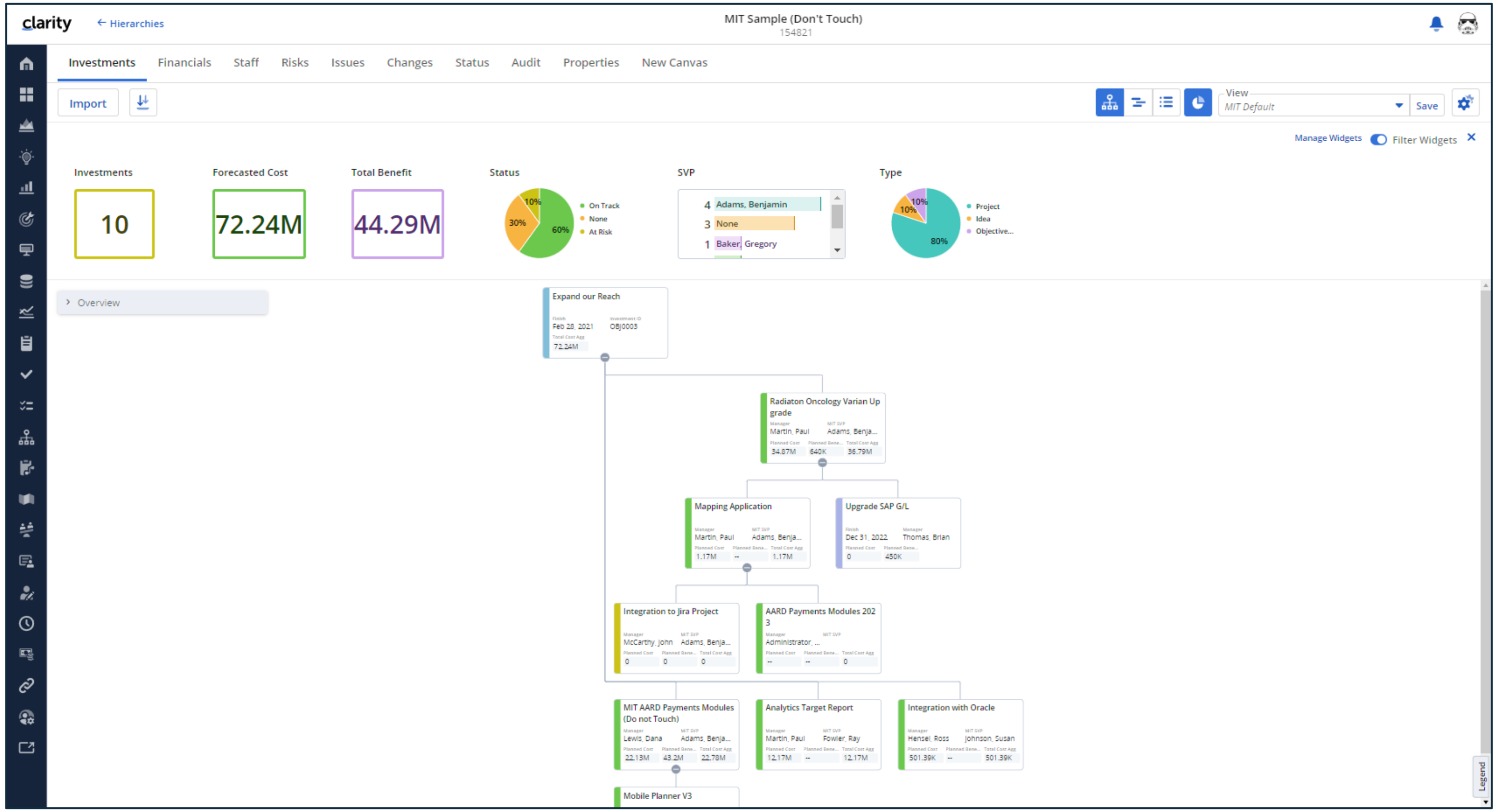
Roadmaps

- No more PPT roadmaps! Quickly grab all your investments and have Clarity build your roadmap, display the information that's important- grouped how you need it.
- Pull in any type of investments and make informed decisions and even create scenarios.
- Examples:
  - Product Roadmaps
  - 5 Year Strategic Roadmap
  - AOP
  - PI Planning



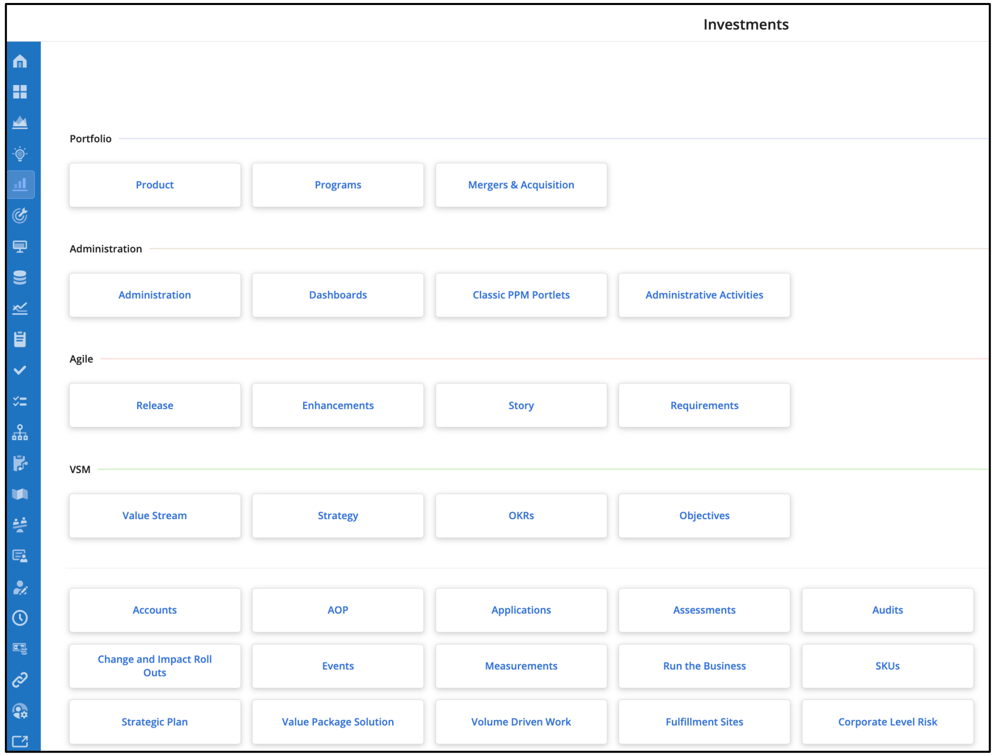
Hierarchies

- Don't export and merge into mega-Excel! Summarize project information in a hierarchy to fit the desired level of information.
- Roll-up investment level information to provide a quick one-stop-shop for investment information
- Examples:
  - Portfolios
  - Programs
  - Strategic Planning (OKRs)



Custom Investments

- Share the love! IT isn't the only group who can benefit from Clarity. Streamline enterprise level reporting by allowing other business units to utilize Clarity and report out at the enterprise level.
- Like Projects but another separate investment type
- Examples:
  - Innovation Centers
  - Business groups
  - HR
  - Finance
  - Procurement



Open Mic: Have you expanded outside IT or your initial implementation group?

Additional Resources

Some Related RegoU Sessions

"Adoption Roundtable" – Tuesday 1:40pm, Constellation B
"Latest Clarity Release Overview" – Tuesday 3:50pm, Constellation B
"Visualization Strategies" – Tuesday 3:50pm, Commodore A
"Migrating to the Modern UX Best Practices" – Tuesday 4:50pm, Commodore A
"Collaborative Work Management" – Wednesday 11:20am, Commodore A

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-modern-ux-white-paper-september-2021
https://info.regoconsulting.com/simplify-change-organizational-change-management
https://info.regoconsulting.com/clarity-roadmaps-fastest-route-to-success
https://www.brighttalk.com/webcast/6505/563591

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.

Questions?

Surveys

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

Thank You For Attending Rego University

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.

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