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SAN DIEGO • 2023

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

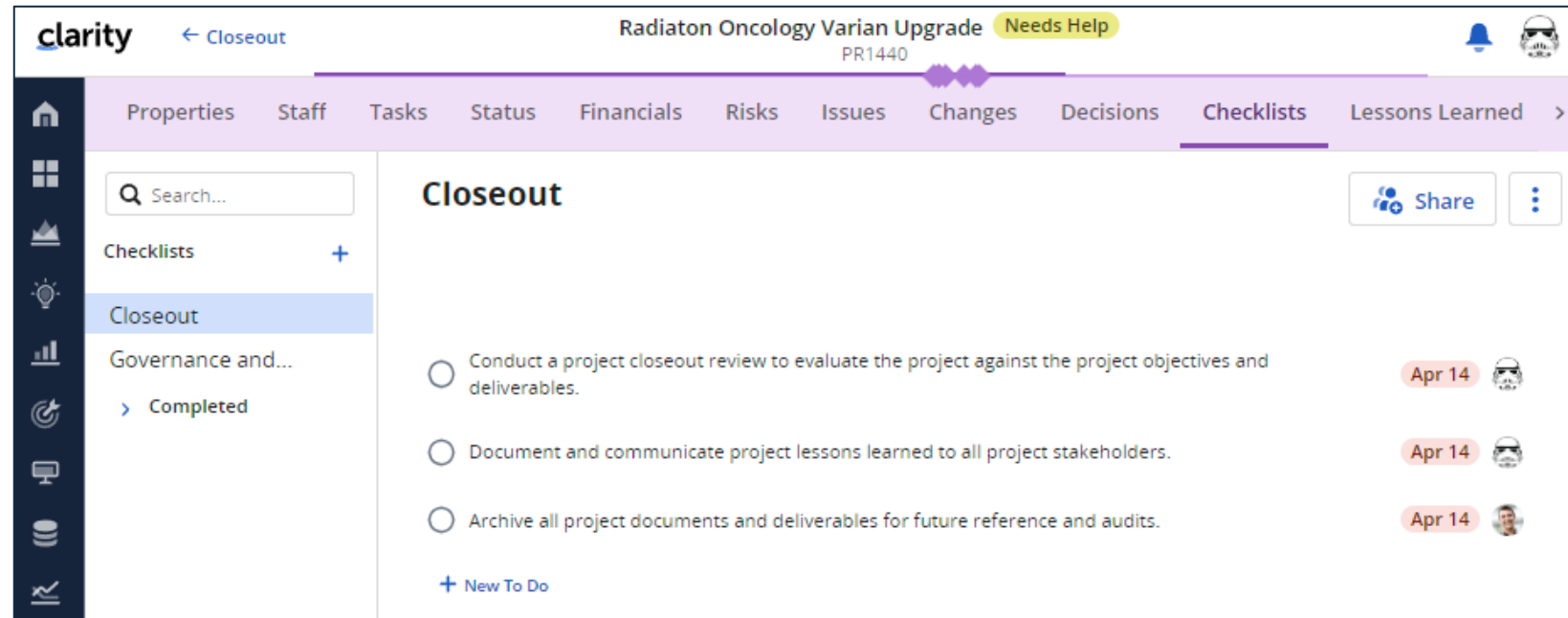
Open Mic: Aside from the common PM, RM, TM personas, what “non-traditional” use cases have you tried to solve for in Clarity? What worked well and what challenges did you face?

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

The screenshot displays the Clarity My Work Canvas dashboard for user pg006. The interface includes a navigation bar with tabs for My Work, My Action Items, Upcoming Work, and Training Canvas. A sidebar on the left contains various tool icons. The main content area is divided into three sections:

- Action Items:** Shows two items with 'High' priority. The first is 'Your idea was marked as incomplete: Consolidate Reporting' with a 'Resubmit' button. The second is 'CRM Contact Center Development - Convert to Project' with an 'AOP: CRM Contact Center Development' link.
- To Dos:** A list of tasks with columns for Name, Completed, and Due Date. Items include 'Determine frequency to capture process metrics to establish baseline', 'review all report metrics', 'Identify all data collection solutions (systems or manual)', 'map commonalities of data between systems', 'Validate list of critical metrics with SMEs', 'Gather Functional Requirements', 'Gather Technical Requirements', 'Scope Management' (due Jan 6, 2021), 'Risk Management' (due Feb 19, 2021), and 'Requirements Management' (due Mar 12, 2021).
- Tasks:** A table showing project progress with columns for Investment Name, Name, Start, Finish, % Complete, Baseline Start, Baseline Finish, and Baseline Duration.

Investment Name	Name	Start	Finish	% Complete	Baseline Start	Baseline Finish	Baseline Duration
AARP Integration	Initiation Phase	Jul 25, 2022	Jul 25, 2022	100%	May 2, 2022	May 2, 2022	
AARP Integration	Deployment and Quality Phase	Aug 22, 2022	Jan 27, 2023	100%	May 30, 2022	Jun 17, 2022	
Airport Access Security	Initiating Process Complete	Mar 29, 2022	Mar 29, 2022	100%	Mar 29, 2022	Mar 29, 2022	
Airport Access Security	Planning Phase Gate Complete	Apr 11, 2022	Apr 11, 2022	100%	Apr 11, 2022	Apr 11, 2022	
Airport Access Security	Design Phase Gate Complete	Apr 25, 2022	Apr 25, 2022	100%	Apr 25, 2022	Apr 25, 2022	
Client Services Datamart	Initiation Phase	Sep 9, 2021	Sep 9, 2021	100%	Sep 9, 2021	Sep 9, 2021	
Client Services Datamart	Initiating Process Complete	Sep 9, 2021	Sep 9, 2021	100%	Sep 9, 2021	Sep 9, 2021	
Data Warehouse Performance Tuning	Initiation Phase	Sep 10, 2021	Sep 10, 2021	100%	Sep 10, 2021	Sep 10, 2021	
Data Warehouse Performance Tuning	Initiating Process Complete	Sep 10, 2021	Sep 10, 2021	100%	Sep 10, 2021	Sep 10, 2021	
Data Warehouse Performance Tuning	Planning Phase Gate Complete	Oct 28, 2021	Oct 28, 2021	100%	Oct 28, 2021	Oct 28, 2021	
Data Warehouse Performance Tuning	Design Phase Gate Complete	Nov 18, 2021	Nov 18, 2021	100%	Nov 18, 2021	Nov 18, 2021	

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

The screenshot displays the Clarity 'My Workspace' interface, which is designed for managing project tasks and communication. The interface is divided into several sections:

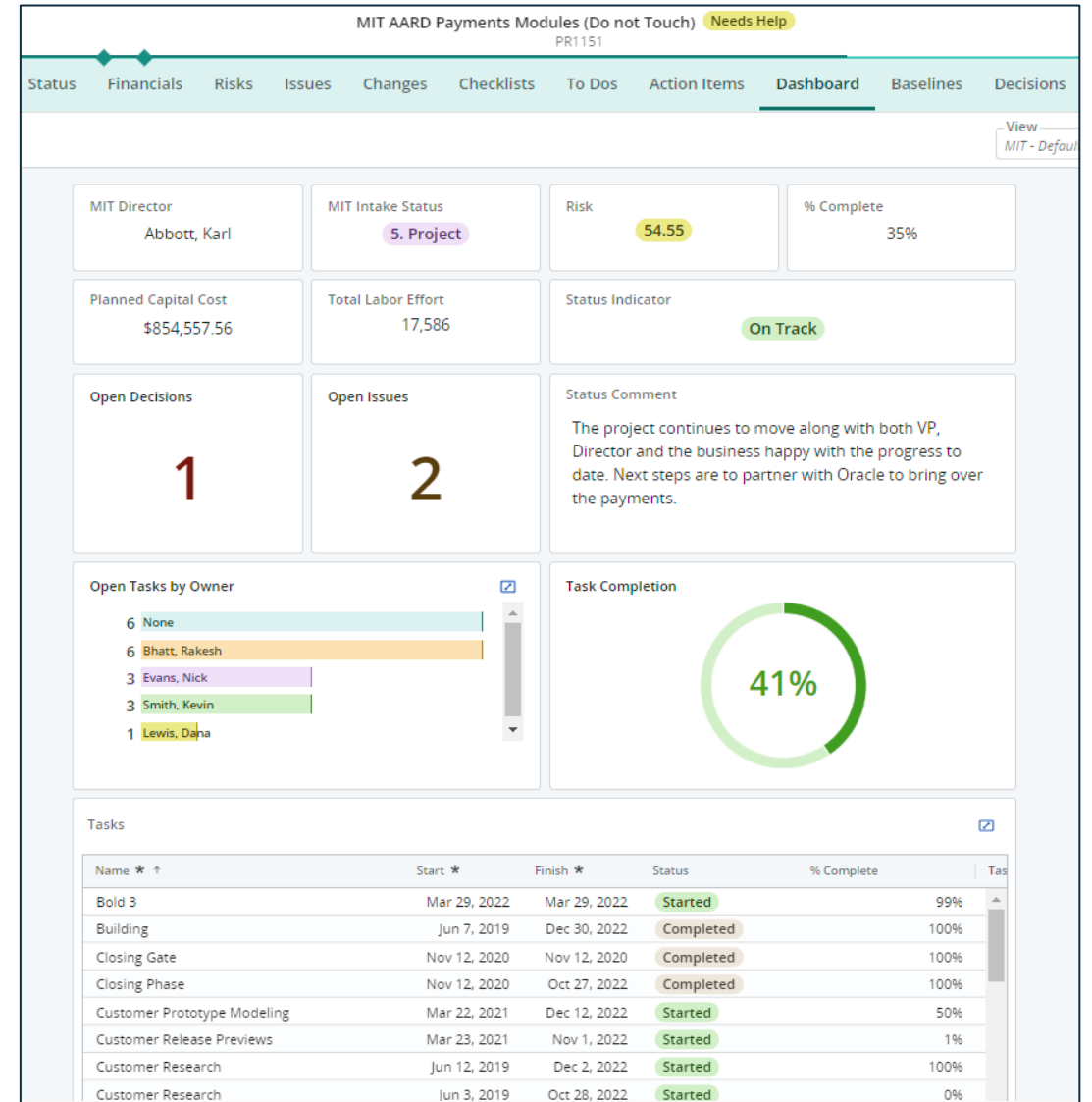
- Navigation and Search:** A top navigation bar includes 'To Dos', 'Action Items', and 'Conversations'. A search bar is located below the navigation.
- Checklists and Smartlists:** A left sidebar contains a list of checklists and smartlists, such as 'Approval', 'Closeout', 'Deployment Activities', and 'Governance and...'. A 'My Team's To Dos' smartlist is also visible.
- Governance and Communication:** The main content area shows a checklist titled 'Radiation Oncology Varian Upgrade' with tasks like 'Establish communication channels and reporting requirements for all project stakeholders' and 'Develop a risk management plan to identify, assess, and mitigate project risks'. It includes due dates (May 12, Mar 08) and user avatars.
- My Team's To Dos (Calendar View):** A calendar view for August 2023 shows tasks assigned to team members. Tasks include 'Develop a risk manager', 'Prepare a report', 'Update Cost Plan', 'Project Properties Upd...', and 'Call Mary and get on th...'. A pop-up window shows details for 'Calculate financials staff + non-labor' with a due date of 'Aug 03 2023'.
- My Team's To Dos (List View):** A detailed list view of tasks, categorized into 'Blocked' and 'Open'. Tasks include 'Sign off that wall was moved', 'Finalize Plan', 'Call mary and book a room', 'Get VP routing', 'Develop a fraud detection and prevention system to minimize the risk of chargebacks and fraudulent', 'Conduct thorough testing and quality assurance to ensure the system works as intended', 'Implement a system to handle refunds, cancellations, and chargebacks', 'Get the diagram made', 'Project Change Management', 'Define Scope change doc', and 'Call mary and get conference room booked'. Each task shows its status, due date, and assigned user.

Let Rego be your guide.

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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

The screenshot shows the 'clarity' interface for a 'Blueprint' titled 'MIT - Project'. The 'Rules' tab is active, displaying a table of rules. A 'New Rule' dialog box is open, allowing configuration of a new rule.

Rule Name * ↑	Enabled *	Description
All fields locked when Stage is Building, except for Name and Stage		All fields are locked when Stage = 'Building' except for 'Name' and 'Stage'
Disable Actions when Work Status is Not Active		
Disable Location When Work Region is not blank		
Hide Financials and Tasks - Stage Closing		
Hide Parent except for PMO	✓	Hides the Parent field except for the PMO Group
Read-Only - Work Status = Cancelled		
Required Attributes		
Status editable by Application Admin		

New Rule

Rule Name *
 Description
 Enter the rule description

Target Object
 Project

Rule Type
 Determine when the below actions are executed. Only one rule type may be selected per business rule.

View Page - Runs every time a user views page, supports only one complex condition (UI action Only)
 Attribute Update - Run only when a selected attribute is updated, supports multiple conditions blocks (Data and UI actions)

Target Attribute
 AOP Year

if Is Equal To + Select , then:

Data Actions- Runs once, when condition becomes true
 + Add Actions

UI Actions- Runs persistently, as long as condition is true
 + Add Actions

+ Add Condition

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

Update Action Item - Step 1 of 3

Description
Identify and map the action item.

Name * Target Object *

Description

Content
Configure the message to recipients.

Subject* Priority

+ Add Attribute

Message

+ Add Attribute

Cancel Next

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

Update Notification - Step 1 of 2

Description
Identify and map the notification.

Name * Target Object *

Description

Content
Configure the message to recipients.

Subject* Priority

+ Add Attribute

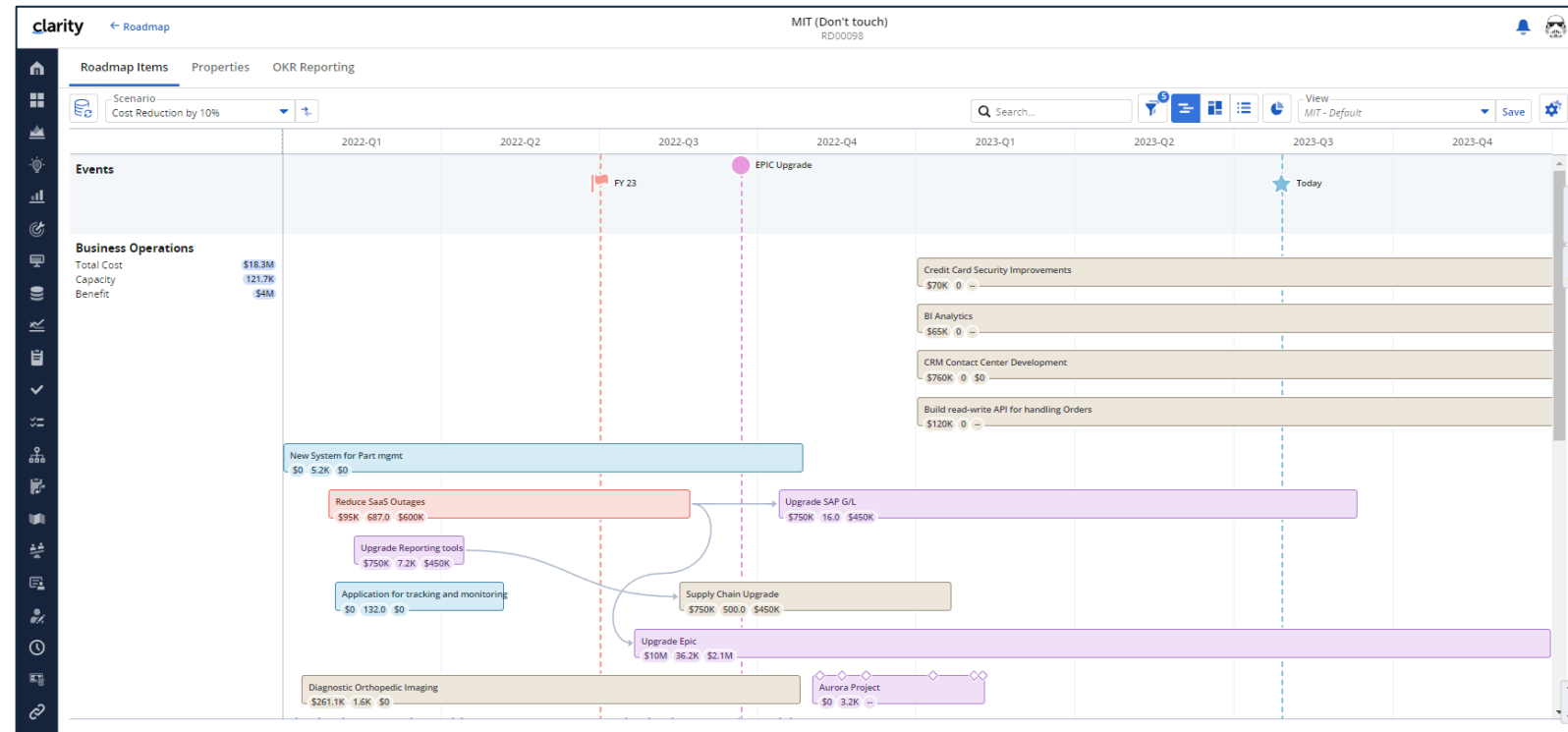
Message

+ Add Attribute

Cancel Next

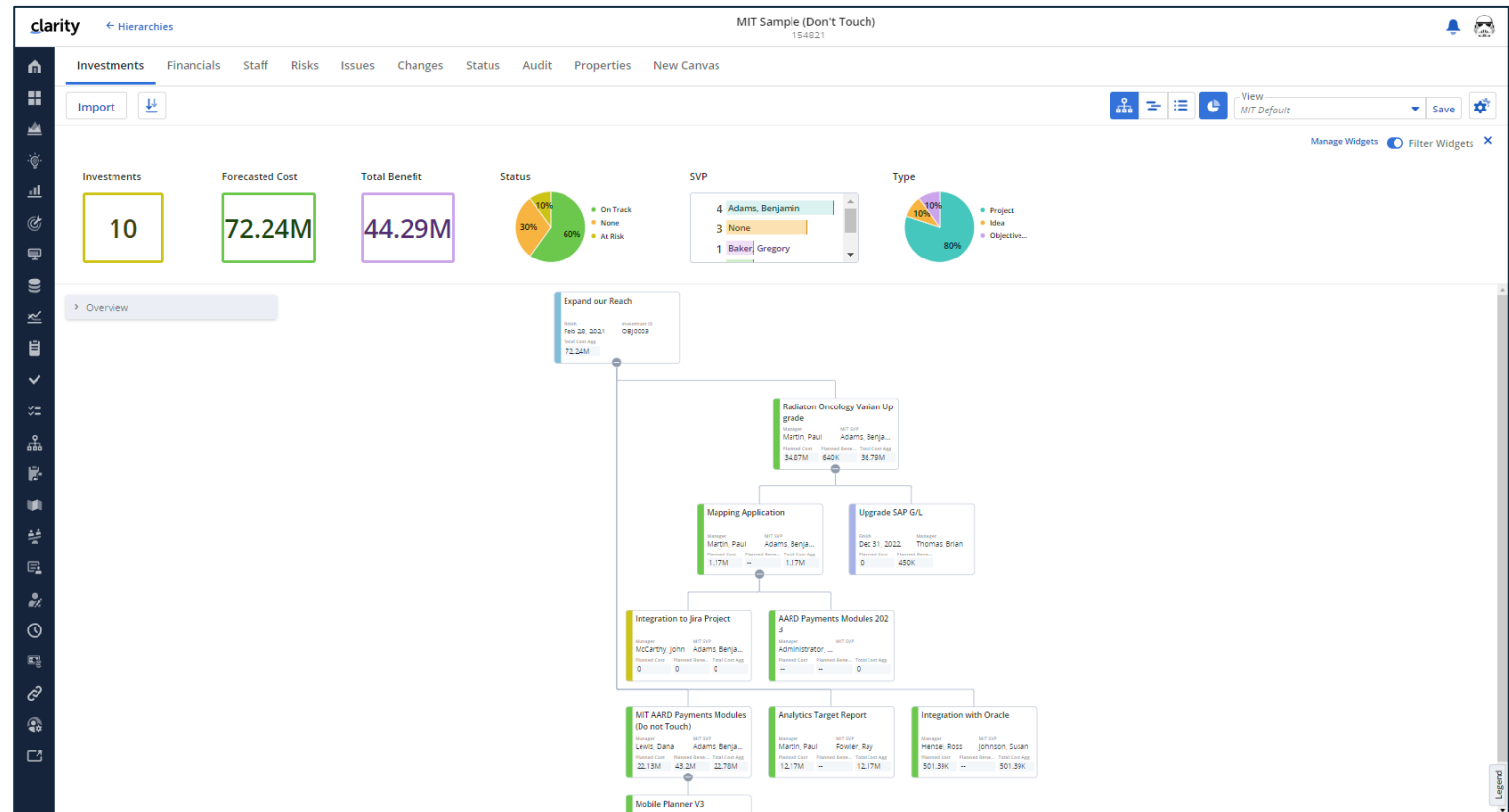
Roadmaps

- 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



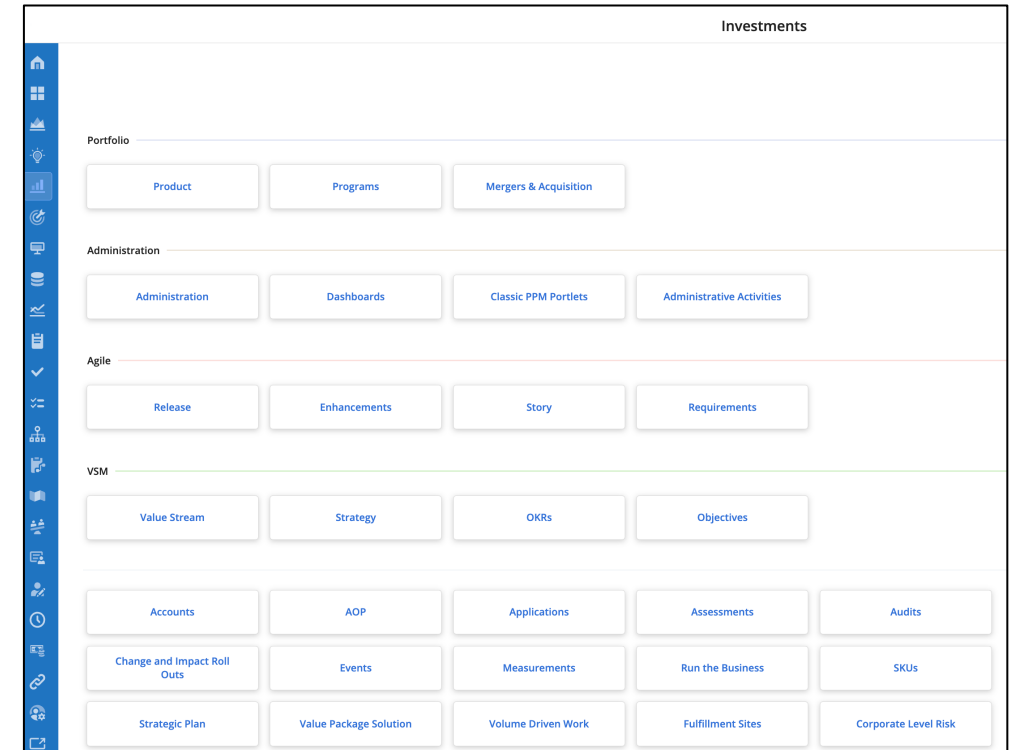
Hierarchies

- 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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