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ValueOps by Broadcom

Rally Clarity

Visualization Strategies in the Modern UX

Bob Werner and Matthew Palicki

Agenda

- Welcome & Introduction
- Value Propositions & Client Stories (40 min)
 - Jaspersoft / Ad Hoc Reports
 - Channels
 - Widgets/Saved Views
 - Status Reports
 - Canvas
 - PowerBl
- Developing a Visualization Strategy (15 min)
- Q&A

Demonstration & Value Propositions



Advanced Reporting

Traditional Reporting Schedulable and deliverable via multiple mediums

| | Clarity PPM |
|------------|--|
| ŝ | Advanced Reporting - Job List |
| ŧ | ✿ Library View - Manage - Create - |
| | Weekly On Monday |
| ∂ | Schedule For: /ca_ppm/reports/project_management/CSK_PRJ_StatusReportList |
| | Schedule Start Start Date: Immediately On Specific Date: 2023-03-28 00:00 Time Zone: America/New_York - Eastern Standard Time Recurrence Recurrence Recurrence Type: Time Zone: |
| | Schedule End |
| | End Date: Run a set number of times Number of runs: Save Cancel |

| Clarity PPM | | |
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| Advanced Reporting | - Job List | |
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| File Handling: | | |
| Overwrite Files | | |
| Sequential File Names | by Timestamp | |
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| Save Cancel | | |

Channels

External Content Link Setup

External link view Live

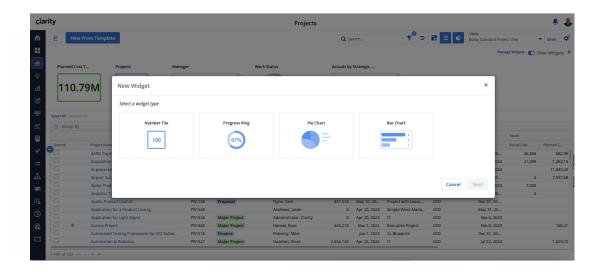
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| New Channel New Canvas | _ | | | | | | | | | | |
| K Action Items | | | | | | | | | | | |
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| B Assignments | | | | | | | | | | | |
| a :≣ Audit | | | | | | | | | | | |
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| 2 Changes | Channel Name * | rce Reporting | | | | | | | | | × |
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| ≈ Checklists | Channel Url * | | | | | | | | | | |
| Compliance | https://clarity-trai | n.regoconsulting.mo | ventus.com/niku/nu#a | ction:psa.resUtilizatio | n, | | | | | | |
| Conversations | Referrer URLs | | | | | | | | | | |
| Decisions | Comma Separated | | | | | | | | | | |
| a Properties | Single Sign On URL | | | | | | | | | | |
| Documents | Sign On URL for Identity | Provider or Service Provid | er initiated authentication for | target application | | | | | | | |

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Widgets and Views

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| • Starres | d | AARD Payments Modules 2023 Acquisition FAQ Website | PR1491 PR1432 | Major Project Major Project | Administrator, Clarity Administrator, Clarity | 682,998 4,612,135 | Apr 15, 2019 Jun 2, 2019 | IT with change IT - Agile | USD | May 26, 20 Apr 1, 2024 | Actual Cost 46,584 | 683 1,263 |
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| | d | AARD Payments Modules 2023 Acquisition FAQ Website Al-powerd Language Translation Tool for In Airport Access Security Apha Product Phase 1 Analytics Target Report | PR1491 PR1432 PR1541 PR1388 PR1022 PR1299 | Major Project Major Project Major Project Major Project Application Change Proposal | Administrator, Clarity Administrator, Clarity Pokorny, Mike Martin, Paul Berks, Paul Martin, Paul | 682,998 4,612,135 11,214,568 8,125,481 701,521 12,168,736 | Apr 15, 2019 Jun 2, 2019 Jan 9, 2023 Sep 9, 2021 Sep 9, 2021 Apr 15, 2019 | IT with change IT - Agile IT Standard Project f Stage Gate Develo Riverside - Project | USD USD USD USD USD USD | May 26, 20 Apr 1, 2024 Feb 27, 2024 Dec 31, 20 Sep 30, 2023 May 26, 20 | Actual Cost 46,584 21,499 0 7,000 | 683 1,263 11,045 |
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Widget Config



Status Reports

Configure, Export and Email

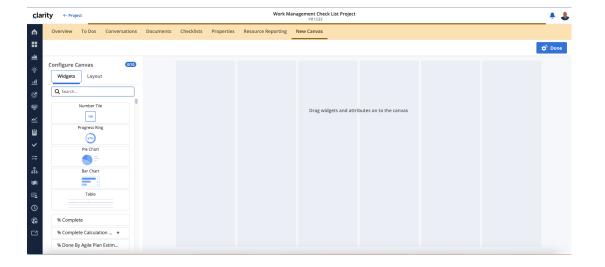
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| Select All Deselect All 3 Items S | elected Edit Delete | | | | | | | | | |
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| > Cost Avoidance (4) | | | 4 | | 1 | | 200 | | | |
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| | Global HR Application Maintenance | PR1025 | ~ | Jul 4, 2019 | ~ | On Track | On Track | On Track | On Track | Pr so th sc be ba |
| | ✓ IoT Implementation for Smart Home Automation | PR1477 | ~ | Jun 15, 2023 | | On Track | Needs Help | Needs Help | At Risk | Wi de so iss mi in |
| | Minimal Online Shopping Site | PR51012 | ~ | Jan 10, 2019 | | On Track | On Track | On Track | On Track | Or fu ca re wi |



Canvas Config Blueprint

Canvas Config Individual

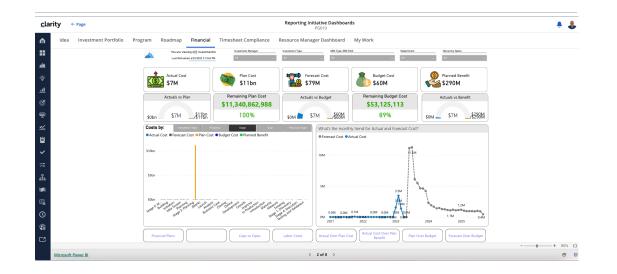
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Config Pages to include Power BI

Power BI within Clarity

| larity | PBI Dashboards Public - EDIT MODE | | + 🌡 |
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| New Channel New Canvas | | | |
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| 👳 Financial | | | |
| 🛒 Idea | | | |
| 👳 Investment Portfolio | Drag to select and reorder modules. | | |
| 👳 My Work | Configure - Resource Manager Dashboard | | |
| 👳 My Work | Channel Name * | Preview | X Delete Channel |
| 🖶 Program | Resource Manager Dashboard | Preview | Delete channel |
| 🖶 Resource Manager Dashboard | Channel Url * | | |
| 🐺 Roadmap | https://app.powerbl.com/view?r=eyirljoiZGYyZGQzNjgtMmMxNS00M2jkLTkxNGitY2FiZDAwNWVYYzA3iiwidCl6ijQ3NzEwMzc2LTNiZTUINGMwYS04Yj | | |
| 👳 Timesheet Compliance | Referrer URLs | | |
| | Comma Separated | | |
| | Single Sign On URL | | |
| | Sign On URL for Identity Provider or Service Provider initiated authentication for target application | | |



Developing Your Visualization Strategy



Planning Your Visualization Strategy

- Identify all personas who have visualization needs
- Obtain VoC on current state existing reports and any known gaps
- Document the business questions/decisions seeking to be solved
- Map out by functional area the known visualization needs for each persona
- Identify for each persona if self-service, automated, or hybrid
- Design "MVP" for each identified visualization
- For automated, identify the format and cadence
- Validate security requirements and access rights needed
- Build highest priority visualizations
- Test and validate / Iterate and adapt
- Determine which legacy reports can be consolidated/replaced/retired

Persona Examples

| Persona | Questions/Decisions to be solved | Functional Areas | Visualization Format(s) | Self-Service, Automated, or Hybrid? | If automated, what is the preferred method/cadence of delivery? | Comments or Special Requests |
|---------------------------------|--|--|---|---|--|--|
| Executive; "Road Warrior" | Are we delivering value? Are we achieving the desired outcomes? Are we managing our financial targets? Where will we anticipate staffing issues? | Hierarchies Roadmaps Dashboards/Canvas | Jaspersoft Reports, PowerBI Dashboard | Hybrid | Portfolio Performance Reports; PDF emailed weekly Monday morning OKR Dashboard, KPIs; on demand through mobile app/PowerBI | This executive not likely to go into the tool themselves. Prefers "white-glove" tailored reports delivered |
| Executive; "Tech Guru" | Are we delivering value? Are we achieving the desired outcomes? Are we managing our financial targets? Where will we anticipate staffing issues? | Hierarchies Roadmaps Dashboards/Canvas | Saved Views, Canvasses, PowerBI Dashboard | Self-Service | | This executive prefers being able to go into the tool themselves |
| Portfolio Manager; Strategy | How is the work in the pipeline supporting Strategy? Do we have the right balance/mix of investments? Where will we anticipate staffing issues? Where are my best options to pivot if needed? | Hierarchies Roadmaps Dashboards/Canvas Staffing | Saved Views, Canvasses | Self-Service | | Develop Widgets and Saved Views based on their requirements. |
| Portfolio Manager; Financial | What is our burn rate for capex and opex? Which investments are At Risk for Budget? Are chargebacks being properly applied? | Hierarchies Dashboards/Canvas Timesheet/Billing Reports | Saved Views, Canvasses | Hybrid | Timesheet/Billing reports PDF emailed on 3 rd business day EOD | Develop Widgets and Saved Views based on their requirements. Validate field level security requirements. |
| PMO Lead | Which Projects are operating outside parameters? What Risks and Issues require attention? What Change Requests need reviewed? Where do we have data quality issues? | Dashboards/Canvas Hierarchies Projects Views My Work/Action Items | Saved Views, Canvasses, Jaspersoft Reports | Hybrid | R/I/C Exception Reports delivered by PDF email weekly on Monday morning | Each PMO will have unique requirements here |
| Delivery Lead | What are my people working on? Who is Over/Under Allocated? What demand has not yet been fulfilled? What Projects are operating outside parameters? | Staffing Projects Views | Saved Views | Self-Service | | |

Additional Resources

Some Related RegoU Sessions

"Visualizations and Dashboards: Best Practices" – Wednesday 10:10am, Constellation B "PowerBI ad hoc: Beginner" – Wednesday 9:00am, Sovereign

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/enhance-your-clarity-data-visualization-and-analysis-with-regos-free-clarity-bi-dashboards-22-august-2023

https://xchange.regoconsulting.com/ (NEW AND IMPROVED!!)

<u>Books</u>

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

<u>SAFe</u>

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.

Questions?



Surveys

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



Let Rego be your guide.

Thank You For Attending Rego University

Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certifications**
- Click on Maintain My Certification ٠
- 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.



888.813.0444

Email info@regoconsulting.com



Website www.regouniversity.com