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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:
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Channels

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External link view Live

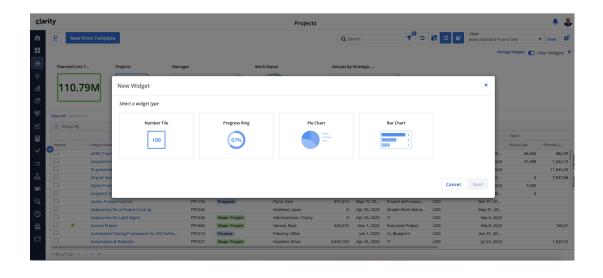
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Widget Config



Status Reports

Configure, Export and Email

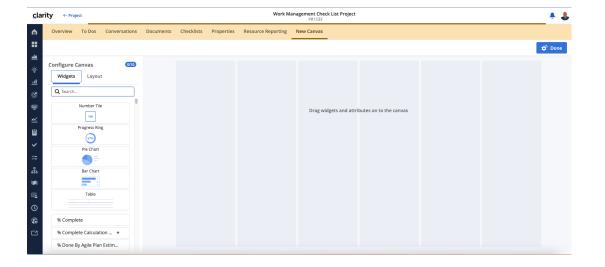
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	✓ IoT Implementation for Smart Home Automation	PR1477	~	Jun 15, 2023		On Track	Needs Help	Needs Help	At Risk	Wi de so iss mi in
	Minimal Online Shopping Site	PR51012	~	Jan 10, 2019		On Track	On Track	On Track	On Track	Or fu ca re wi



Canvas Config Blueprint

Canvas Config Individual

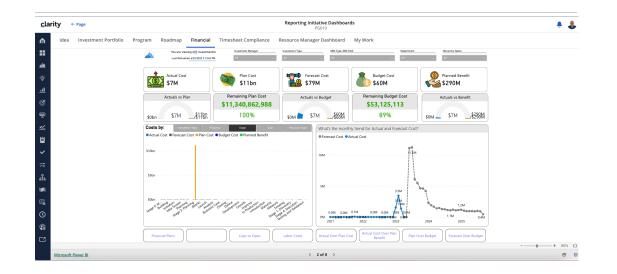
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Config Pages to include Power BI

Power BI within Clarity

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👳 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