



# regoUniversity

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# Clarity Adoption Roundtable

Robby Elliott and Wes McCoubrie

# Introductions

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

# For discussion consideration...

- Are adoption strategies at your organization formal or informal?
- Will you / did you implement Clarity with an understanding of who will monitor adoption and how?
- Are you measuring adoption? What metrics do you use? Do you share the metric with users to express value?
- If you did not see the adoption you wanted, what did you do to increase usage and data integrity?



# For discussion consideration...

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- Does anyone survey end users for satisfaction in support of adoption? (Boom, we have a survey object for you)
- Is adoption impacted by people that cannot access Clarity today? What is your strategy for non-Clarity users that need data?
- Are you investing enough in Clarity? Enough people internally and external help? You could show below as an example of support required for good adoption:



# Support Considerations



Let Rego be your guide.

# Supported Needed for Good Adoption

Users:	50-100	100-400	400-1000	1000-2000	2000-5000
Basic System Support	.25 - .5 Tech .25 - .5 Funct .25 - .5 SME	.25 - .75 Tech .25 - .75 Funct .25 - .75 SME	.5 - 1 Tech .5 - 1 Funct .5 - 1 SME	1 - 2 Tech .75 - 1.5 Funct .75 - 1.5 SME	2 - 3 Tech 1 - 3 Funct 1 - 3 SME
ADD Project Mgmt: Scheduling (OWB/MSP), Issues/Risks/Status	0 Tech 0 Funct .10 - .25 SME	0 Tech 0 Funct .25 - .75 SME	0 Tech .25 - .5 Funct .5 - 1 SME	0 Tech .5 - 1 Funct 1 - 2 SME	0 Tech .75 - 1.5 Funct 2 - 3 SME
ADD Resource Mgmt	0 Tech 0 Funct .10 - .25 SME	0 Tech 0 Funct .25 - .75 SME	0 Tech .25 - .5 Funct .5 - 1 SME	0 Tech .5 - 1 Funct 1 - 2 SME	0 Tech .75 - 1.5 Funct 2 - 4 SME
ADD Financial Mgmt: Cost Plans, Rates, Transactions	.10 - .25 Tech 0 Funct 0 SME	.10 - .25 Tech 0 Funct 0 SME	.25 - .75 Tech .25 Funct .25 SME	.5 - 1 Tech 0 Funct 0 SME	.5 - 1 Tech 0 Funct 0 SME
ADD Demand and Portfolio Mgmt	0 Tech 0 Funct 0 SME	0 Tech 0 Funct 0 SME	.25 Tech 0 Funct .25 SME	.25 Tech 0 Funct .25 - .5 SME	0 Tech 0 Funct .5 - 1 SME
Total FTE Ranges :	1.05 - 2.25	1.35 - 4.0	4.75 - 8.5	10.5 - 13.0	10.5 - 21.0

# Survey Module



Let Rego be your guide.

# Survey Module

Purpose: Allow clients to create feedback surveys to stakeholders and users from within Clarity, allow them to respond from email, and then aggregate and analyze that feedback.

- Users respond to surveys directly within email
- 100% out-of-the-box capabilities so it works in SaaS and On-Premise
- Configurable questions and question types (icon, thumbs up/down, numbers, etc.)
- Responses are collected and analyzed via a Survey Dashboard
- Sample Surveys could include:
  - Application Feedback
  - Project Stakeholder on Closure
  - Project Stakeholder on Milestone
  - Process Feedback (ie: Ideation or Stage Gate Process)
  - Project Manager Feedback
  - Team Feedback

**Project Manager Feedback Requested - PR1095**

From: Fleming, Nicole <no-reply@regoconsulting.net>  
To: Ross Hensel

Monday, February 20, 2023 at 10:56 PM

[EXTERNAL EMAIL]

**clarity**

Ross Hensel,

The PMO is requesting feedback on [PR1095 - A Collaboration Initiative](#). Using the emoji icons below, ranked from least satisfied to most satisfied, please click the emoji. Once selected, enter any feedback on this project in the email reply.

**Project Manager:** Fleming, Nicole

Unsatisfied
  Slightly Dissatisfied
  Indifferent
  Slightly Satisfied
  Satisfied

Customer satisfaction is a top priority for our organization. Your feedback helps reward, drive change and improve future project execution.

Thank you,  
Clarity Administration  
Clarity Application at [https://clarity.rego.com](#)

Please do not respond to this email.

Surveys Sent	Responses	Outstanding	Avg Score
10	7	3	57

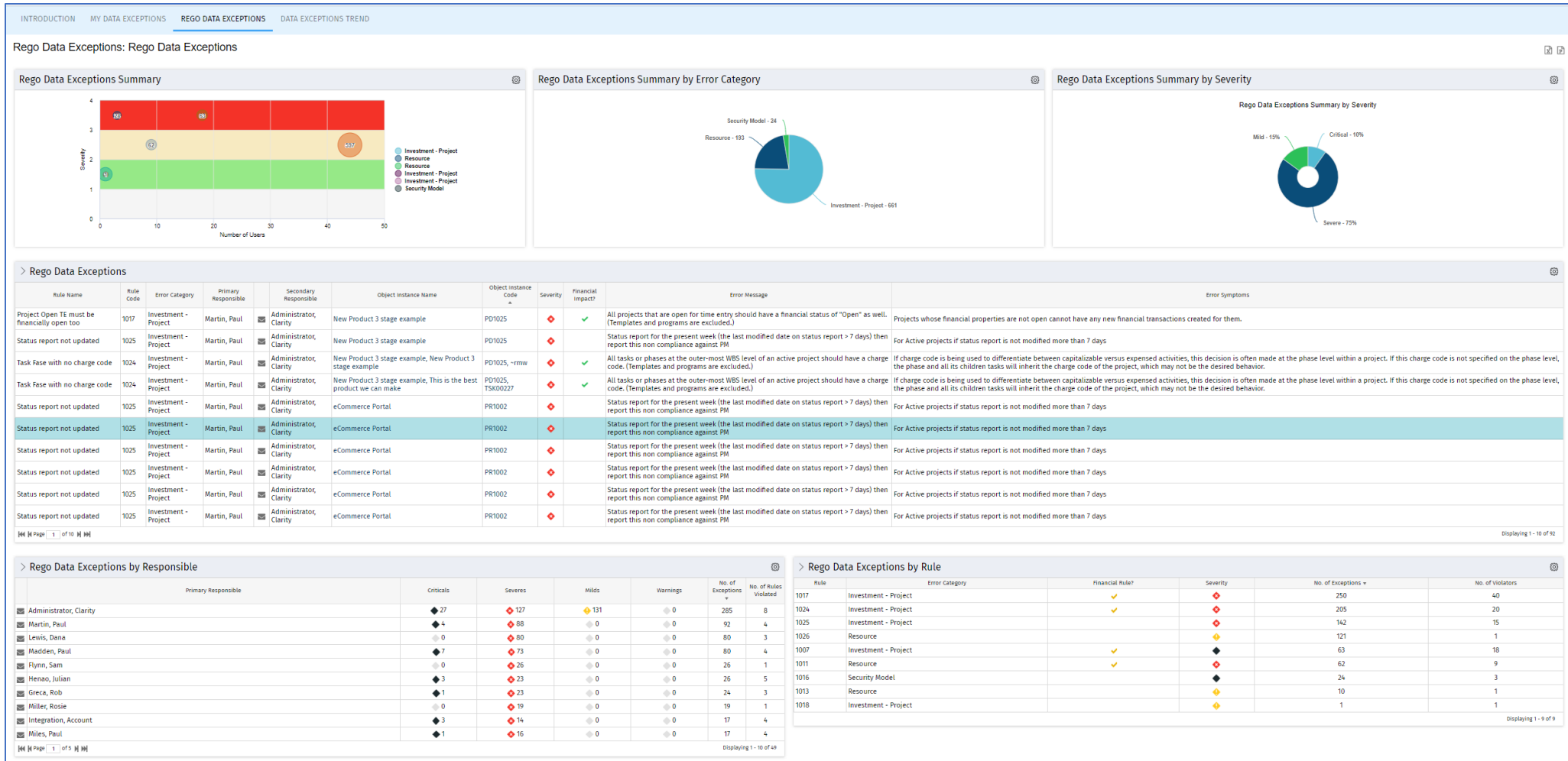
Name *	Investment	Score	Feedback
<input checked="" type="checkbox"/> Cooper, Andy	A Collaboration Initiative	100	Game-changer for our organization. It streamlined our processes and saved us valuable time and resources. Highly recommend!
<input type="checkbox"/> Hensel, Ross	A Collaboration Initiative	50	The project was implemented as expected, but it didn't bring any significant improvements to our operations. It was just okay.
<input type="checkbox"/> Roberts, Beth	AC SAFE Implementation	75	The team did an excellent job with the project. They were responsive to our needs and provided creative solutions to our challenges. Thank you!
<input type="checkbox"/> Olney, Pam	AC SAFE Implementation	50	Minor glitches, but overall it was functional. It didn't wow us, but it didn't disappoint us either.
<input type="checkbox"/> Roberts, Beth	Allocation Material Tracker		
<input type="checkbox"/> Olney, Pam	Allocation Material Tracker	100	Project exceeded our expectations. It was delivered on time, within budget, and with exceptional quality. We are very satisfied with the outcome.
<input type="checkbox"/> Roberts, Beth	Application for Inventory Management		



# Adoption Metrics Module

Let Rego be your guide.

# RegoXchange – Adoption Metrics



Adoption Metrics - Oracle - RegoXchange (regoconsulting.com)

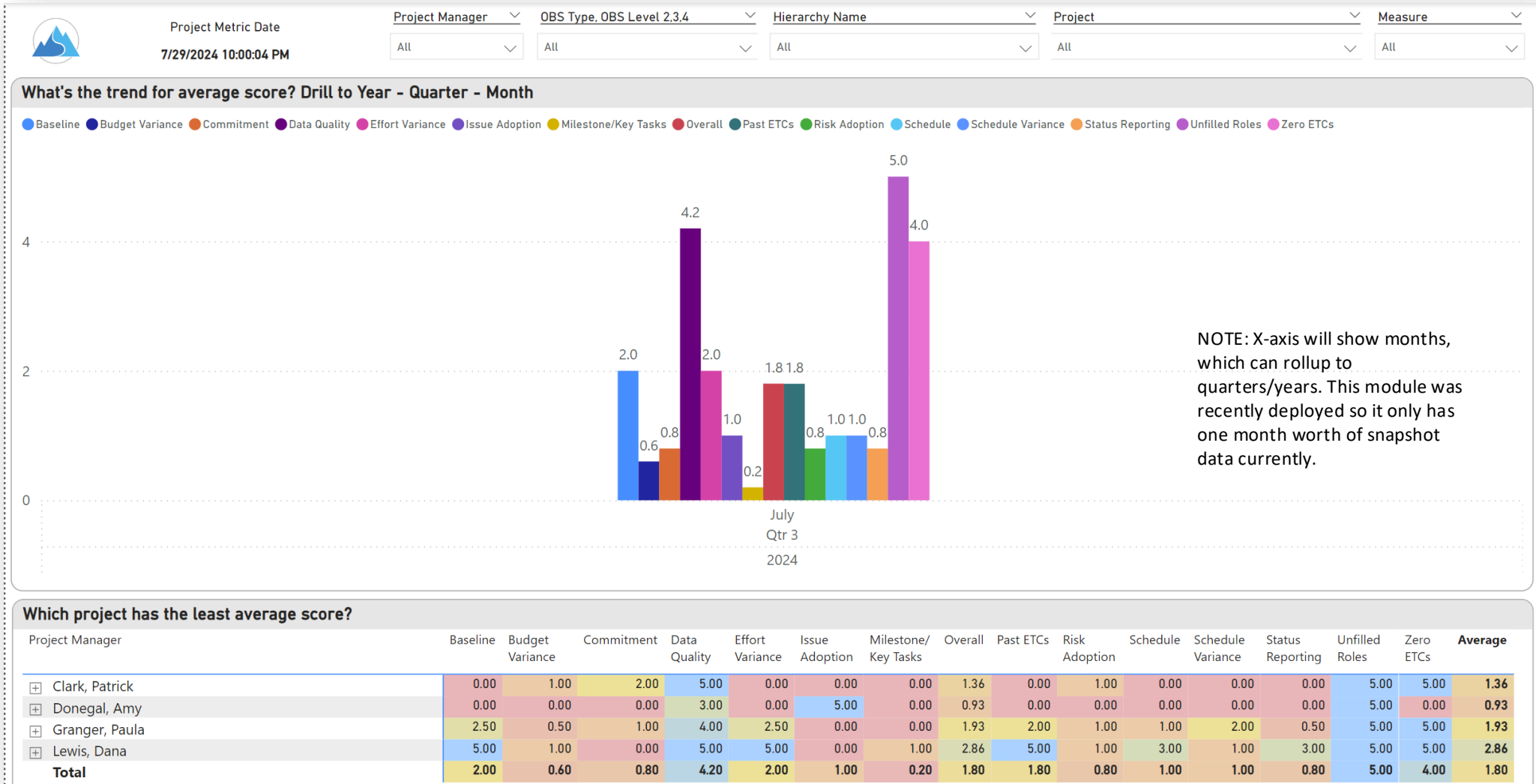
# Project Adoption



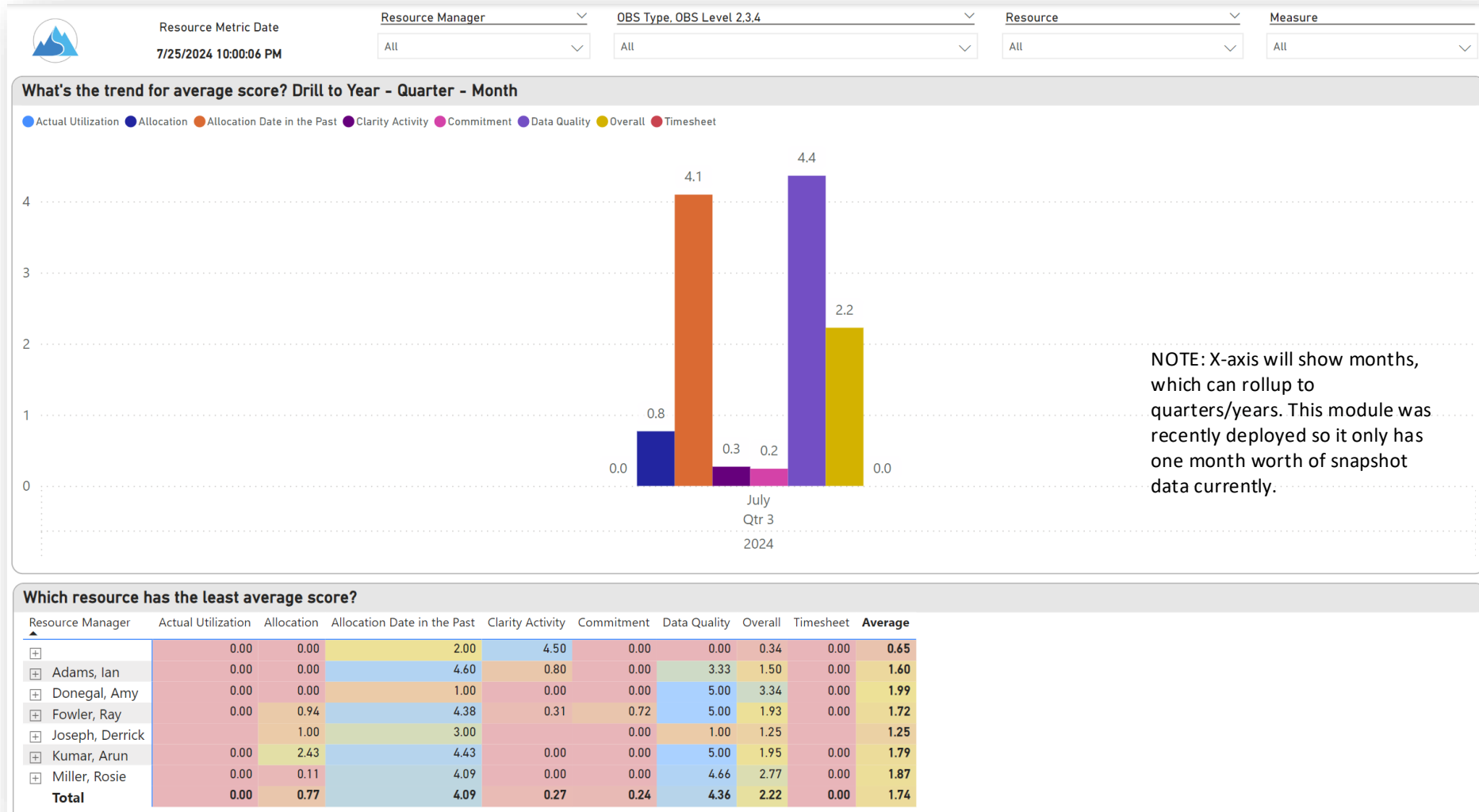
# Resource Adoption



# Project Adoption Trend



# Resource Adoption Trend



# Power BI: Data Integrity

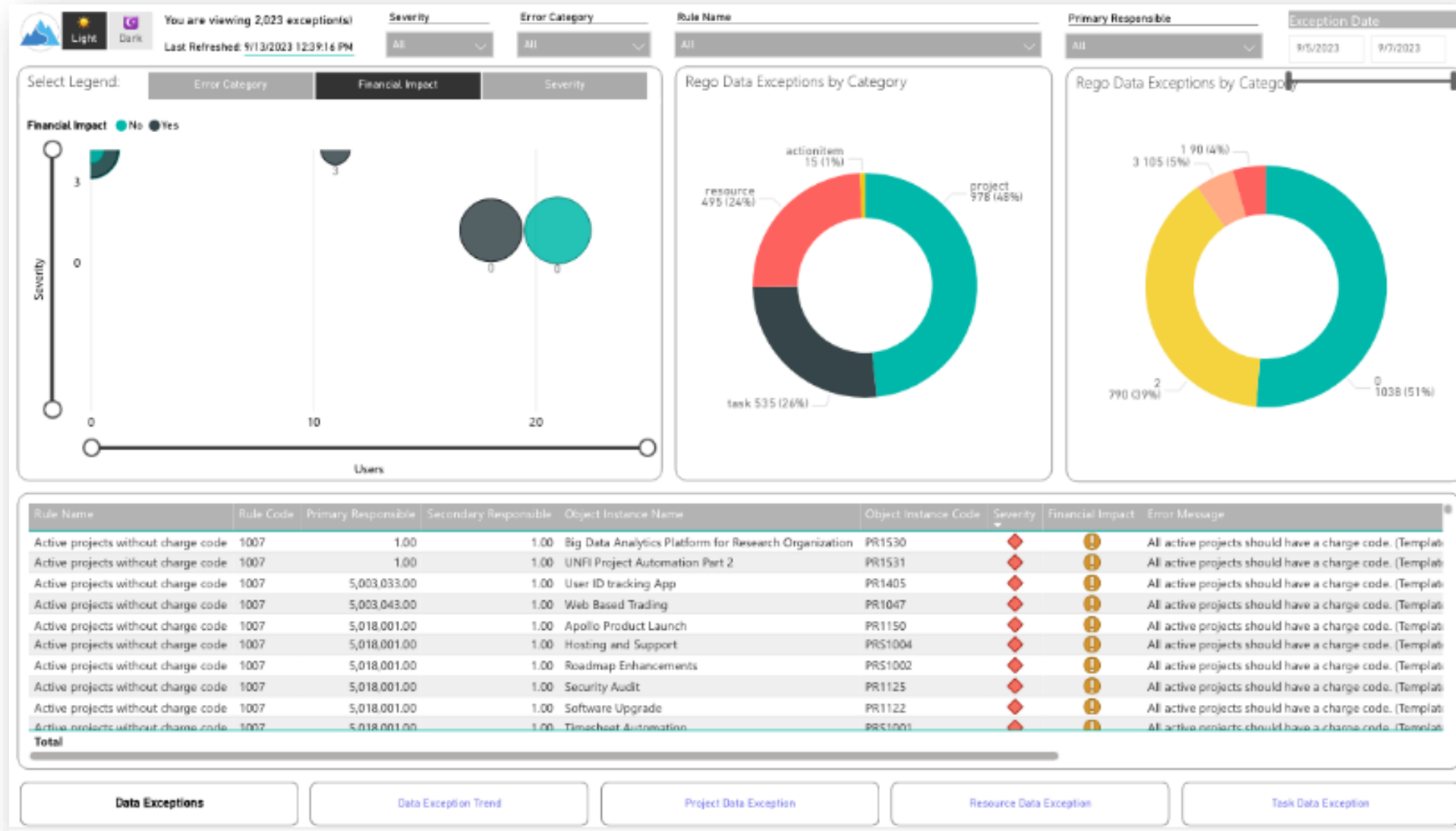
Let Rego be your guide.



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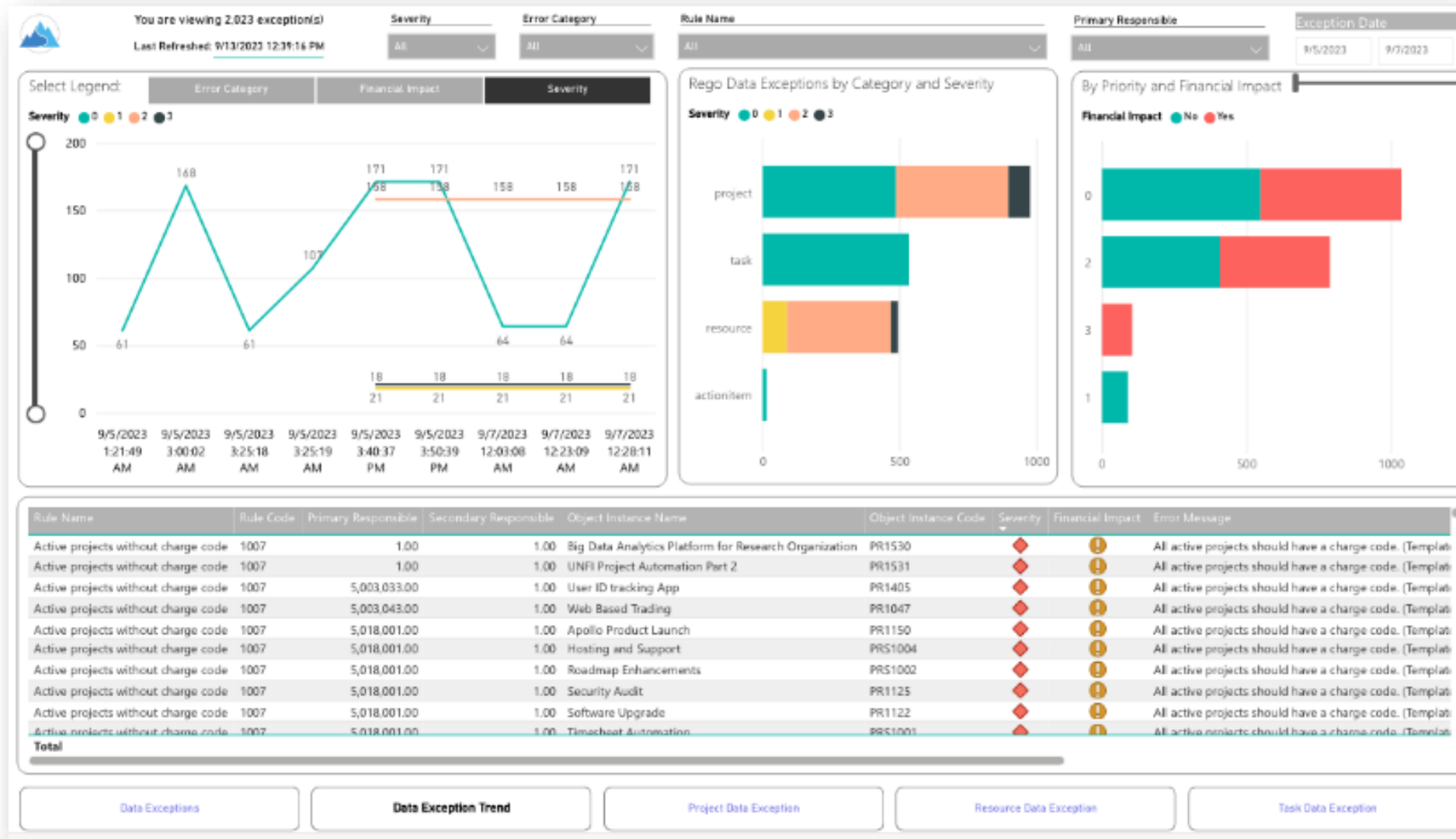
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# Power BI Suite: Data Exceptions

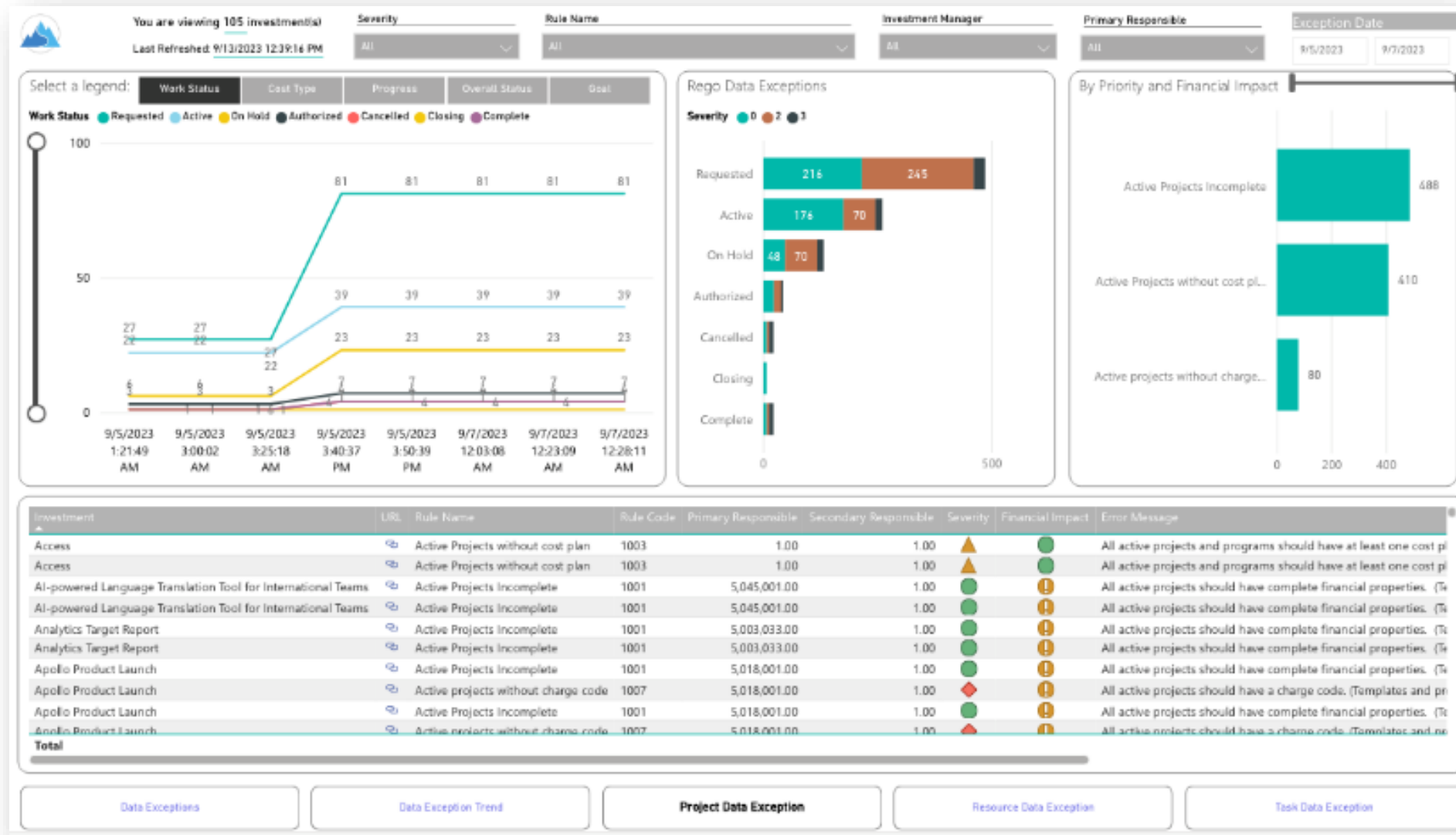




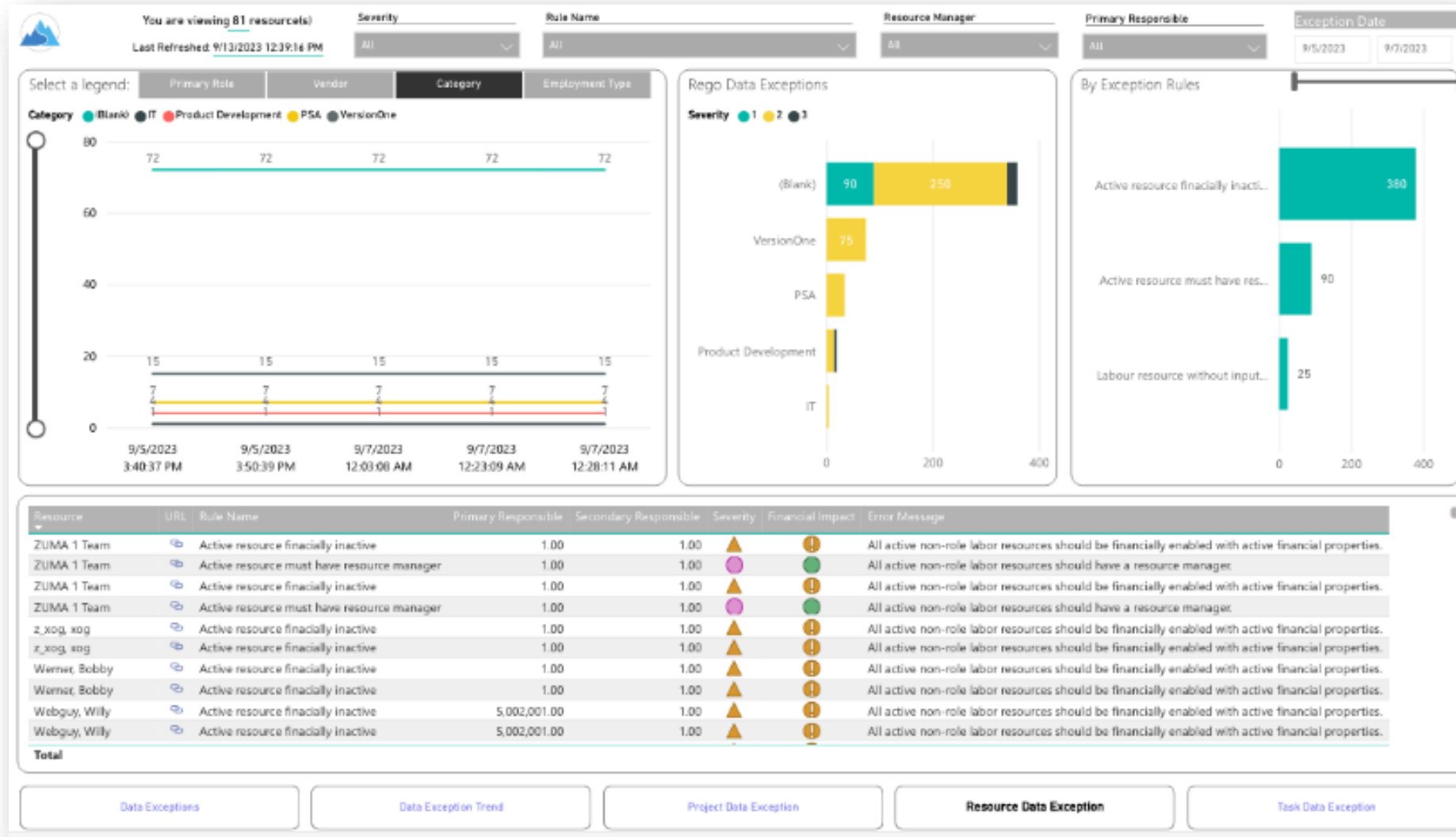
# Power BI Suite: Data Exception Trend



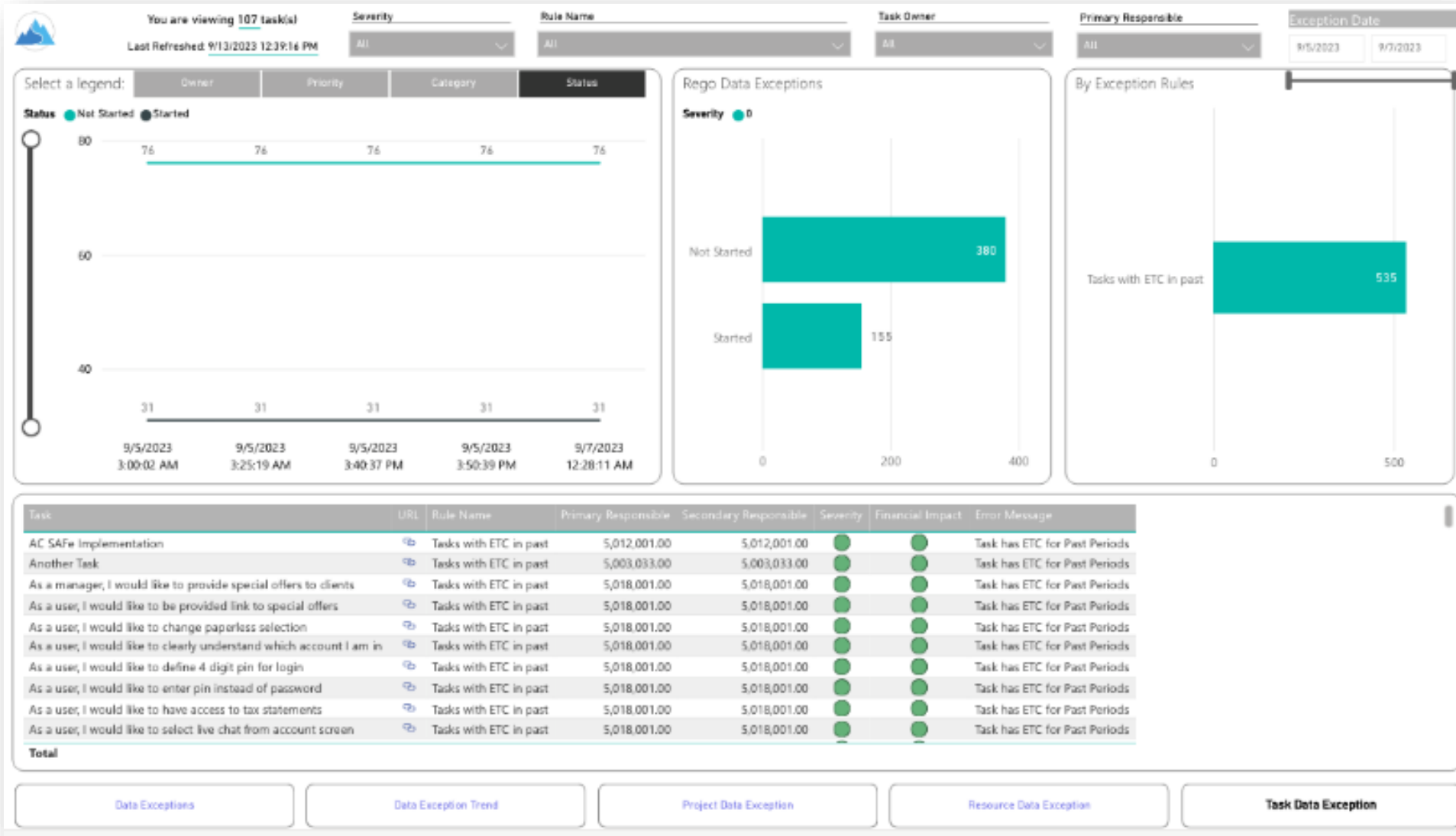
# Power BI Suite: Project Data Exception



# Power BI Suite: Resource Data Exception



# Power BI Suite: Task Data Exception



# Questions?



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- Click on **Certifications**
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- 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.



### Phone

888.813.0444



### Email

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### Website

[www.regouniversity.com](http://www.regouniversity.com)