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# Best Practices for Collaborative Work Management

**Your Guides:**  
**Wes McCoubrie and Josh Childers**

# Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself
- **Show or Movie to Watch on Flight**



# Agenda

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- What is Collaborative Work Management?
- Real Life Stories – Why This is so Important
- Overview and Latest Enhancements
- Value Proposition and Demonstration

# Open Mic

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- What are your organizations using for CWM?
- Are you aware of Clarity's capabilities for CWM?

# What is Collaborative Work Management (CWM)?

“The CWM market consists of vendors offering task-driven team hubs that empower business users to plan, carry out and manage their work. Team hubs combine task, planning, workflow, integration and automation capabilities, with conversations, content publishing, reporting, analytics and dashboards. Products in this market are defined by their purpose (work planning and execution), by their target users (nontechnical business users) and by their broad functionality.”<sup>1</sup>

## “Key Findings

- Collaborative work management (CWM) products empower business users to plan, manage and automate common repeatable work activities.
- The level of interest in collaborative work management has been growing steadily over the last few years, with a notable rise consistent with the increase in hybrid work.
- CWM tools come with prebuilt work templates for business users engaged in agile teamwork, goal management, case management, issue tracking, strategic work planning, product management, marketing work and legal work.
- Most organizations deploy CWM tools tactically, targeting specific situations usually applicable to small groups of employees. Multiple CWM tools in the same organization are common.”<sup>2</sup>

<sup>1</sup> <https://www.gartner.com/reviews/market/collaborative-work-management>

<sup>2</sup> <https://www.gartner.com/en/documents/4022601>

Open Mic:

What are some CWM tools being used in your org today?

THIS!  
This is why this topic is relevant to enterprises and organizations using Clarity!

# Selected Customer Reactions about Collaborative Work

- *“Don’t worry about dominating here - All large enterprises have many of these products – whether from Microsoft or Google or Atlassian – you have an advantage because you’re a system of record - if it’s simple.”*
- *“You need something so simple they would want to use it. But don’t expect to capture the entire enterprise. Other parts of the organization do provide an opportunity for expansion if it’s simple.”*
- *“One big driver is the dashboards. If you can make sense of all this data. Users can create their own dashboards in most these tools. But they struggle to pull it all together – there are many versions of the truth. Clarity has an opportunity to federate all this data so the enterprise can make sense of it.”*
- *“The Enterprise Transformation Office for example, is struggling with single source of truth. They have every flavor of CWM tool and were planning on building integrations to all of them. This will be a game changer to give them a plan to leverage a single platform and forget the whole integration thing.”*

# Different Runways for Different Solutions

Tool	Checklists and Tasks	Collaboration	Workflow	Project Management	Strategic Alignment	Resource Management	Financial Management	Portfolio Management
Asana	✓	✓	✓	✓	✓			✓
Trello	✓	✓	✓	✓				
Monday.com	✓	✓		✓				✓
MS Planner	✓	✓						
ClickUp	✓	✓	✓	✓	✓			
Clarity	✓	✓	✓	✓	✓	✓	✓	✓

Clarity entered this market in 2015 with the Modern UX and has aggressively developed capabilities matching other top solutions. Due to its robust, enterprise-level reputation, Clarity is too often overlooked as a team-centric work management tool.

Admittedly, Clarity is a blank canvas to be shaped to your use cases; other solutions templatize heavily.

# Notable Enhancements 16.1.3 – 16.2.2





# Notable Enhancements 16.1.3 – 16.2.2

## - *Notification Enhancements*

- *Sending Notification to To Do Owner (16.3.1)*
- *Support for Multi-Valued Lookup in Business Rules (16.3.1)*
- *Navigating to Target Object from Notifications (16.3.1)*

## - *My Workspace Enhancements*

- *Enhanced Conversations within My Workspace (16.3.1)*
- *Added Note to To Dos in Checklists (16.3.1)*

## - *Business Rules Enhancements*

- *Sending notifications using Business Rules (16.2.2)*

## - *Collaborative Work Mgmt Enhancements*

- *Add Attachments for To Dos (16.2.2)*

# Notable Enhancements 16.1.3 – 16.2.2

## - Usability Enhancements

- *Action Item links to Clarity (16.3.1)*
- *Share Saved Views by Using URLs (16.3.1)*
- *Viewing Action Item Notifications (16.2.1)*
- *Action Item Clarity Attribute Data Automatically Updating (16.2.1)*
- *Clarity Information Centre (16.2.1)*
- *New Saved views set to private (16.2.2)*
- *Change to Action Items in My Workspace (16.2.2)*

## - General Enhancements

- *New Action Item Template (16.2.0)*
- *Sections for To Dos (16.2.0)*

## - Introducing Clarity Mobile App 3.2.9 (16.2.2)

- *Time Entry Increment Support*
- *Drag and Drop within Checklist*
- *Attachments within To Dos*

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# “Task-Driven Team Hubs”

The image displays three overlapping screenshots of a project management tool interface, likely Microsoft Project or a similar software, illustrating "Task-Driven Team Hubs".

- Top-Left Screenshot:** Shows a "Cloud Migration To Dos" board. The "Blocked" column contains a task: "Establish & validate Blackout Exit Criteria" (Cutover Readiness (Cloud Migration Workstream)). A sub-task "Blocked" is noted with "Need input from stakeholders".
- Middle Screenshot:** Shows a calendar view for January 2023. A task "Blackout scenarios and proce..." is scheduled for Wednesday, January 4th.
- Bottom-Right Screenshot:** Shows an "Idea Checklists" board. It lists tasks with due dates and assignees:
  - Is all appropriate vendor documentation completed and attached? (Apr 14, PA)
  - Has the Security Team reviewed and signed off? (Apr 28, ST)
  - Are all initial estimates and requirements documents included? (May 05, CA)
  - Has Governance Board approved and scored the Idea? (PA)
  - Is all appropriate vendor documentation completed and attached? (PA)
  - Has the Security Team reviewed and signed off? (ST)
  - Are all initial estimates and requirements documents included? (CA)
  - Has Governance Board approved and scored the Idea? (PA)
  - Is all appropriate vendor documentation completed and attached? (PA)
  - Has the Security Team reviewed and signed off? (ST)

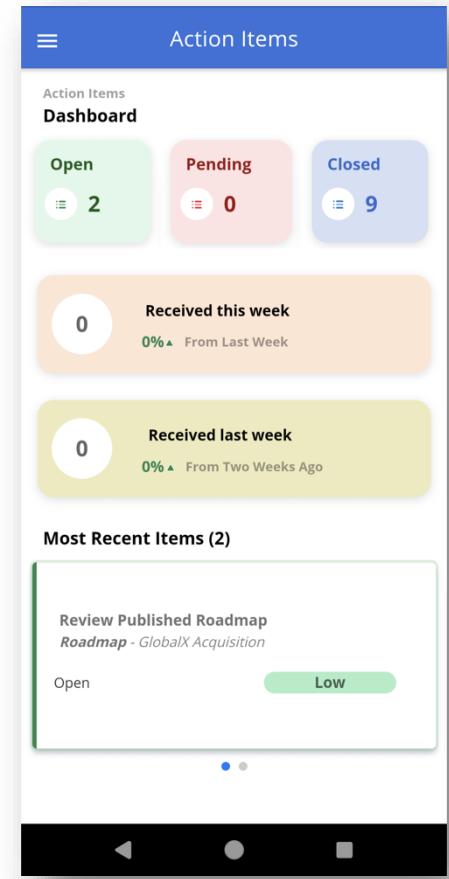
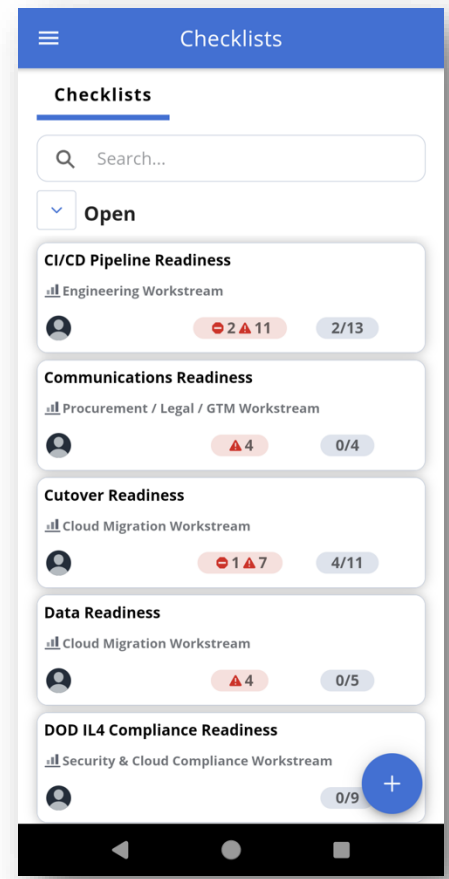
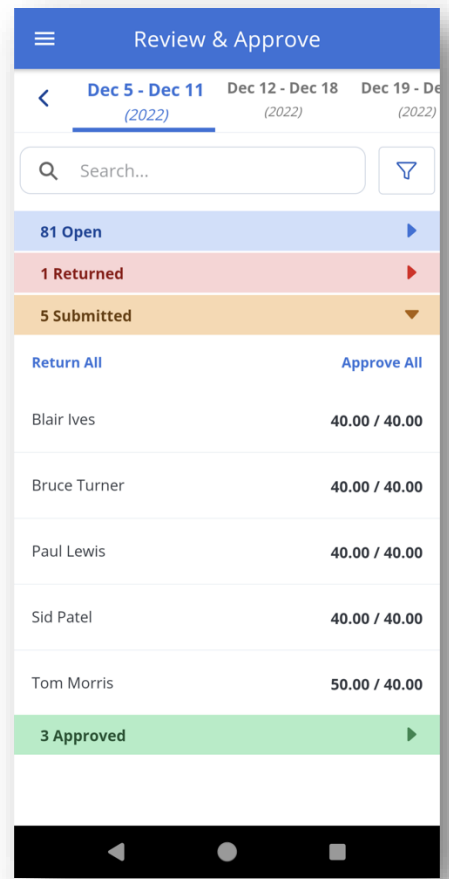
# “Workflow, Integration, and Automation”

The screenshot displays the Clarity software interface with three overlapping windows:

- Action Items Window:** Shows a list of items under 'Open Action Items'. The top item is 'ABLE Payments Module has been placed On Hold' with a 'High' priority. Below it is 'Review Published Roadmap' for 'GlobalX Acquisition'. The bottom item is 'Please review the issue: Pacing Sales growth' with details: Issue Name: Pacing Sales growth, Project Name: Overall M&A Playbook, Issue Category: Interdependencies, Issue Owner: Higgins, Tanya.
- Notifications Window:** A 'New Notification' dialog box with a search bar and a filter icon.
- Rules Configuration Window:** Shows the 'Rules' tab for a 'Project - Major' blueprint. It contains a table of rules:

Rule Name	Enabled	Description	Last Updated By	Last Update
Hide Financials	✓	Hide the financial section for On Hold or Canceled Projects	Arpel, Ian	
Hide Modules When Completed	✓	Hide Modules when Project Work Status is set to completed	Arpel, Ian	
Make Strategy a Required Field when Project Work Status is Active	✓	Make Strategy a Required Field when Project Work Status is Active	Arpel, Ian	
Notify stakeholder when project goes On Hold	✓	Send action item to Primary Stakeholder when Work Status is set to On Hold	Arpel, Ian	
Status Reports not Editable once Submitted	✓	Once Final, the Status Report is not editable	Arpel, Ian	
When the Grow the Business goal is attached to a Project, do something.	✓	When the Grow the Business goal is attached to a Project, do something.	Arpel, Ian	

# “Workflow, Integration, and Automation”



# “Conversations, Content Publishing”

The screenshot displays the Clarity software interface. The top navigation bar includes 'My Workspace' and a notification bell. Below this, there are tabs for 'To Dos', 'Action Items', and 'Conversations'. The 'Conversations' tab is active, showing a list of messages with details like 'Due to recent re-org, we have a gap in...', 'Pods: Crushers Pod', 'Team: UX', and 'You started a new conversation Aug 3...'. A second window is overlaid on top, titled 'Digital Banking Product Line Roadmap' (RD00017). This window shows a dashboard with a '48%' progress indicator, 'Items by Horizon' (11 Horizon 1: Investing), and 'Items by Big Rock' (19% Delight U..., 29% Improve T...). Below the dashboard is a 'Status Reports' section with a search bar, filter options (Match Filters: All, Any; Add Filter Groups), and a table of 10 items. The table has columns for 'Starrred', 'Investment ID', 'Latest', 'Report Status', 'Report Date', 'Overall Status', 'Schedule Status', 'Scope Status', 'Cost and Effort Status', and 'Status Report Update'. The items listed are Pro00000001, PRO00000010, PR2009, EPI00000038, and WS00000001. A 'Details' sidebar is visible on the right side of the table.

Starrred	Investment ID	Latest	Report Status	Report Date	Overall Status	Schedule Status	Scope Status	Cost and Effort Status	Status Report Update
<input checked="" type="checkbox"/>	Pro00000001	✓	Final	Apr 15, 2022	Needs Help	On Track	On Track	Needs Help	
<input checked="" type="checkbox"/>	PRO00000010	✓	Final	Apr 15, 2022	Needs Help	On Track	On Track	Needs Help	
<input checked="" type="checkbox"/>	PR2009	✓	Final	May 3, 2022	Needs Help	Needs Help	On Track	On Track	A lot of work came together this week to complete several tasks and getting Phase 1. Removing Effort Status filters, tasks are back on track. Schedule should get back on track by end of
<input checked="" type="checkbox"/>	EPI00000038	✓	Final	Mar 9, 2023	Needs Help	Needs Help	On Track	Needs Help	
<input checked="" type="checkbox"/>	WS00000001	✓	Final	Mar 24, 2023	Needs Help	Needs Help	Needs Help	On Track	

# “Reporting, Analytics, Dashboards”

The screenshot displays the Clarity software interface, which is used for project and financial reporting. It is divided into several main sections:

- Left Panel (Program Data):** Contains a hierarchy tree for the 'Global Compliance Program Hierarchy', a 'Lean Canvas Business Case' section with text and bullet points, and a 'Role Breakdown' bar chart showing team composition: 6 Project Managers, 5 Engineers, 5 ML Engineers, 5 QAs, 5 Security Architects, 4 Business Analysts, 3 Architects, and 1 None.
- Top Navigation:** Includes tabs for 'Investments', 'Tasks', 'Financials', 'Staff', and 'Program Data'. The 'Financials' tab is currently active.
- Dashboard (Cloud Transformation Program H0000004):** Features several key performance indicators (KPIs) and charts:
  - Capital:** A green box showing 2.9M.
  - Operating:** A green box showing 6.97M.
  - Transclass:** A pie chart showing 14%.
  - Capitalization %:** A green gauge showing 30%.
  - Top 3 Categories:** A list showing '7.06M Internal Labor'.
- Agile Performance (00000003):** A detailed report section with several summary boxes:
  - SPEND:** % of Funding is 70%. Budget is \$400,000, Actuals are \$280,000.
  - CAPEX/OPEX:** CapEx is \$100K, OpEx is \$180K.
  - Schedule:** % of Schedule is 62%. Start date is 10/31/22, Finish date is 6/28/23.
  - Weeks Remaining:** 4 weeks.
  - Funded FTEs:** 35.
- Table:** A detailed table of features with columns for Feature ID, Est. Storypoints, Storypoints Accepted, % Complete, Actuals, Actual Cost, Start, and Finish. The total row shows 1165 storypoints and \$174,789 in actual costs.
- Bar Chart:** A horizontal bar chart titled '% Complete and % Remaining by Feature' showing progress for various features like 'Backorder fulfillment', 'Credit card error messaging', etc.



# Demonstration



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# Questions?



# Additional Resources

## 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/discovering-clarity-integrations-september-2022>

<https://info.regoconsulting.com/top-ppm-trends-for-2023-december-2022>

<https://info.regoconsulting.com/clarity-survey-module-march-2023>

<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!!)

## Books

[Accelerate: Building Strategic Agility for a Faster-Moving World, John P. Kotter](#)

[Out of the Crisis, W. Edwards Deming](#)

[Value Stream Mapping: How to Visualize Work and Align Leadership for Organizational Transformation, Martin/Osterling](#)

[The 4 Disciplines of Execution, McChesney/Covey/Huling](#)

## SAFe

<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](#)

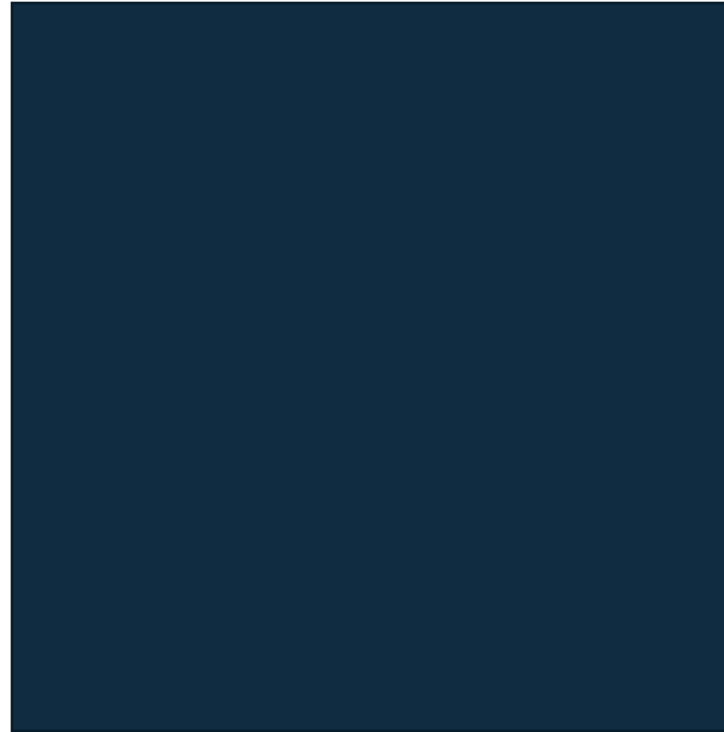
[The Last Arrow, Erwin McManus](#)

[Mindset: The New Psychology of Success, Carol S. Dweck, Ph.D.](#)

# Surveys

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



# Thank You For Attending RegoUniversity

## Instructions for PMI credits

- Access your account at [pmi.org](https://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.



### Phone

888.813.0444



### Email

[info@regoconsulting.com](mailto:info@regoconsulting.com)

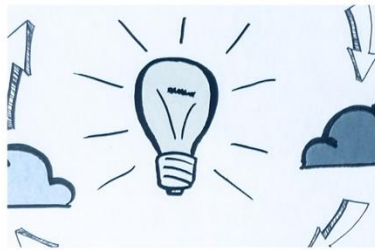
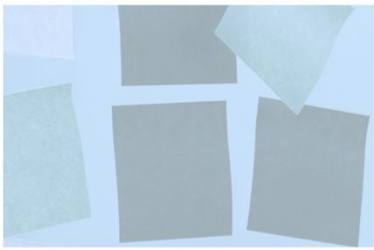


### Website

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

# APPENDIX

- Broadcom Slides
- New Enhancements



# Clarity for Collaborative Work.

**clarity**

Search...

[New Checklist](#)

Meeting with Kurt Aug 9

Product Team Slide Deck Aug 5

Customer Calls to Set up Aug 1

Filtering Feature Design July 30

**Smart Lists**

My To Dos

All To Dos

Another smart/dynamic list?

**My To Dos**

**Today**

- Filtering UI mockups
- Update slide deck design and layout

**This Week**

- Complete mockups for funding to review
- Set up meeting with Malik to review POC

**Later On**

- Acme Corp - Roadmapping

**clarity**

Search...

View: Default View Save

Monday	Tuesday	Wednesday	Thursday	Friday
1 Brian Smith 4/5 Joana Leite 3/3	2	3 Jason Garcia 2/3 Rita Leite 2/12 Kyle Martin 2/5	4	5
8	9 Rita Leite 2/12 Kyle Martin 2/5 Carmen Sanchez 1/8	10	11 Brian Smith 4/5 Joana Leite 3/3	12
15	16	17	18	19
22	23	24	25	26

9:00

Approve Budget for Security Project

Smart To Do

Security Project (PR1234)

Due Today

**Budget Information**

Updated today at 12:04pm by Shelby W.

Total Cost **\$4.2M**

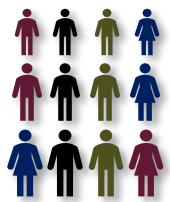
OpEx **\$1.2M**

[More Info...](#)

Approve Reject



KEY WORK IS CONNECTED TO ENTERPRISE STRATEGY AND BUSINESS OBJECTIVES.



EMPLOYEES CAN ONBOARD THEMSELVES AND COLLABORATE IN ANY FORMAT – ANYTIME, ANYWHERE, WITH ANYONE.

Backlog Gates Working Signoff

Backlog	Gates	Working	Signoff
Database Development Jul 30, 2021 Berry, Jason	Closing Phase Gate Complete Jan 29, 2023 Granger, Pa...	Get Signoff from Jeff Jun 15, 2022 Quinn, Randy	Prepare Business Case Content Jun 30, 2021 Quinn, Randy
Unit and Performance Testing Mar 1, 2022 Berry, Jason	Construction Phase Gate Complete Apr 23, 2022 Granger, Pa...	Lean Planning meeting Feb 12, 2021 Berry, Jason	
Usability and User Acceptance Testing Sep 13, 2022 Stoneburg, ...	Deployment Phase Gate Complete Oct 18, 2022 Granger, Pa...	Functional and System Testing Jun 29, 2022 Garcia, Alex	
User Interface Development Nov 12, 2021 Stoneburg, ...	Initiating Process Complete Feb 8, 2021 Granger, Pa...	Ops Review Approval Jan 25, 2022 Roberts, Beth	

# Personalize Work.

Set up workspaces with **lists, calendars, boards** and more.

Keep work private until you share it.

The screenshot shows the Clarity workspace interface. On the left, there is a sidebar with a search bar and a 'New Checklist' button. Below that, a list of tasks is shown with dates: 'Meeting with Kurt' (Aug 9), 'Product Team Slide Deck' (Aug 5), 'Customer Calls to Set up' (Aug 1), and 'Filtering Feature Design' (July 30). Under the heading 'Smart Lists', there are options for 'My To Dos', 'All To Dos', and 'Another smart/dynamic list?'. The main area displays a 'My To Dos' list with sections for 'Today', 'This Week', and 'Later On'. The 'Today' section includes 'Filtering UI mockups' (checked) and 'Update slide deck design and layout'. The 'This Week' section includes 'Complete mockups for funding to review' and 'Set up meeting with Mallik to review POC'. The 'Later On' section includes 'Acme Corp - Roadmapping'. On the right, there is a list of items with tags and dates: 'Project: 2020 Q4 PI Plan' (Aug 9), 'Checklist: Product Team Slide Deck' (Aug 9), 'Checklist: Meeting with Kurt' (Aug 12), 'Checklist: Filtering Feature Design' (Aug 13), and 'Checklist: Customer Calls to Set up'.

Tag work for quick roll-ups.

## Configure My Workspace

### Modules

Checklists

Smartlists

Board

Calendar

+ Add Module

Cancel

Save

Personalize your own workspace.



Share Work.

Invite anyone (inside or outside the company) to work on your to-do lists.

Collaborate on boards, calendars and lists.

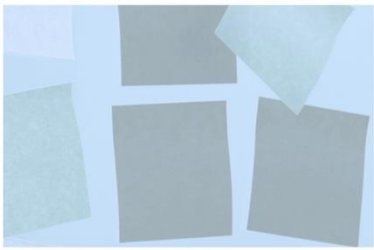
Users self-register for fast and easy access.

Engage team members with conversations.

The screenshot displays the Clarity project management interface. On the left, there's a Kanban board with columns for 'Backlog', 'Gates', and 'Working'. The 'Backlog' column contains items like 'Database Development' and 'Unit and Performance Testing'. The 'Gates' column has 'Closing Phase Gate Complete' and 'Construction Phase Gate Complete'. The 'Working' column includes 'Get Signoff from Jeff' and 'Lean Planning meeting'. On the right, there's a calendar view showing tasks assigned to team members across days. Below the calendar is a 'My To Dos' list with tasks such as 'Meeting with Kurt', 'Product Team Slide Deck', and 'Customer Calls to Set up'. A 'Smart Lists' section is also visible, showing filters for 'My To Dos' and 'All To Dos'.

This screenshot shows a detailed view of a checklist and a conversation. The checklist is titled 'Rego Annual Users Conference' and includes a date of 'Sep 20, 2021', a sponsor 'Alf Abuhajeh', and a narrative. The checklist items are: 'Complete Slide deck content' (checked), 'Finalize invite list', 'Update slide deck design and layout', and 'Creat Product Demo Video'. Below the checklist is a 'Conversations' section with a thread. The first message is from Debra: 'Thanks Patrick Clark. Let's plan to publish the approved schedule by end of next month. We need to be sure that all stakeholders are ready for the 12/31 decommission date. We can set up a QA session to answer stakeholder questions.' The second message is from Patrick: 'I am working on the schedule now and should have it approved by next week.' The third message is from Debra: 'Have you put together a communication plan for Sales and HR regarding final migration dates?'.





# Automate Work.

**clarity** My

Checklists Smartlists Board Calendar

Q Search...

New Smartlist

- My To Dos
- Watched Items
- Team To Dos

**My To Dos**

**Today**

- Filtering UI Mockups
- Update slide deck design and layout

**Next 7 Days**

- complete mockups for funding review
- setup meeting with Mallik to review POC

**Later**

- ACME Corp - Roadmapping

### Automations

**Conditions**

- Target: This To Do
- Status: = Complete

+ Add Condition

**Actions**

- Notify: Mary Jackson
- Create: New To Do
- Owner: Tom Wheeler
- Watching: Current User; Mary Jackson

+ Add Action

Cancel Save

**Build simple workflow to automate basic activities.**

**If This, Then That:**  
Send alert, create new to do, change watcher, etc.

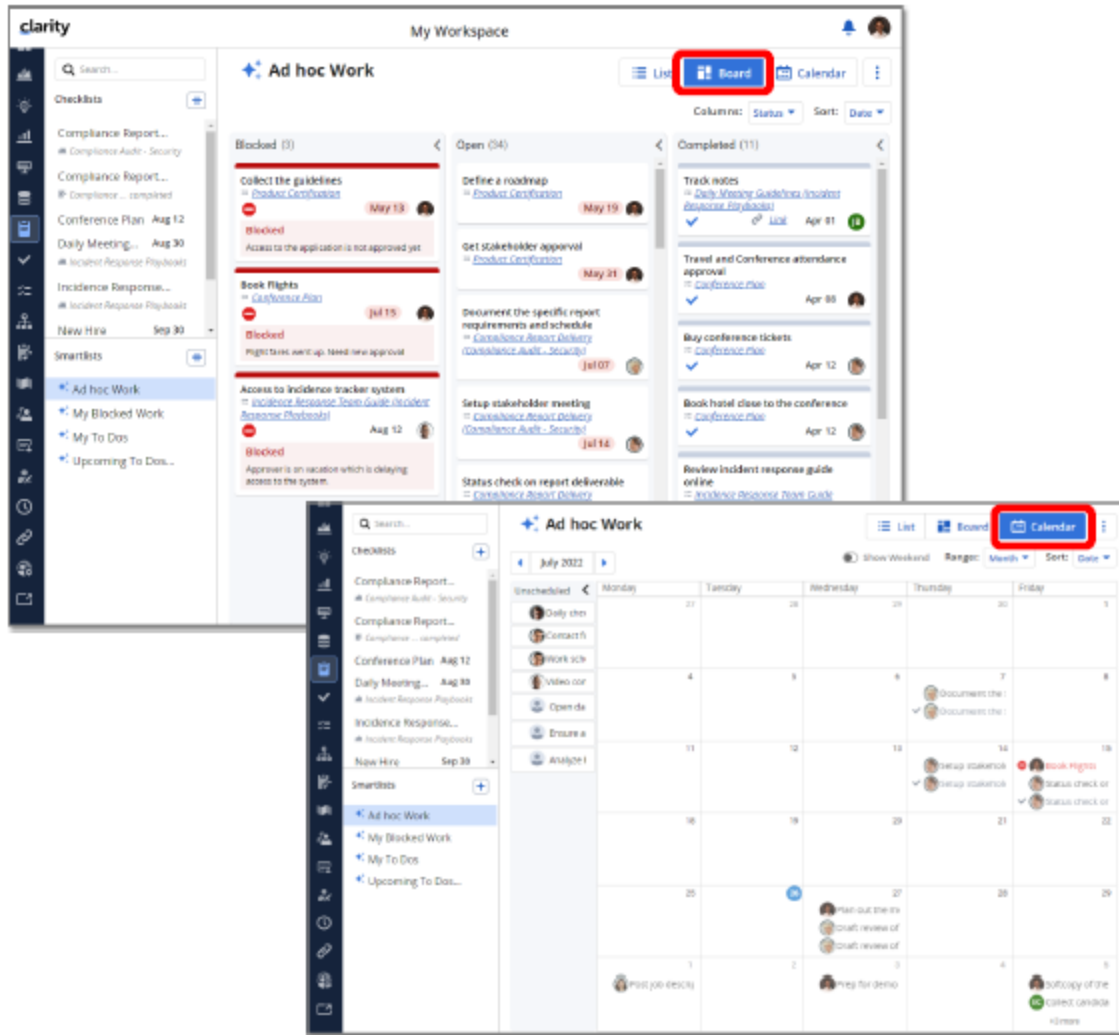
**Eliminating the mundane allows teams to focus on delivering value.**



# Checklist and To Do Updates

- “To Do” table widget available in Page canvas
- Ability to see Investment and Task To Do in a single view
- Checklist Enhancements:
  - Checklist module in Agreements
  - Notification when sharing Checklists
- My Workspace Enhancements:
  - Decouple To Do and Task owner
  - Ability to view user avatar when sharing or adding owner
  - Move checklist to investment or agreement
  - Mark checklist as completed
  - Smartlist to support Board view for To Dos
  - Smartlist to support Calendar view for To Dos

# New View Options for Smartlists



- Introducing “Board” and “Calendar” view for Smartlist. This is in addition to the existing “List” view.
- Filter defined in the smartlist is shared between each view.
- Each view has their own display option.
- “To Do” can be edited within each of these views.

# Sample Table

Post Time Sheets	6:00 PM	6:00 PM
Post Transactions	6:30 PM	6:30 PM
Post to WIP	6:45 PM	6:45 PM
Import Financial Actuals	7:00 PM	7:00 PM

# Questions?





# Master Clarity with Rego University

Earn Certifications in Administration, Leadership, and Technical Proficiency

Let Rego be your guide.



# Elevate Your Professional Expertise with Rego University Certifications

Rego is excited to introduce our **new certification programs**, designed to enhance your expertise in Clarity administration, leadership, and technical skills. These certifications provide hands-on experience and knowledge to excel in your career.



## Certification Requirements:

✓ **Completion:** 12 units per certification track

✓ **Eligibility:** Open to all Rego University attendees



## Important Reminder:

To have your certification **credits tracked**, ensure you **complete the class surveys in the app** after each session. This step is critical for certification progress.



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- 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

[info@regoconsulting.com](mailto:info@regoconsulting.com)



### Website

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