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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

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

Open Mic

- 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."[1]

"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."[2]

[1] https://www.gartner.com/reviews/market/collaborative-work-management
[2] https://www.gartner.com/en/documents/4022601

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

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

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

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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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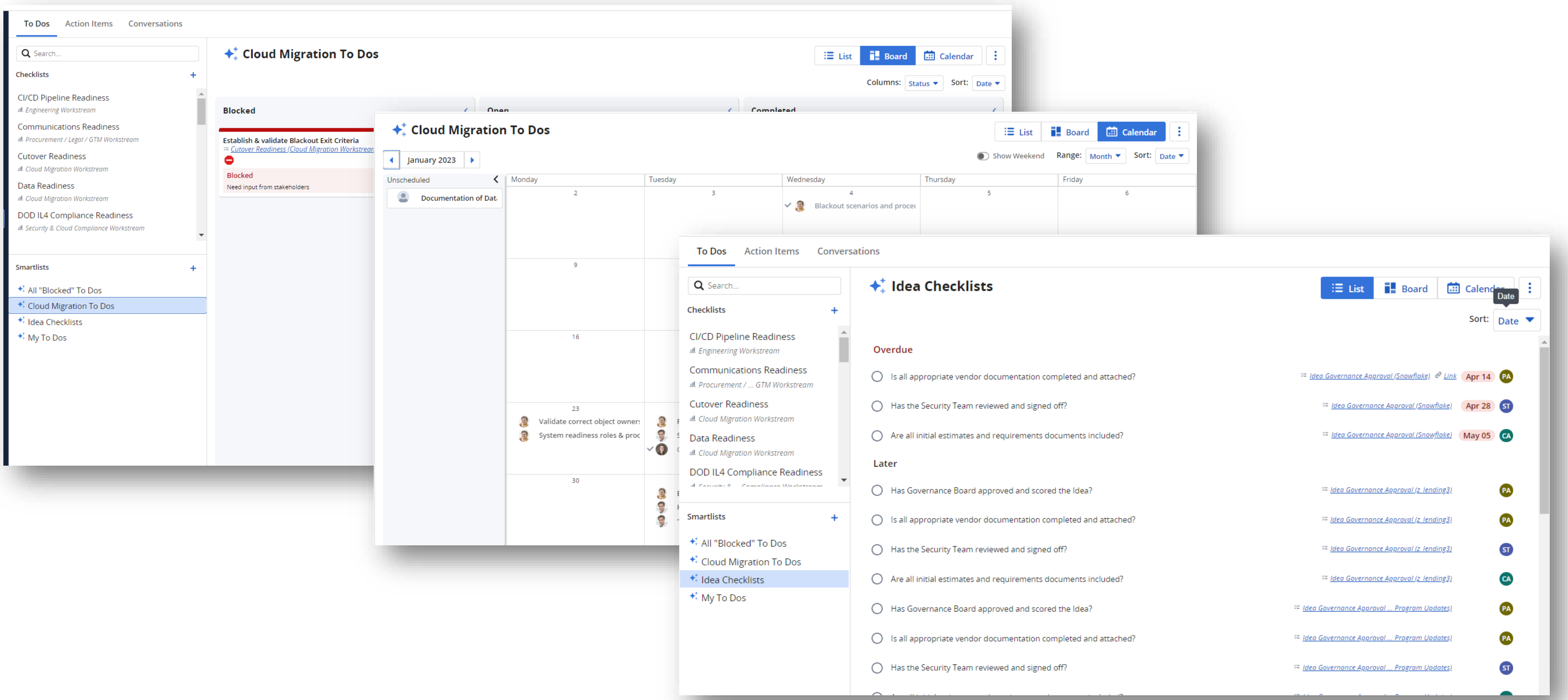
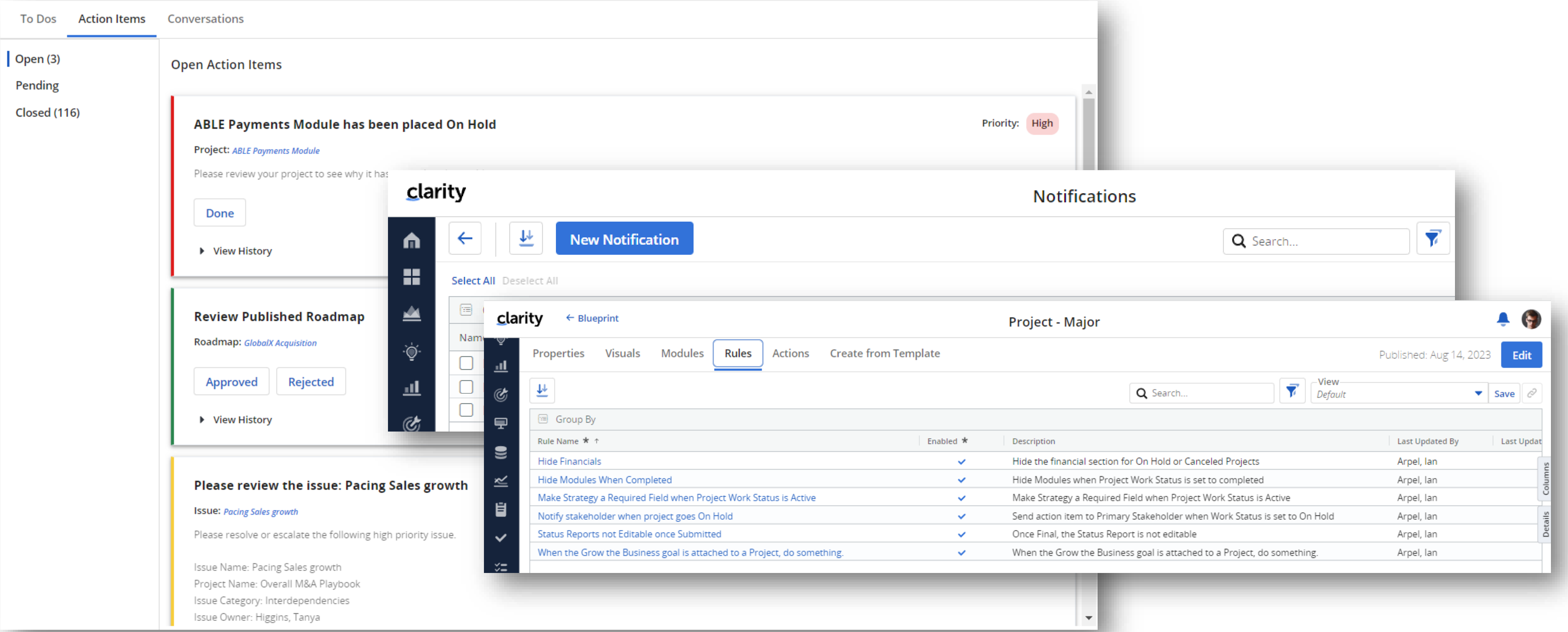
"Task-Driven Team Hubs"



"Workflow, Integration, and Automation"



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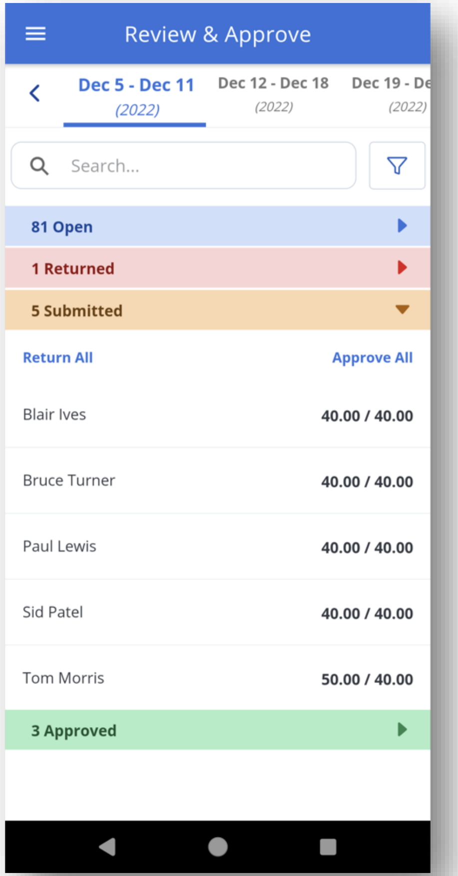
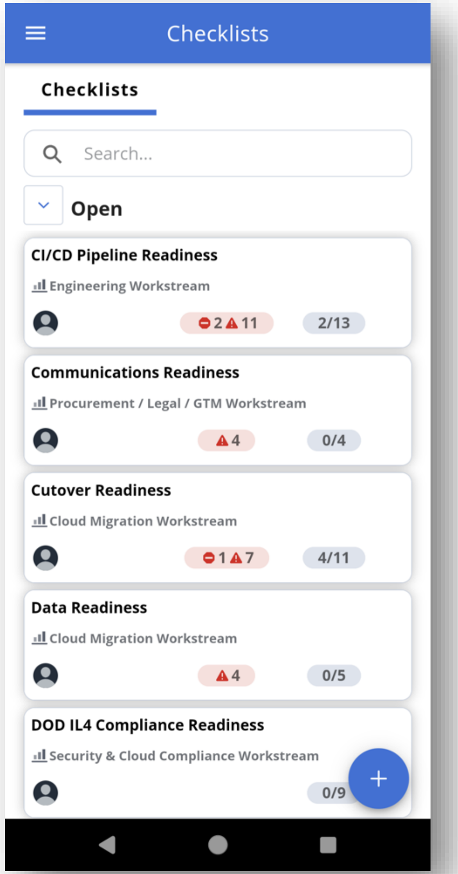
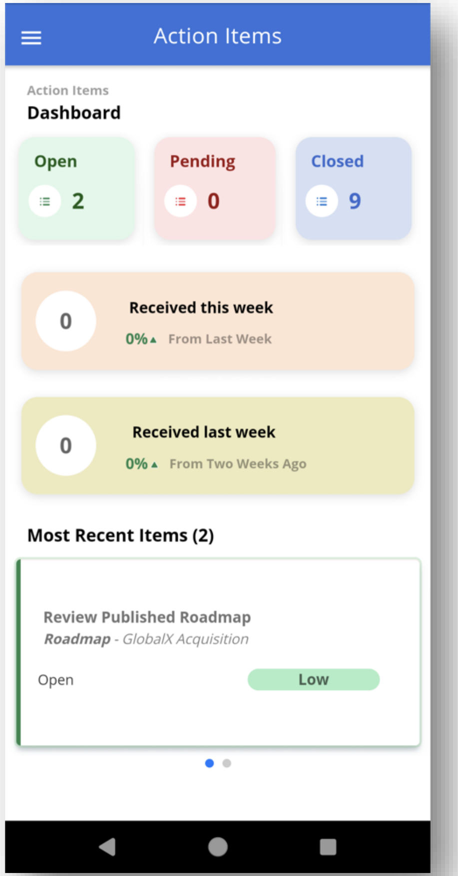
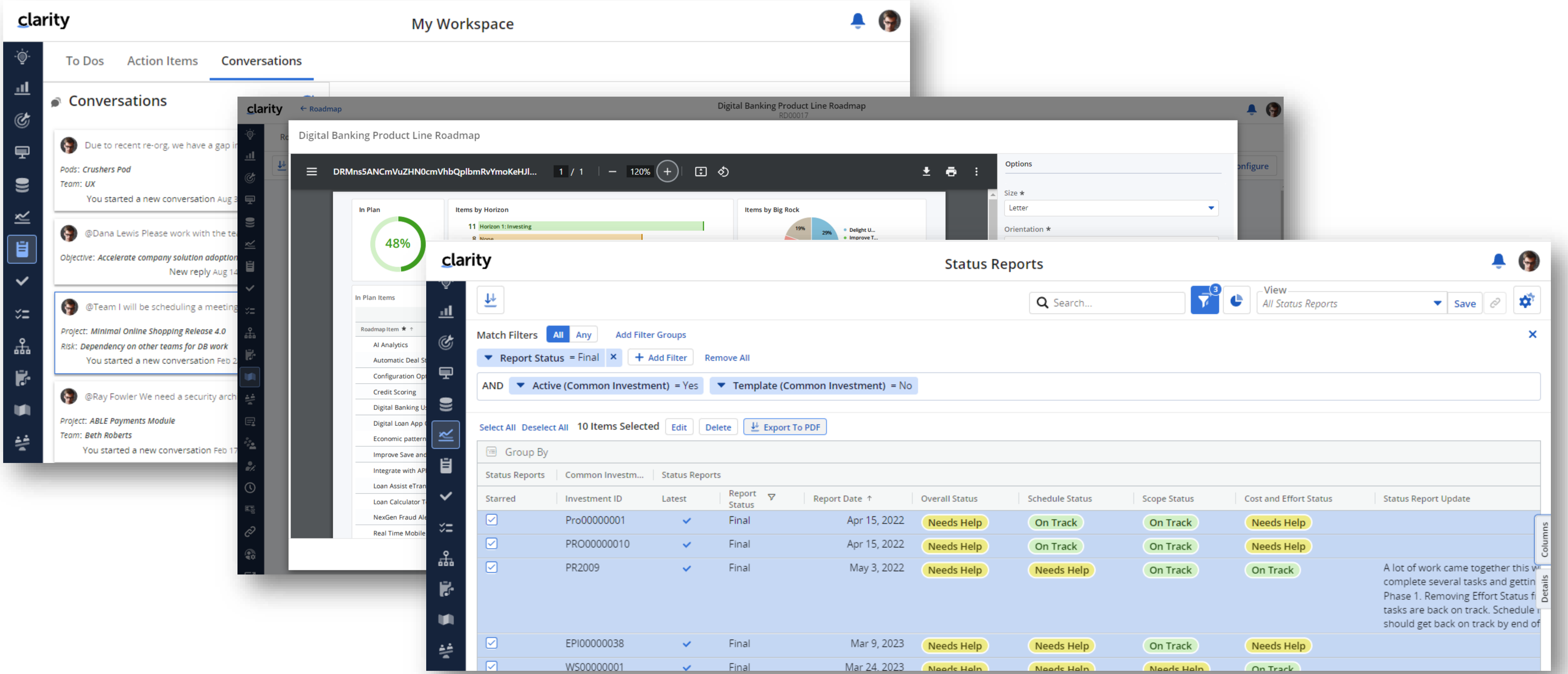


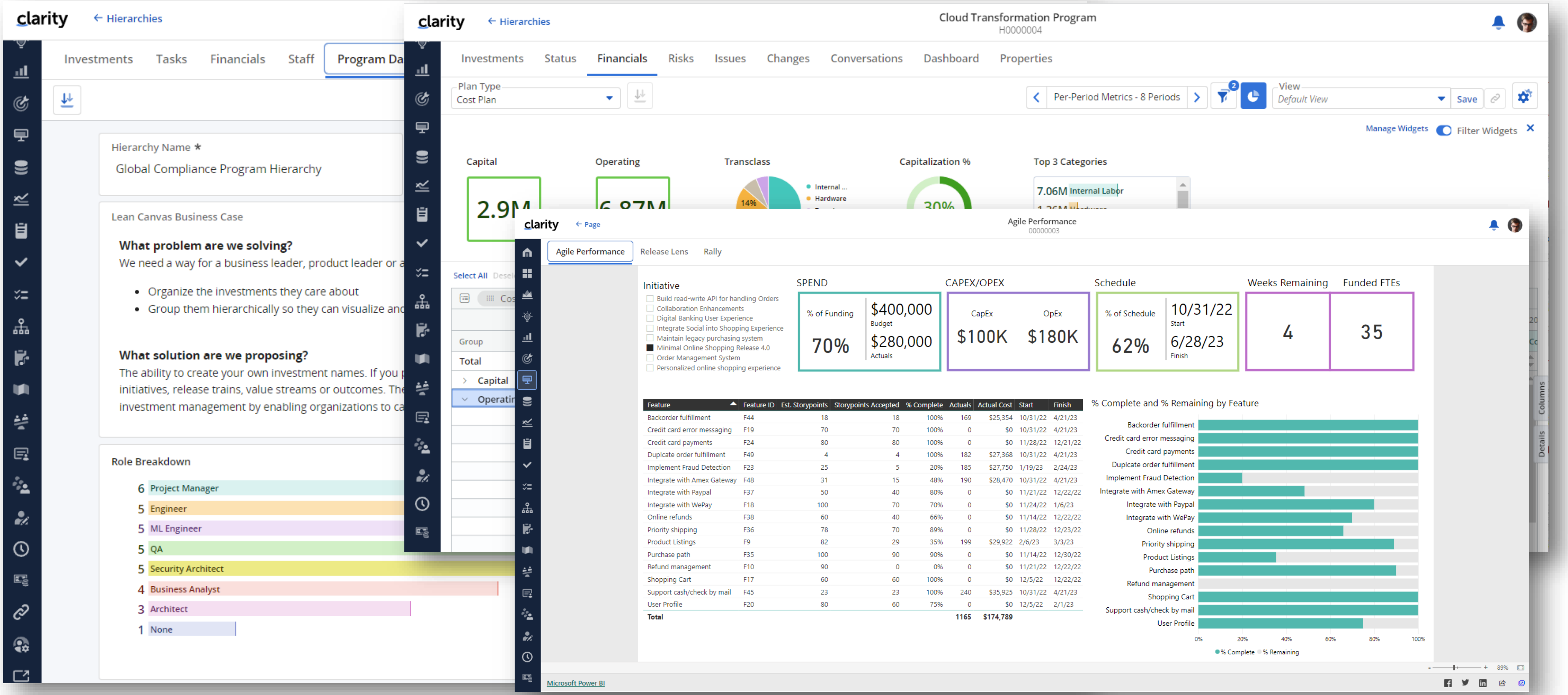




"Conversations, Content Publishing"



"Reporting, Analytics, Dashboards"



Demonstration

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

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

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- 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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888.813.0444

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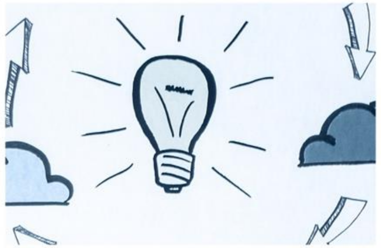
www.regouniversity.com

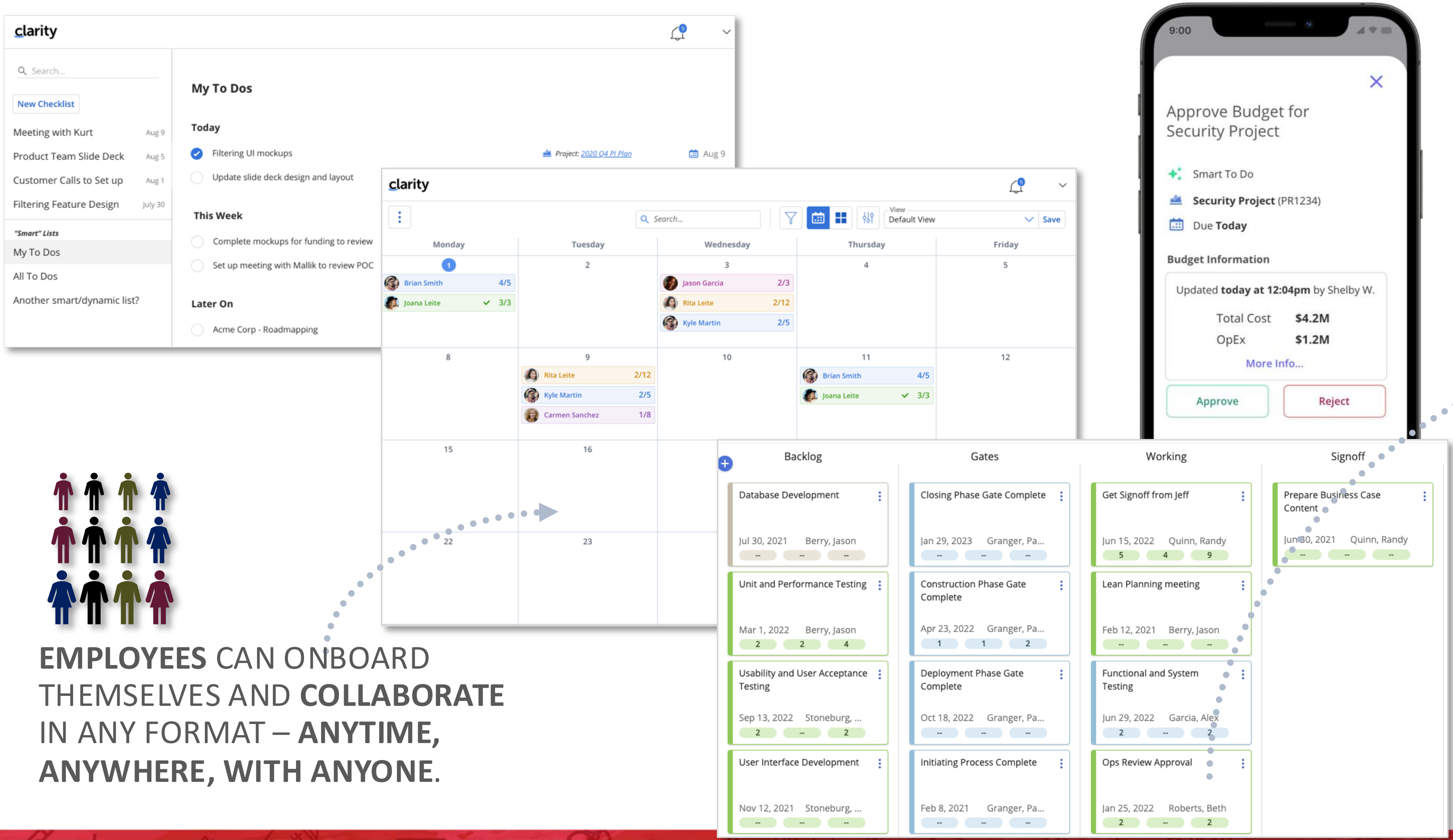
APPENDIX

- Broadcom Slides
- New Enhancements





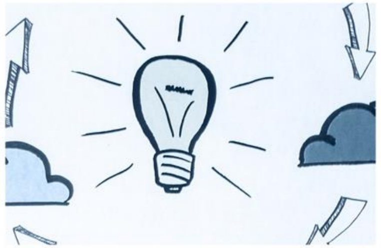

Clarity for Collaborative Work.



KEY WORK IS CONNECTED TO ENTERPRISE STRATEGY AND BUSINESS OBJECTIVES.

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

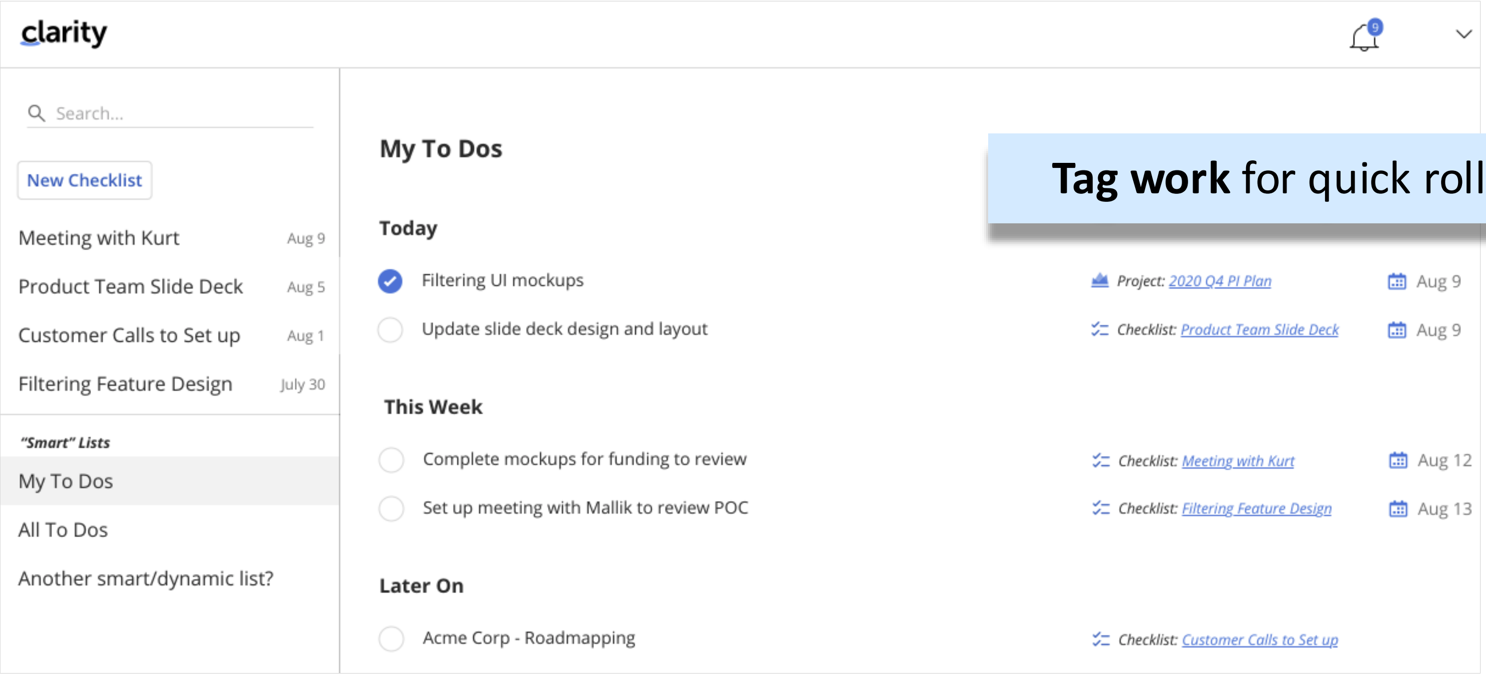




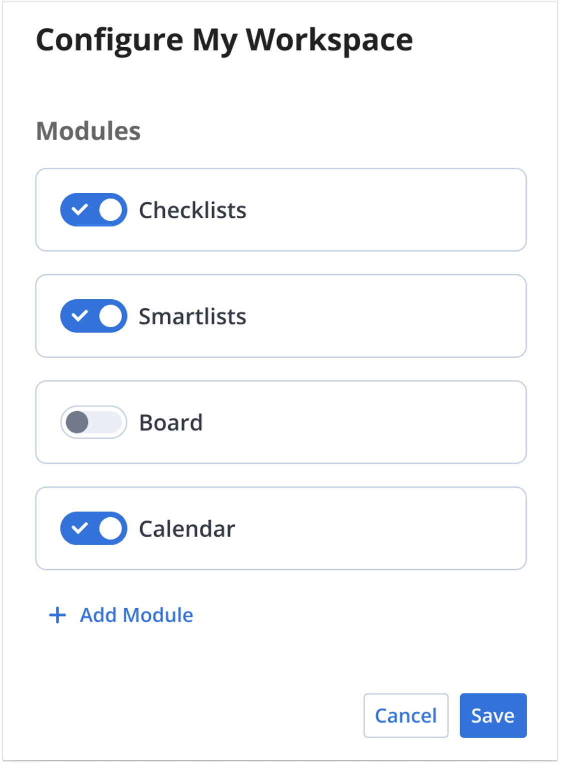

Personalize Work.

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

Keep work private until you share it.

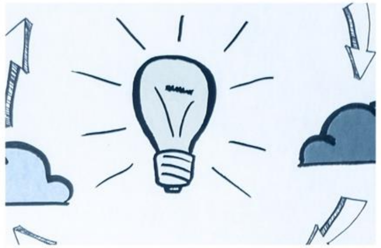


Tag work for quick roll-ups.



Personalize your own workspace.

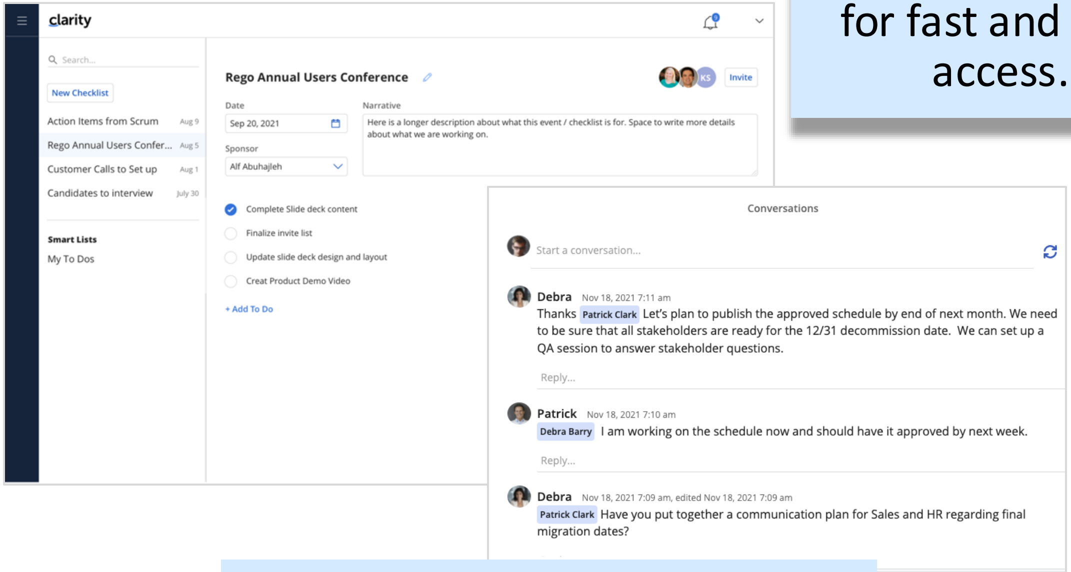





Share Work.

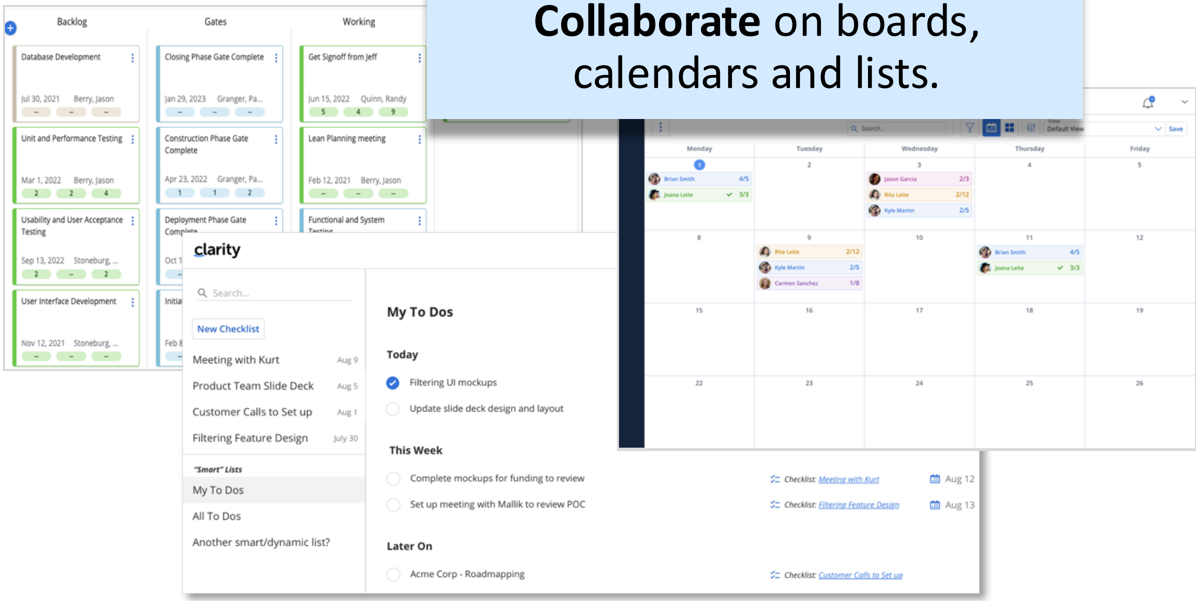
Invite anyone (inside or outside the company) to work on your to-do lists.

Users **self-register** for fast and easy access.

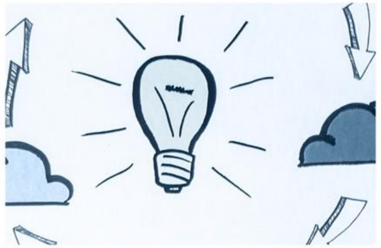


Engage team members with conversations.

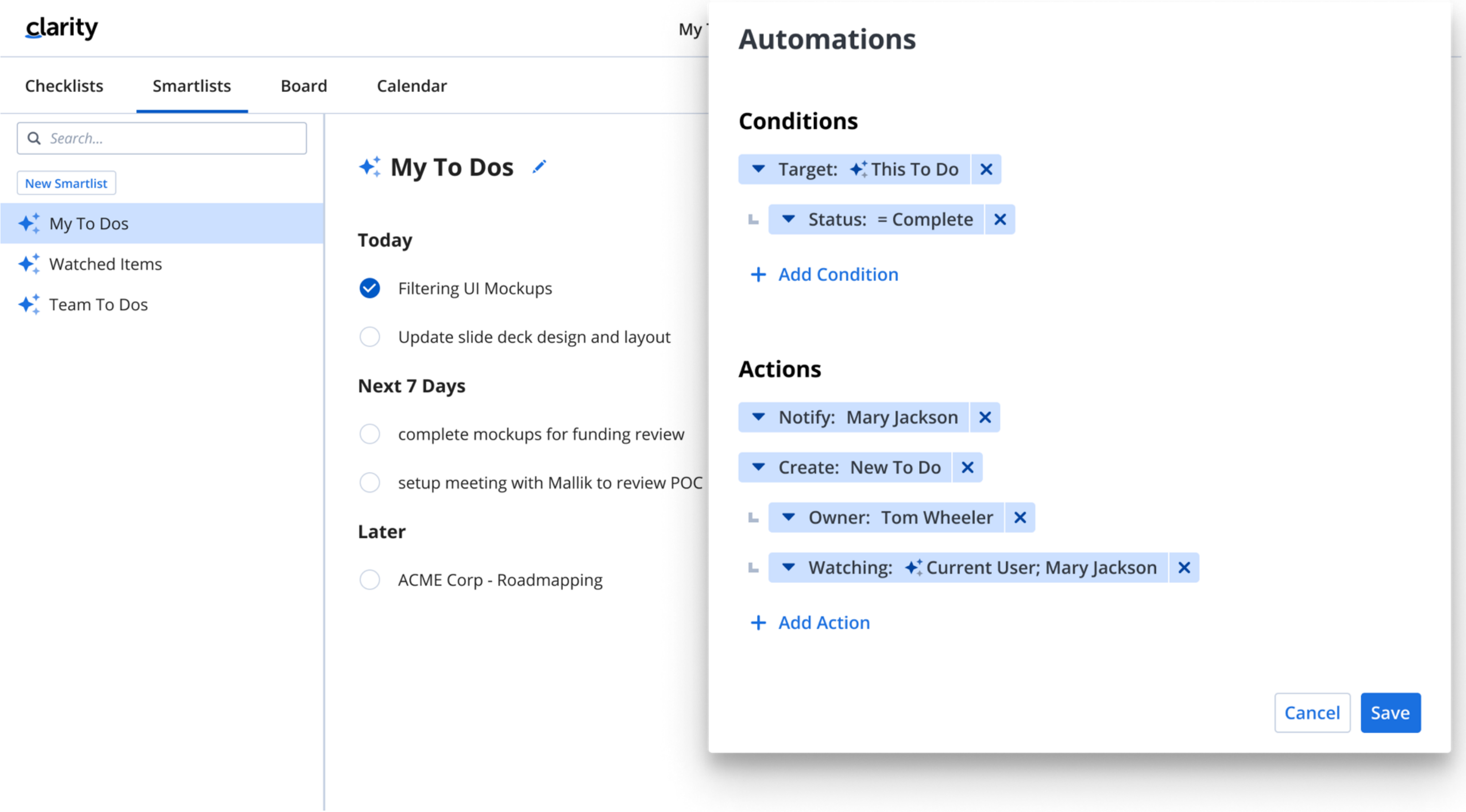
Collaborate on boards, calendars and lists.








Automate Work.



Build simple workflow to automate basic activities.

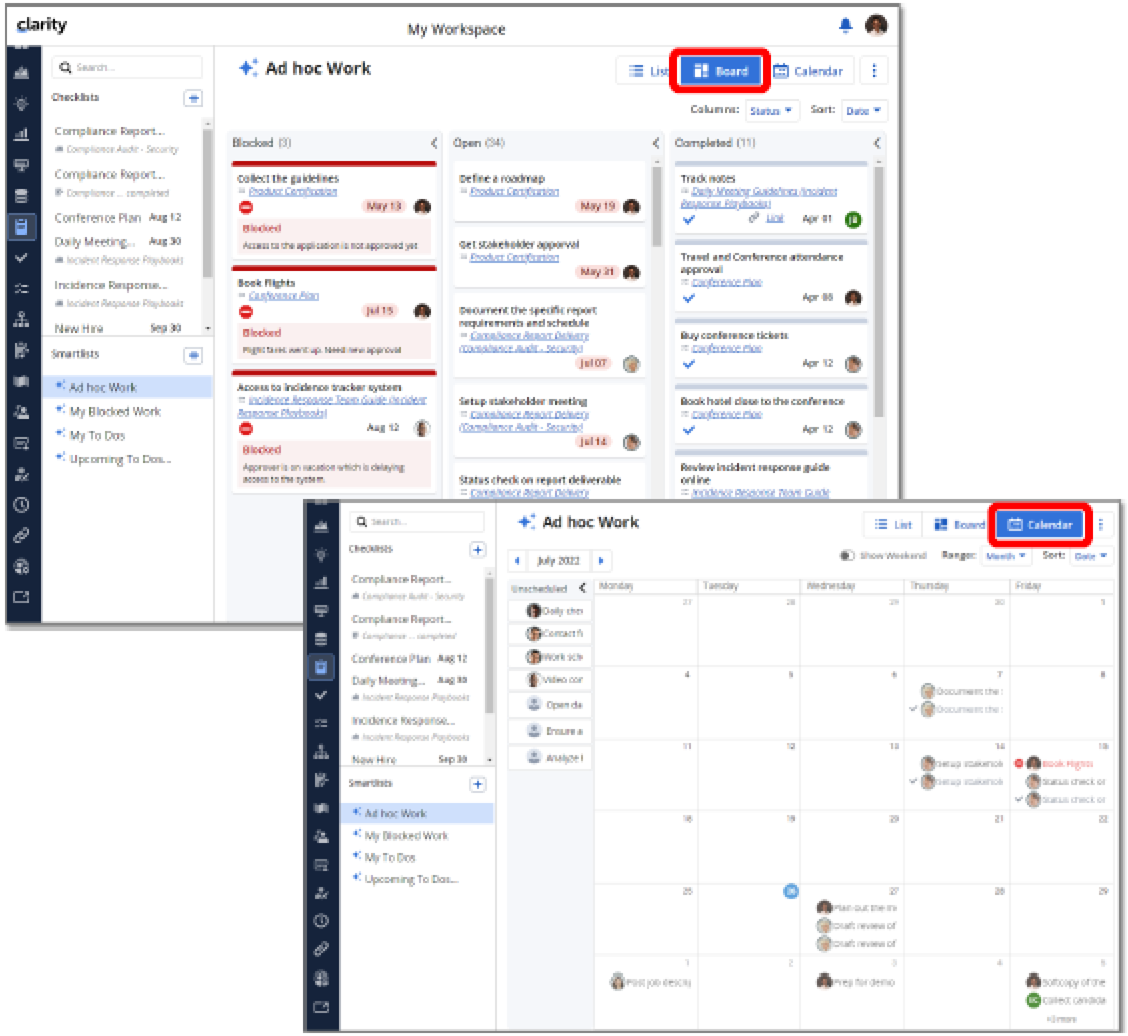
If This, Then That:
Send alert, create new to do, change watcher, etc.

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?

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

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- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
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