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Best Practice Use of Clarity for Project Management

Your Guides:
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Agenda

- Defining Project Management
- Clarity Capability Highlights
- Clarity Best Practices
- Ecosystem & Process Best Practices

- Discussion #1: What is Project Management in your organization?
- Discussion #2: What are your greatest challenges to successful delivery?
- Discussion #3: How can your Project Management ecosystem be optimized?

Introductions

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

Defining Project Management

Open Discussion #1

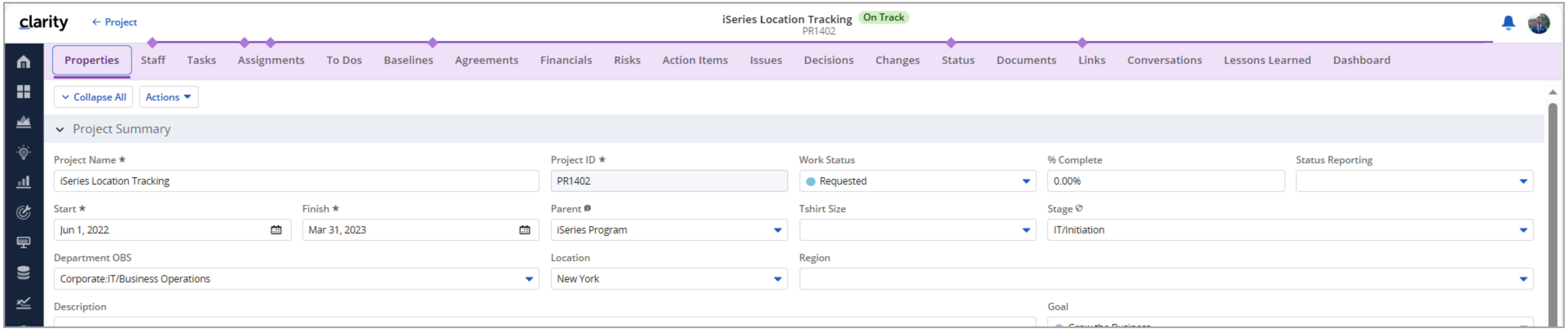
- What does "Project Management" mean in your organization?
- How many of you are PMs or are a part of the PMO?
- What are the foundational responsibilities?
- What are the most common methodologies?

Typical PM Activities

Category	Initial Set-Up	Ongoing Monitor & Control	Project Closure
General Project Management	• Create project & populate necessary data.	• Add/monitor/update risks, issues, and change requests • Create status reports (weekly/monthly)	• Set "Open for Time Entry" to no on project • Ensure all risks, issues, and changes are closed or resolved. • Complete final status report
Team Management	• Determine project work needed, estimate staffing needs and request roles or resources.	• Confirm roles filled with named resources. • View variances between planned allocation, ETCs and actual hours. • Modify resource allocations as needed.	• Set resource allocations to reflect project close date. • Set "Open for Time Entry" to no for all resources.
Task Management	• Build project schedule/WBS. • Sequence task/milestones, add dependencies, and link tasks. • Assign resources to tasks and add ETCs. • Run Auto-Schedule to identify critical path. • Set Baseline	• Update project schedule with task status (started/complete) • Monitor for proposed ETCs. Adjust ETCs as needed. • Run Auto-Schedule • Manage To Dos and Checklists	• Set task/milestone status to complete. • Zero out ETCs • Close tasks for time entry • Ensure all future dates on tasks/milestones are set no later than project close date
Financial Management	• Create Cost/Budget/Benefit plans	• View project variance between budget and actuals. Introduce change requests as needed.	

Clarity’s PM Capability Suite

Use Clarity to manage all aspects of your investments:

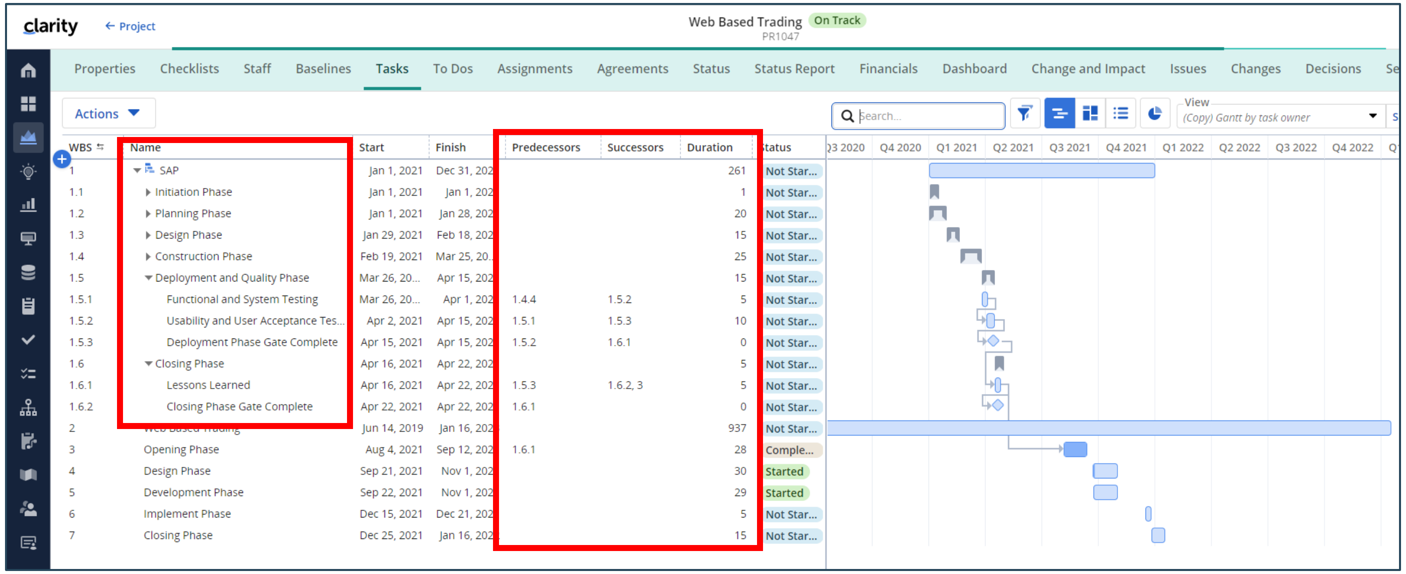


- Monitor Team Allocations / Availability
- Manage Schedule
- Capture Checklists / To Dos / Action Items
- Baseline
- Monitor Dependencies
- Forecast Against Budget
- Log Risks, Issues, and Changes
- Report Status
- Manage Artifacts
- Collaborate
- Custom Objects:
  - Assumptions
  - Decisions
  - Lessons Learned

Recent Clarity Release Highlights

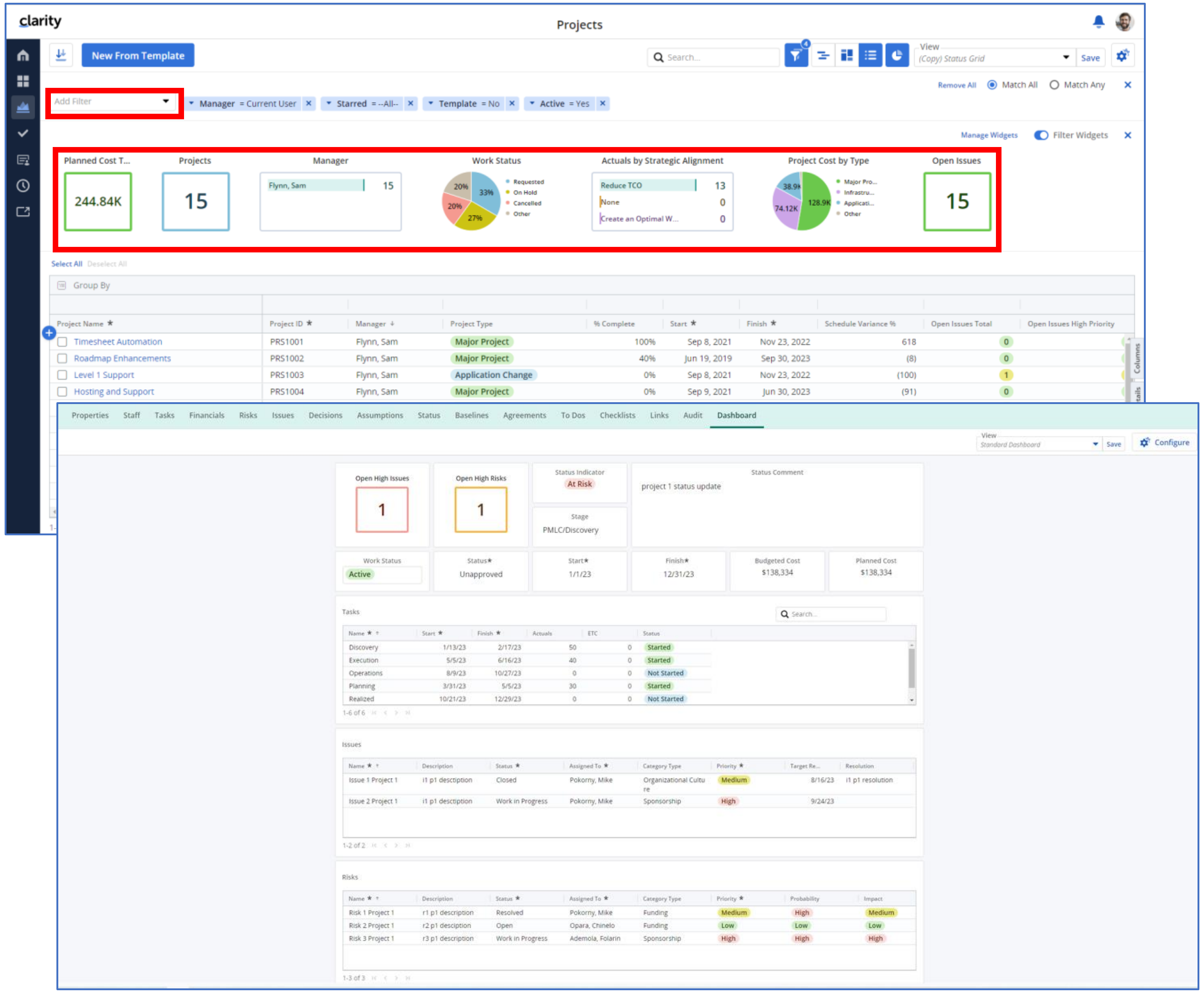
Task Improvements

- You can now add/display sub-project tasks on your Task timeline along with external Task Dependencies. This will assist the PM's in managing dependencies between project.
- Editable duration, predecessors, and successors
- Full auto-scheduling and basic Tentative Schedules with the ability to discard the changes



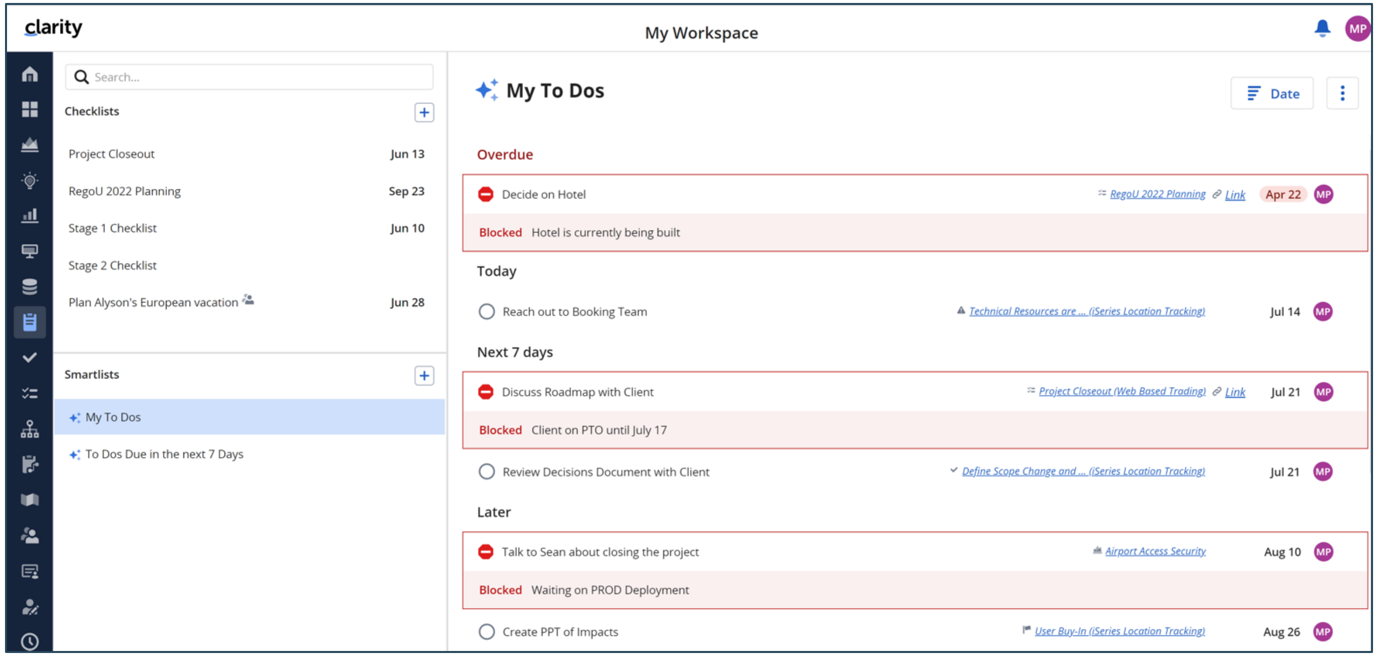
Improved Insights

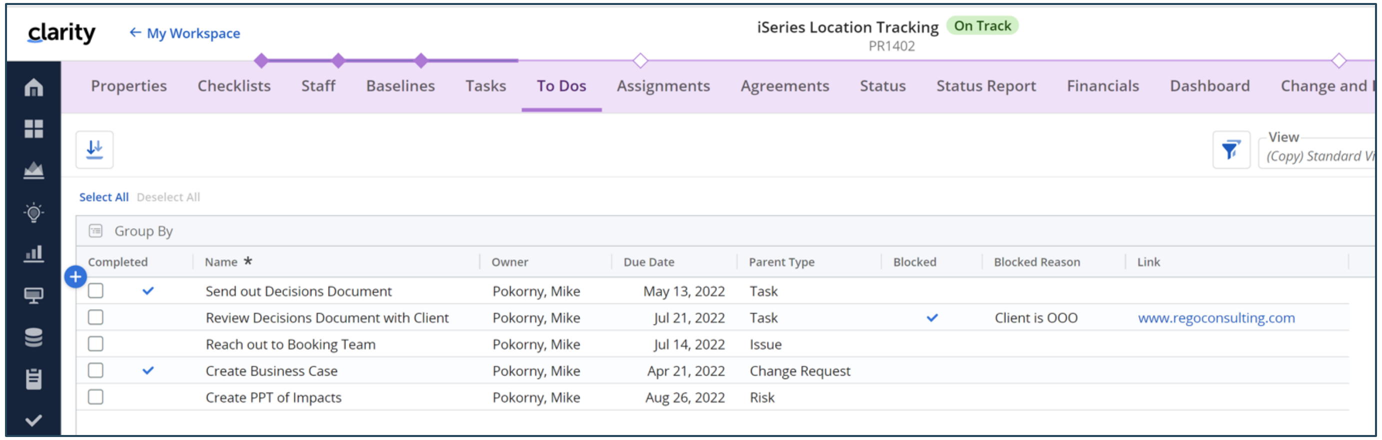
- Whether you are using Projects, Ideas, and/or Custom Investment Type to track your work, you can utilize the common Widget functionality on the Master and Sub-object grid views to get a quick insight into your work.
- Canvases can be used to create exportable Dashboards to convey key Project Data elements
- These views can be created for the end users with context sensitive smart filters to show them relevant data.



To Dos, Checklists, and My Workspace

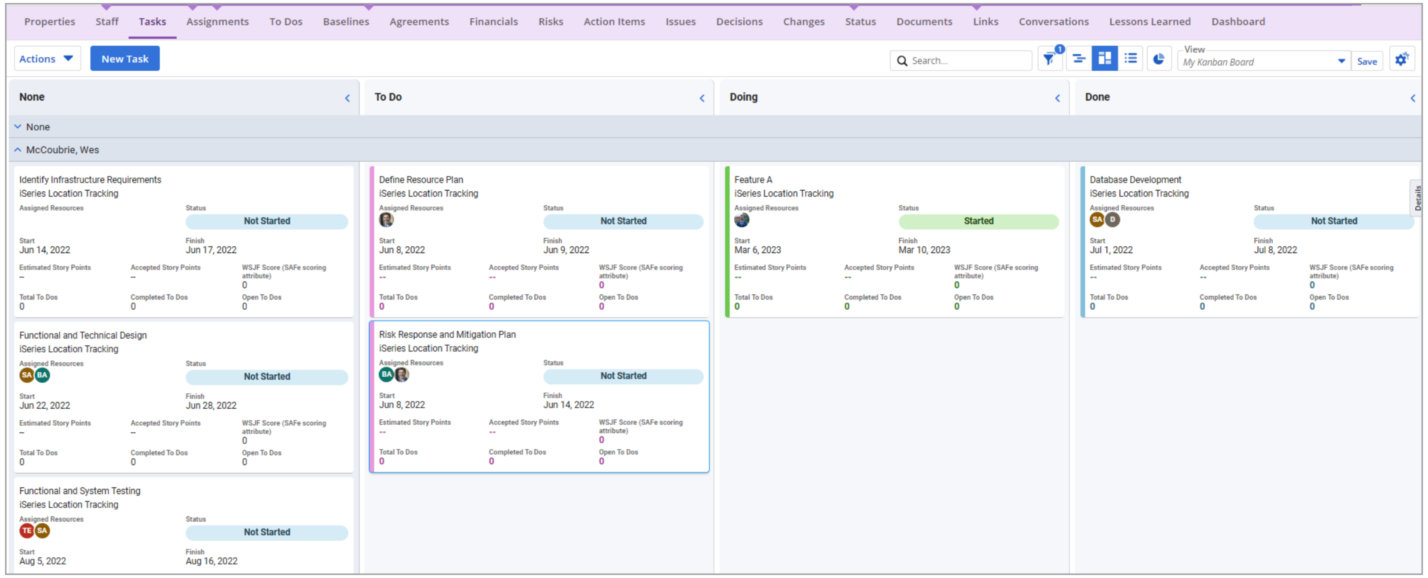
- Investment Managers can now add To Dos to Projects, Tasks, Risks, Issues, and Changes
- We can capture lower-level details by assigning owners, due dates, blockers, and blocked reasons
- This helps us track, collaborate, and report on ad hoc work that is too small of an effort for task creation





Board Enhancements

- Expanded card configuration capabilities
- Group by columns and swimlanes
- Supports foundational Agile management techniques
- Examples:
  - Group by Feature / Story with columns representing progress.
  - Color by Epic.
  - Surface story points, sprint, target release



Clarity Best Practices

Open Discussion #2

- What are your greatest challenges to successful delivery and collaboration?
- How much time do you spend managing the data in Clarity?
- What functions seem to be cumbersome?
- Which parts of the tool make things easier?
- Suggested features to be added/removed?

Make Information Easier To Access

Having your data organized, structured, and current will allow for better communications and decisions.

- Save filters and configure list views specific to you and your projects.
- Emphasize areas you need to manage; targeted information.
- Keep data current by using email reminders (e.g., RegoXchange “stalkers”)

Clarity - Project Compliance Inbox x

clarity@ca.com <clarity@ca.com> 1:53 PM (1 minute ago)

to chris

Project Manager: Wuenstel, Chris

You are receiving this email because at least one project currently assigned to you has data that is out of compliance. Please review the list below and address all compliance issues ASAP.

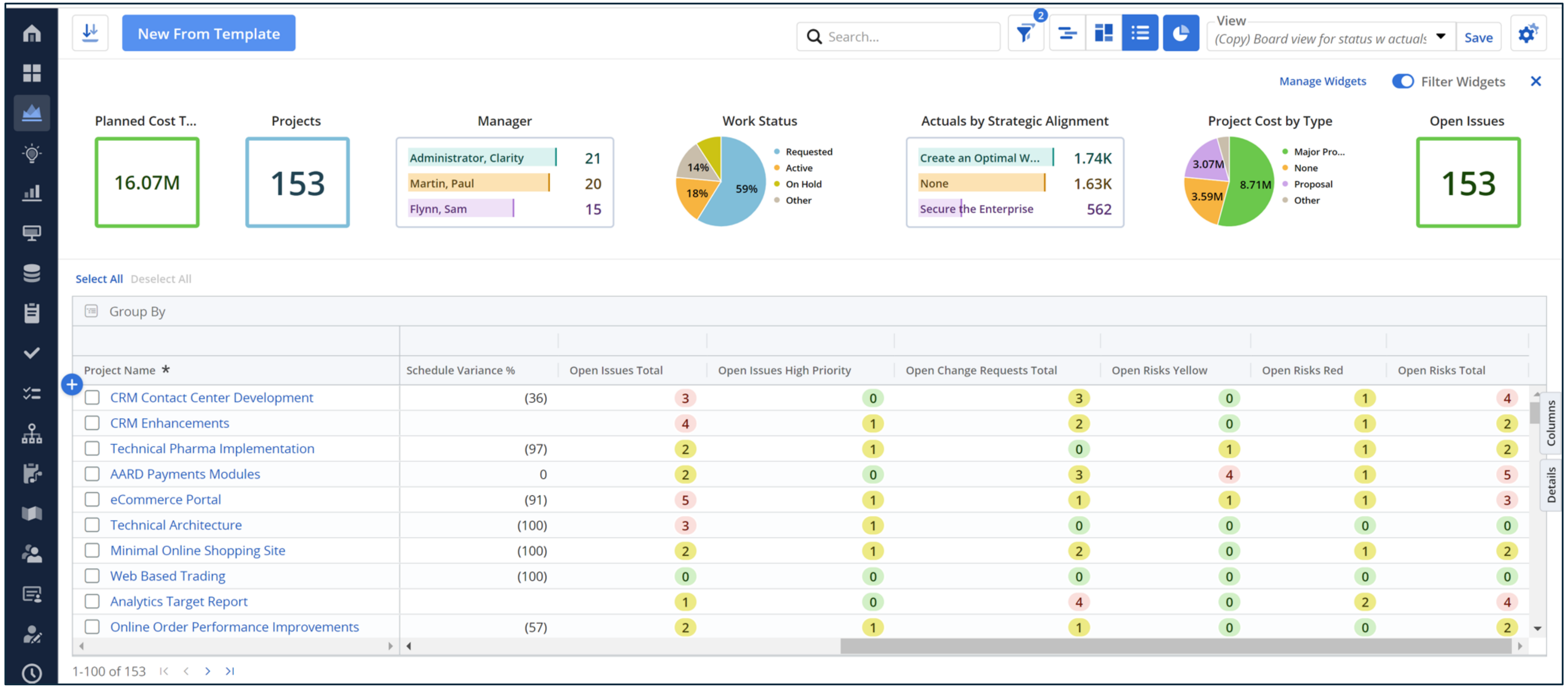
These projects have data compliance issues:

Project ID	Project Name	Stale Task Count	Late Issue Count	Late Risk Count	Late Status Report	Total Count
PR9232	Deploy Windows 7	18			No Status Reports created	19
PRJ03	Create Webcam Conference	3	1	2	No Status Reports created	7

This is an automated message. Please do not reply.

Make Flags Easy To Identify

- Use indicators to identify what needs attention - red highlights issues.
- Allows you to focus on the items putting the team, department, or company at risk.
- Utilize widgets and canvases to easily identify and report on project status

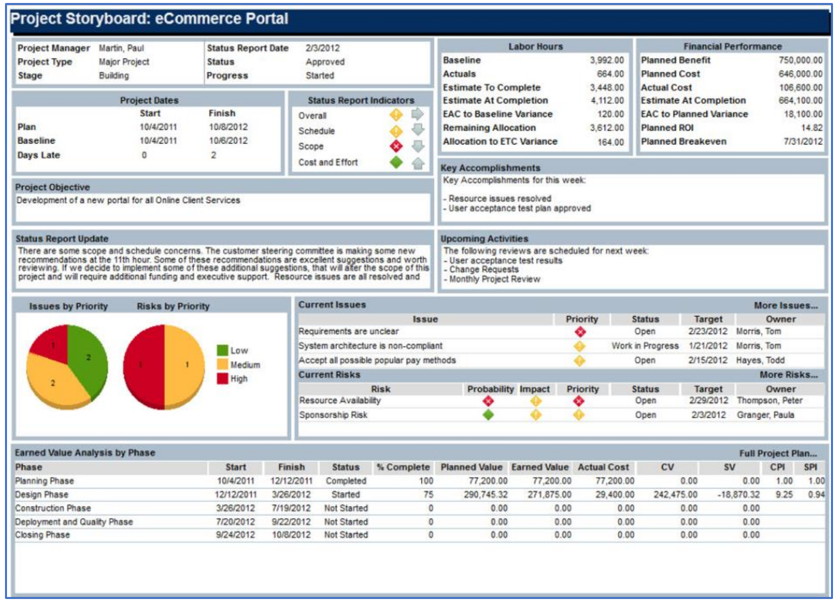


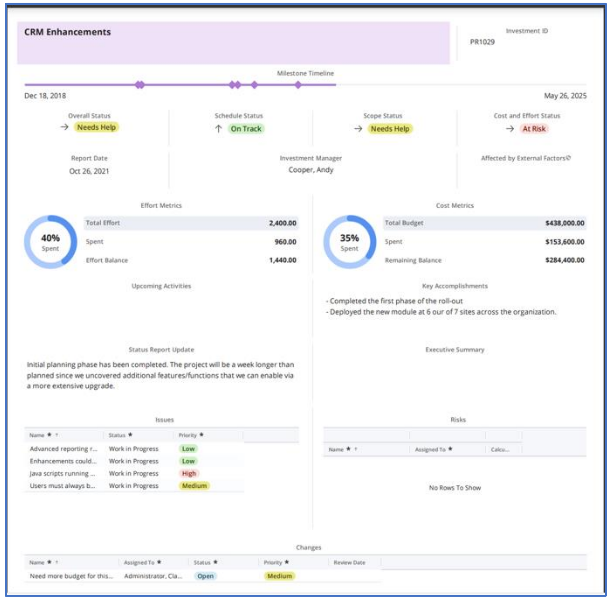
Simplify & Automate Reporting

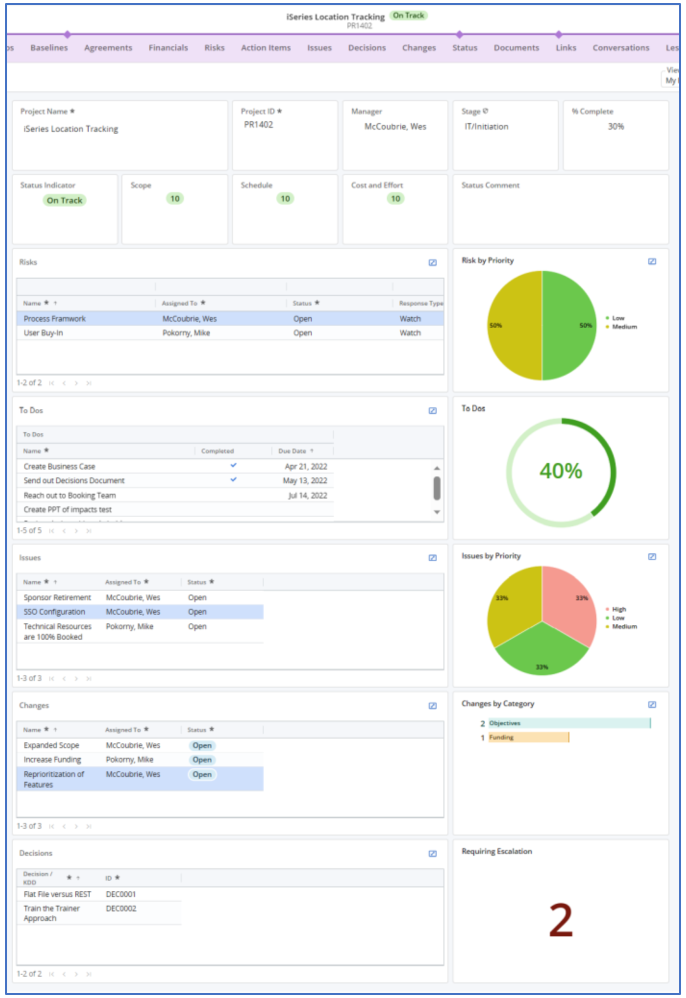
- Status Reports should be automated based on Clarity information you already update – no time to build a separate PowerPoint.
- Stakeholder information should be just the most important things:
  - More icons, less text
  - Focus on key milestones, not tasks.
  - Highlight changes from last time, not everything.

Scheduled reports, a formatted/filtered portlet, or a nicely designed Canvas will reduce the time and complexity required to compile stakeholder reports!

Report Examples





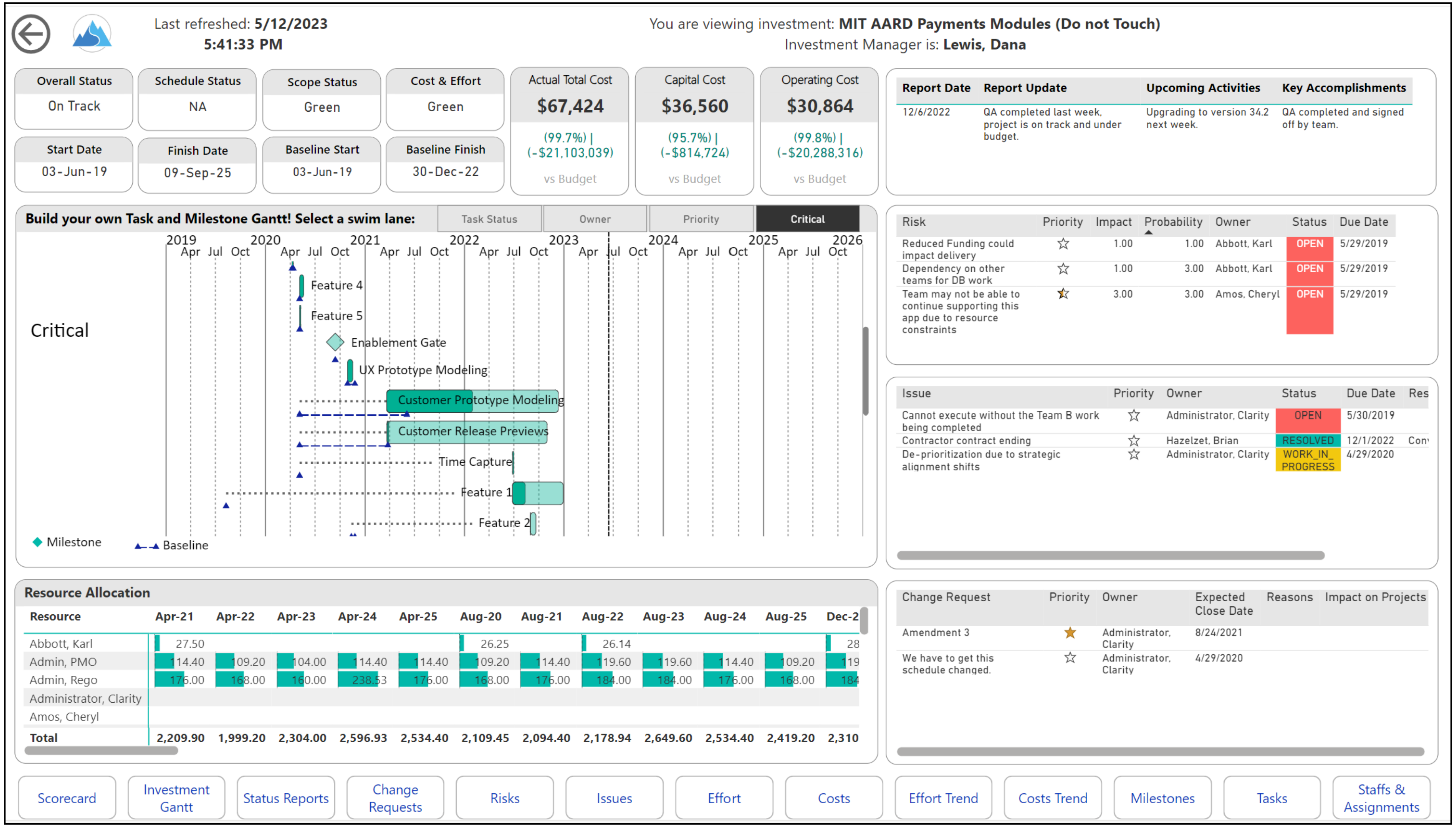


KPIs by Project Type

Application Change

Project Name	Project Manager	Start Date	Finish Date	Status	Schedule	Alignment	Risk	Resource Allocations	Resource Actuals
CRM Enhancements	Reed, Henry	11/3/2011	3/5/2012					2,280.00	1,496.00
Global Expense Application	McCarthy, John	1/2/2012	2/2/2012					90.00	35.00
Global Order Processing	Granger, Paula	5/8/2012	8/17/2012					3,064.00	0.00
HR Claims Enhancement	Sutherland, Joy	2/1/2012	5/22/2012					1,600.00	0.00
Total								7,034.00	1,531.00

Power BI Suite



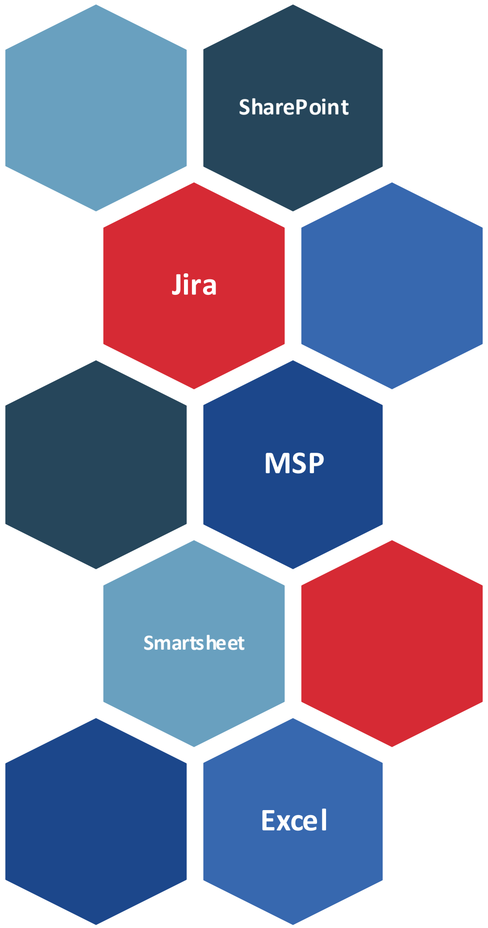
Ecosystem & Process Best Practices

Open Discussion #3

- How many of you have more work than hours in the day?
- What helps you make sure you get everything done?
- Any good examples of a PM Playbook or PMO Framework?

Ecosystem Overload

- Eliminate work that is offline, unshared, not real-time, and not centralized
- Centralizing PM activities will reduce complexity and increase accuracy and ease in reporting information to all project stakeholders.
- Eliminate multiple data entry points, improve data integrity.
- Avoid “one more place” to go to review project data.
- Think strategically about integrations.



Work with a Regular Cadence

- A predictable cadence allows the project manager to make sure they are continually focused on the right tasks at the right time.
  - Reports and portlets in Clarity are only as good as their data. It is critical that your data is always up to date. If you don't have a regular schedule for updating your projects, you risk reporting (and managing your project) on stale or inaccurate data.
- The real power of cadence is in the habits it forms.
  - Cadence encourages discipline & discipline results in predictability. A predictable cadence helps to set expectations and provides a less stressful environment.
- Set up a consistent work schedule, one that makes sense for your team.
  - Schedules are critical, without them we have a harder time committing to a task. Like exercise, managing a project takes commitment and discipline. Making a weekly chart of tasks helps encourage this discipline.

Sample Schedule

- The following is an example of a Project Manager's weekly schedule.
  - Based on a Friday status/project team meeting.
  - Can be adjusted based on the Clarity features used.

Process	Time per Project	Sat	Sun	Mon	Tue	Wed	Thu	Fri
Team members submit their time sheet	5 min							X
Project Managers Review Checklist(s)/To Do(s)	10 min			X				
Project Managers Review Pending Actuals (morning)	10 min			X				
Resource Managers Approve Timesheets (afternoon)	30 min			X				
Posted hours show up on project. PM reviews hours.	10 min				X			
Project Manager compares the planned vs actual cost to budget	30 min				X			
Project Manager updates the WBS	20 min					X		
Project Manager updates allocation for resources	10 min					X		
Project Manager reviews/updates risks, issues, changes (as needed)	30 min						X	
Project Managers Publish Status Report	20 min						X	
Weekly Team Meeting	30-60 min							X

Questions?

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- **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.

Surveys

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

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- Access your account at 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**
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- Training classes = **Technical**
- Click on **I agree** and **Submit**

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