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Clarity Support Organization Best Practices

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Introduction

Clarity Support Organization | Best Practices

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Introduction

- This class will discuss how other Clarity users support users, solve issues, discover solutions, and successfully use Clarity.

- Understanding all aspects of Clarity support and implementing the proper support model is crucial to ensuring that your Clarity system continues to add great value to your company.

- Volume, demand, number of users, company culture, structure, and PPM maturity all play a part in what support model works for you.

- Effective Clarity Support is PEOPLE, PROCESS, and APPLICATION support

Agenda

- Sustainment Structure

- Support Team Structure

- Support Work/Intake Structure

- Supporting Upgrades

- Appendix: Common Support Gaps

Poll Questions

- How effective is you current Clarity Support on a Scale of 1 – 5, 5 Most Efficient?

- Who makes decisions about your PPM tool?
  - Product Owner
  - Steering Committee
  - User Group
  - No Formal Process
  - Other

Sustainment Structure

Let Rego be your guide.

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Common Sustainment Roles

Operating / Steering Committee	Product Owner	Core Application Team	Power Users/Community of Practice
• Steer Priority and Sequencing of Enhancements and New Functionality • Primary Team for Driving the Vision of All Solutions • Communication with Enterprise – Releases, New Functions, Reporting • Approval of Release Content	• Works with Leadership to Define and Update Roadmap, Enterprise Reporting • Resolves Conflicts and Owns Prioritization • Proposes new solutions and capabilities in best interest of the Organization • Communicates and champions change • Skills/Knowledge: functional product knowledge, business knowledge	• End User Support • Configuration / Development - Reporting • Process Support, Mentoring & Training • Solution Architecture & Integrations • Skills/Knowledge: functional product knowledge, administration training, technical knowledge, business knowledge	• Share knowledge and best practice • Promote policy, process and tool use • Assist with User Testing • Provide feedback on enhancements and new functionality

Matrixed Steering Committee

Common Sustainment Challenges

Lack of Staffing or Accountability to:
- Create and maintain a Strategic Vision
- Consistently own business process standards, data standards and data quality for all supported work and processes
- Communicate with stakeholders about new capabilities delivered internally or by Broadcom
- Create feedback loops and **collaborate** on a Tooling Backlog
- Train and mentor users
- **Triage and Deliver** leadership, business unit, and end user requests
- Architecture and technical skills to create **complex solutions** and system processes

Lack of **Structure** to:
- Collect, triage, agree upon, and deliver continuous improvements
- Communicate tooling opportunities with other leaders (different teams buying/creating similar functionality, new features that could support business challenges are unused)
- Align Process and Tool changes
- Maintain training, data dictionary, and other assets over time
- Ensure all users / organizations have access to improvements

Poor **Prioritization**
- Failure to prioritize VOC requests
- Failure to balance multiple stakeholder requests

Support Team Structure

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Poll Question

- How do you structure your support team?
  - Dedicated Functional and Technical Team
  - Functional Team Only
  - Matrixed with IT or PMO or Other
  - Out-Sourced
  - Other
- Where in your Organization does the Support Team reside?
  - IT
 - PMO
  - Strategy
  - Product Management
  - Finance

Support Model: Centralized

Advantages:

- "One vision"

- More efficient collaboration

- Cross training, multiple skills

- Accountability is more effective in Direct Reporting Structure

- Continuous learning opportunity

Disadvantages:

- Must actively seek Input from external areas

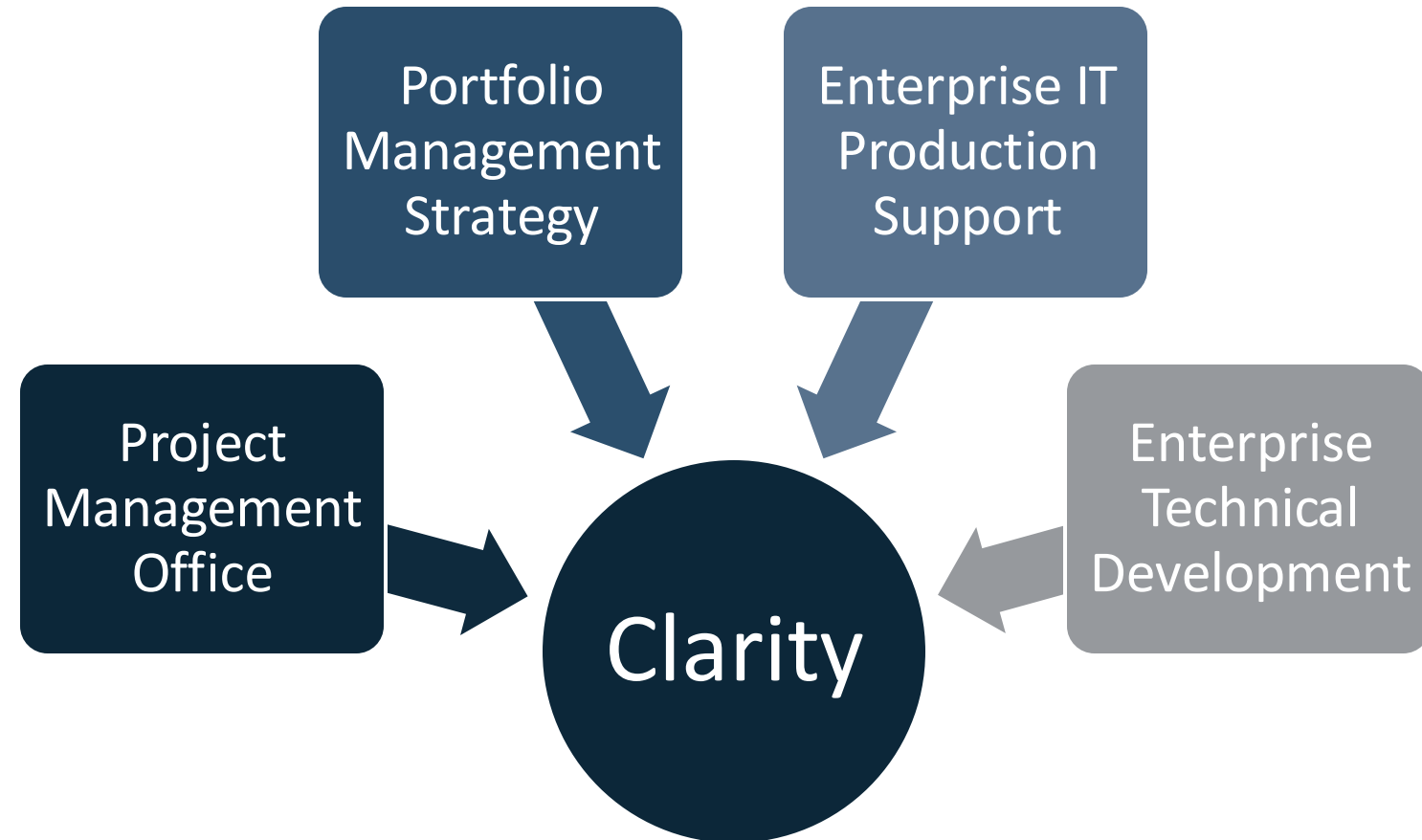- Perceived as Overhead / Unpopular to use dedicated teams
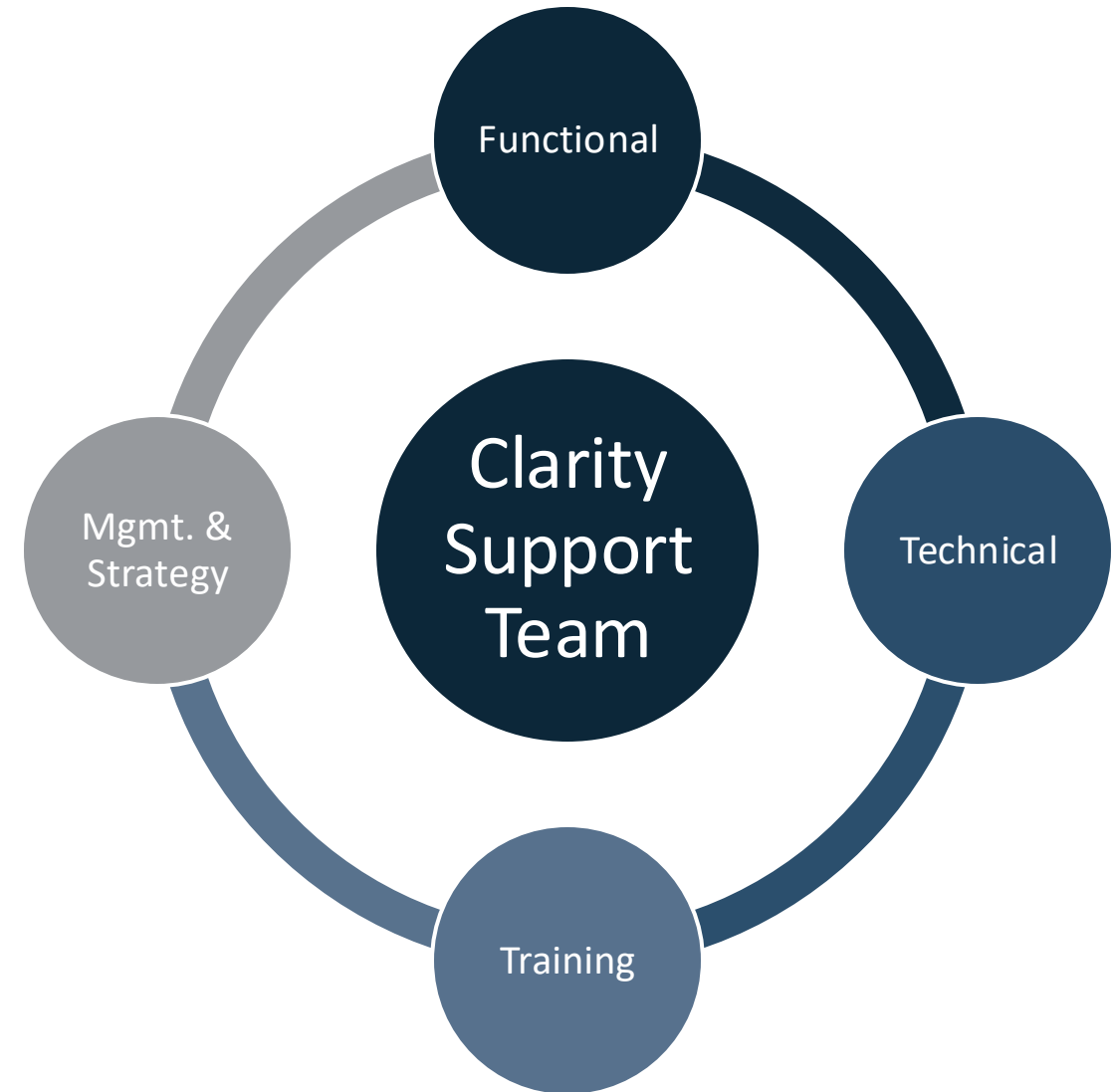
Support Model: Distributed

Advantages:

- Focused expertise
- Focused priorities
- Faster issue / response time

Disadvantages:

- Limited collaboration
- Risk of incorrect communication to end user
- Cross training challenges

Portfolio Management Strategy

Enterprise IT Production Support

Project Management Office

Enterprise Technical Development

Clarity

The PMO Transformation: Portfolio Management to Value Stream Management Broadens Can the Support Team's Scope
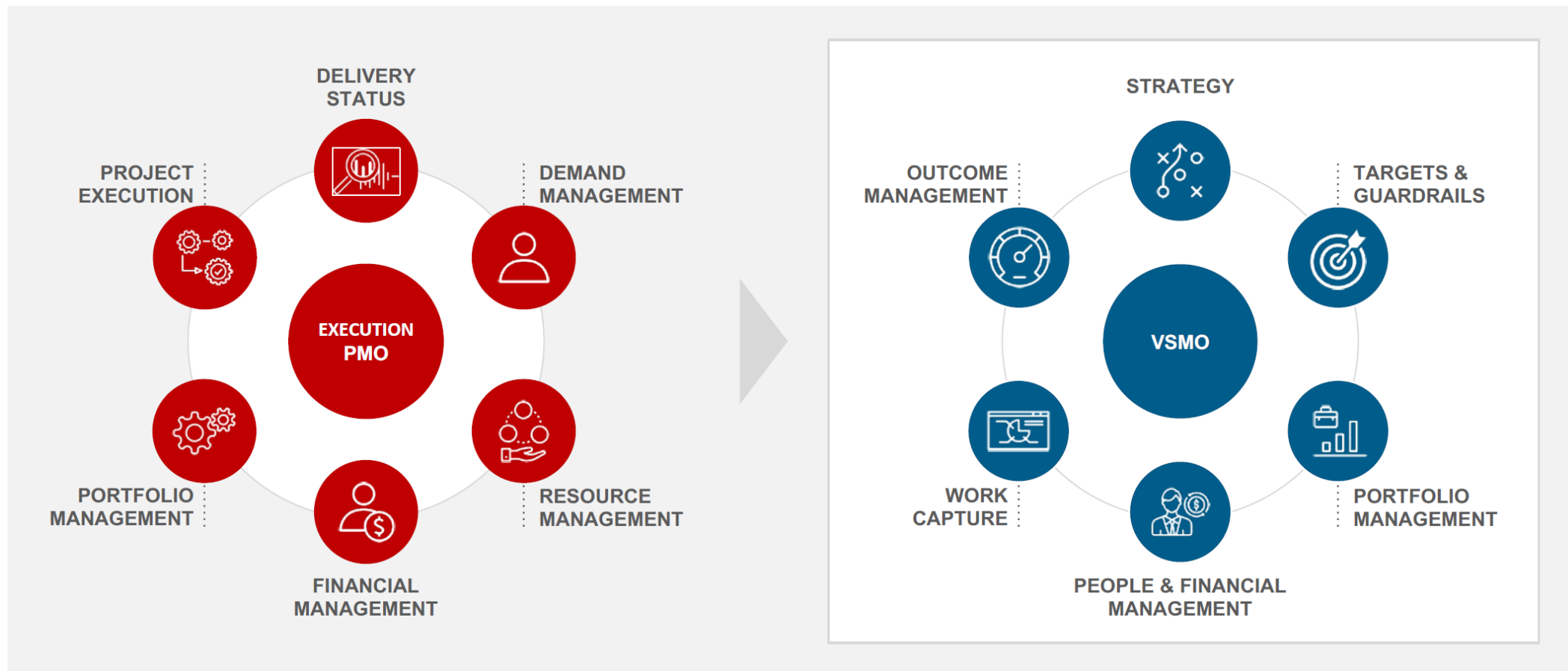
Support Teams Need to Think Holistically

Ongoing Management

- Incidents
- User Questions
- Process Evolution
- Leadership Needs
- Routine Maintenance and User Onboarding
- Data / Report Requests
- Upgrade Management, and Feature Releases
- Environment Management (refreshes)
- Unmet business needs
- Voice of the Customer (end user improvement requests)

People

Process

Technology

?
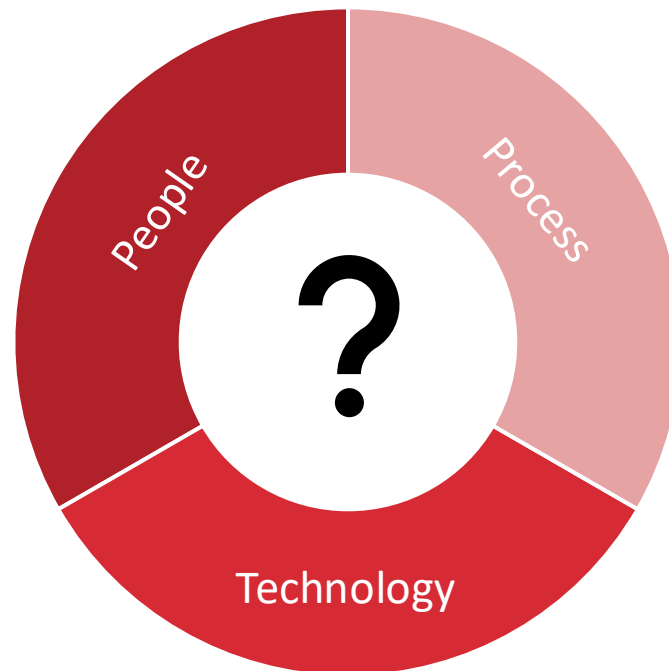
Organizational Change Management

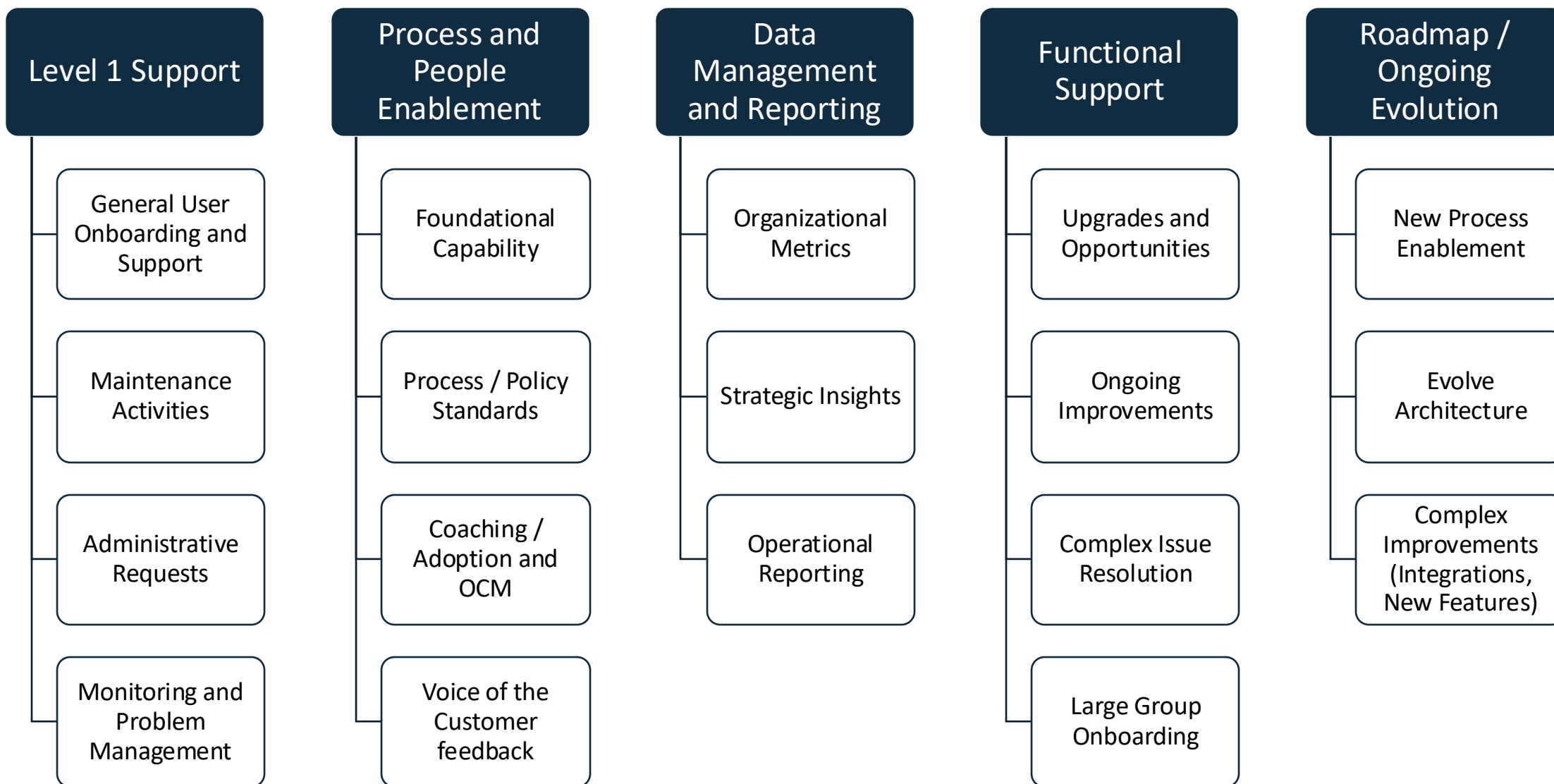- Communications
- Coaching
- Rapid End User Support

Sustained Assets

- Process Documents
- Training / Reference
- Data Quality Management
- Existing Reports
- Data Dictionary
- Communications

Functional Changes

- Onboarding and Migration
- Enhancement Releases
- New Metrics and Reports
- Feature Releases

Key Components to ensure ongoing value

Level 1 Support	Process and People Enablement	Data Management and Reporting	Functional Support	Roadmap / Ongoing Evolution
General User Onboarding and Support	Foundational Capability	Organizational Metrics	Upgrades and Opportunities	New Process Enablement
Maintenance Activities	Process / Policy Standards	Strategic Insights	Ongoing Improvements	Evolve Architecture
Administrative Requests	Coaching / Adoption and OCM	Operational Reporting	Complex Issue Resolution	Complex Improvements (Integrations, New Features)
Monitoring and Problem Management	Voice of the Customer feedback		Large Group Onboarding	

Sample Staffing Data

- Includes resources outside of Core Clarity Team, Process SMEs, Power Users, etc.

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

Other Support Resources Opportunities

- Provide Self-Service Alternatives
  - Project requests
  - Resource requests
  - Quick Reference Cards
  - Process FAQs
  - Links to Process Documentation
- Enhance and Re-Focus Training
  - Promote Integrated Content Experience (ICE) and/or training videos
  - Train and Empower Subject Matter Experts in area across the organization
  - "Lunch & Learn" sessions on the week's most common request
- Automate Recurring Activities
  - Resource provisioning and removal
  - Project shutdown
  - Log maintenance
  - Time period maintenance

Support Model Staffing Alternatives

Area	Staffing Options
Management	1. Internal PMO owns both process and tool 2. Internal PMO owns process and Internal IT group is the product owner of the tool
Functional – Level 1	1. Outsourced to External vendor 2. Moved to Help Desk (rare) 3. Staffed within the internal PMO
Technical Development – Level 2	1. Internal PMO performs this work 2. Internal IT product owner staffs technical resources 3. Outsourced to External Vendor
Functional – Level 2	1. Internal PMO performs this work 2. Outsourced to External Vendor
Level 3 Support	1. Move to On demand 2. Internal IT product owner manages 3. Internal IT product owner manages infrastructure, and some level 3 monitoring is outsourced to external vendor
Project / Release Management	1. Internal PMO manages projects and releases 2. Internal IT product owner manages projects and releases 3. Outsourced to External Vendor
SMEs & Evangelists & Trainers	1. Internal PMO performs this work 2. Outsourced to External Vendor (would not outsource SMEs– just trainers)

Support Work/Intake Structure

Poll Question

- What is Your Support/Enhancement Intake Process?
  - COTS Solution – (Service Now, Cherwell, etc.)
  - Clarity CIT
  - SharePoint
  - Agile Tool
  - Email
  - Anything goes!

Ongoing Support Levels

Level 1 Support
Administrative Requests (access, security, timesheets, new projects/users, OBS changes, lookup changes)
General Support (information, issues, reporting, how to)
Monitoring Clarity Jobs & Processes (daily, weekly)
Working with the Clarity SaaS/Rego AWS team with any hosting issues

Level 2 Support
Functional Roadmap and Release Planning
Best Practice Functional Consulting
Data Defects
Reports, Portlets, or Processes
End User Training
Project and Release Management

Level 3 Support
Integrations
Performance Improvements (CA On Demand Does This)
Upgrades (Clarity SaaS/Rego AWS Does This)

Components Of Support: Request Process

Best Practice In Request Tracking

- Tracking of Support Work
  - The ability to track and report on all support requests is a key building block for a successful support model

- General Support Requests, Application Administration and Ongoing Monitoring
  - Level 1 - Internal ticket system (ITSM) or support email

- Work Request Tracking Module (Level 2 / 3 Requests)
  - Facilitates the support process by providing a more formalize method to track and prioritize the status of all Clarity work requests
    - Clarity Custom Object, SharePoint, Smart Sheet, Agile Backlog

Clarity Work Intake Solution - Example

- Example: Custom Work request object in Clarity can be used to effectively manage Level 2 and 3 requests

- Enabled with auto-generated emails and background process that support task creation / time tracking

Supporting Upgrades

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Poll Question

- How is your Organization handling the support for the numerous upgrades released by Broadcom each year?
  - As a Broadcom SaaS Deployment
  - As a Rego SaaS Deployment
  - As an On-premise Deployment

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Best Practices – Supporting Upgrade Releases

- Review Broadcom Release Notes
  - Any changes to areas of the application with high visibility or risk?
  - Any new features/functions that deliver benefit to users?
- Complete a Change Impact Analysis
  - Are any configuration or access modifications required?
  - Any impact to current workflow processes
- Develop and Execute Testing
  - Execute Test Scripts for the most critical functionality
- Evaluate Testing Results
- Communicate Upgrade Impact and Timings to the Users

Release Management

Create a standard cadence for changes
- Incorporate time for testing
- Coordinate user communications

Enhancement Definition of Done includes work to maintain assets over time
- Ensure changes meet the Definition of Done
- Identify **Data Quality Owners**
- Update User Reference Information
- If required, incorporate into onboarding process
- Create OCM plans for larger changes

Consider separate Upgrade, Maintenance and Capability Releases
- Plan for quarterly upgrades
- Deliver "VoC" and Admin changes in Maintenance Releases
- Deliver larger capabilities in Capability Releases

Summary – Keys to Success

Have a Vision and Stay Current

- Communicate how the tooling will evolve.
- No initial implementation is perfect. Have a plan in place to manage improvements, including a method to collect and prioritize changes, and resources to implement them.

Short Cycle Time

- Be responsive. If users believe their enhancements, defects, etc. take too long or do not meet their needs, they will look elsewhere to get their data or implement their process.

Staff a Solid Team(s)

- People are always the most important element.
- Trained SMEs and Admins can keep you moving forward even on a shoestring budget.
- Outsourcing may make sense especially if you are concerned about turnover.

Communicate and Collaborate Across Organizations

Questions?

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- Click on **Course or Training**
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- Class Name = **regoUniversity**
- Course **Description**
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Appendix:
Common Support Gaps

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Typical Support Gaps – Roles

- Strategic Alignment & Vision
  - Roadmap creation and guidance
  - Annual Reviews / Updates of Roadmap

- Training & Mentoring
  - Onboarding support for new RMs/PMs
  - Formal mentoring to share and collect real-world best practices
  - Portlet and report optimization
  - Best practice configuration guidance, FM and RM in particular

- Change Management
  - Managing process changes vs. tool changes
  - Effective communication of all changes
  - Stick to a Release Schedule

Support Gaps – Turnover

- How many have had support staff leave?

- How were they replaced?
  - Hire a Clarity expert
  - Hire and train
  - Outsourced to a firm

- How do you retain staff?
  - Role rotations
  - Empowerment
  - Advancement path

- How do you mitigate the impact of turnover?
  - Cross-training
  - Formal back-up assignments
  - Strong documentation

Support Gaps – Internal Management

- In what tool is demand collected, prioritized, assigned, and managed through delivery?
  - Help Desk
  - Ticketing system
  - Support Email
  - Change requests – Excel, Clarity WR object, other

- Who owns triage and prioritization?
  - Specified Level 1 Resource
  - Team Manager
  - PMO

- How do you balance the book of work to ensure enhancement do not take too long to implement, causing users to lose patience and confidence?

- How is progress communicated back to the requestors?
  - Reports, Portlets
  - Email

Sustainment Decisions / Discussion

Topic	Decision / Notes
• Who will and how will we support end user questions and break/fix issues? What is the communication path and how are issues tracked?	•
• Who will monitor/manage data quality?	•
• Who will perform routine monitoring and maintenance?	•
• How will resources be onboarded to the tool?	•
• How will we track future functionality requests? What is the channel used?	•
• Who will maintain a Roadmap and communicate with stakeholders?	•
• Who will configure enhancements, and how often will there be functionality releases?	•
• How/who will support testing for quarterly upgrades?	•
• Will you be leveraging team "SMEs" for support?	•
• Who will decide on what goes into a functional release? (Steering Committee? Each BU?)	•