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Financial Management Roundtable

Your guides:
Karen Lifsey & Mario Castillo

Introductions

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



Agenda

Approach:

- An outline of topics will be presented for discussion.
- We are not limited by these topics, as their purpose is to ‘spark’ the conversation.

Encouragements:

- Participate and share your insight.
- This is an opportunity to interact with peers and share challenges, issues, resolutions, and successes.
- If there are questions very specific to your organization, we can discuss directly afterwards or within the Labs.

Possible Discussion Points

- What financial information are you being asked to provide to enable:
 - Project Managers or Scrum Masters
 - Business Partners
 - Finance
 - Executives
- How has Agile development transformed financial management in Clarity?
- Are you forecasting, on what cadence?
- How are you defining rates for forecasts?
- What grouping attributes are you utilizing?

Possible Discussion Points

- Are you bringing in actual costs, labor, non-labor? How?
- Do you have or want a GL integration for non-labor activity?
- Are you tracking time for labor costing? In Clarity or elsewhere?
- Is Clarity being leveraged in planning or budgeting activities?
- Are you using Clarity for capitalization?
- What gaps are you encountering in your finance/costing efforts within Clarity?

Questions?





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Administration, Leadership,
and Technical Proficiency

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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



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Let us know how we can improve!
Don't forget to fill out the class survey.



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