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The Power of the Modern UX

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Introductions

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

Agenda

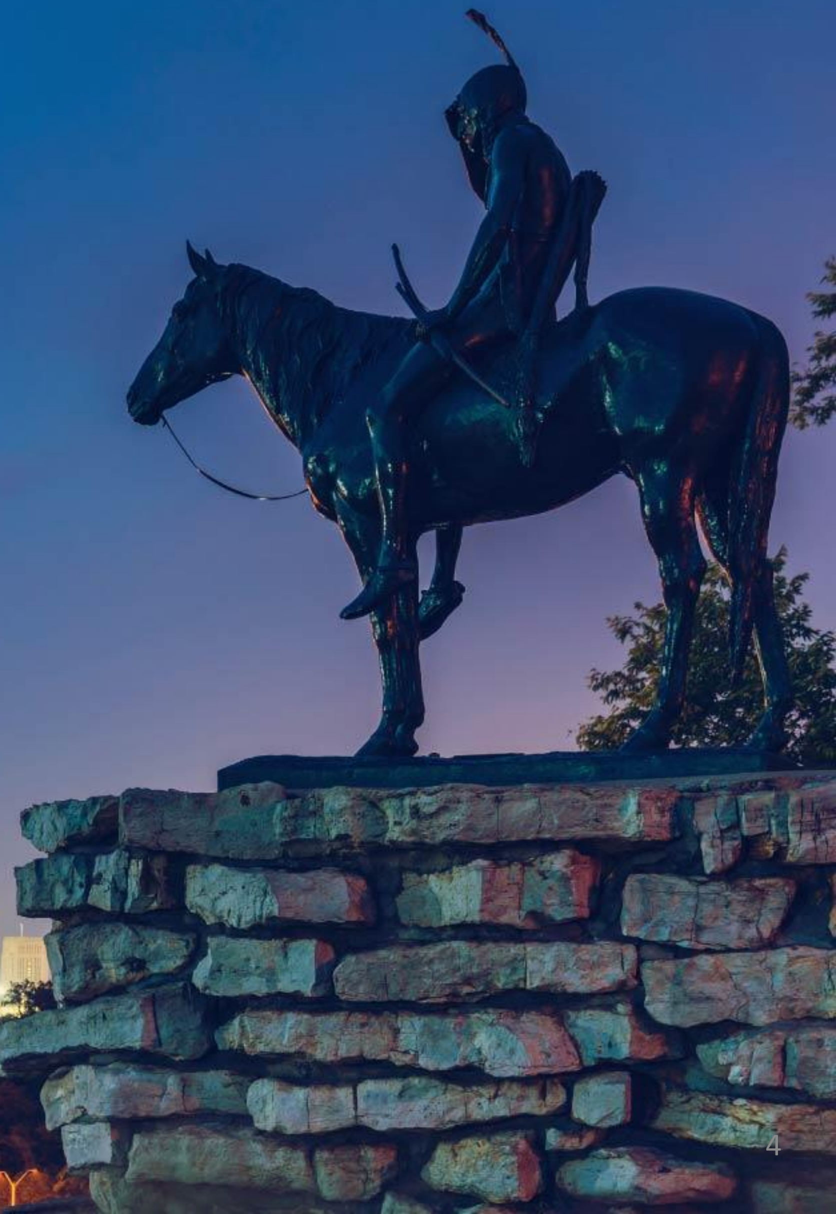
- Genesis of the Modern Experience
- Why “Stock” objects aren’t always a fit
- Projects vs. CITs
- Ideas vs. CITs
- Roadmaps vs. Hierarchies
- How to leverage CITs, custom fields, blueprints and views to personalize
- When to add NEW vs. OOTB

How the Modern Experience Came to be:

- Users have Changed - PM's aren't all PMP certified
- App's on devices have changed the expectations
- Younger folks coming into the job force – different experiences

and

- Simplicity and personalization are themes



Clarity's Modern Experience – Built for YOU

Clarity Product Management Applies
"Design Thinking" to Develop capabilities focused on Users

Design Thinking is a methodology used by thought leaders and trusted advisors
to solve complex problems and find desirable solutions.

A **Design Mindset** is not problem-focused, its solution focused, and action oriented towards creating a preferred future.
Rally Overview and Integration with Clarity PPM

Design Thinking draws upon logic, imagination, intuition, and systemic reasoning, to explore possibilities of what could be—and
creating desired outcomes.

Stock Objects – Not Always a fit

- The OOTB content is great…until…
  - You have different terms
  - You have unique use cases
  - You have different processes

The evolution of the product lends itself to configurable options that don’t require team members to re-learn processes and terms!

Projects VS. a custom investment (aka CIT)

PROJECT

- Delivered out of the box (don’t need to add fields for standard stuff)
- Supports timelines, Gantt charts, grid
- Supports tentative plans and autoscheduling

CIT

- Need to be created, custom. Some traditional fields come over (from the investment object) buy you may need to create fields, sub-objects, etc
- Supports timelines, Gantt charts
- Supports tentative plans and autoscheduling

**No baselines, copy from templates, msp exports or subprojects*

Projects offer a slight advantage to the mature project manager ?

Projects VS. a custom investment (aka CIT)

IDEA

- Capture business case information
- Capture timelines, financials, staff requirements
- Can convert, after approval, to a project (and even move data forward)

CIT

- Capture business case information
- Capture timelines, financials, staff requirements

**Out of the box, cannot currently convert to another investment type* (*yet – see rego innovation)*

Roadmaps vs. Hierarchies

ROADMAP

- Roll up chosen work
- Provide many visual insights
- Allow for what if scenarios
- Allows for modeling against constraints and targets
- Only shows “current state” after job has been run

GREAT for planning and showing “where we are going

HIERARCHY

- Roll up chosen work
- Provide many visual insights
- Show real-time, current state without a job
- Cannot do comparisons or versions of the hierarchy
- Can roll up into dashboards and canvases current information

GREAT for portfolio and program roll ups to communicate progress

Live Product -

How to Leverage the tool to personalize, configure and change

Blueprints and personalization

Discussion – When to use CITs vs ootb?

Questions?

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