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Visualization & Dashboards Persona-Based Reporting Strategies

Your Guides:
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Agenda

- Introduction
- Persona Based Reporting
- Reporting Tool Options
- Additional Resources

Introductions

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

Persona Based Reporting

Why Persona Based Reporting

- Each persona has its unique reporting needs and preferences

- Tailored reports help
  - Improve user adoption and engagement
  - Increase efficiency
  - Drive better decision-making

How to do Persona Based Reporting

1. Understanding User Personas:
    - Define and explain the various user personas within the organization who interact with Clarity PPM.
    - Highlight the unique reporting needs and preferences of each persona.

2. Persona Mapping and Analysis:
    - Showcase examples of persona mapping and how it aligns with reporting requirements.
    - Illustrate how persona analysis can help in designing customized reports for different user groups.

3. Customized Reporting Solutions:
    - Examples of persona-based report templates and dashboards tailored to specific user personas.

4. Implementation Strategy:
    - Considerations such as data segmentation, report design, and user training.

What are the Personas?

Leadership

Require high-level summaries and key performance indicators (KPIs) to make strategic decisions.

Strategy

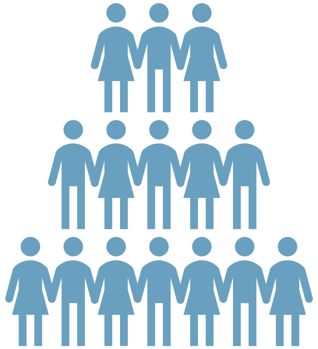
Provide dashboards with visualizations of overall project health, budget status, and strategic insights. Focus on concise, actionable data to aid decision-making at a glance.

Portfolio Managers

Portfolio managers oversee multiple projects and need portfolio-level insights and performance metrics.

Strategy

Provide portfolio status reports, benefit realization analyses, risk exposure reports, and portfolio health dashboards. Include resource demand vs. capacity across projects, strategic alignment analyses, and portfolio risk assessments.



Resource Managers

Resource managers focus on resource allocation, capacity planning, and team productivity.

Strategy

Provide resource allocation reports, demand vs. capacity analysis, team workload summaries, and skill inventory reports. Include graphs showing resource utilization and availability for efficient resource management.

What are the Personas?

Financial Analyst

Financial analysts require cost tracking, budget forecasting, and financial performance metrics.

Strategy

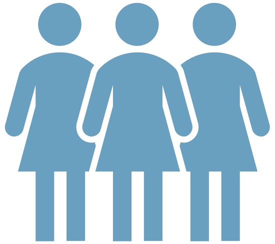
Offer financial reports with budget vs. actuals comparisons, cost breakdowns, variance analysis, and profitability metrics. Include cost benefit analyses, and financial KPIs for financial decision-making.

Project Manager

Project managers need detailed project progress, resource allocation information, and risk assessments.

Strategy

Offer detailed project reports with task status, resource utilization, budget tracking, and risk analysis. Include Gantt charts, resource histograms, and project variance analyses for effective project management.



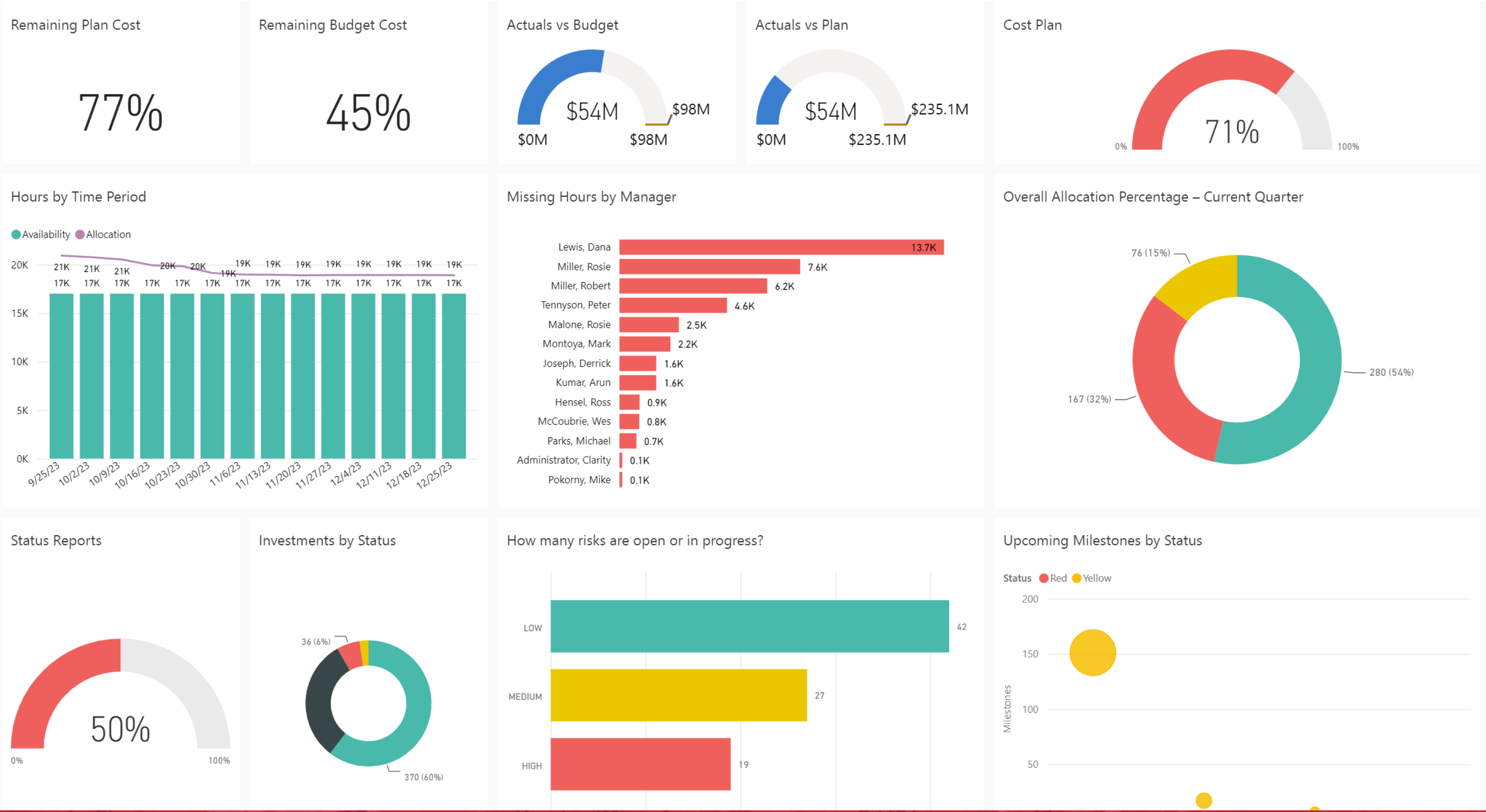
Team Member

Team members focus on task assignments, progress updates, and collaboration within projects.

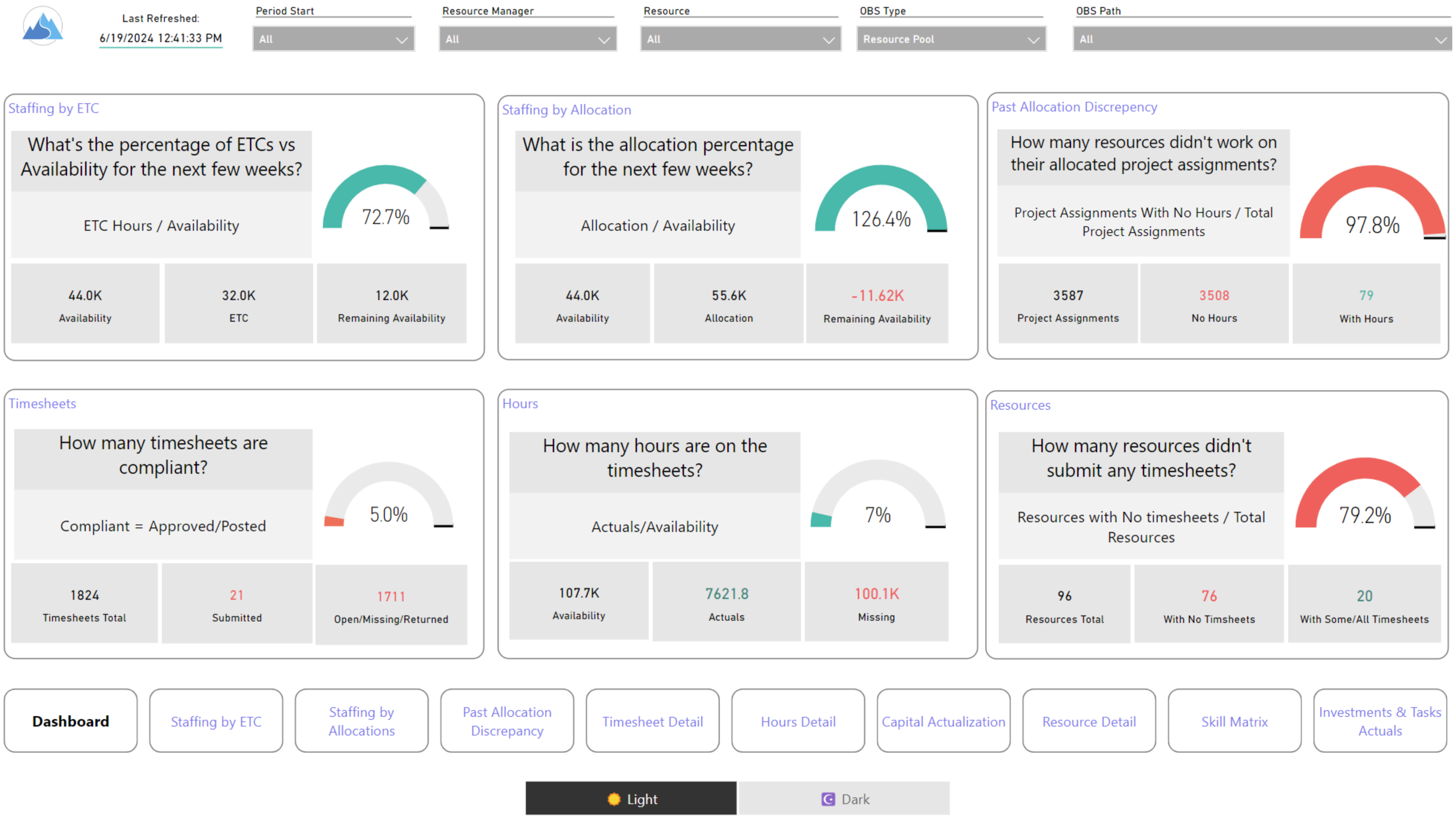
Strategy

Offer individual task progress reports, time tracking summaries, collaboration metrics, and team performance dashboards. Include personalized task lists, upcoming deadlines, and team communication insights.

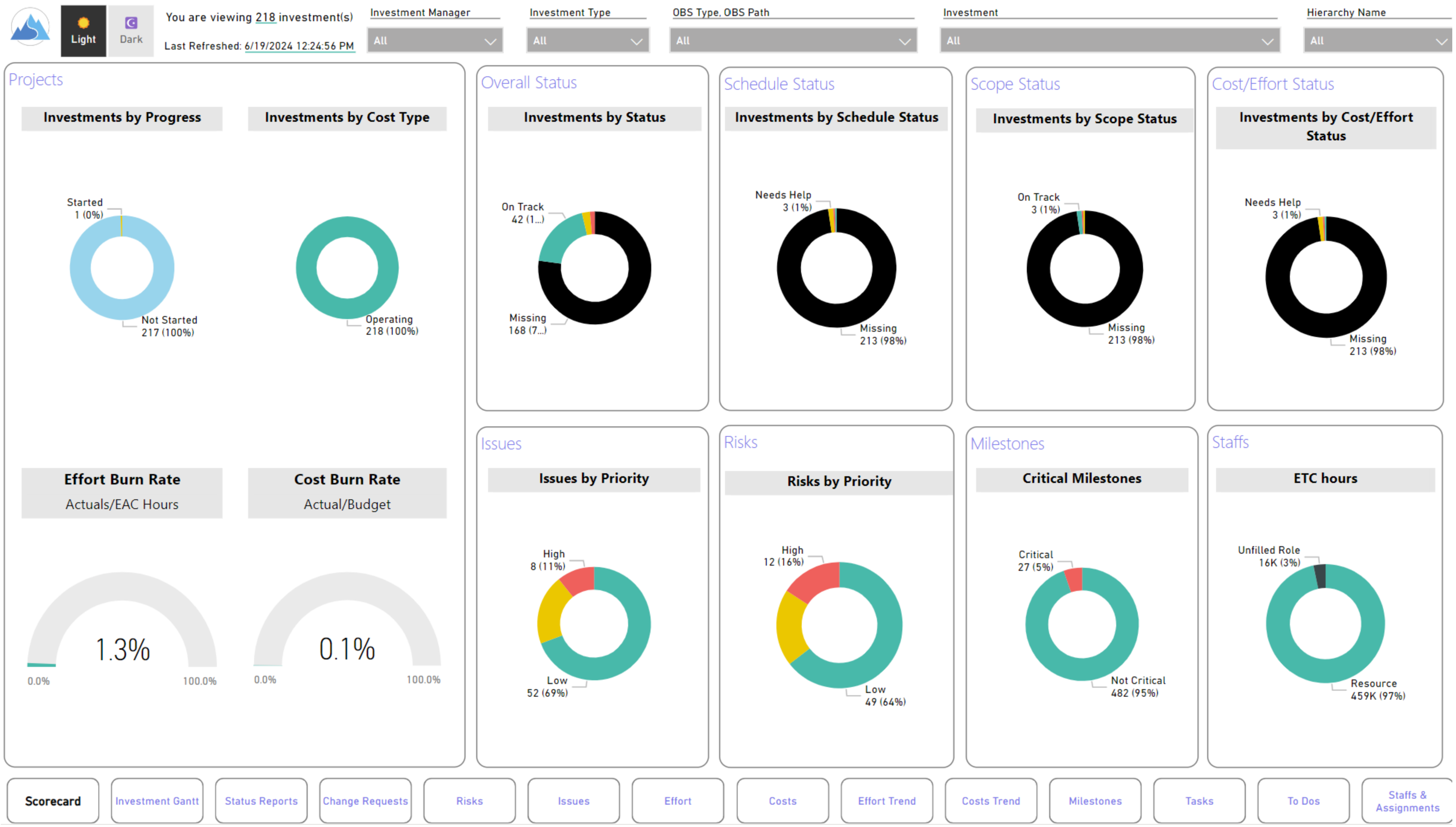
Leadership


Remaining Plan Cost
77%
Remaining Budget Cost
45%
Actuals vs Budget
$54M
$0M
$98M
$98M
Actuals vs Plan
$54M
$0M
$235.1M
$235.1M
Cost Plan
71%
0%
100%
Hours by Time Period
Availability
Allocation
20K
15K
10K
5K
0K
21K 21K 21K 20K 20K 19K 19K 19K 19K 19K 19K 19K 19K 19K
17K 17K 17K 17K 17K 17K 17K 17K 17K 17K 17K 17K 17K 17K
9/25/23 10/2/23 10/9/23 10/16/23 10/23/23 10/30/23 11/6/23 11/13/23 11/20/23 11/27/23 12/4/23 12/11/23 12/18/23 12/25/23
Missing Hours by Manager
Lewis, Dana 13.7K
Miller, Rosie 7.6K
Miller, Robert 6.2K
Tennyson, Peter 4.6K
Malone, Rosie 2.5K
Montoya, Mark 2.2K
Joseph, Derrick 1.6K
Kumar, Arun 1.6K
Hensel, Ross 0.9K
McCoubrie, Wes 0.8K
Parks, Michael 0.7K
Administrator, Clarity 0.1K
Pokorny, Mike 0.1K
Overall Allocation Percentage – Current Quarter
76 (15%)
280 (54%)
167 (32%)
Status Reports
50%
0%
100%
Investments by Status
36 (6%)
370 (60%)
How many risks are open or in progress?
LOW 42
MEDIUM 27
HIGH 19
Upcoming Milestones by Status
Status Red Yellow
200
150
100
50
Milestones

Resource Manager



Portfolio Manager



Reporting Tools

Accessing your data

Flat File

Flat file exports from Clarity for quick ad-hoc analysis

- PROS: Easy and quick
- CONS: Data could be siloed or stale, requires manual refresh, not sustainable, may need encryption

ODATA

An out-of-the-box (OOTB) way to access the data warehouse data via BI applications.

- PROS: Easily configured/setup, easily include additional tables/fields
- CONS: Some fields not available in DWH, some issues when accessing via Tableau, DWH jobs need to be scheduled

Rego ODATA

Available to AWS hosted customers that allows access to both the DWH and transactional (query built) databases.

- PROS: Easily configured/setup, easily include additional tables/fields, transactional database access for small queries
- CONS: AWS only, query timeout limits for transactional database access

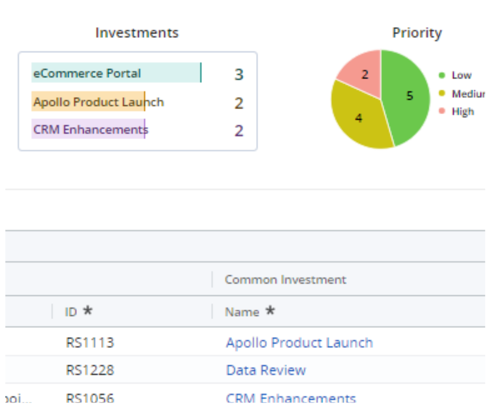
On-site DWH

Custom-developed process to extract data from Clarity and send it onsite to a DWH.

- PROS: Ability to marry Clarity data with other data stored onsite
- CONS: Time-consuming setup process, SFTP + DBA teams need to be involved

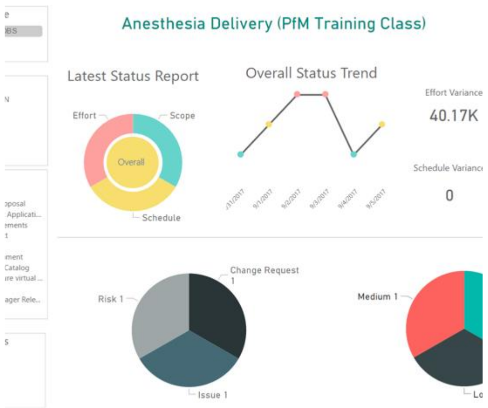
Choose your fighter

In UI Views and Widgets



- Live Data
- Reports are operational, used day-to-day
- Can only be accessed by Clarity users
- Filter options over the live data
- End user configurable for quick changes in layout or type
- No maintenance and constantly being improved by each release

Integrated BI Solutions

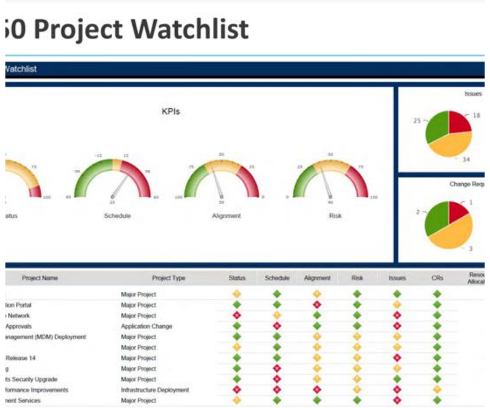


- Typically tied to multiple data sources
- OData and DB connectors are common Clarity connection options
- Industry-best visualization, interactivity, most flexibility
- Reports can be accessed by non-clarity users
- Scheduled delivery, mobile alerts
- Complex logic and calculations
- Might have a license requirement

Portlets

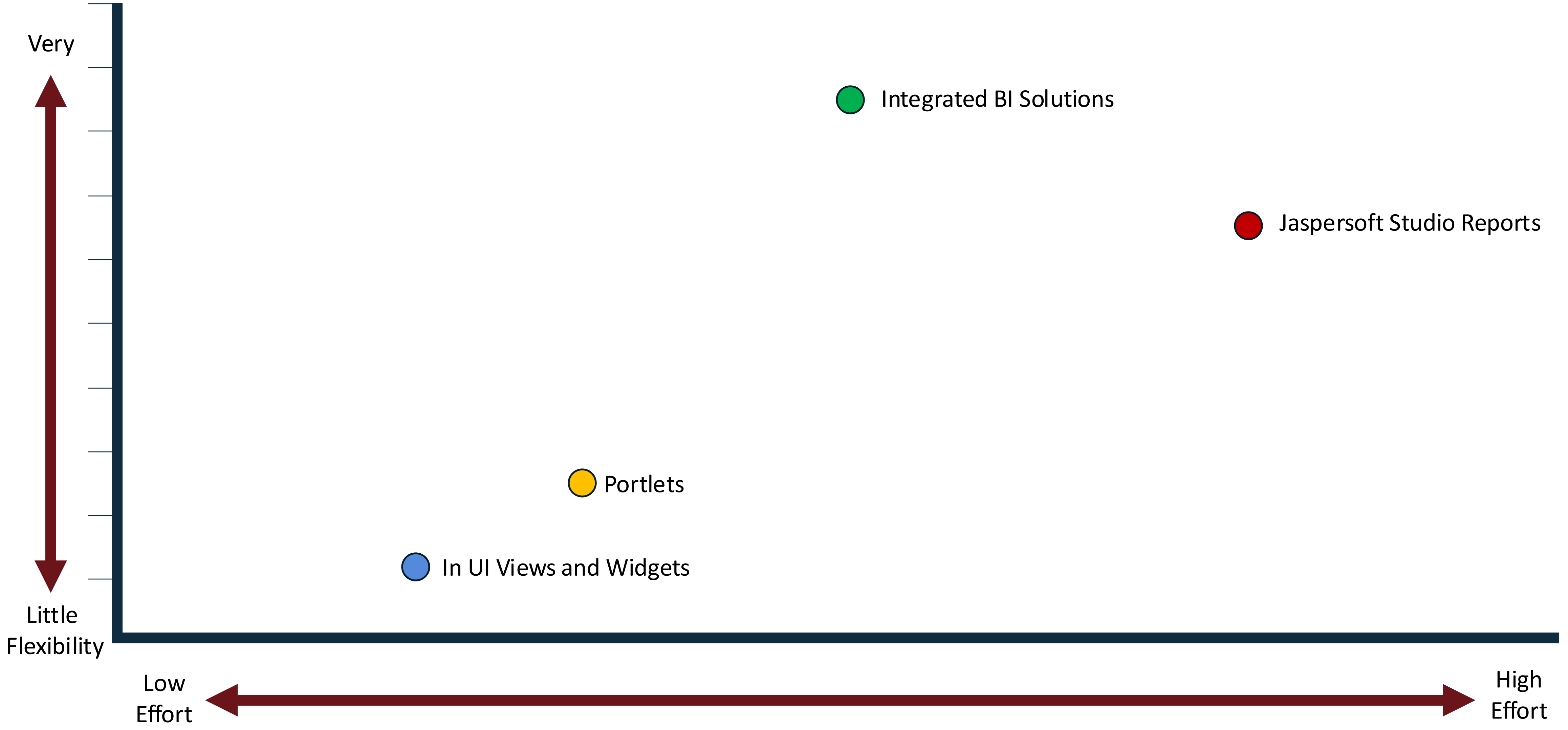
- Live Data
- Reports are operational, used day-to-day
- Can only be accessed by Clarity users
- Could be slow and impact the clarity application
- Personalization features available
- Query based portlets only available in Classic

Jasper Reports



- Sunset in 2026
- Data sourced from Clarity DWH as default
- “Paper” report for print outs or exports
- Can only be accessed from Clarity
- Only use as last resort

Flexibility vs Effort



Discussion

- What reporting challenges have you seen at your organization?
- What about success stories?
- What reporting tool do you currently use?

Additional Resources

- Rego Webinars:
  - Rego's Free Clarity Power BI Dashboards: A Deep Dive – Part 1
  - Rego's Free Clarity Power BI Dashboards: A Deep Dive – Part 2
  - Winning Reporting Strategies
- Rego Free Trainings:
  - PowerBI (repeats monthly)
  - Jaspersoft (repeats monthly)

- Next up: Visualizations & Dashboards | Best Practice & Sharing

* Email Clarity@Broadcom.com to register

Questions?

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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

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.

Thank You For Attending Rego University

Instructions for PMI credits

- 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**
- 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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