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AI and Predictive Analytics

Your Guides:

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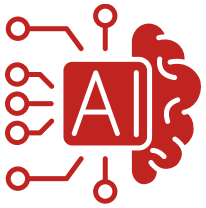
Part 1: AI

Discussion

How will AI affect IT/NPD organizations?

Discussion

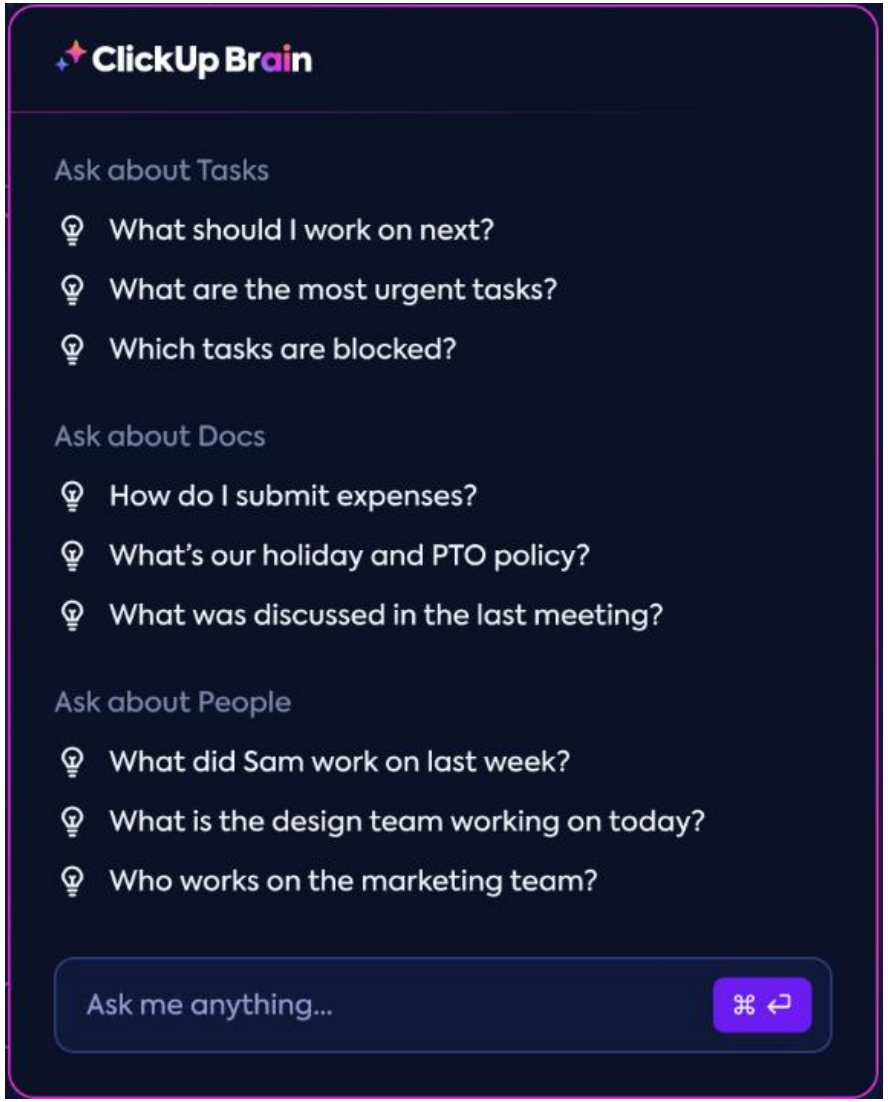


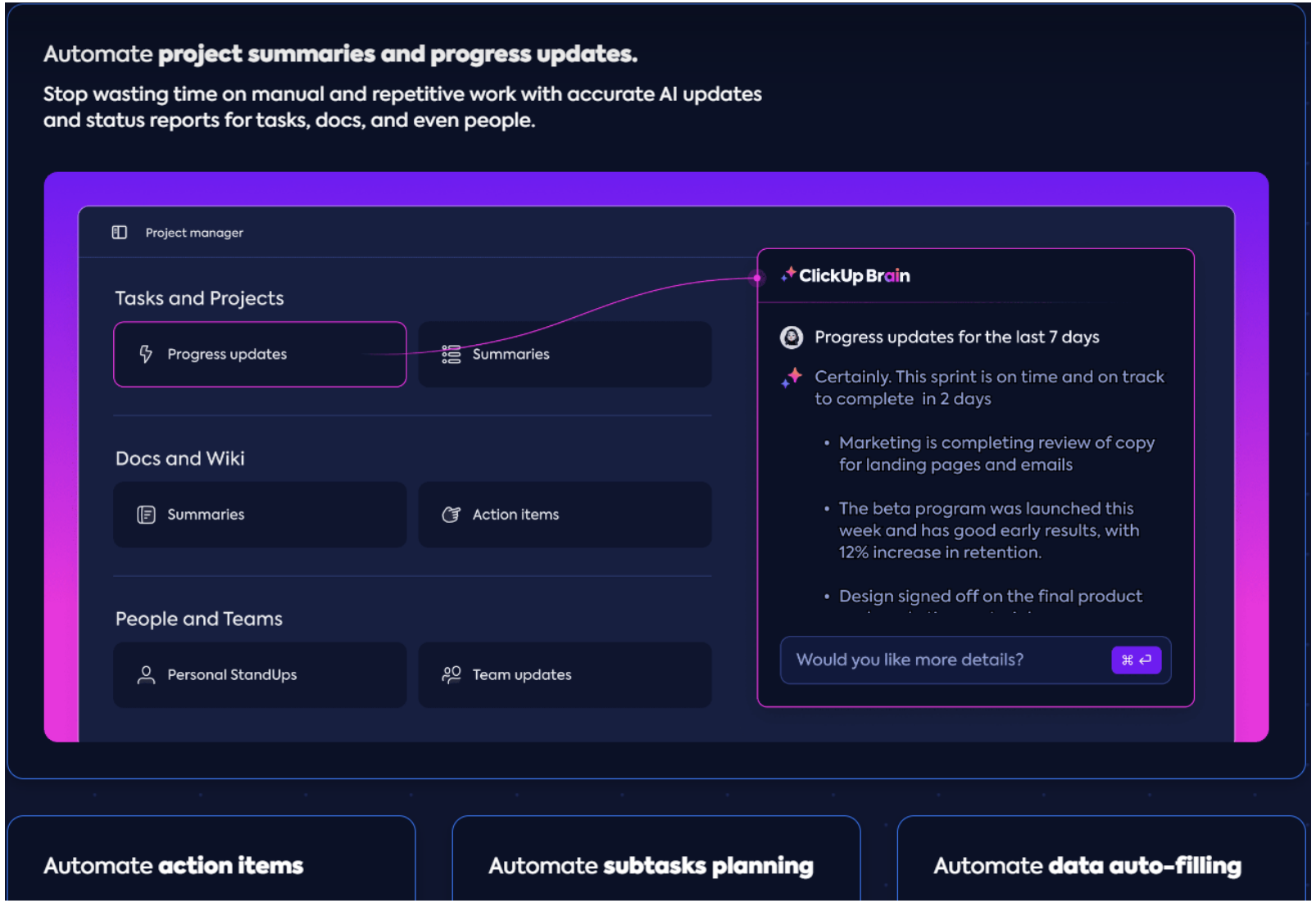
How will AI affect Project, Resource, Strategic Portfolio Management?

What We See Now

Examples

Clickup - AI


ClickUp Brain
Ask about Tasks
What should I work on next?
What are the most urgent tasks?
Which tasks are blocked?
Ask about Docs
How do I submit expenses?
What's our holiday and PTO policy?
What was discussed in the last meeting?
Ask about People
What did Sam work on last week?
What is the design team working on today?
Who works on the marketing team?
Ask me anything...
⌘ ⏎

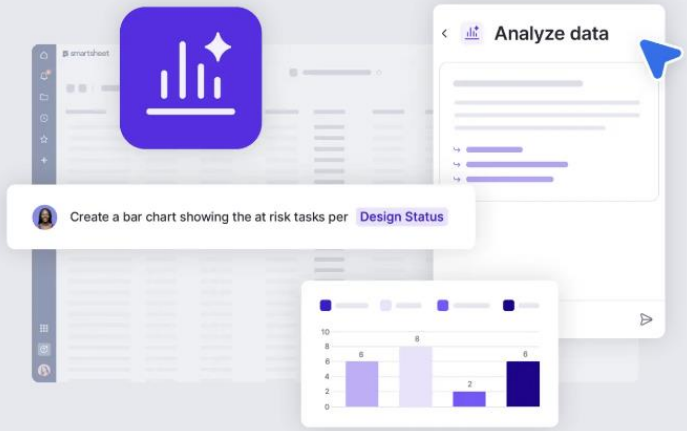

Automate project summaries and progress updates.
Stop wasting time on manual and repetitive work with accurate AI updates and status reports for tasks, docs, and even people.
Project manager
Tasks and Projects
Progress updates
Summaries
Docs and Wiki
Summaries
Action items
People and Teams
Personal StandUps
Team updates
ClickUp Brain
Progress updates for the last 7 days
Certainly. This sprint is on time and on track to complete in 2 days
Marketing is completing review of copy for landing pages and emails
The beta program was launched this week and has good early results, with 12% increase in retention.
Design signed off on the final product
Would you like more details?
⌘ ⏎
Automate action items
Automate subtasks planning
Automate data auto-filling

Smartsheet - AI

NOW AVAILABLE

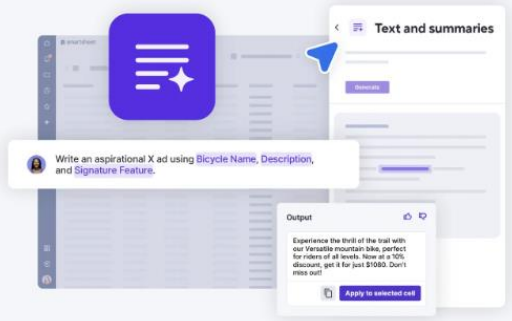
Analyze data

Get instant insight into your business and answer ad hoc questions with AI-generated charts and metrics.



Text and summaries

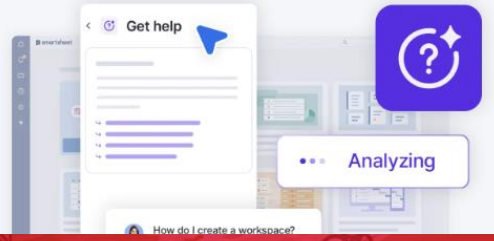
Save time by harnessing your sheet data to craft compelling ad copy, analyze sentiment, translate text, summarize task status, and more.



NOW AVAILABLE

Get help

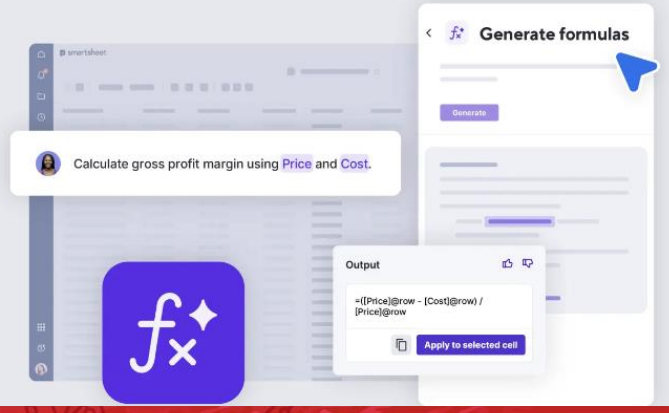
Accomplish even more in Smartsheet with the help of the AI assistant's on-the-spot guidance delivering actionable answers to your questions.



NOW AVAILABLE

Generate formulas

Spend time making data-driven decisions, instead of writing complex formulas. Uplevel reporting and analysis with calculated metrics.



Monday.com

Always stay one step ahead

Quickly get fresh suggestions and ideas for what steps to take next, such as a detailed project plan or action items based on meeting summaries.

Create your own no-code AI workflow

Mix and match our powerful AI capabilities to build tailored solutions and improve how your business operates with an entirely new way of working.

Sort through data in seconds

Automatically analyze and categorize your data at scale with AI, and easily tag and label by type, urgency, or sentiment.

Get the bottom line up front

Quickly summarize complex topics, extract key points, and gain actionable insights to save time and move work forward.

Planview

Summarizers

Increase efficiency and productivity across your teams. Turn daily and weekly reporting chores into auto-generated insights. Use AI summarizers to save time, enhance knowledge, and provide actionable information by summarizing risks, issues, and work in progress, and even building release notes with the click of a button.

Sentiment Analysis

Understand whether a product, project, or work item is truly on track by analyzing the emotiona tone and sentiments of comment and status text as well as computational linguistics behind aggregated comments over time. Use the sentiment scores to reveal positive, neutral, or negative insights and make plan or work pivots before delivery is impacted.

AI Help

Unlock assistance on-demand with AI Help. Transform your Planview Platform experience with the AI Help in-app interface, providing plain text answers to your questions. Access thousands of pages of customer success center help articles and other product- or solution-specific documentation without ever leaving your screen.

Optimizations & Simulations

Unlock scenario planning and dive into a realm of 'what-if' scenarios and trade-off analyses. Explore multiple avenues to pinpoint the most efficient and effective allocation of your capital and capacity for peak performance and strategic success.

Planview Copilot

Planview Copilot empowers employees from the team room to the board room with access, connection, and visibility into your organization's data and the insights hidden within. Converse with and question your data using natural language to glean insights, derive recommendations based on best practices, and inform strategic decisions.

Broadcom

The three A's of AI = Ask, Act, Advise

Current Capabilities

- Vaia (ICE) for search of help.
- Concierge with "bring your own API key" for OpenAI and Google
- Status report narrative generation
- Rich text generation and revision
- Text improvement recommendations (formerly known as text grading)

Coming Soon

- Roadmap Summarization, which will take all the roadmap items in a given roadmap and provide a narrative explanation of the roadmap as a whole.
- Greater configuration capabilities for administrators and partners to define/alter AI prompts.

What We See Now

What can SPM Tools do, related to AI?

- AI Assistant “concierge”
  - Ask “How To”
  - Ask for Data – Show me XYZ
  - Ask for potential issues
- Create Summaries
  - Analyze data and summarize descriptions, status, etc.
- Data Auto-Filling / Tagging

AI “Adjacent” Items

- Predictive Health of Projects
- No-Code Workflows
- Scenario “What If” Planning

Is AI what we want? Do we have the Data?

Project Planning

- AI can create a project plan for you at the start of the project. - Is that what PMs want? Why or Why Not?
- AI can auto-schedule your plan based on daily resource process, assuming resources, dependencies, actuals, and ETC are entered on detailed tasks. – Is that what we want? Do we have the data? Why or why not?

Resource Planning

- AI can auto-allocate and assign resources to work based on skills and availability, assuming detailed skills, actuals, ETCs, and assignments are entered at a detailed level. – Is that what we want? Do we have the data? Why or why not?

Investment Rationalization

- AI can analyze ROI and resources and decide on priority and slotting. – Is that what leaders want? Why or why not?

Use Case – Project Status

Discussion

How confident are you in PM set Project Status?

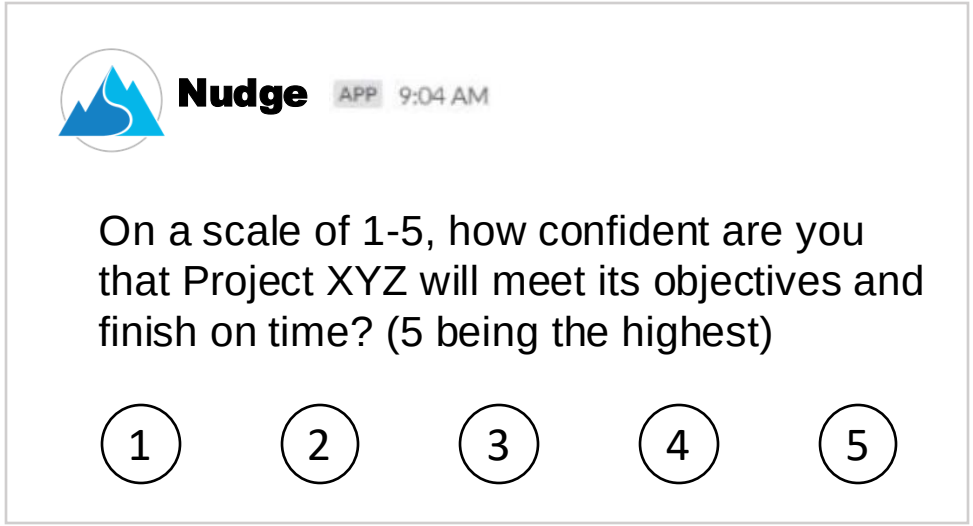
AI could give you the “Real” unbiases status – if you have the data.

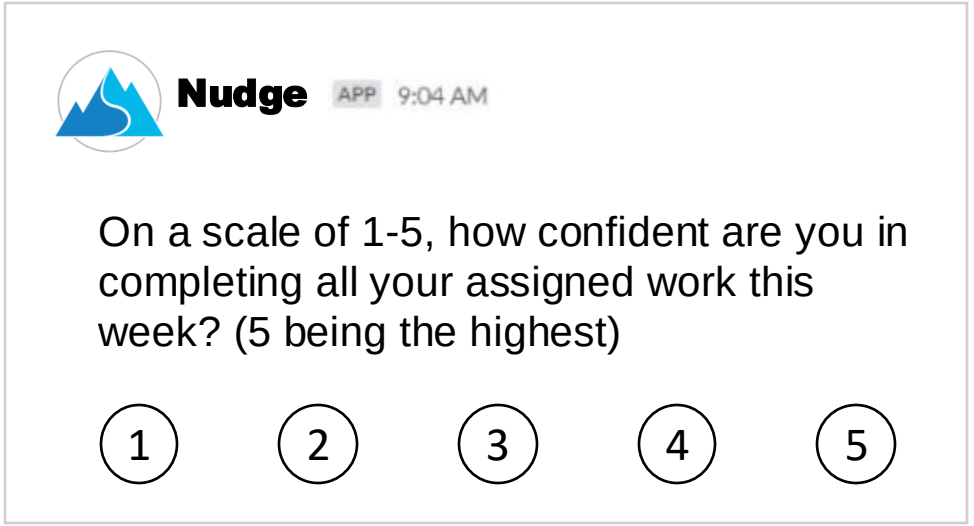
Are your PMs putting in detailed information – issues, risks, changes, financial plans, detailed schedules with ETCs and assignments, stakeholder survey feedback, testing plans, baselined dates within the detailed schedules, allocations matching assignments?

Without the data – How can we be confident in Project Status / Health?

Health Without Data – The Future?

- Another data point to determine Project health?
  - Use of behavioral science to gather feedback from users doing the work along with stakeholders (Acquisition Completed)
  - Gives “gut feel” based on project team and stakeholder meetings and history
  - AI could analyze responses by individuals and identify those with the best “predictive” sense of how things are going….





Predictive Warnings?

- Could we develop a set of Predictive Warnings – i.e. “Here are some areas of concern, you should take a look”
  - Bad/Missing Data – missing status, mismatched allocations, issues not resolved, etc.
  - Proactive Risk Identification on resources, schedule, financials, etc. (with remediation suggestions)
  - We are not expending enough hours to complete on time, or conversely, the last 5 tasks have been over by 20 hours, etc.
- Drill into warnings to address them
- “Snooze” some warnings – it is okay that this resource is over allocated, or that this task is running late

Part 2:
What Do We Really Want?

Requirements Gathering

Rego is Building a Predictive Module Right Now – We Need Your Input!!

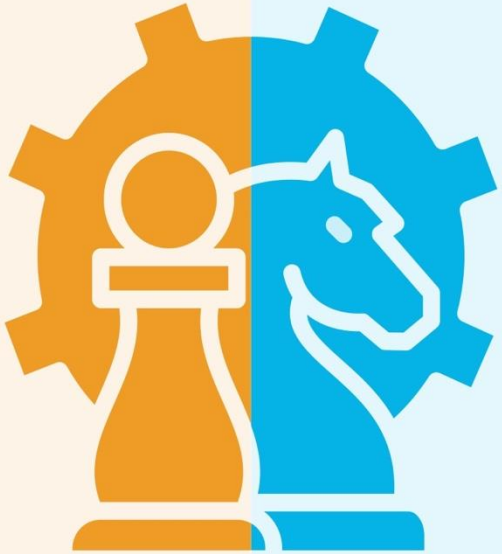
- What do you want Clarity to do for you?
- What set of questions do you want answered immediately?

Part 3: Gamification

What is Gamification

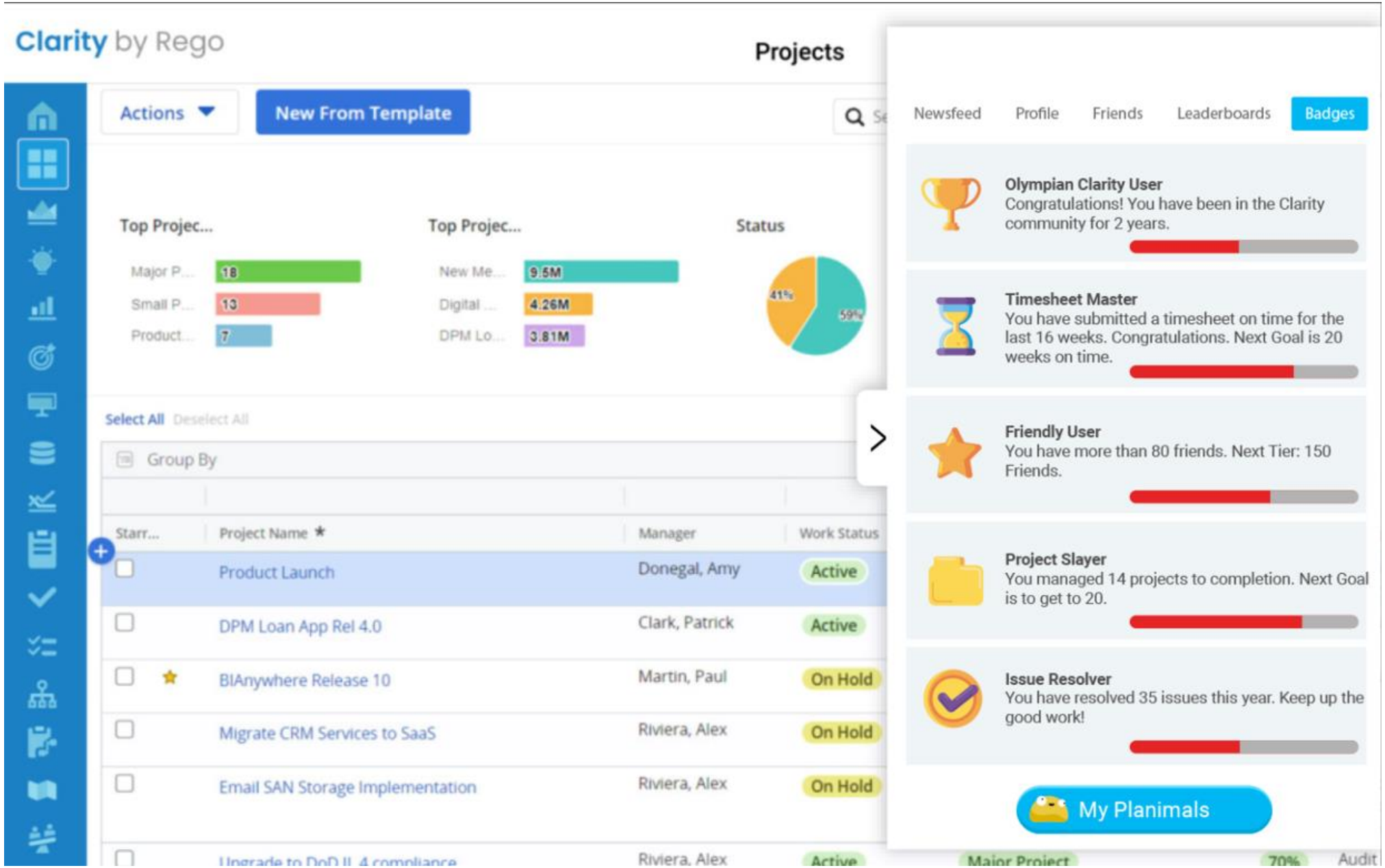
Designed to:

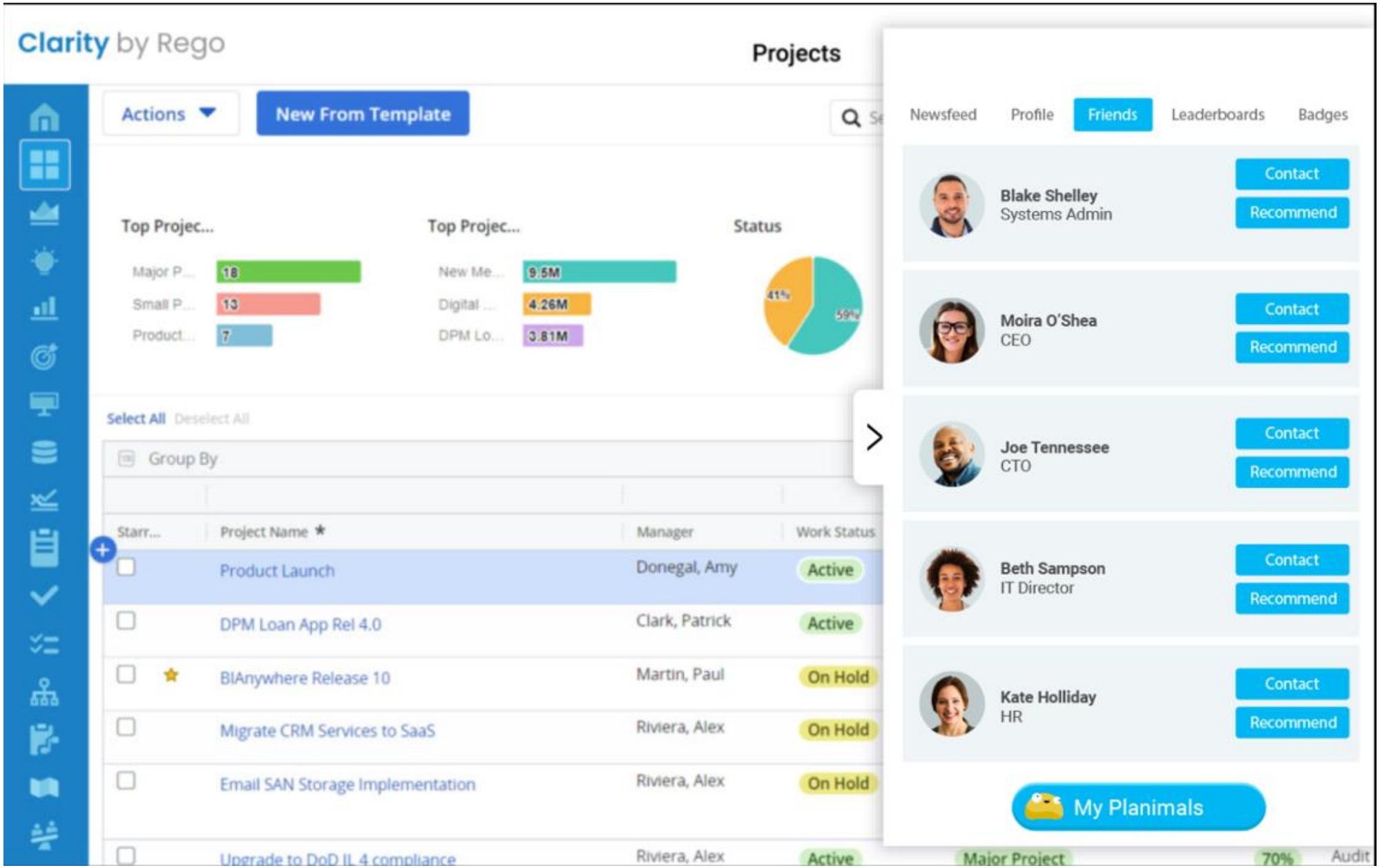
- Make Clarity More Fun
- Increase User Adoption
- Improve Data Quality



Areas of Gamification:

- Earn Badges & Achievements
- Visualize Work in Fun Ways
- Celebratory Animations & Sounds
- Personalized Voices and Themes
- Collect & Earn Rewards
- More to Come!


Clarity by Rego
Projects
Actions
New From Template
Top Projec...
Major P...
18
Small P...
13
Product...
7
Top Projec...
New Me...
9.5M
Digital ...
4.26M
DPM Lo...
3.81M
Status
41%
59%
Select All
Deselect All
Group By
Starr...
Project Name
Manager
Work Status
Product Launch
Donegal, Amy
Active
DPM Loan App Rel 4.0
Clark, Patrick
Active
BIAnywhere Release 10
Martin, Paul
On Hold
Migrate CRM Services to SaaS
Riviera, Alex
On Hold
Email SAN Storage Implementation
Riviera, Alex
On Hold
Upgrade to DoD IL 4 compliance
Riviera, Alex
Active
Major Project
70%
Audit
Newsfeed
Profile
Friends
Leaderboards
Badges
Olympian Clarity User
Congratulations! You have been in the Clarity community for 2 years.
Timesheet Master
You have submitted a timesheet on time for the last 16 weeks. Congratulations. Next Goal is 20 weeks on time.
Friendly User
You have more than 80 friends. Next Tier: 150 Friends.
Project Slayer
You managed 14 projects to completion. Next Goal is to get to 20.
Issue Resolver
You have resolved 35 issues this year. Keep up the good work!
My Planimals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Active
Major Project
70%
Audit
Blake Shelley
Systems Admin
Contact
Recommend
Moira O'Shea
CEO
Contact
Recommend
Joe Tennessee
CTO
Contact
Recommend
Beth Sampson
IT Director
Contact
Recommend
Kate Holliday
HR
Contact
Recommend
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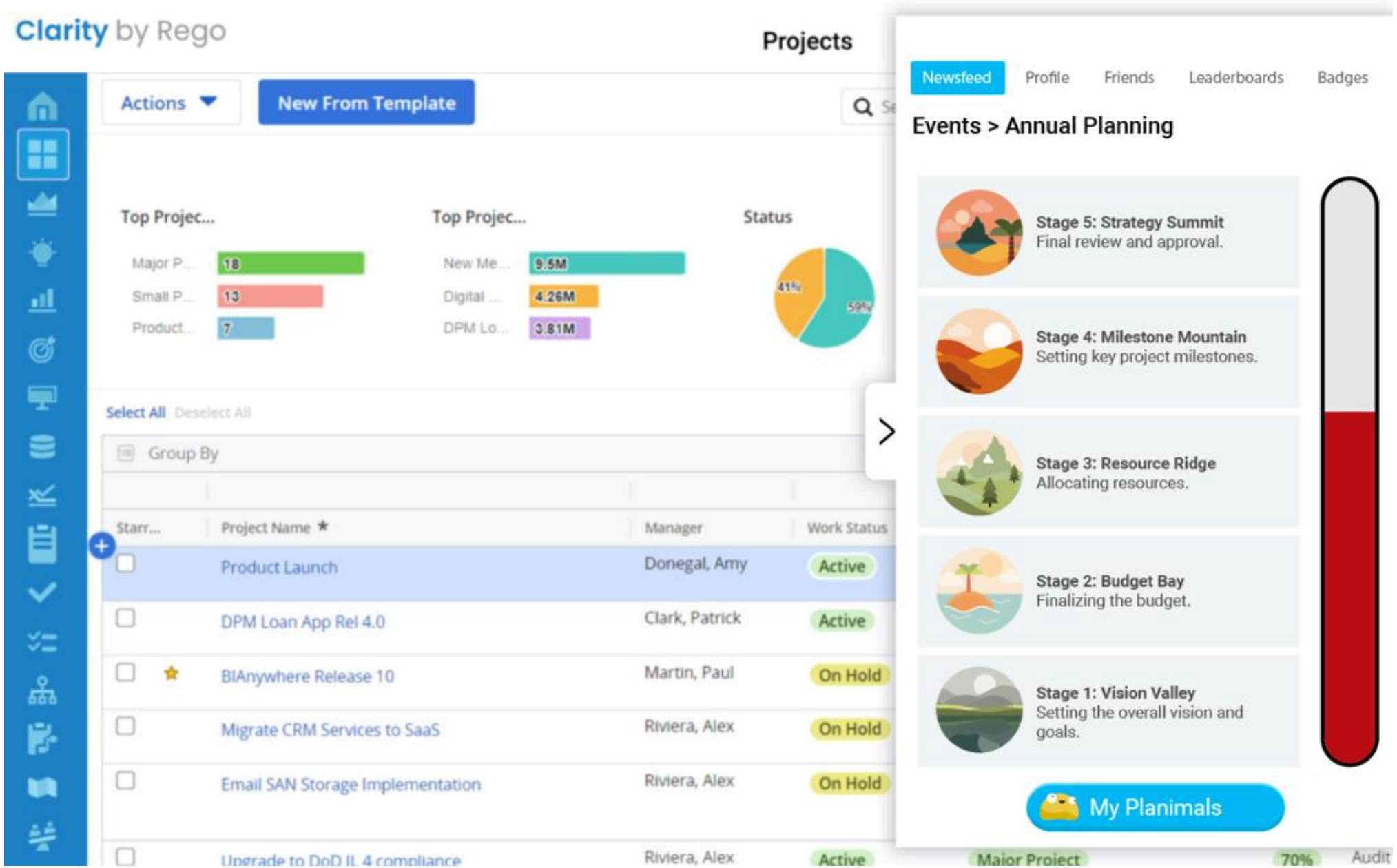
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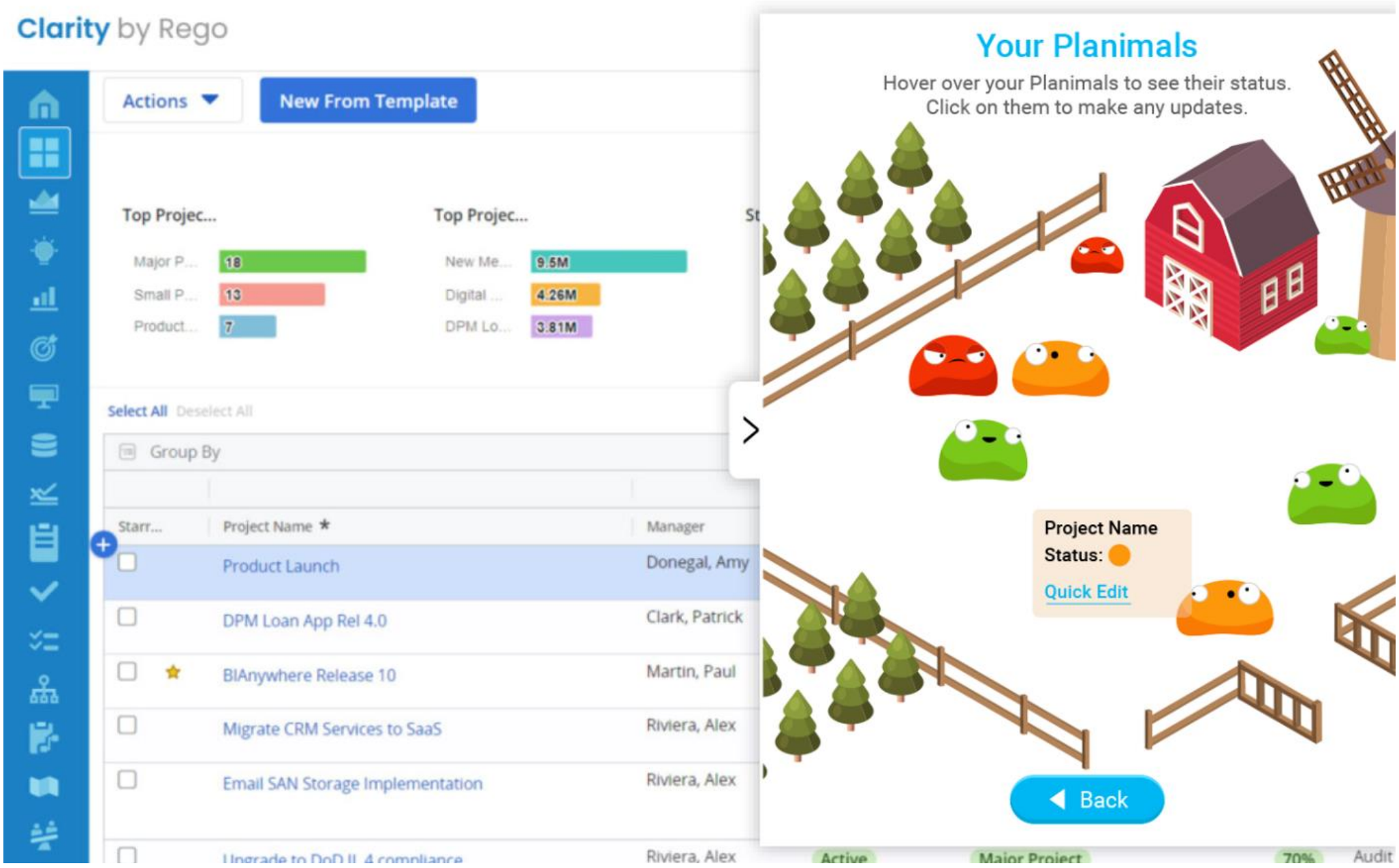
Upgrade to DoD IL 4 compliance
Riviera, Alex
Active
Major Project
70%
Audit
Newsfeed
Profile
Friends
Leaderboards
Badges
Events > Annual Planning
Stage 5: Strategy Summit
Final review and approval.
Stage 4: Milestone Mountain
Setting key project milestones.
Stage 3: Resource Ridge
Allocating resources.
Stage 2: Budget Bay
Finalizing the budget.
Stage 1: Vision Valley
Setting the overall vision and goals.
My Planimals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Your Planimals
Hover over your Planimals to see their status.
Click on them to make any updates.
Project Name
Status:
Quick Edit
Back
Active
Major Project
70%
Audit

Discussion

Is there a place for gamification in Clarity? In your organizations?

What aspects would be of interest?

Questions?

regoUniversity

Master Clarity with Rego University

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Let Rego be your guide.

Elevate Your Professional Expertise with Rego University Certifications

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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