LAS VEGAS

regoUniversity 2025

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Best Practices for Collaborative Work Management

Your Guides:

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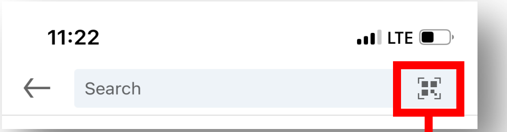
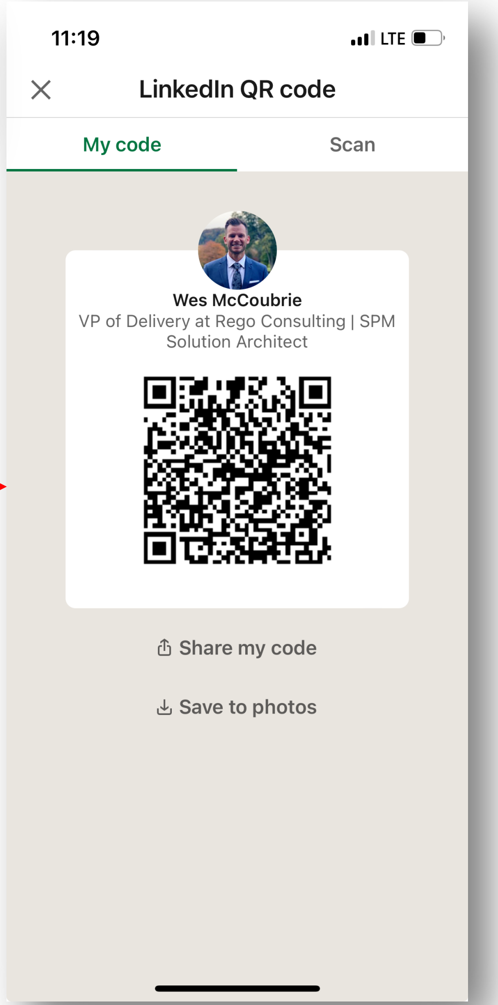
Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself
- LinkedIn!





Agenda

Let’s answer these questions…

- What is Collaborative Work Management (CWM)?
- How did Clarity enter this space?
- What features support CWM?
- What does it look like?

What Is Collaborative Work Management (CWM)?

Gartner:

The CWM market consists of vendors offering task-driven team hubs that empower business users to plan, carry out and manage their work. Team hubs combine task, planning, workflow, integration and automation capabilities, with conversations, content publishing, reporting, analytics and dashboards. Products in this market are defined by their purpose (work planning and execution), by their target users (nontechnical business users) and by their broad functionality.[1]

[1] https://www.gartner.com/reviews/market/collaborative-work-management

What Is Collaborative Work Management (CWM)?

Gartner:

Key Findings

- Collaborative work management (CWM) products empower business users to plan, manage and automate common repeatable work activities.
- The level of interest in collaborative work management has been growing steadily over the last few years, with a notable rise consistent with the increase in hybrid work.
- CWM tools come with prebuilt work templates for business users engaged in agile teamwork, goal management, case management, issue tracking, strategic work planning, product management, marketing work and legal work.
- Most organizations deploy CWM tools tactically, targeting specific situations usually applicable to small groups of employees. Multiple CWM tools in the same organization are common.[2]

[2] https://www.gartner.com/en/documents/4022601

Open Mic

- What are your organizations using for CWM?
- Are you aware of Clarity's capabilities for CWM?

Selected Customer Reactions About Collaborative Work

- "Don't worry about dominating here - All large enterprises have many of these products – whether from Microsoft or Google or Atlassian – you have an advantage because you're a system of record - if it's simple."
- "You need something so simple they would want to use it. But don't expect to capture the entire enterprise. Other parts of the organization do provide an opportunity for expansion if it's simple."
- "One big driver is the dashboards. If you can make sense of all this data. Users can create their own dashboards in most these tools. But they struggle to pull it all together – there are many versions of the truth. Clarity has an opportunity to federate all this data so the enterprise can make sense of it."
- "The Enterprise Transformation Office for example, is struggling with single source of truth. They have every flavor of CWM tool and were planning on building integrations to all of them. This will be a game changer to give them a plan to leverage a single platform and forget the whole integration thing."

Different Runways for Different Solutions

Tool	Checklists and Tasks	Collaboration	Workflow	Project Management	Resource Management	Financial Management	Portfolio Management	Ad Hoc Dashboards
Asana	✓	✓	✓	✓			✓	
Trello	✓	✓	✓					
Monday.com	✓	✓	✓	✓	✓		✓	
MS Planner	✓	✓						
ClickUp	✓	✓	✓	✓	✓		✓	
SmartSheet	✓	✓	✓	✓	✓			✓
Clarity	✓	✓	✓	✓	✓	✓	✓	✓

Clarity entered this market in 2016 with the Modern UX and has aggressively developed capabilities matching other top solutions. Due to its robust, enterprise-level reputation, Clarity is too often overlooked as a team-centric work management tool.

Admittedly, Clarity is a blank canvas to be shaped to your use cases; other solutions templatize heavily.

CWM Features 16.1.3+

Core Functionality

Work Management
- To Dos
- Checklists
- Tasks Dashboard
- My Workspace

Collaboration
- Conversations
- Business Rules
- Action Items
- Notifications
- View Sharing

Usability
- Mobile App
- Global Search
- Vaia / AI Assist

Reporting
- Status Dashboard
- Status Publish to PDF
- Expanded Canvas Reporting

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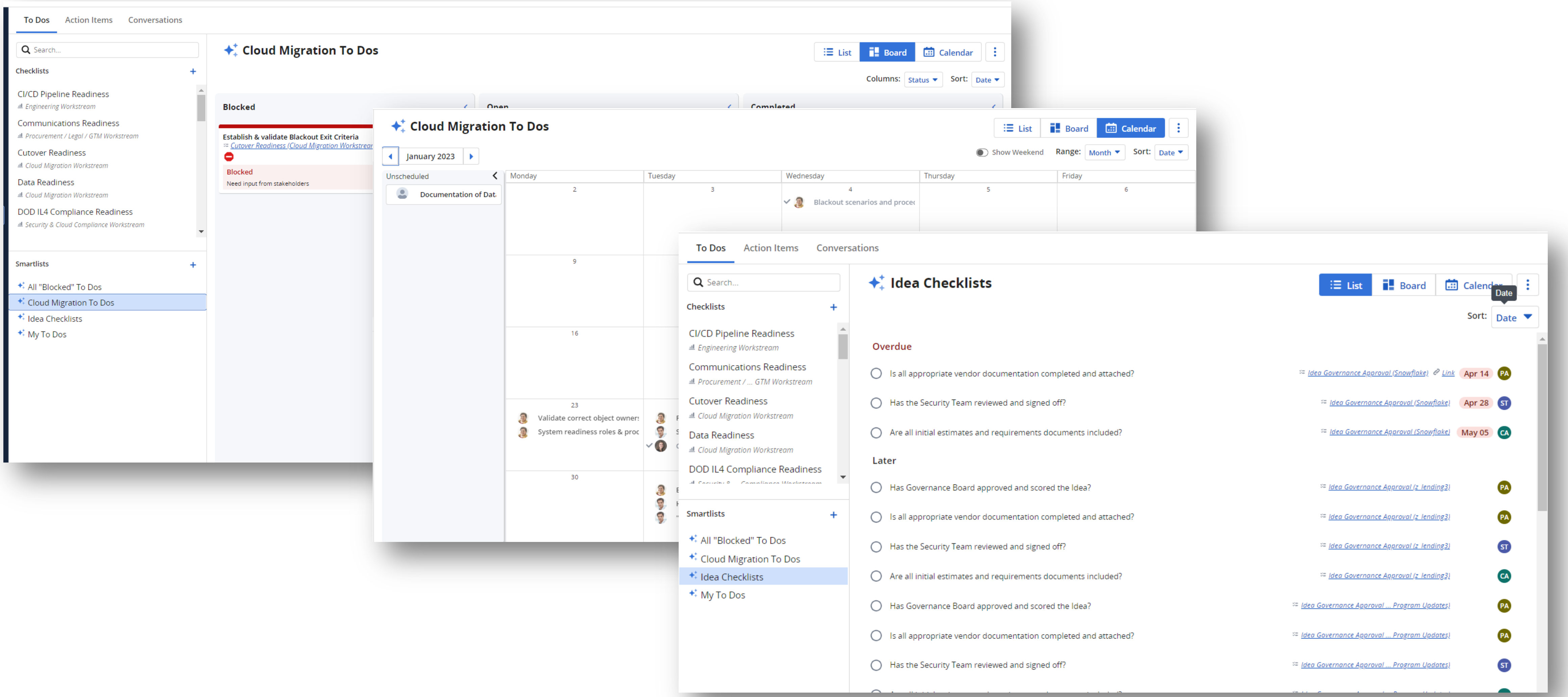
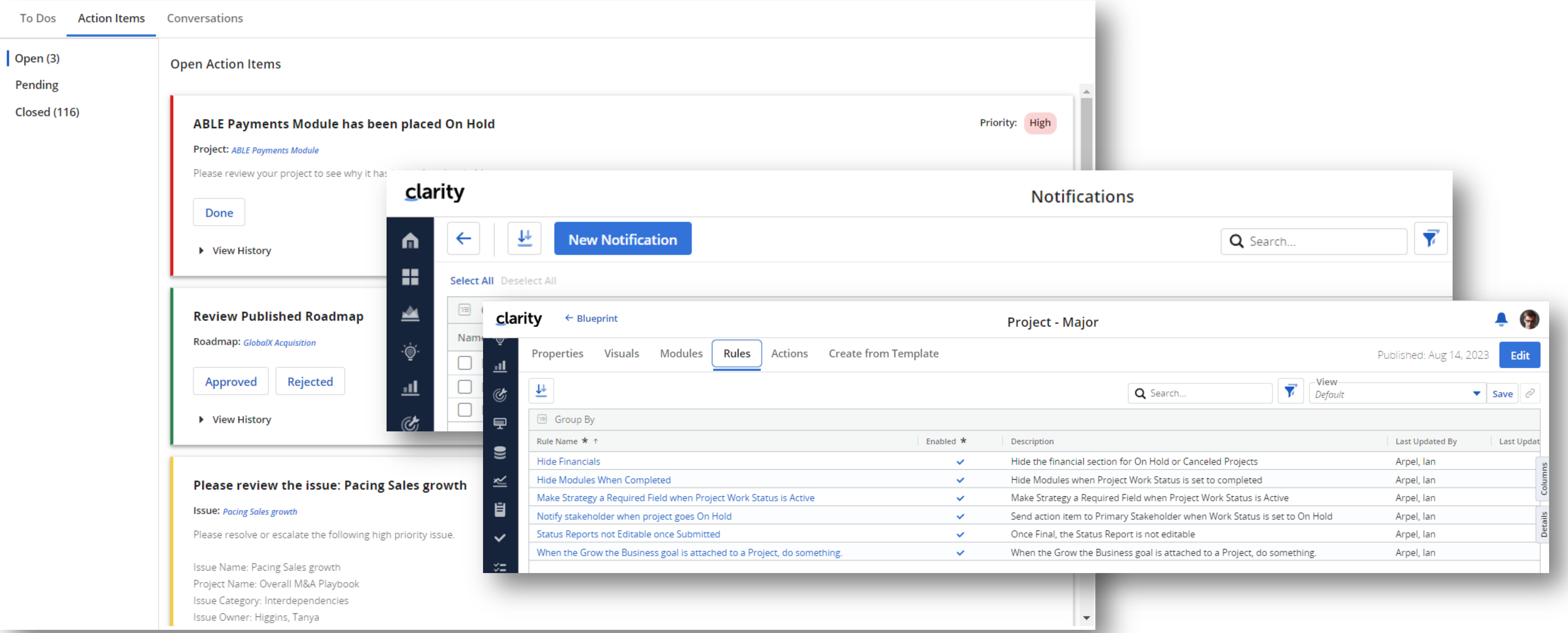
“Task-Driven Team Hubs”



"Workflow, Integration, and Automation"



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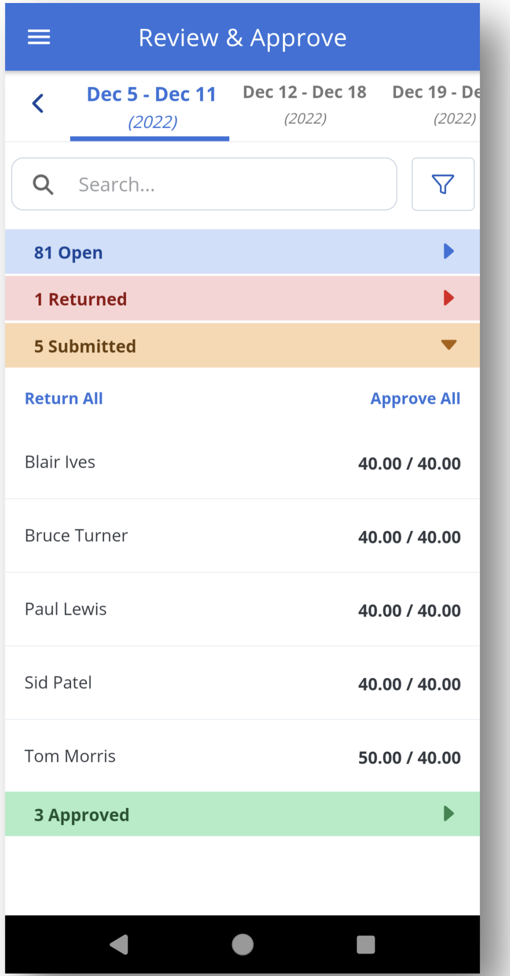
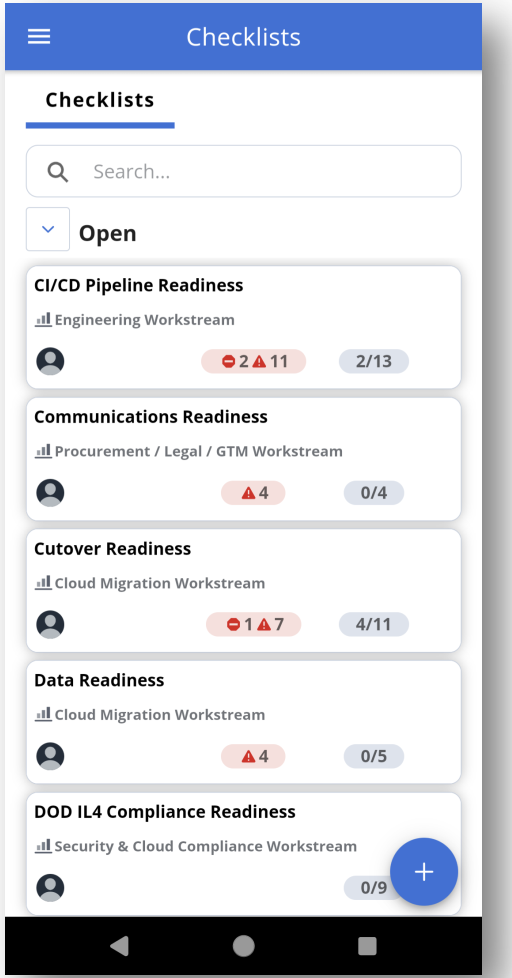
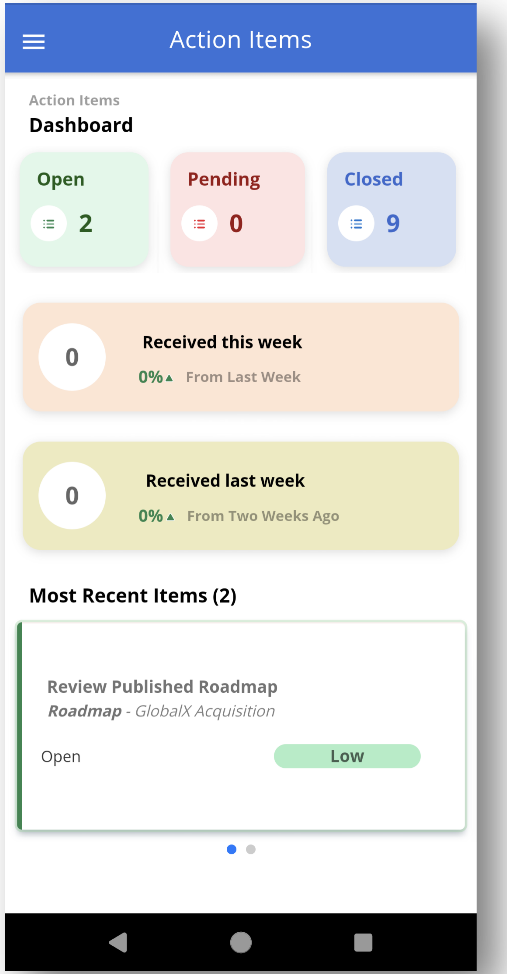
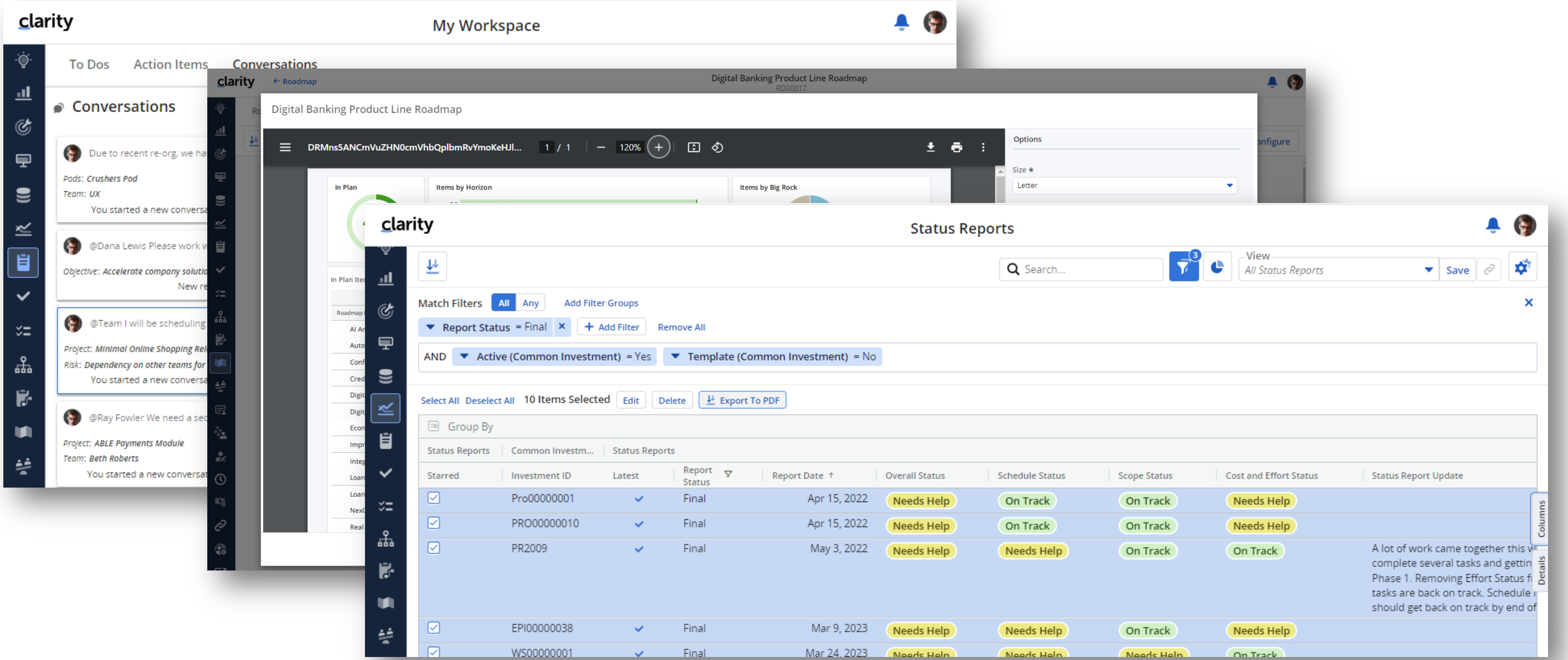


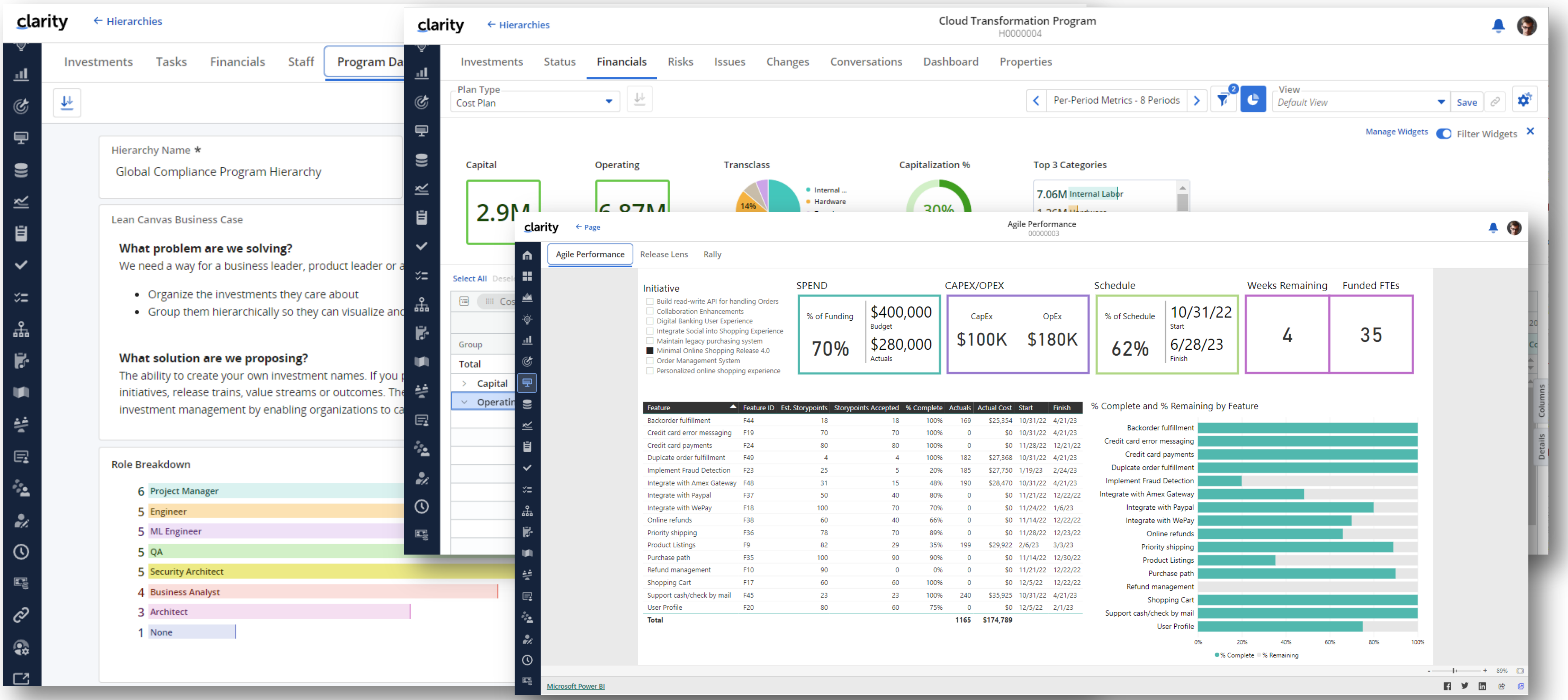




“Conversations, Content Publishing”



“Reporting, Analytics, Dashboards”



Demonstration

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Questions?

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