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Best Practices for Collaborative Work Management

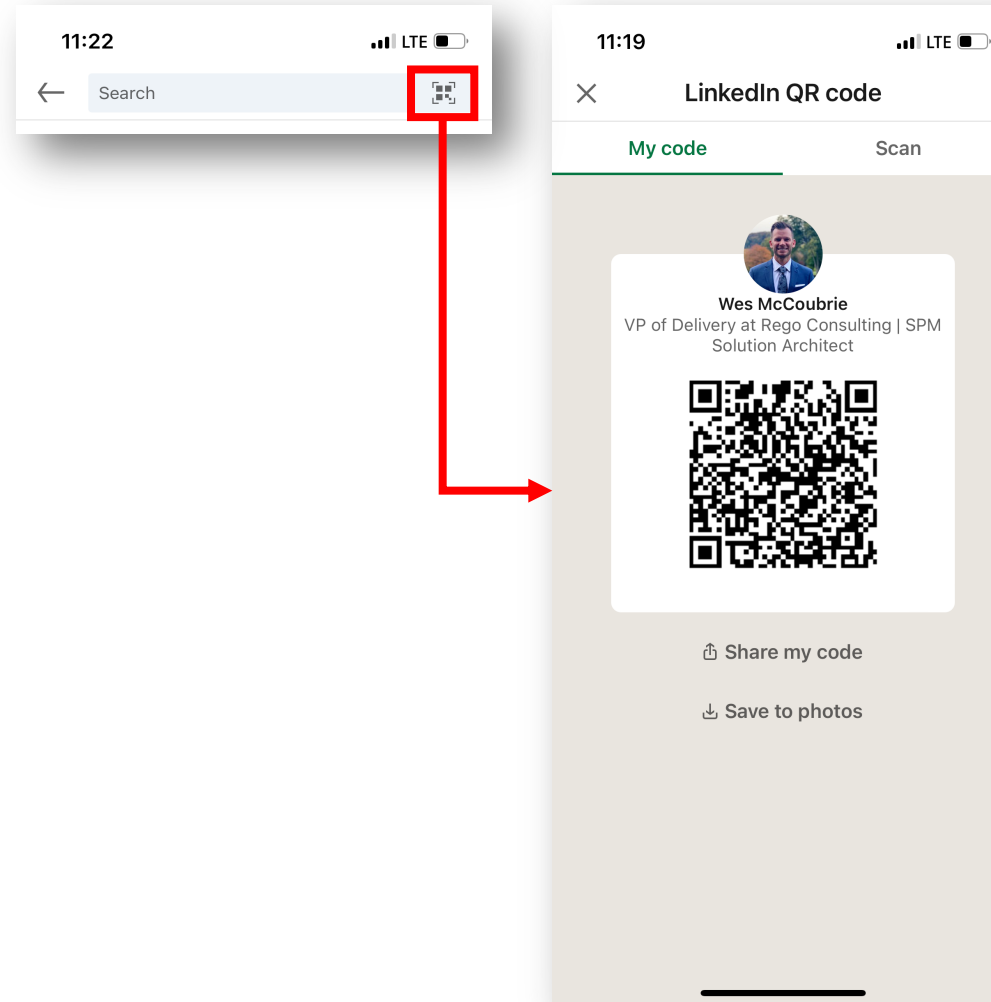
Your Guides:
Michelle Merriam-Day and Wes McCoubrie



Introductions

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- 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

What Is Collaborative Work Management (CWM)?

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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.

“Task-Driven Team Hubs”

The image displays three overlapping screenshots of a task management application, illustrating 'Task-Driven Team Hubs'.

Top Screenshot: Cloud Migration To Dos

- Navigation:** To Dos, Action Items, Conversations.
- Search:** Search...
- Checklists:**
 - CI/CD Pipeline Readiness (Engineering Workstream)
 - Communications Readiness (Procurement / Legal / GTM Workstream)
 - Cutover Readiness (Cloud Migration Workstream)
 - Data Readiness (Cloud Migration Workstream)
 - DOD IL4 Compliance Readiness (Security & Cloud Compliance Workstream)
- Smartlists:**
 - All "Blocked" To Dos
 - Cloud Migration To Dos (Selected)
 - Idea Checklists
 - My To Dos
- Main Content:**
 - Blocked:** Establish and validate Blackout Exit Criteria (Cutover Readiness / Cloud Migration Workstream). Status: Blocked. Reason: Need input from stakeholders.
 - Calendar:** January 2023. Tasks include 'Documentation of Dat...' on Monday and 'Blackout scenarios and proce...' on Wednesday.

Middle Screenshot: Cloud Migration To Dos (Calendar View)

- Navigation:** List, Board, Calendar.
- Columns:** Status, Sort: Date.
- Calendar:** January 2023. Tasks include 'Documentation of Dat...' on Monday and 'Blackout scenarios and proce...' on Wednesday.

Bottom Screenshot: Idea Checklists

- Navigation:** To Dos, Action Items, Conversations.
- Search:** Search...
- Checklists:**
 - CI/CD Pipeline Readiness (Engineering Workstream)
 - Communications Readiness (Procurement / ... GTM Workstream)
 - Cutover Readiness (Cloud Migration Workstream)
 - Data Readiness (Cloud Migration Workstream)
 - DOD IL4 Compliance Readiness (Security & Cloud Compliance Workstream)
- Smartlists:**
 - All "Blocked" To Dos
 - Cloud Migration To Dos
 - Idea Checklists (Selected)
 - My To Dos
- Main Content:**
 - Overdue:**
 - Is all appropriate vendor documentation completed and attached?
 - Has the Security Team reviewed and signed off?
 - Are all initial estimates and requirements documents included?
 - Later:**
 - Has Governance Board approved and scored the Idea?
 - Is all appropriate vendor documentation completed and attached?
 - Has the Security Team reviewed and signed off?
 - Are all initial estimates and requirements documents included?
 - Has Governance Board approved and scored the Idea?
 - Is all appropriate vendor documentation completed and attached?
 - Has the Security Team reviewed and signed off?

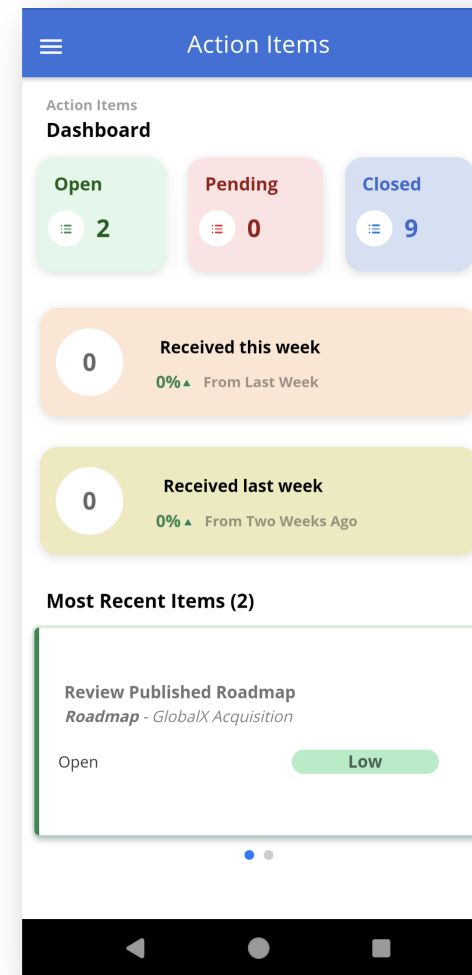
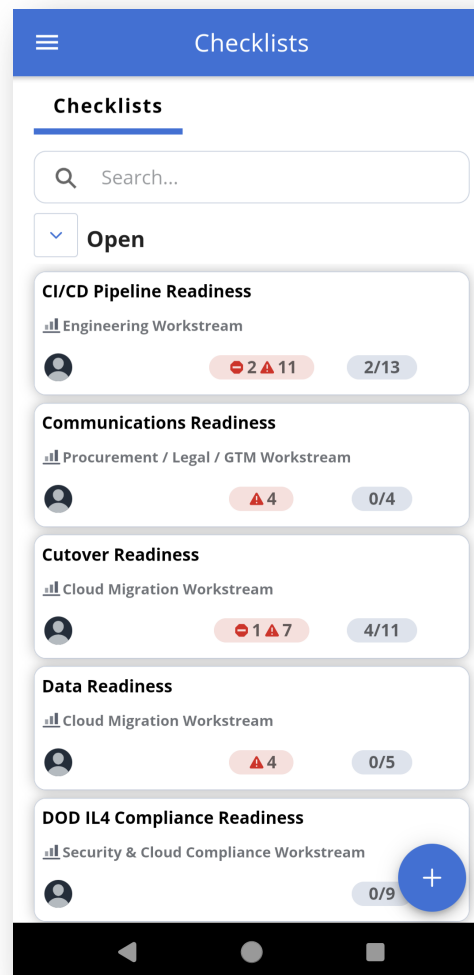
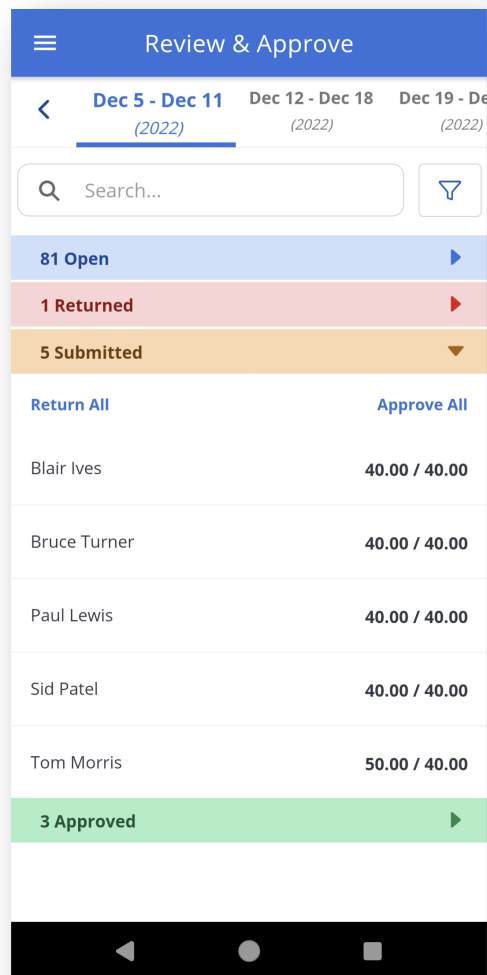
“Workflow, Integration, and Automation”

The screenshot displays the Clarity software interface, which is organized into several key sections:

- Top Navigation:** Includes tabs for "To Dos", "Action Items", and "Conversations".
- Left Sidebar:**
 - Action Items:** Shows a list of items with status filters: "Open (3)", "Pending", and "Closed (116)".
 - Review Published Roadmap:** Features a "Roadmap: GlobalX Acquisition" with "Approved" and "Rejected" buttons, and a "View History" link.
 - Issue Details:** Displays information for an issue titled "Please review the issue: Pacing Sales growth". It includes the issue name, project name ("Overall M&A Playbook"), category ("Interdependencies"), and owner ("Higgins, Tanya").
- Main Content Area:**
 - Open Action Items:** Shows a notification for "ABLE Payments Module has been placed On Hold" with a "High" priority. It includes a "Done" button and a "View History" link.
 - Notifications:** A section with a "New Notification" button and a search bar.
 - Project - Major:** A detailed view of a project with tabs for "Properties", "Visuals", "Modules", "Rules", "Actions", and "Create from Template". The "Rules" tab is currently active, showing a table of rules.

Rule Name	Enabled	Description	Last Updated By	Last Update
Hide Financials	✓	Hide the financial section for On Hold or Canceled Projects	Arpel, Ian	
Hide Modules When Completed	✓	Hide Modules when Project Work Status is set to completed	Arpel, Ian	
Make Strategy a Required Field when Project Work Status is Active	✓	Make Strategy a Required Field when Project Work Status is Active	Arpel, Ian	
Notify stakeholder when project goes On Hold	✓	Send action item to Primary Stakeholder when Work Status is set to On Hold	Arpel, Ian	
Status Reports not Editable once Submitted	✓	Once Final, the Status Report is not editable	Arpel, Ian	
When the Grow the Business goal is attached to a Project, do something.	✓	When the Grow the Business goal is attached to a Project, do something.	Arpel, Ian	

“Workflow, Integration, and Automation”



“Conversations, Content Publishing”

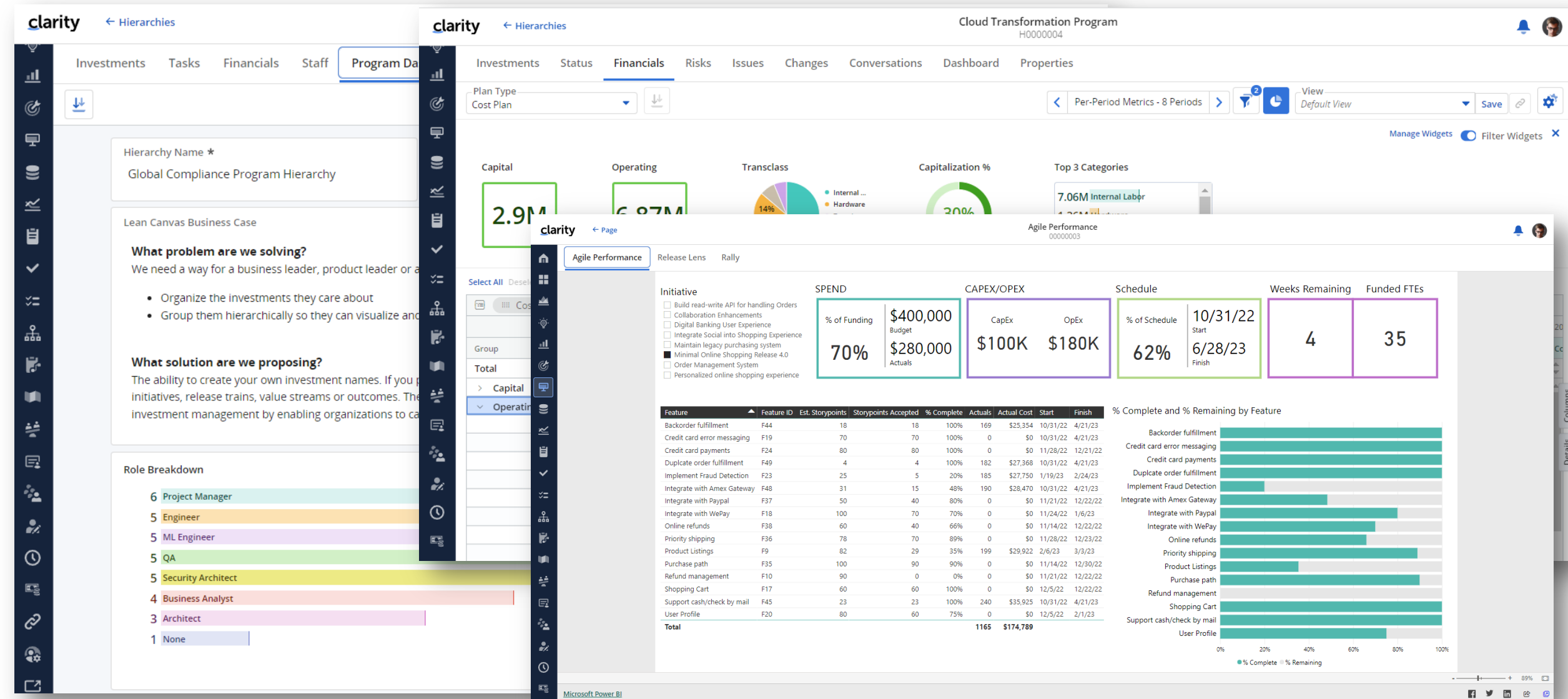
The screenshot displays the Clarity software interface, which is used for project management and reporting. The interface is divided into several sections:

- Conversations:** A sidebar on the left shows a list of conversations. The selected conversation is titled "Project: Minimal Online Shopping Rel" and includes details about the team (UX), objective (Accelerate company solution), and risk (Dependency on other teams for).
- Digital Banking Product Line Roadmap:** A central section showing a roadmap for the Digital Banking Product Line. It includes a "Roadmap" view and a "Status Reports" view.
- Status Reports:** A detailed view of the status reports, showing a table of items with columns for Status, Investment ID, Latest, Report Status, Report Date, Overall Status, Schedule Status, Scope Status, Cost and Effort Status, and Status Report Update. The table is filtered by "Report Status = Final" and "Active (Common Investment) = Yes".

The "Status Reports" table contains the following data:

Status	Investment ID	Latest	Report Status	Report Date	Overall Status	Schedule Status	Scope Status	Cost and Effort Status	Status Report Update
✓	Pro00000001	✓	Final	Apr 15, 2022	Needs Help	On Track	On Track	Needs Help	
✓	PRO00000010	✓	Final	Apr 15, 2022	Needs Help	On Track	On Track	Needs Help	
✓	PR2009	✓	Final	May 3, 2022	Needs Help	Needs Help	On Track	On Track	A lot of work came together this week to complete several tasks and getting Phase 1. Removing Effort Status from tasks are back on track. Schedule should get back on track by end of
✓	EPI00000038	✓	Final	Mar 9, 2023	Needs Help	Needs Help	On Track	Needs Help	
✓	WS00000001	✓	Final	Mar 24, 2023	Needs Help	Needs Help	Needs Help	On Track	

“Reporting, Analytics, Dashboards”



Demonstration

Questions?





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- Click on **Report PDU's**
- Click on **Course or Training**
- Class Provider = **Rego Consulting**
- Class Name = **regoUniversity**
- Course **Description**
- Date Started = **Today's Date**
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- Training classes = **Technical**
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