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Agile Integrations Considerations for Hybrid Ecosystems

Your Guides:
Eric Myers and Ben Raper



Introduction

Are you struggling with implementing Agile tools in addition to Clarity?

This class will review best practices for implementing agile tools in conjunction with Clarity - living in a Bi-Modal world. We will discuss how Clarity can be used to govern both types of work and teams and how Agile tools should interface into Clarity.

Introductions

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



Agenda

- An Agile Revolution and Evolution
- Integrations
- Consolidations
- Transformation
- Personas
- Connectors

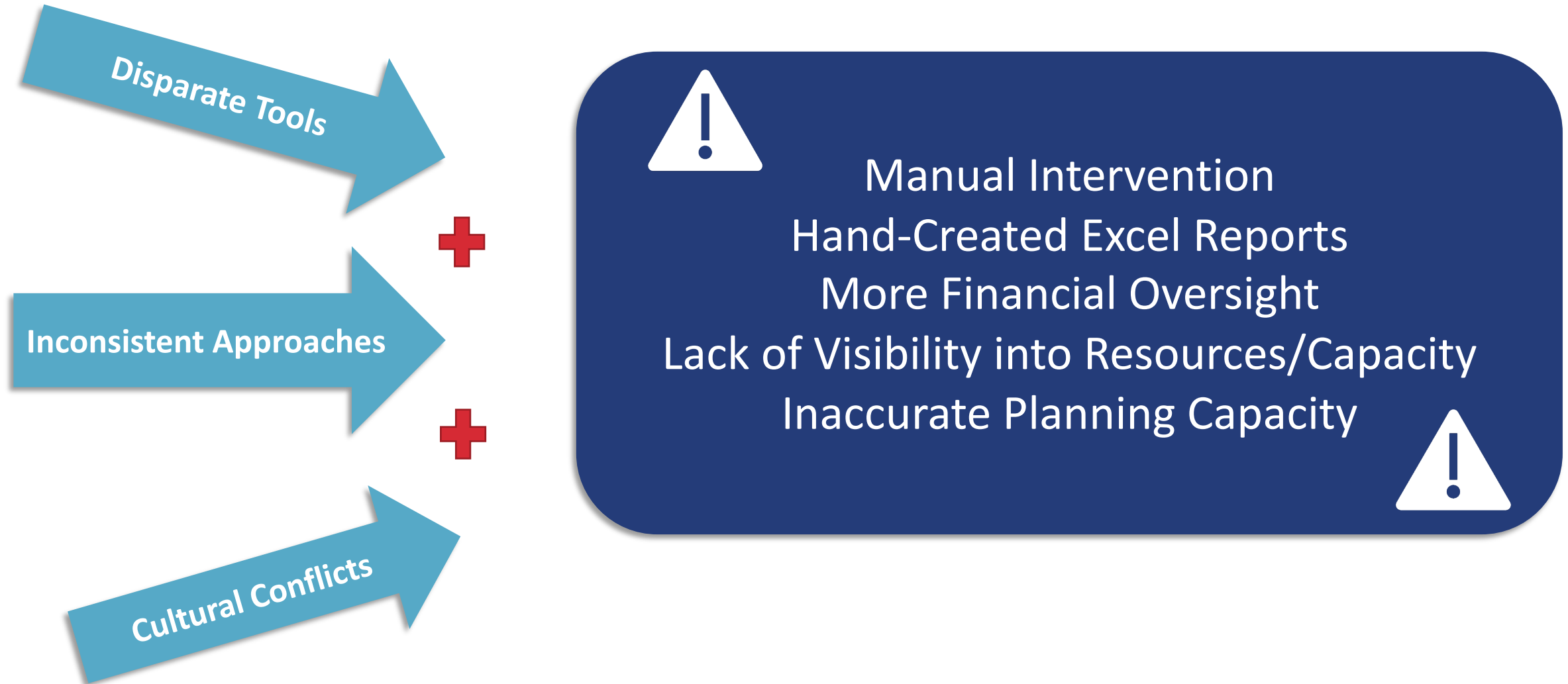
An Agile Revolution and Evolution

- ✓ Agile Development approaches were introduced more than 20 years ago!
- ✓ As it has been adopted and used, Agile has also evolved and/or mutated in organizations to better fit and align to the needs of the organization.



Agile Doesn't Always Mean Organizational Agility

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General Reasons for Connecting Your PPM and Agile Tools



Right Tool, Right Granularity

Tools have a core “purpose and granularity” use the right ones, for the right use cases.



Reporting/Transparency

Decision-makers want a “one-stop-shop” for monitoring investments



Financial

Provide Clarity with Time Tracking information from Agile tools



Time Tracking

Avoid duplicate time-entry



Resource Management

Generate an understanding of how people are utilized



Agnostic Work Management

Gain insight and consistency no matter what delivery methods are used

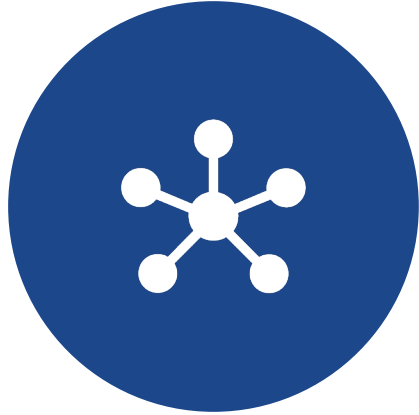
But One Size Does NOT Fit All

Here at Rego, we meet you where you are on your Journey. If you are looking for simple tool integration or more organizational transformation, we are here to help.





Three General Approaches



INTEGRATE



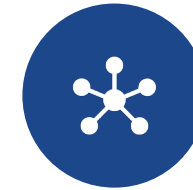
CONSOLIDATE



TRANSFORM

Integration Approach

Rego's Most Basic Approach – All about System-to-System Integration



INTEGRATE

- **Is a GOOD fit, if you:**

- Have mature tools and processes
- Have come to agreements with Finance on needs and expectations
- Need tool to tool integration (Clarity to your Agile tool) for information and updates

- **Is not for organizations who need:**

- More consolidated data and reports
- Need coaching or organizational change help
- Need to normalize data across lots of Agile and PPM tools

Consolidation Approach

Rego's Intermediary Solution: Besides integration, we help with data consolidation and normalization



- **Is a GOOD fit, if you:**

- Are maturing your methodologies
- Have come to some agreements with Finance on needs and expectations
- Need tool to tool integration (Clarity to your Agile tool) for information and updates
- Want to normalize data and remove manual intervention between systems

- **Is not for organizations who need:**

- Transformational help
- Need coaching or organizational change help
- Just want tool to tool integration

Transformation Approach

Rego's Most Advanced Approach, we help you transform your development



TRANSFORM

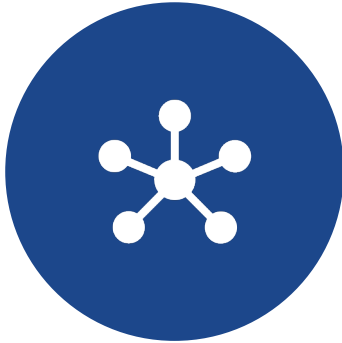
- **Is a GOOD fit, if you:**

- Have Leadership buy in
- Have commitment from Finance
- Want transformational coaching
- Want help with reporting and consolidated outputs

- **Is not for organizations who:**

- Want tool to tool basic integration
- Still need Finance to buy in or Leadership support
- Don't want to change approaches

Three General Approaches



INTEGRATE

Agile and PPM Tools
Targeted Focus



CONSOLIDATE

Agile and PPM Tools +
Data/Content Normalization



TRANSFORM

Agile and PPM Tools +
Data/Content Normalization +
Coaching and Transformation

Develop Your Plan!



Understand Your Problem, Then Integrate

Successful
Integration can only
occur once you
understand what
you're integrating



Understand Your Data

-  Develop a Data Dictionary for each Tool
-  Identify every Entity and Field, Type, and Values
-  Identify actual usage and quality of data for each
-  Map your Data between tools and validate if it makes sense to include in an Integration



Clean Up Your House Before You Put More in It

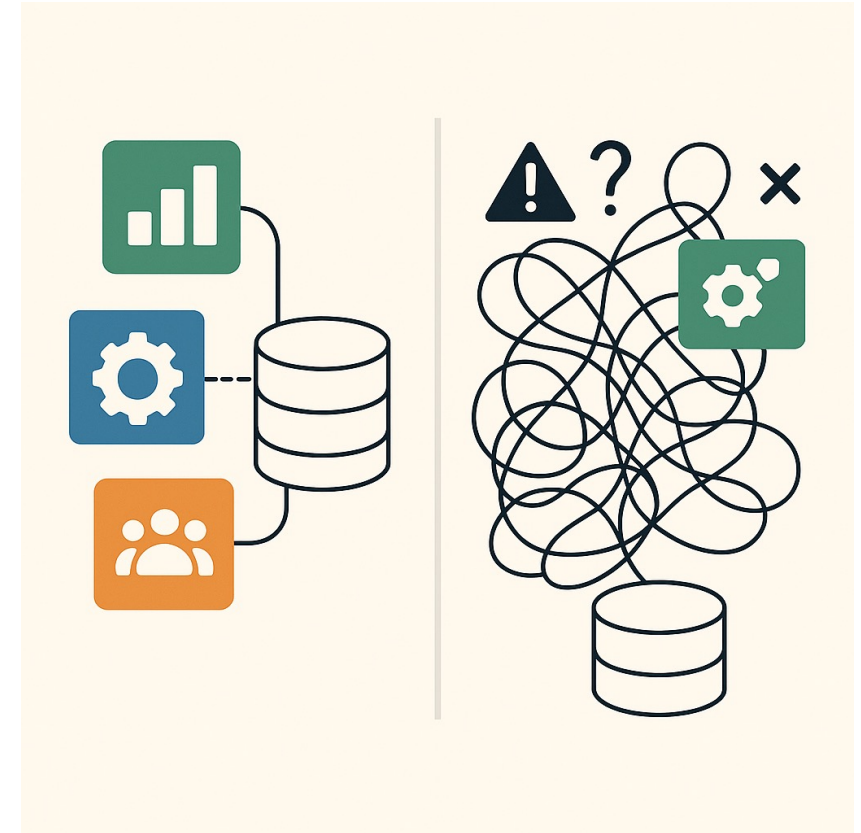


Establish Protocols

- ❓ Questions to consider:
- Which the system is the source?
 - Does it really add value in the other system?
 - What problem or need is trying to be solved by integrating it?

⚙️ Establish new data request intake and approval processes

⚙️ Develop a forum and cadence to review requests



Bring It to Life:

Frictionless Time Tracking inc. Rally

Frictionless Time Tracking

Image sourced from: **Reclaim Control Without Slowing Delivery: A Guide to Frictionless Tracking** eBook.

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INTRODUCING FRICTIONLESS TIME

ValueOps Frictionless Time eliminates manual time entry by automatically capturing effort from the tools teams already use, like Rally, Jira, and more. It connects delivery data to financial and strategic frameworks in real time, without disrupting how work gets done.

With Frictionless Time, you get:

01 Automated time compliance that meets project and audit standards

02 Real-time traceability into effort, status, and progress

03 Reliable data to forecast accurately and manage resources with confidence

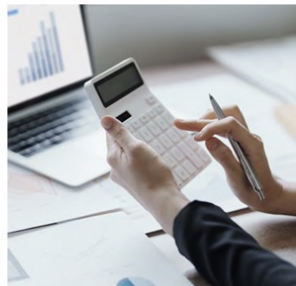
HOW VALUEOPS DELIVERS FRICTIONLESS TIME



Automated Time Capture from Delivery Tools

No behavior changes. Time is pulled directly from stories, tasks, and workflows — turning real activity into real insight.

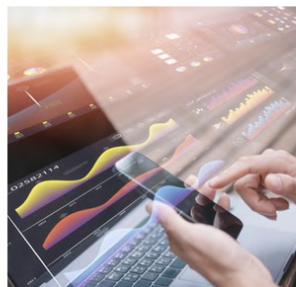
- ✓ Invisible to teams
- ✓ Consistent across hybrid delivery environments



Financial Mapping That Aligns to Governance Needs

Custom rules map effort to timesheet codes, CapEx/OpEx categories, and audit frameworks.

- ✓ Standardized reporting, no matter how work is done
- ✓ Built-in audit support



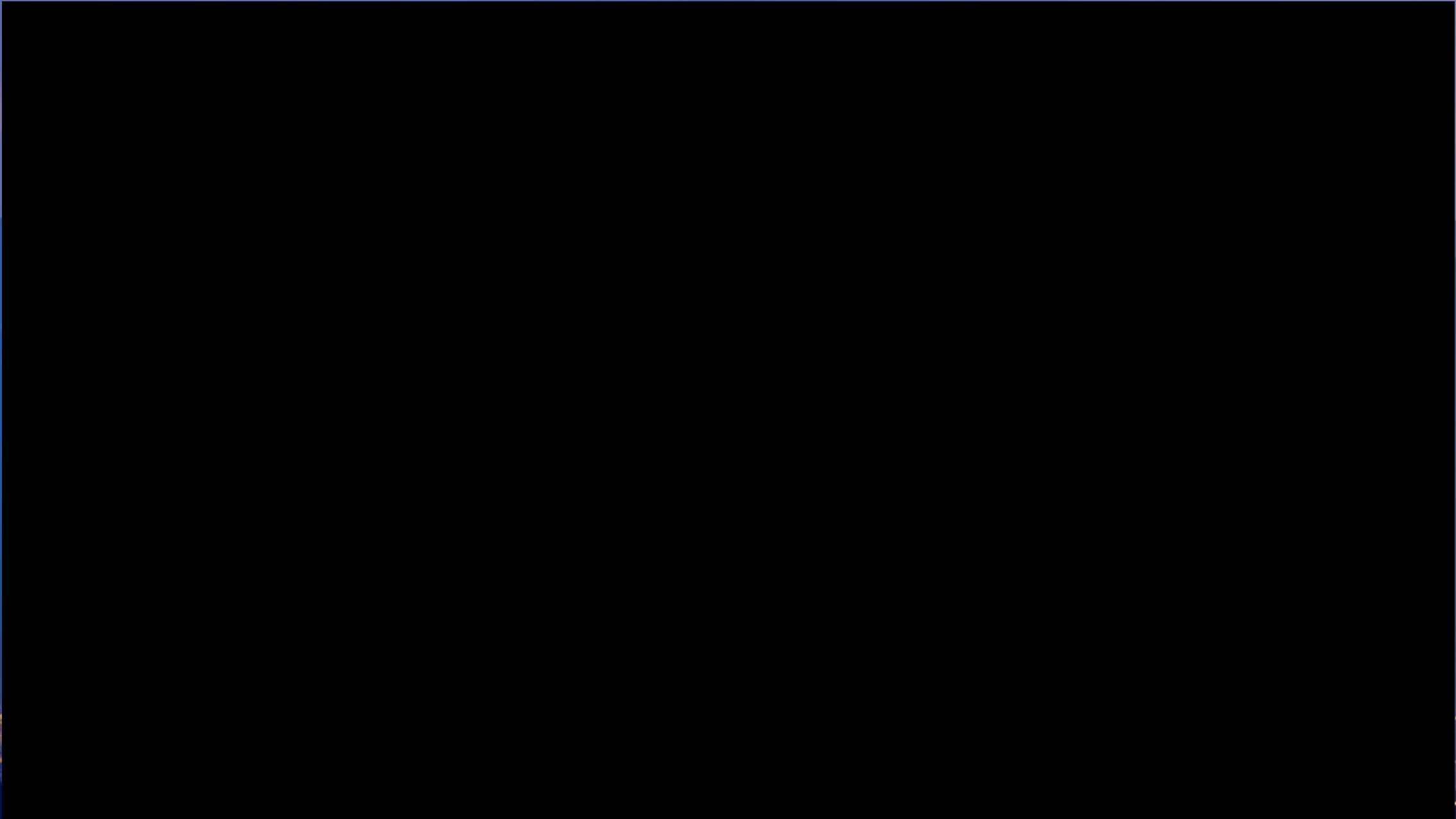
Real-Time Visibility from Work to Investment

Time data flows seamlessly into traditional portfolio structures, powering smarter planning, faster forecasts, and better cross-functional coordination.

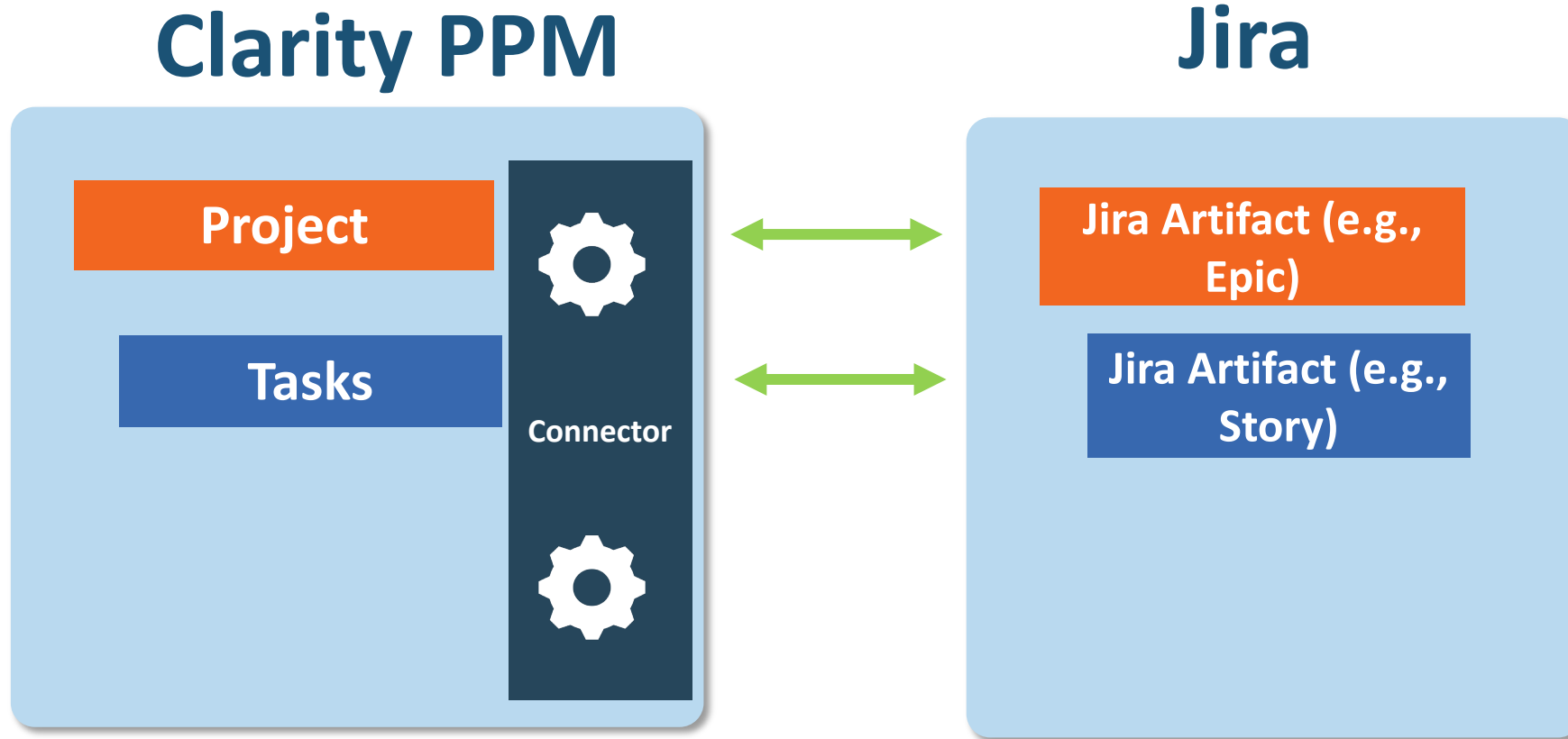
- ✓ Replace fire drills with foresight
- ✓ Align delivery, finance, and strategy around shared truth

Bring It to Life: JIRA Connector by Rego

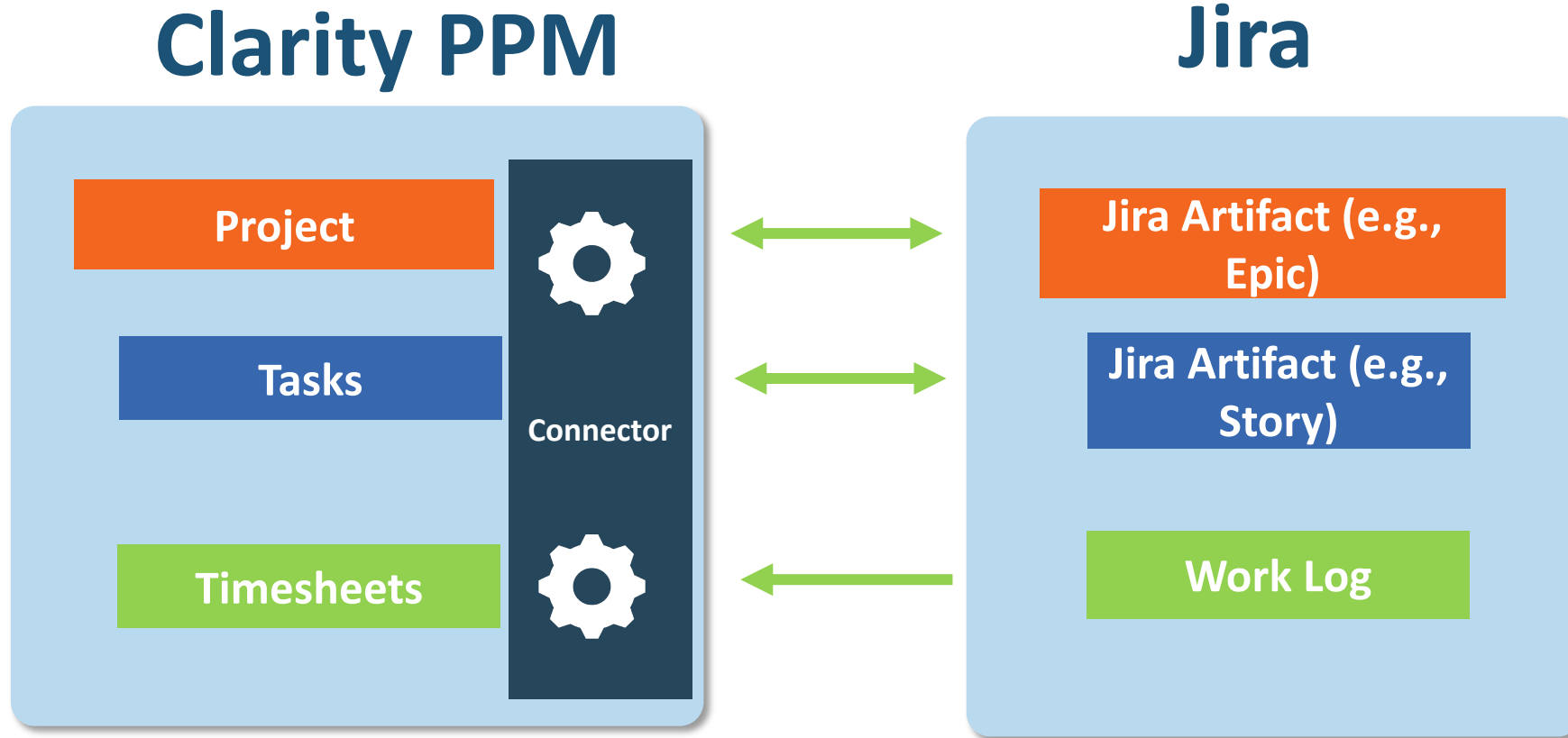




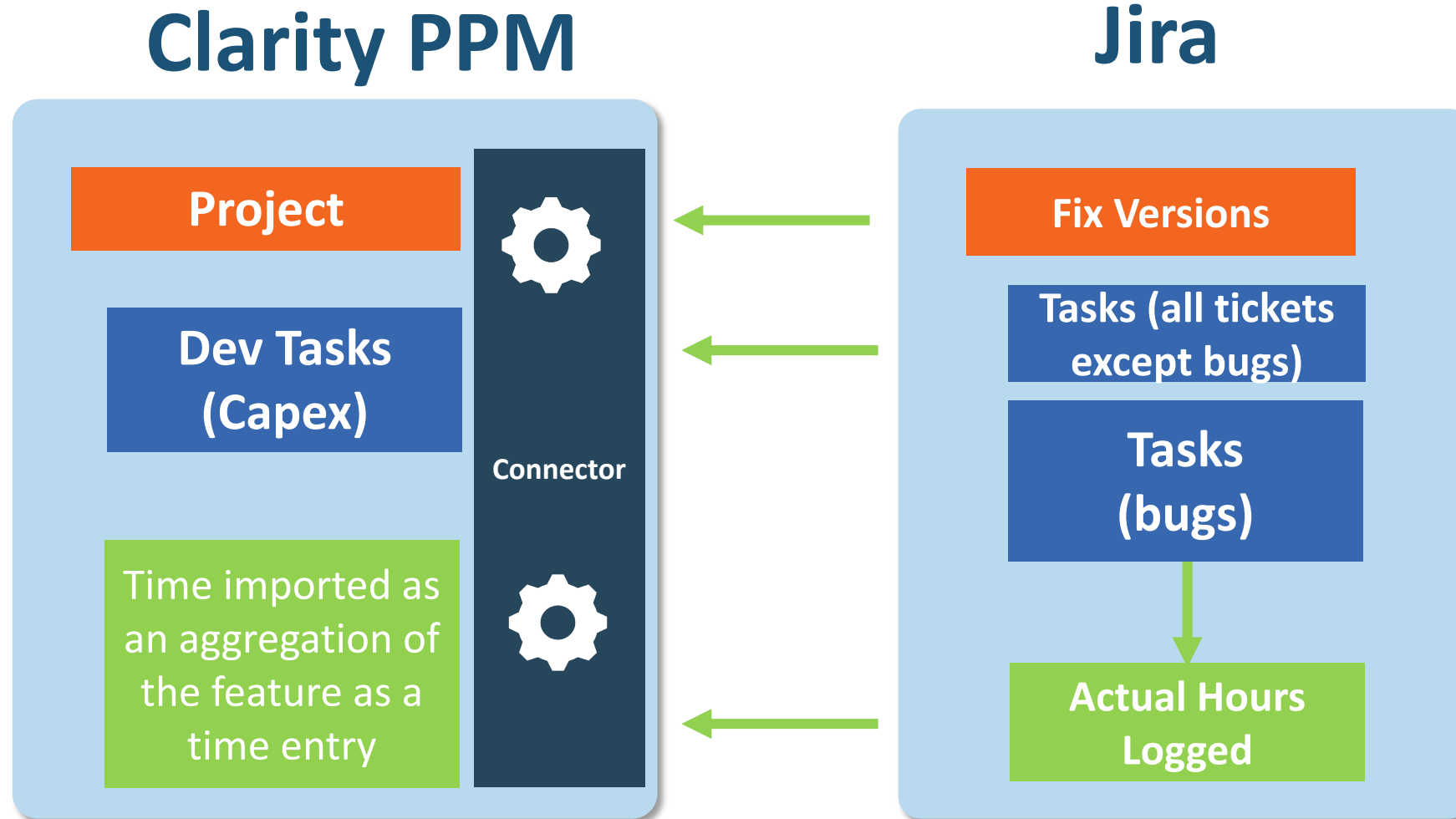
Standard Approach – Standard Integration of Jira and Clarity



Standard Approach – Standard Jira with Worklog



Tailored Approach – Fix Versions (Customer Example)



Automated Time from JIRA



One of our clients wanted a solution that created timesheets without their engineers having to fill out a timesheet

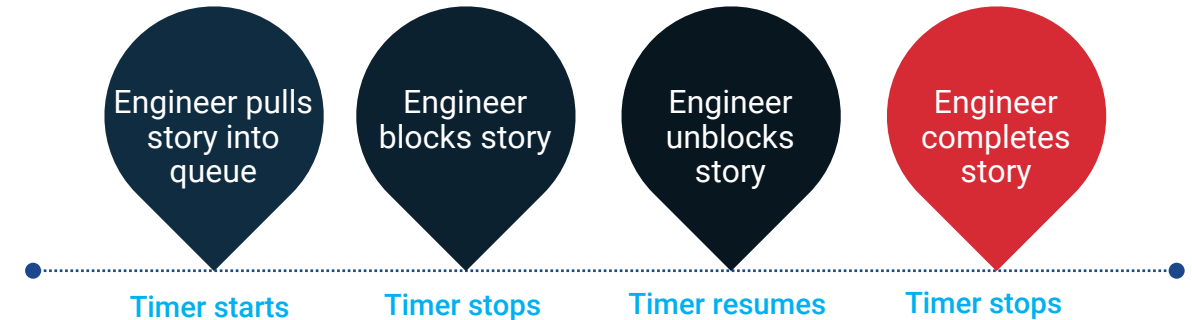


We built a solution that acts similarly to a stopwatch

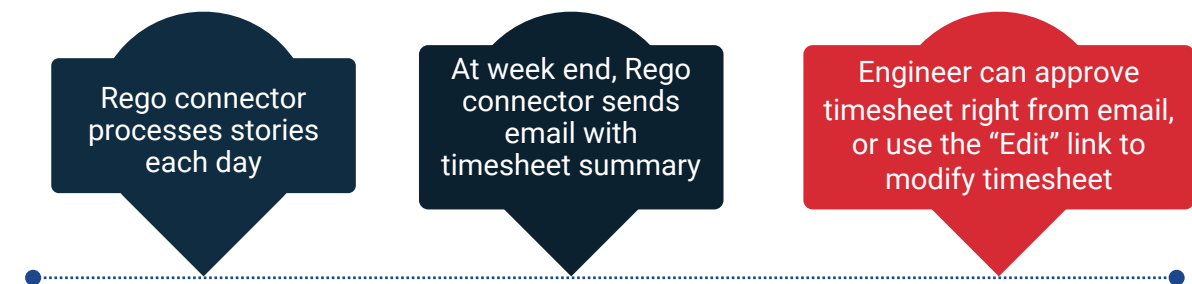


Any newly created JIRA Issues (associated with integrated Epic) OR updates to already imported JIRA Issues OR Time booked on JIRA Issues and sub-tasks is brought over to CA PPM by scheduled Jobs

JIRA



Clarity PPM



Bring It to Life: ValueOps ConnectALL to Manage your Automation

Question:
Are You Using ConnectAll?
What Are Your Use Cases?



Value Stream Automation



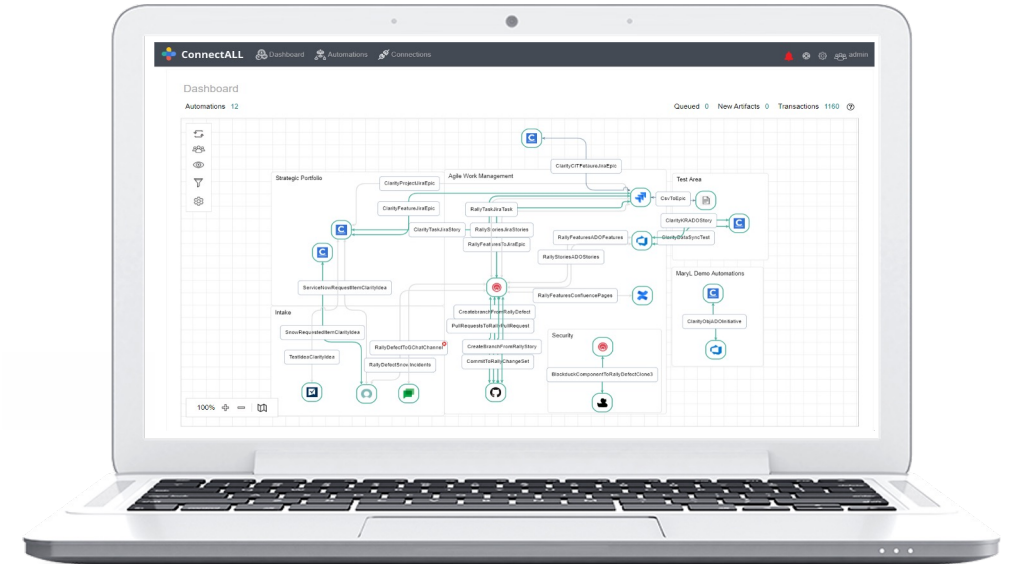
Automate the flow of information and activities across teams, organizations and tools



Eliminate non-value-added activities, remove bottlenecks, increase efficiencies



Integrate, interoperate, trigger, and monitor activities in the Value Stream

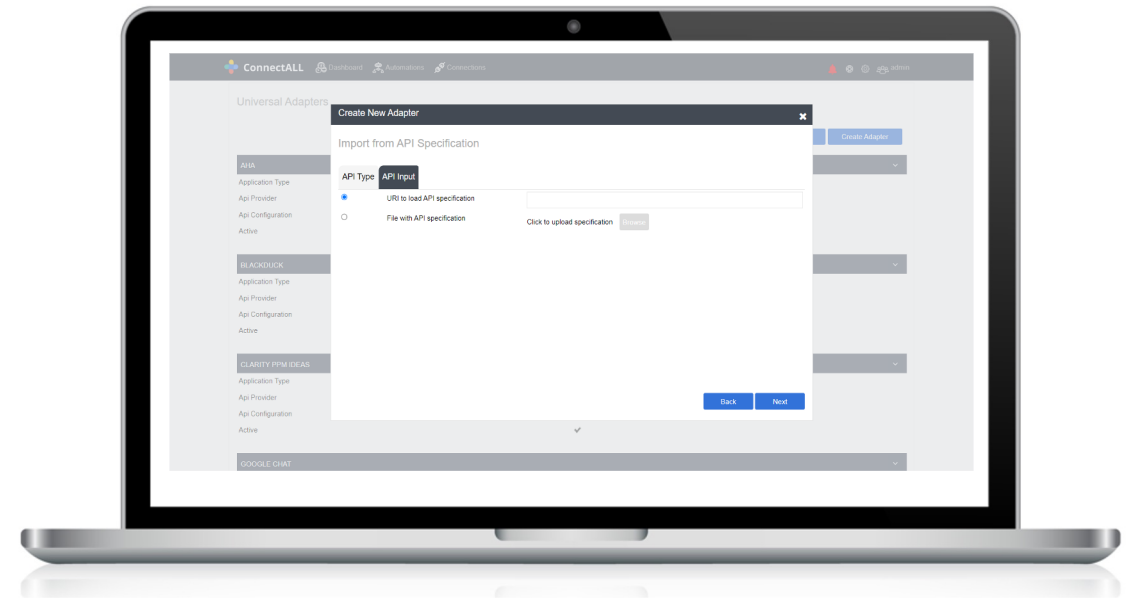


Create Alignment



Align the efforts of everyone in the organization, by uniting the enterprise and identifying bottlenecks

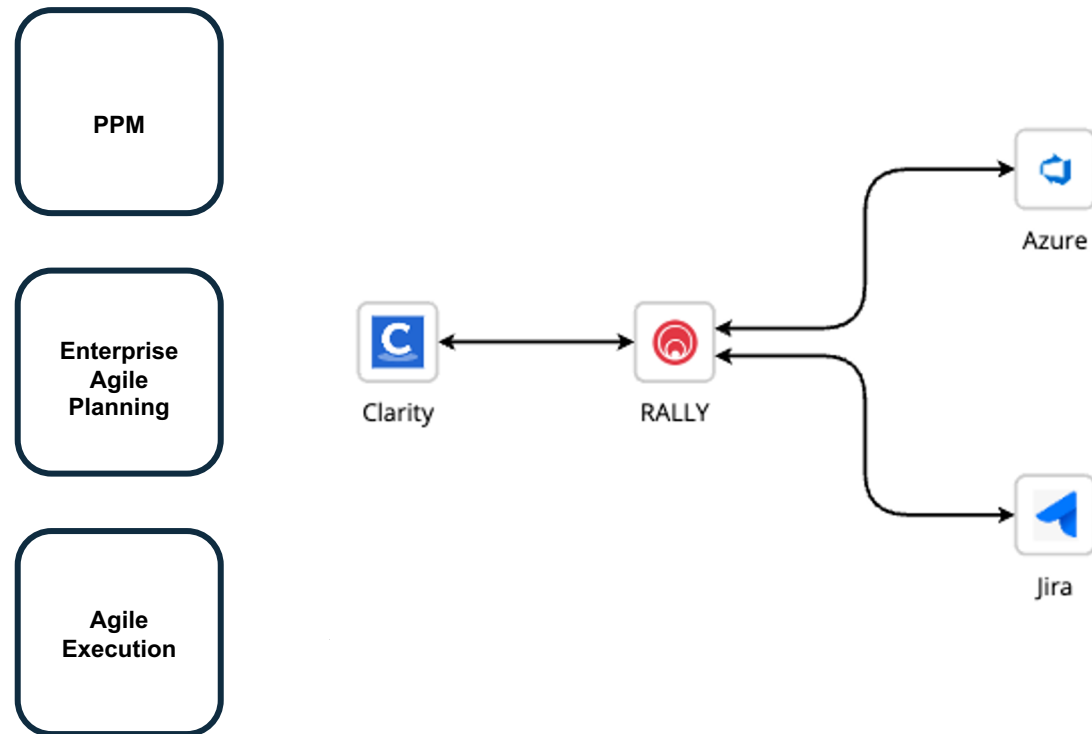
- Quickly connect any tool in the software delivery value stream
- Eliminate non-value-added activities
- Remove bottlenecks
- Sync records to and from any application with any database
- Eliminate waste by identifying duplicate solutions and work creation
- Automate the value stream and control the flow of information with out of the box data models for standardization of data



How It Works: Alignment

Features to align business and delivery, reduce friction, and foster collaboration

“We often have a breakdown in how our business strategy is translated into delivery plans, leading to overproduction.”



Automation at Every Step



ServiceNow

Service Management

- Incidents
- Issues
- Requests



Clarity

Portfolio Management

- Ideas
- Strategies
- Initiatives
- Roadmaps



Rally

Requirements Management

- Initiatives
- Epics
- User Stories
- Tasks, Sub Tasks
- Defects
- Sprints



Microfocus ALM

Test Management

- Defects
- Test Plans
- Test Scripts
- Tests
- Results



GitHub



Jenkins



Octopus

Config, Build & Deploy Mgmt...

- Commits
- Pull Requests
- Builds (Jobs)
- Results
- Deployments

Request

Plan

Build

Test

Deploy

Usage

Questions?





Master Clarity with Rego University

Earn Certifications in
Administration, Leadership,
and Technical Proficiency

Let Rego be your guide.



Elevate Your Professional Expertise with Rego University Certifications

Rego is excited to continue our **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!
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