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2025

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Financial Management Roundtable

Your Guides:
Karen Lifsey and Brian Hazelzet

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Agenda



Approach:

- An outline of topics will be presented for discussion
- We are not limited by these topics, as their purpose is to "spark" the conversation



Encouragements:

- Participate and share your insight
- This is an opportunity to interact with peers and share challenges, issues, resolutions, and successes
- If there are questions very specific to your organization, we can discuss directly afterwards or within the Labs

Possible Discussion Points

- ❓ What financial information are you being asked to provide to enable:
 - Project Managers or Scrum Masters
 - Business Partners
 - Finance
 - Executives
- ❓ How has Agile development transformed financial management in Clarity?
- ❓ Has your organization investigated the use of MUX Teams?
- ❓ Are you forecasting? On what cadence?
- ❓ How are you defining rates for forecasts?
- ❓ What grouping attributes are you utilizing?

Possible Discussion Points

- ? Are you bringing in actual costs, labor, non-labor? How?
- ? Do you have or want a GL integration for non-labor activity?
- ? Are you tracking time for labor costing? In Clarity or elsewhere?
- ? Is Clarity being leveraged in planning or budgeting activities?
- ? Are you using Clarity for capitalization?
- ? What gaps are you encountering in your finance/costing efforts within Clarity?
- ? Are you seeing a need for financial drill down/roll up? Draw down funding?

Questions?





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