From Chaos to Clarity: Mastering Data Quality for Smarter Operations

Las Vegas regoUniversity 2025

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Your Guides:

Rego Consulting – Mario Castillo

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Agenda

1. Our Transformation Journey
2. Financials – Key Challenges
3. Onboarding – Key Challenges
4. Exploring Untapped Potential
5. Financials – Clarity Solutions
6. On Boarding – Clarity Solutions
7. From Strategy to Reality
8. SOX – Change Management process

Our Transformation Journey

From Struggle to Reset – Early Clarity adoption in 2017 faced challenges with limited use and heavy customizations.

Fresh Start with Rego – Partnered in 2020 to reimplement Clarity with a simplified, scalable foundation.

Driving Enterprise Value – By 2023, Clarity became a SOX in-scope system, powering time tracking, cost capitalization, and enterprise visibility.

Financials – Key Challenges

- Limited approval workflow for task creation.
- Timesheet submission not automated; manual follow-up required.
- Manual Excel work for timesheets exceeding 40 hours.
- Inconsistent or missing charge codes.
- Onboarding delays leading to out-of-period entries.
- Project costs tracked manually instead of at task level.
- Incomplete or inaccurate rate data.

Onboarding – Key Challenges

- Delays in timely terminations within the system.
- Onboarding lags causing out-of-period entries.
- Lack of approver hierarchy.
- Errors in the rate matrix.
- Lack of automated reminders for contractors.
- Complexity around role changes.

Exploring Untapped Potential

Evolving Use of Clarity

Opportunity to expand adoption across the organization.

Shift from legacy practices to modernized ways of working.

Building Organizational Maturity

Enhance utilization of Clarity PPM as a strategic solution.

Strengthen visibility into projects, resources, and financials.

Strengthening Business Processes & Governance

Establish consistent processes.

Introduce technology architecture and governance frameworks to support scale and sustainability.

Financials – Clarity Solutions

Task Approval & Governance

Introduced a custom task approval process to ensure project templates are consistently reviewed and approved by IT Finance.

Resource Hour Smoothing

(via RegoXchange)

Implemented automated logic to split resource hours: first 40 hours tagged as *Billable*, additional hours tagged as *Non-Billable*.

Annual Resource Rate Updates

Established a standardized yearly update cycle for updating resource rates.

Onboarding – Clarity Solutions

Data Integrity Monitoring

(Rego Product)

Implemented automated data extracts to monitor integrity issues across the system.

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Timesheet Compliance

(via RegoXchange)

Deployed the *Time Tracking Stalker* to send reminders to users and approvers.

Contractor Renewal Alerts

(via RegoXchange)

Automated reminders at 60, 45, 21, and 15 days before contractor SOW expiration.

From Strategy to Reality

- **As of January 1, 2023, Clarity is officially an in-scope system for Sarbanes-Oxley (SOX).**

- *A major milestone that reflects the discipline, governance, and value Clarity now delivers to the organization.*

- *This achievement was made possible through a clear roadmap, disciplined execution, and strong partnership.*

SOX – Change Management Process

Review Broadcom Release Notes

- Identify changes with high visibility or risk.
- Assess new features or functions that could benefit users.

Complete a Change Impact Analysis

- Determine required configuration or access updates.
- Evaluate potential impact on existing workflows.

Develop and Execute Testing

- Run test scripts focused on critical functionality.

Evaluate Testing Results

- Validate results to confirm stability and compliance.

Communicate to Users

- Share upgrade timelines, impacts, and key changes.

Data Extract – List (Back Up)

List of Data Extracts (1/2)
1.- Changes in Primary Roles for all type of Resources
2.- Primary Role mismatch in Investments and Custom Investments Team & Assignments
3.- Validate Resource Financial Information
4.- Employees with a valid Resource Rate in Rate Matrix
5.- Contractor with a missing Rate
6.- Primary Role mismatch in Timesheets
7.- Rate Matrix Issues
8.- Timesheet – Returned & Adjustments – Issues

List of Data Extracts (2/2)
9.- Task Approved dates vs First Actuals dates
10.- Tasks Open for Time Entry and NOT Financially approved
11.- Timesheet Self Approval
12.- Resources added/updated 5 days
13.- Terminated Resources
14.- Resources' Time Approvers
15.- New Time Approvers
16.- New Project Managers

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London Stock Exchange (LSEG) and Clarity

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Nikolay Katsarov

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Who is LSEG?

LSEG

About us

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Backed by more than three centuries of experience, innovative technologies and a team of over 26,000 people in 65 countries, we are driving financial stability, empowering economies and enabling you to grow sustainably.

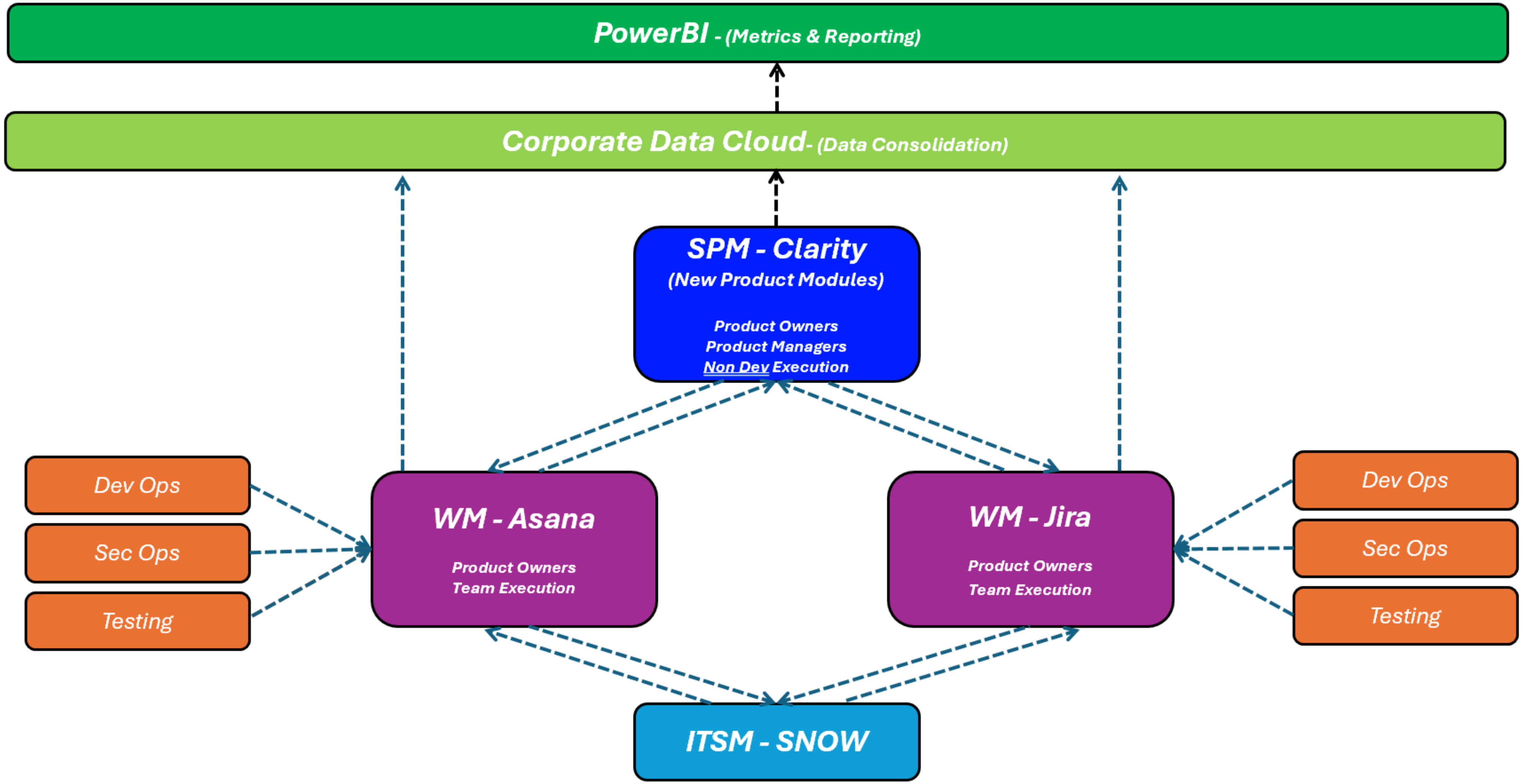
Our Journey with Clarity

- We started with Clarity in ~2008
- We currently have 16000 users
- Primary focus has been Timesheets, Project Management, Financial Management and Resource Management
- We current managed ~1.5 Billion/yr (USD) in project investment (change) in Clarity
- A common quote in LSEG "***Clarity is the 2nd most utilized application in our organization***."

Where Are We Going

- Moving toward standardized ways of working
- We are focused on connecting our ecosystem of tools with Clarity as a focal point for Portfolio Management and SPM
- With an end goal of Faster Time to Market, we are on a journey to be a Customer Lead organization

Our Next Step – Product Tooling Overview



Turning Sweet Ideas into Finished Projects

From Bean to Bar - Powered by Clarity

Every chocolate bar starts as a cocoa bean, just like every project starts as an idea.

Clarity was designed as the centralized process that transforms raw ideas into beautifully wrapped, ready-to-launch deliverables. It took a partnership across multiple divisions to ensure success!

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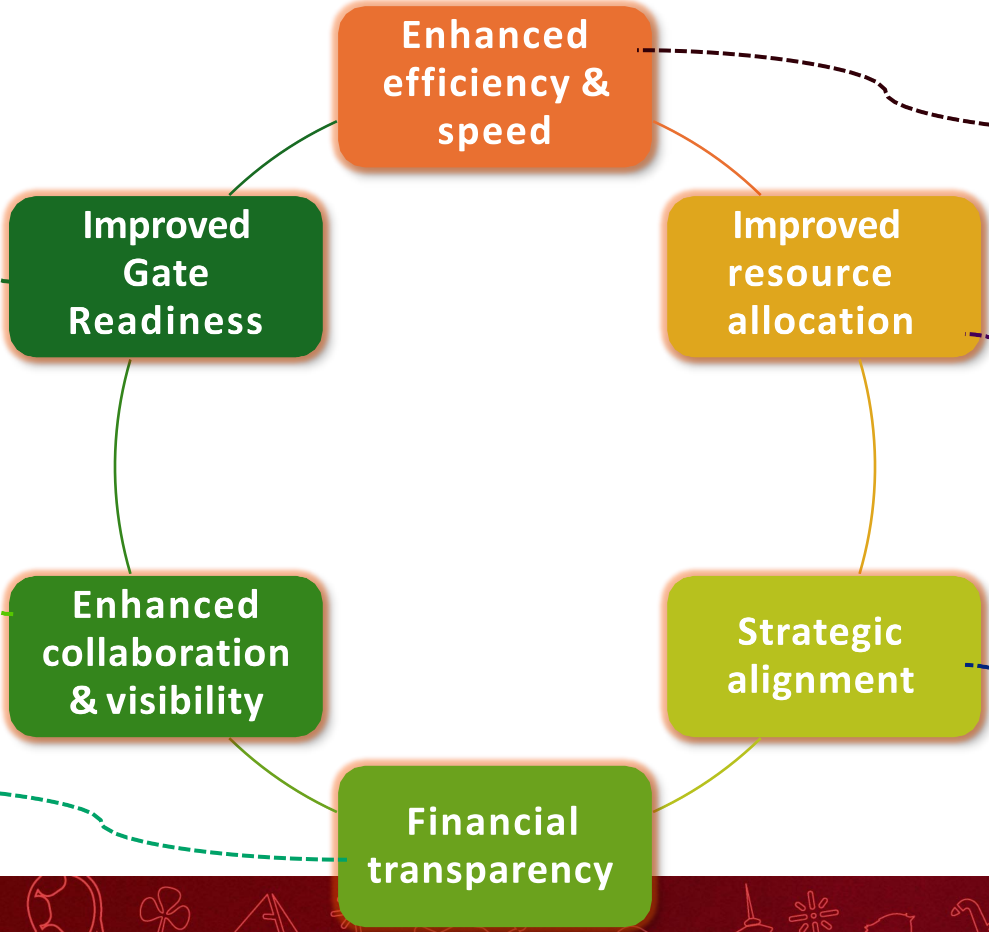
HERSHEY TPT Transformation Program Team

HERSHEY EPP Enterprise Portfolio Products

Benefits of an Enterprise Intake Form

This initiative was partnered with the Hershey Transformation Team to find a viable functionality that would allow business units to all utilize one tool for idea initiation and project execution.



Improved Gate Readiness
- ✓ Reduces project failure risks through thorough vetting
- ✓ Streamlines & automates conversion of approved ideas into projects

Enhanced collaboration & visibility
- ✓ Promotes collaboration and transparency across multiple governance bodies including TPT, IS & Capital PMOs
- ✓ Integrates review process and ensures thorough vetting

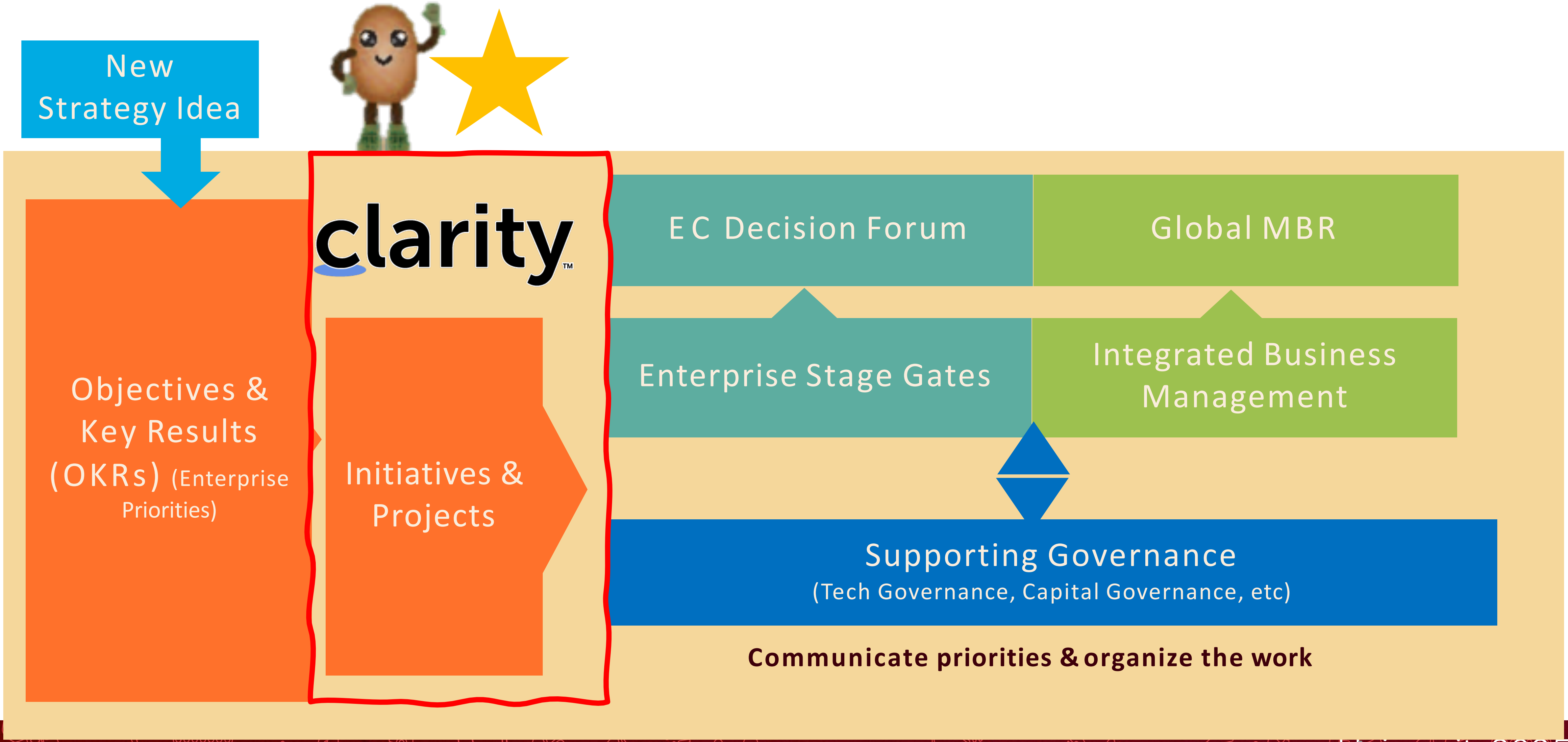
Financial transparency
- ✓ Provides a financial picture of the idea with both estimated benefits and costs to achieve the benefits

Enhanced efficiency & speed
- ✓ Increases efficiencies by eliminating redundant steps
- ✓ A single integrated process ensures quicker decision-making

Improved resource allocation
- ✓ Prioritizes resources for viable ideas
- ✓ Initiates resource planning early on

Strategic alignment
- ✓ Ensures alignment with the Enterprise OKRs
- ✓ Considers regulatory, compliance and contractual obligations

Utilizing Clarity as the Centralized Tool

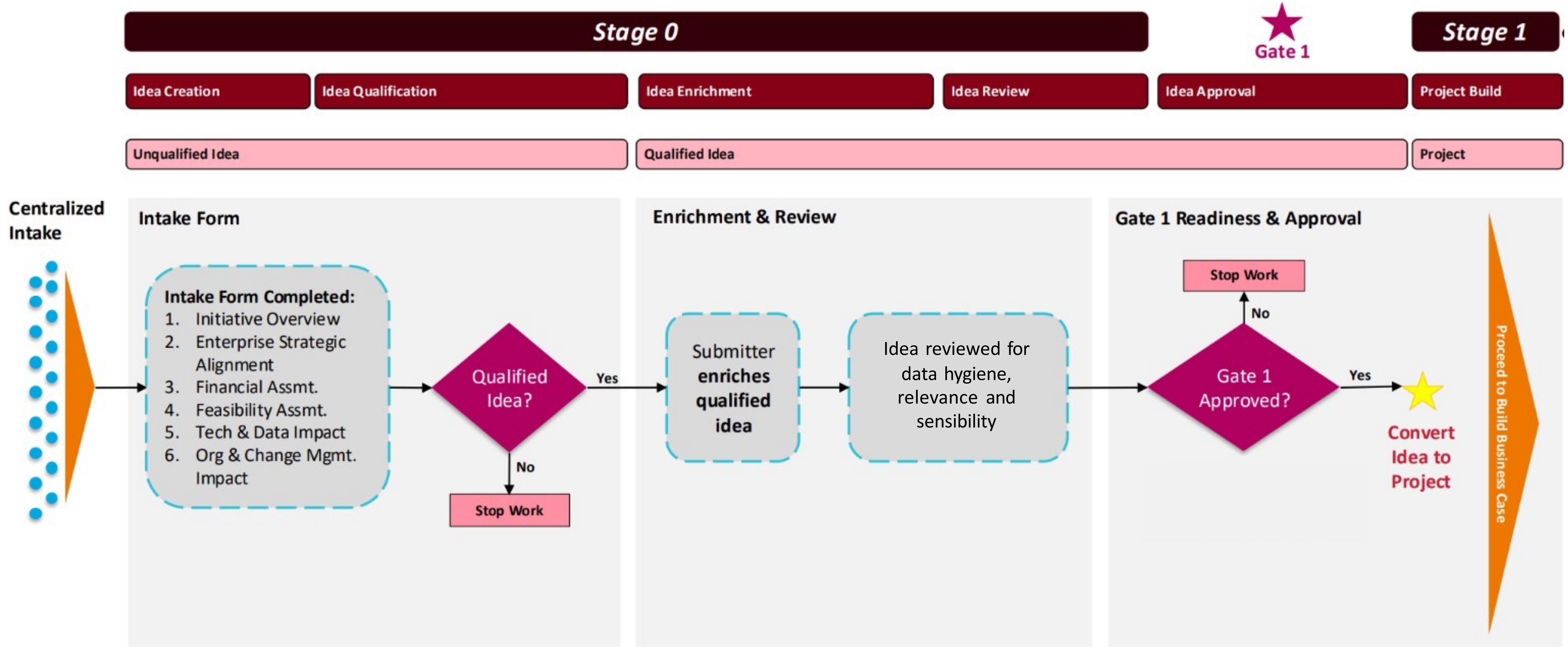


Step 1: Cocoa Harvest

Building an Enterprise Idea Intake Form

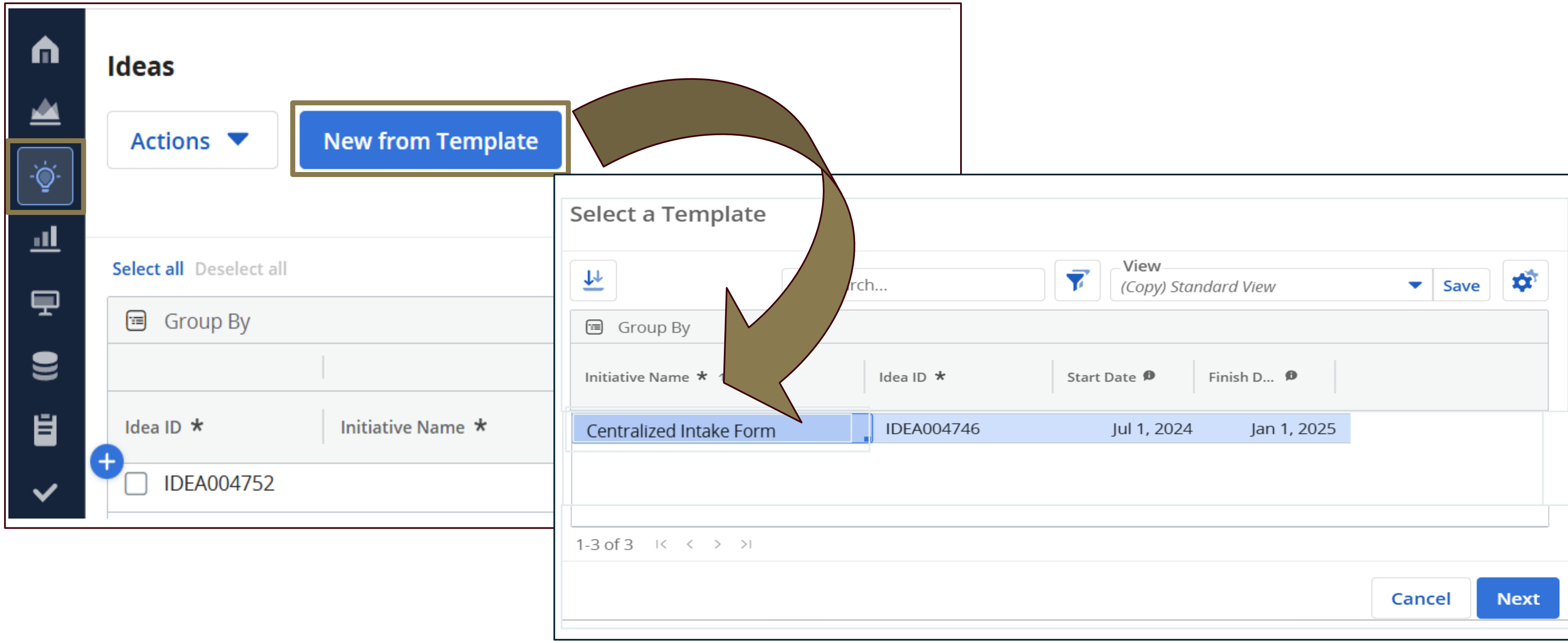
From across the enterprise, ideas are collected in a simplistic form with an unlimited licensing for Clarity. The intake form is the “harvest basket” where the data is collected to be reviewed.

Idea Workflow Summary

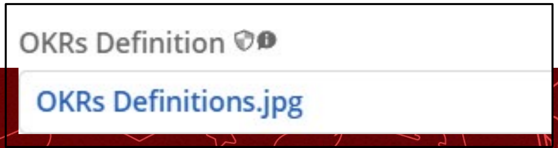


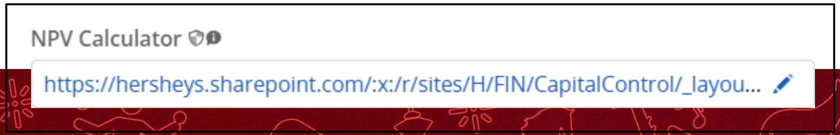
Utilization of Idea Templates

- Utilizing a **Template** allows for the end users to all work off of the same wireframe, but also allows the administration team to have consistency and quickly make modifications when needed

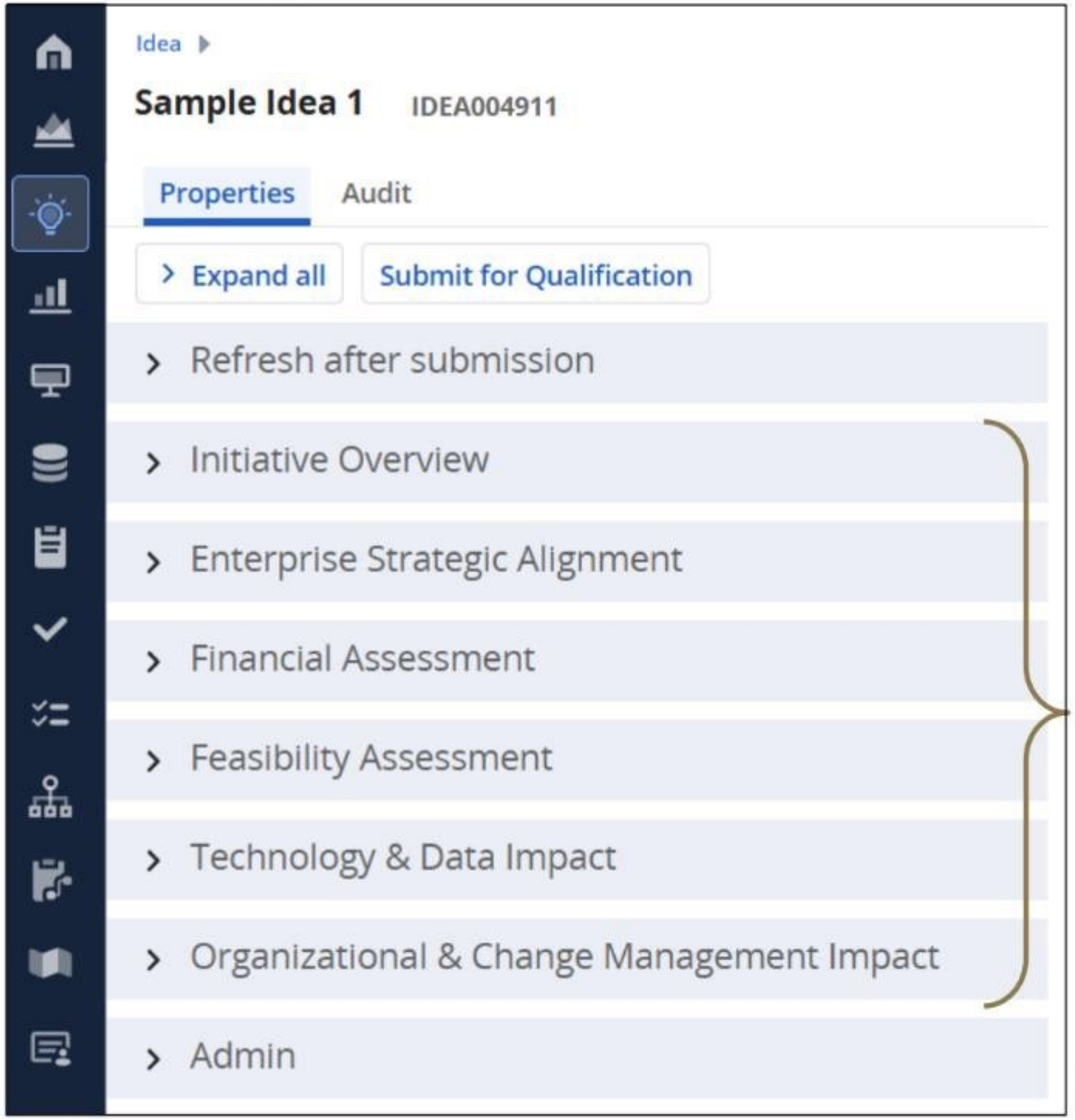


Cocoa Bean Tip:
Add links and/or images on fields within the template to link training materials & supporting documentation





Idea Intake Form



- The initial form contains a series of basic questions that can be applicable across multiple business units.

- We utilized dynamic capabilities of the tool to allow for additional questions to appear ONLY when a specific response is given. For example, if you say “YES” this relates to an OKR, another field appears to select which OKR it is applicable for.

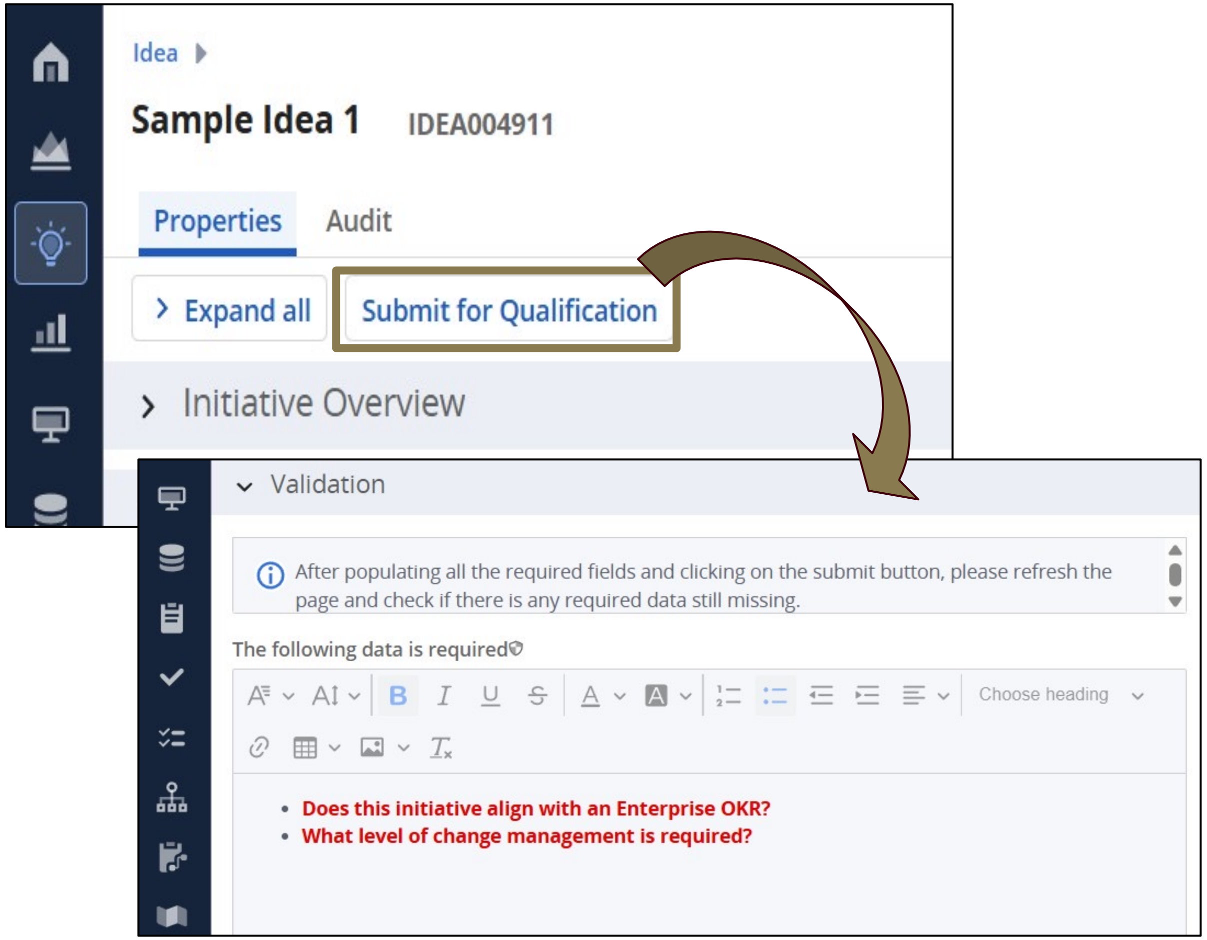
Cocoa Bean Tip:
Set your default to have the fields collapsed for easier navigation depending on the size of the page results

Step 2: Roasting
Initial Review & Scoring

In this stage, there is an automated early vetting and prioritization, which incorporates scoring mechanisms to remove "impurities", such as unclear scope & misaligned goals to company objectives.

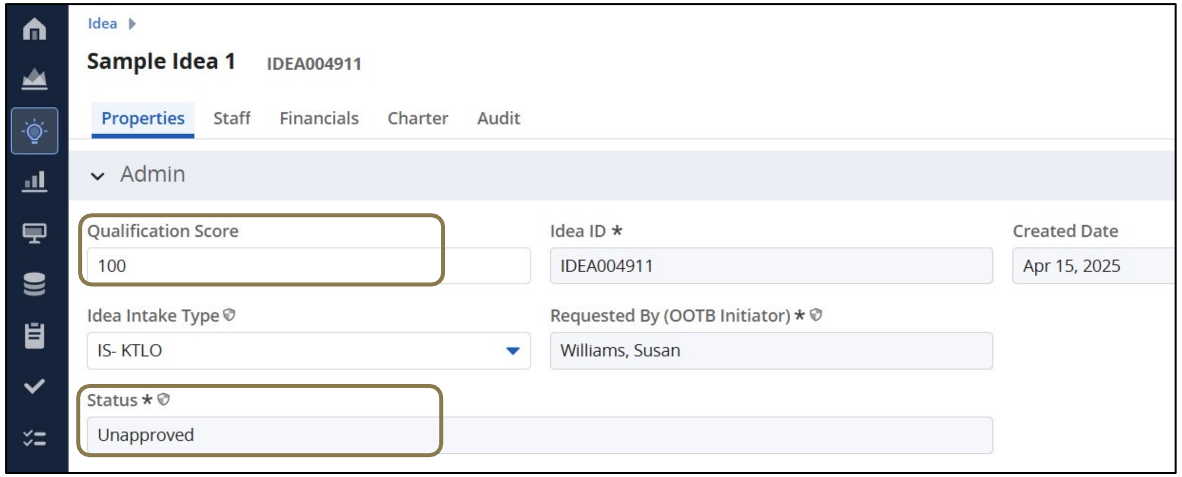
Submitting the Idea for Qualification

- We used a “**Submit for Qualification**” button to kick off a process that reviews the responses provided.
- Upon submitting the process, a field for “**The following data is required**” highlights any missing responses that need to be submitted to generate a score. The submitter can continue to fill in these fields and hit “refresh” to have the form re-evaluated until all required responses are complete.
- After refreshing and clearing all the missing field alerts, a “Score” is generated to populate an Idea Type.



Qualification Score

- The **Qualification Score** is a numerical value based on weighting.
- Less than 50 generates a "Rejected" status, but scores above 50 are "Unapproved" which allows the submitter to decide when to "Submit for Approval"



Idea Section	Scoring Question	% Weight	Notes
Enterprise Strategic Alignment	**Does this initiative align with an Enterprise OKR?**	**0-10%**	
	If No, Are there any regulatory, compliance, or contractual obligations tied to this initiative?	*0-100%**	*Compliance ideas get a score of a 100*
	If No, Does it drive any of the following business impact?	*0-100%**	*KTLO ideas get a score of a 100*
Financial Assessment	Estimated Net Sales Growth (Total)	40-50%	
	Estimated Cost Savings		
	Estimated Capital Cost	10-25%	
	Estimated Op-Ex One Time Cost		
	Estimated Annual Costs (during steady state)		
	Capital Project Type	0-100%*	*Asset Renewal & SHE-Q ideas get a score of a 100*
Feasibility Assessment	Estimated Speed to Impact	5-15%	
	Estimated cost avoidance		
	How critical is it to engage external parties (e.g. customers, vendors, consultants, etc.)		
	What level of external visibility does this initiative have?		

Cocoa Bean Tip:
To eliminate users changing the score to ensure qualification, allow the score to be calculated only once. Lock the scoring from being modified based on changed responses.

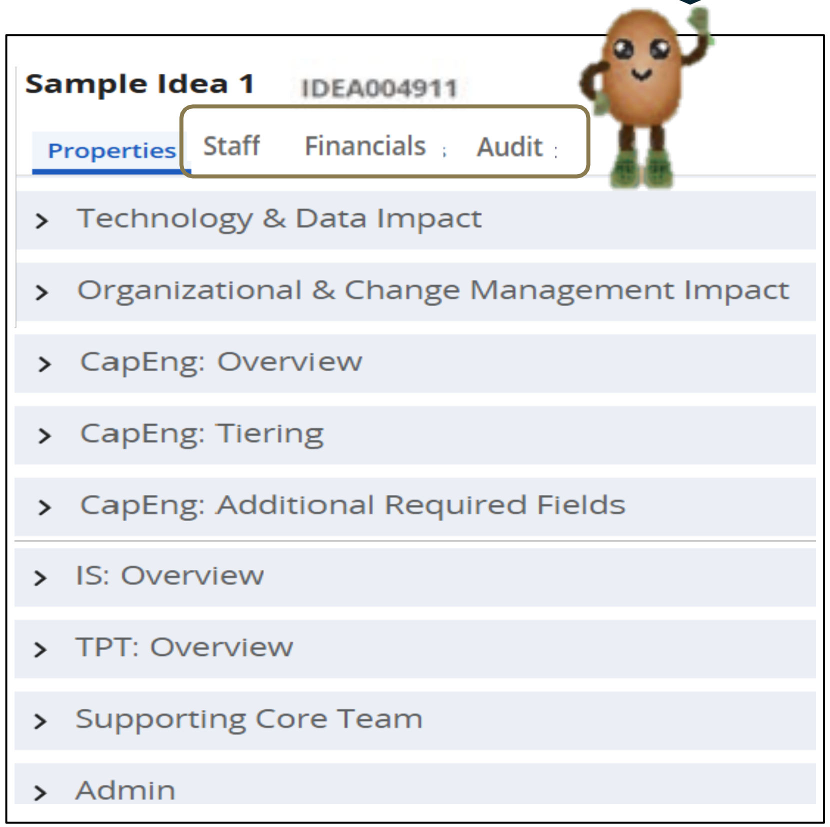
Step 3: Grinding & Refining
Additional Enrichment Intake Questions

By completing additional enrichment questions, the objective is to break ideas into manageable pieces. It also allows for the next level of information to be added including resources, timelines, and dependencies.

Idea Enrichment

Cocoa Bean Tip:
Certain tabs can appear based on Security Groups.
Example “Audit” can be for privileged access users only

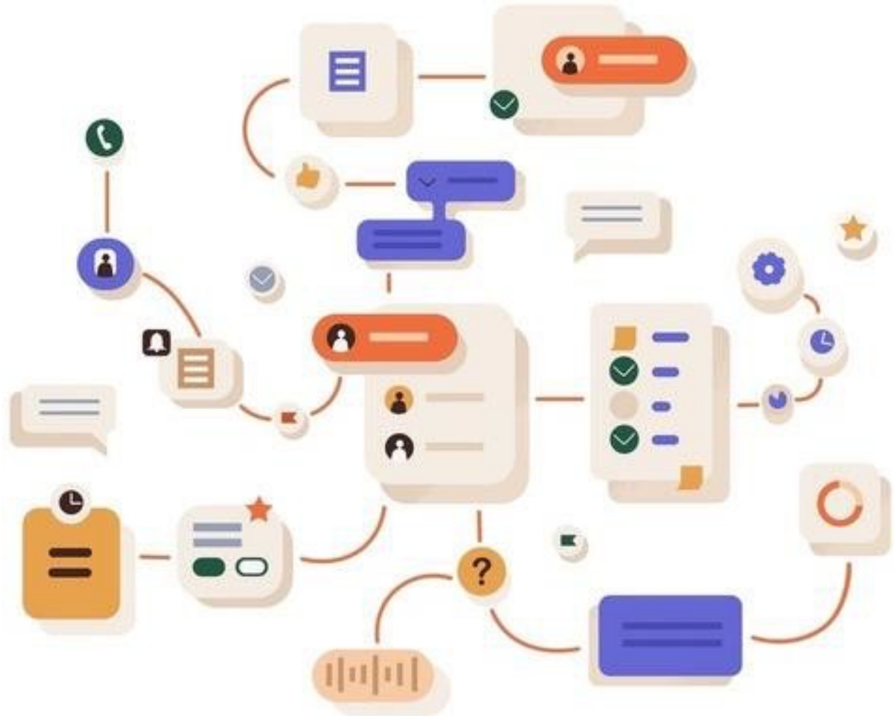
- Once the qualification score is complete, the requestor is expected to partner with additional stakeholders to enrich the idea with additional information.
- This completion of additional fields and tabs includes:
  - Financial Plans: Cost Plans/Budget Plans
  - Staffing Tab for Resource Planning



Custom Clarity Processes

- **Custom processes** were designed within Clarity to define complex start conditions, along with multi-tiered review steps to ensure **that ideas are routed individually** based on difference business units

- We have ideas classified where they could belong to one business unit or they could belong to a merge of 2 business units, and the process needed to be built to provide the correct views for a merge, along with a merged approval workflow



Cocoa Bean Tip:
Plan for a significant amount of time for testing when there is complexity. Clarity v16.3 allows you as an admin to "Impersonate a User" which makes testing much easier!

Step 4: Molding
Idea Approval (AIR Workflow & My Workspace)

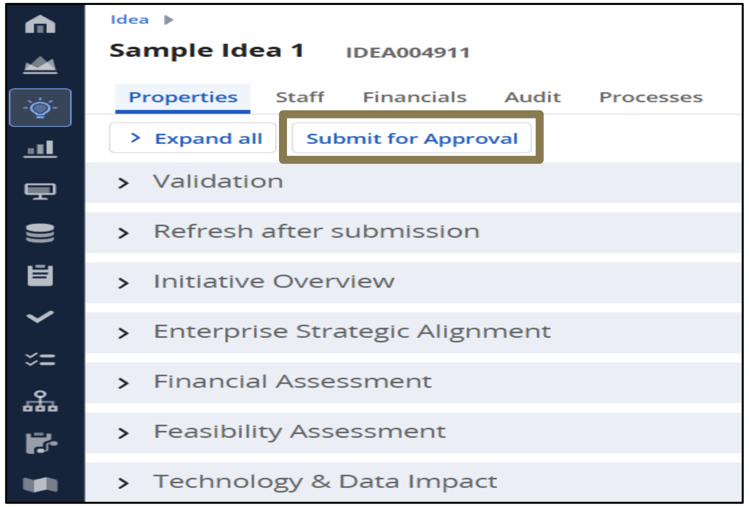
In molding the future of the initiative, the approvers and stakeholders across the business are required to complete their approval or rejection to move forward.

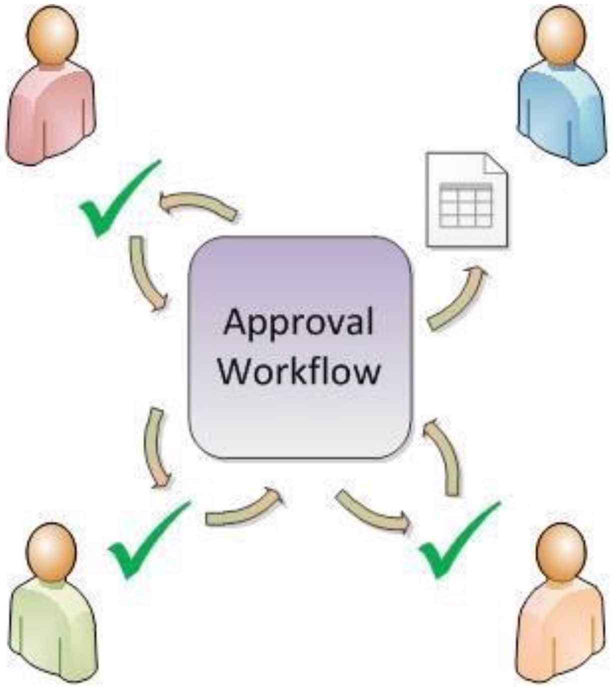
Clarity utilizes two different features to make this seamless for the leadership approvers.

Submitting Idea for Approval

❖ Once the submitter is ready for the idea to go through the approval review, the option at the top will show as "**Submit for Approval**"

A workflow of approver names was designed in the process based on the qualified idea type and scoring

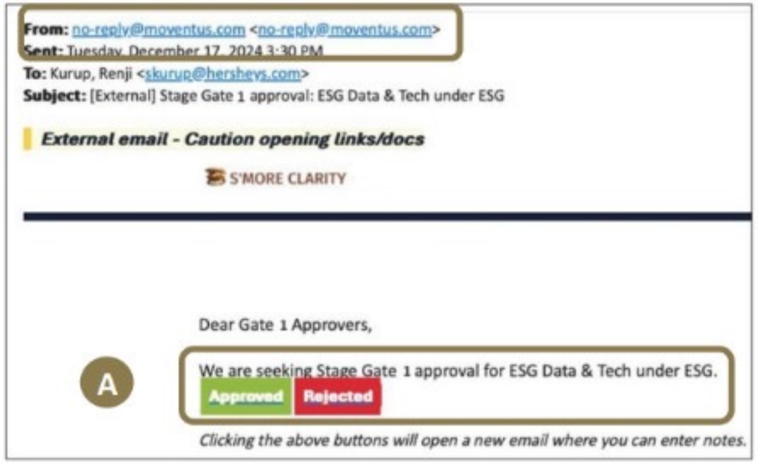




Rego AIR Workflow

Approval Request Email Alert

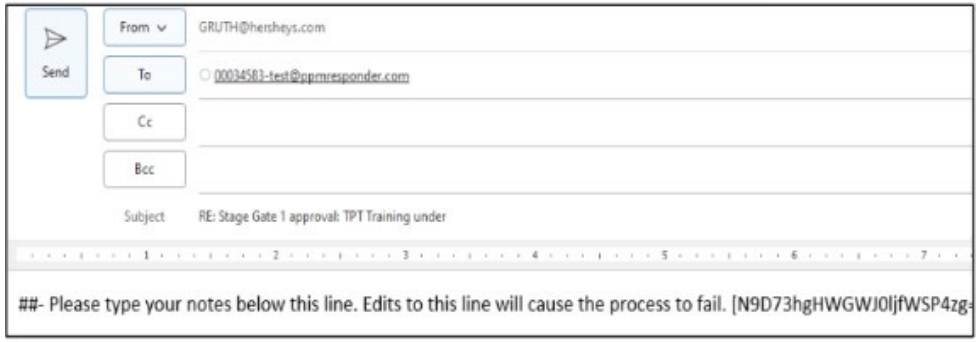
Once the idea is submitted for approval, the approvers receive an email from Clarity; the email contains a link to the idea and approve/reject buttons



Approval Response

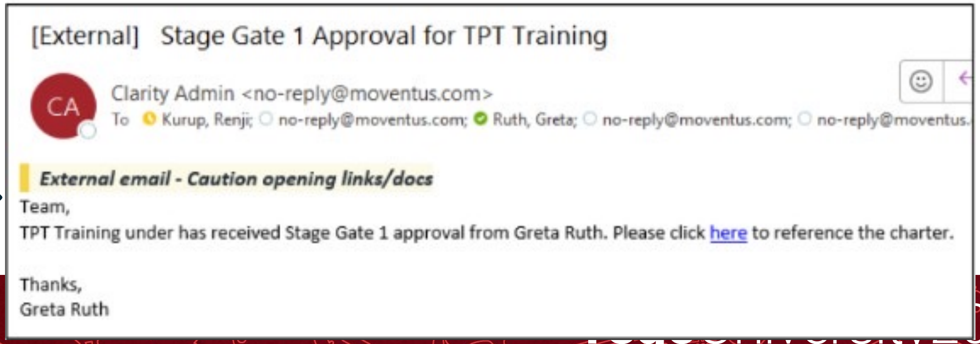
The response is captured in an email response back to Clarity

- ➢An email response is created based on whether the approver clicks approve or reject
- ➢Additional comments can be added, in case of rejections
- ➢The comments are sent to the submitter as well



Approval Confirmation Email

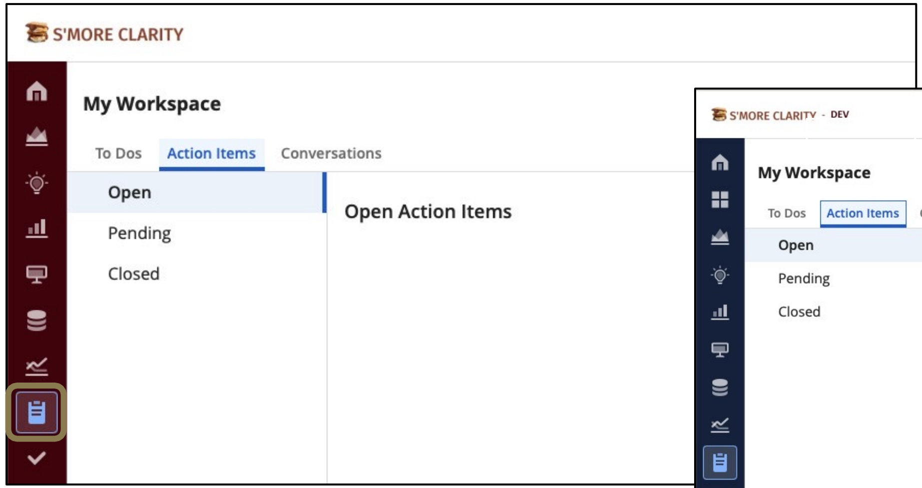
Once all approvals are secured, the approvers and team members are notified via email



Clarity: My Workspace

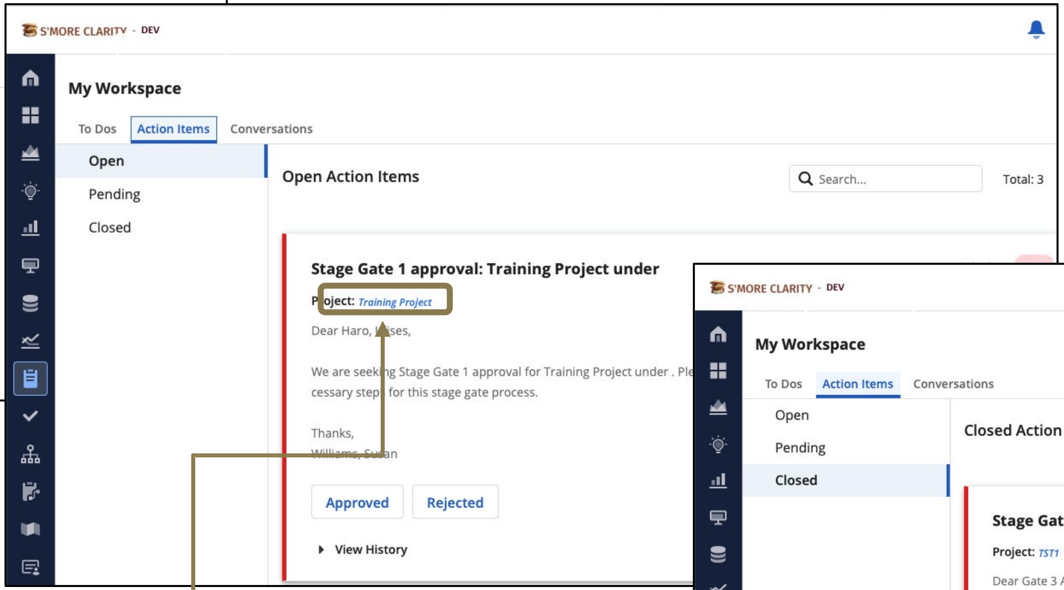
Approval Requests

Approval requests are displayed within My Workspace



Pending Requests

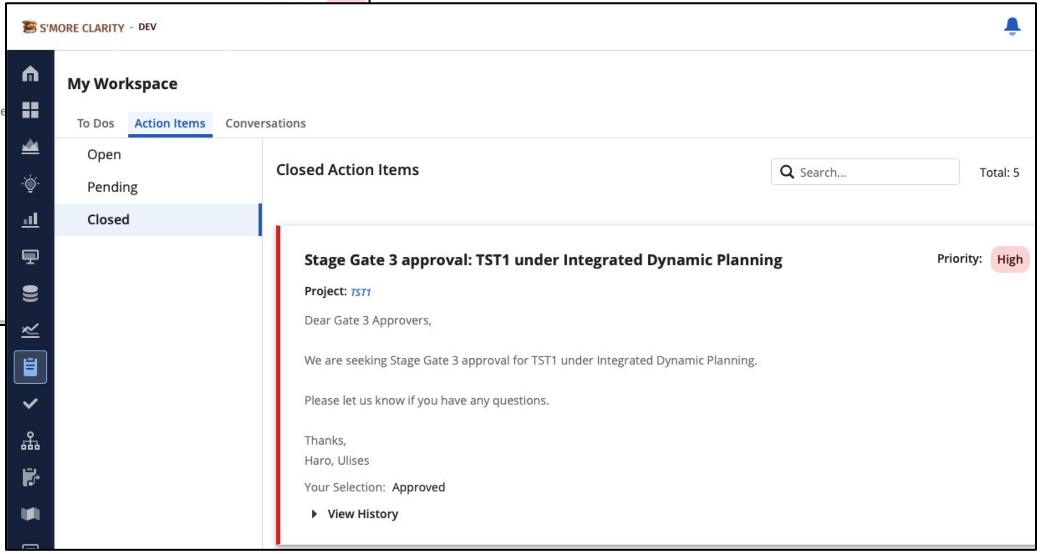
Pending approvals are displayed under the Open Action Items section. Click on the approved / rejected buttons as appropriate



Adding a hyperlink allows them to directly access and review details of what they are approving

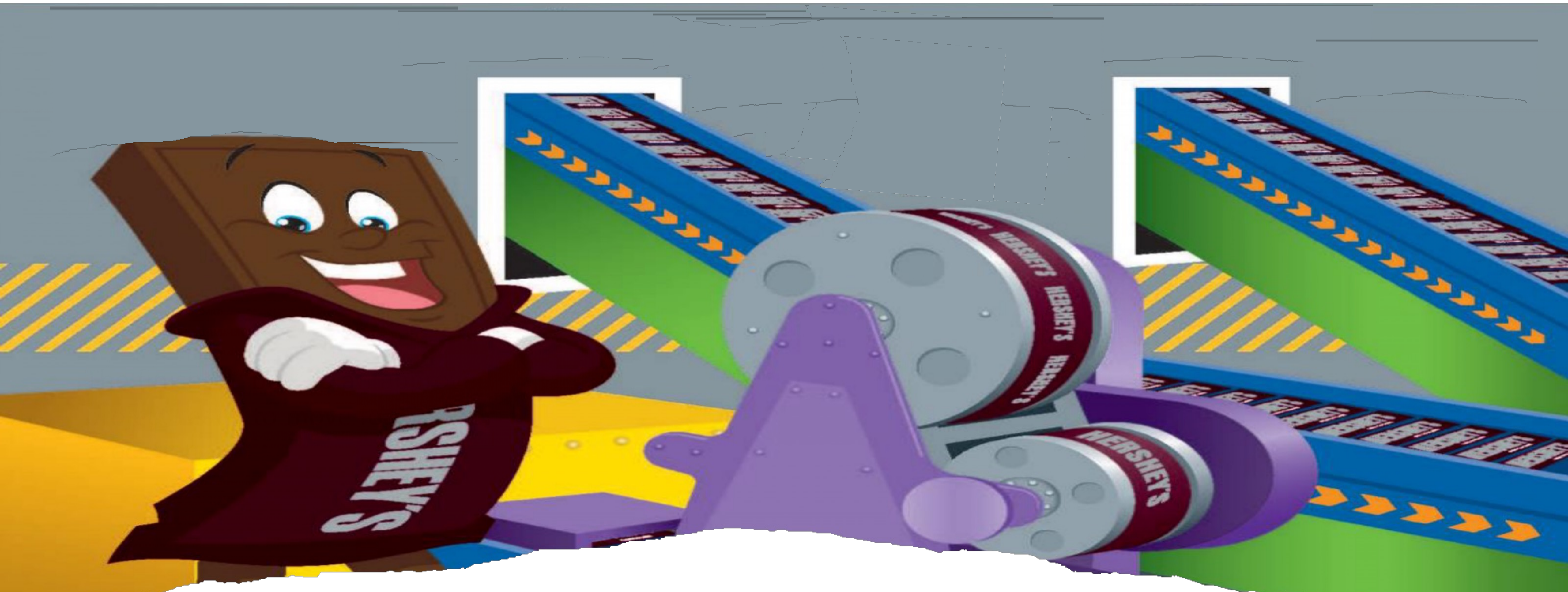
Completed Approvals

After completion, these are displayed under the Closed Items section for future reference.



Cocoa Bean Tip:

Ensure the My Workspace widget is added to the necessary security groups. It may be easiest to use the “Basic User Group” for rights.



Step 5: Wrapping
Project Initiation & Launch Ready

After all approvals are received, the "finished bar" is ready to move forward as an executable project.

Clarity Projects

The active projects in Clarity are comprehensive to ensure the following key deliverables are achieved within the system:

Execution planning

- Tested and locked plans with key activities, deliverables, milestones, and resources for the Initiative
- Ability to trigger and facilitate decision making

Rigorous tracking

- Source of truth and real time overview into the implementation progress at all times
- Transparency on critical dependencies

Risk management

- Predictive risk and performance indicators supported by configurable exception-based reporting, notifications and dashboards

Empowered org

- Initiative leaders retain autonomy in executing day to day functions, while having a clear avenue for issue escalation
- Reduction in offline comms and creation of status updates, in xslx, ppt

Clear Intake = Strong Foundation

Information Services

Transformation

Clarity Processes = Smooth Transformation

Enterprise Continuous Improvement

Capital Engineering

Approved Ideas → Ready to Deliver!

...with more teams are being added every day!

Questions?

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Certification Requirements:

- **Completion**: 12 units per certification track
- **Eligibility**: Open to all Rego University attendees

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- Click on **Course or Training**
- Class Provider = **Rego Consulting**
- Class Name = **Rego University**
- Course **Description**
- Date Started = **Today's Date**
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