

★ LAS VEGAS ★

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2025

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The Power of the Modern UX

Your Guides:
Josh Childers & Ross Hensel

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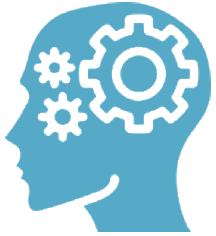
Introductions

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

Agenda

- Genesis of the Modern Experience
- Why “Stock” objects aren’t always a fit
- Projects vs. Custom Investment Type (CIT)
- Ideas vs. CIT
- Objectives vs. CIT
- Roadmaps vs. Hierarchies
- Agreements vs. Project/Roadmap Dependencies
- How to leverage CITs, custom fields, blueprints and views to personalize
- When to add NEW vs. OOTB

Stock Objects – Not Always a fit



The OOTB content is great...until...

- You have different terms
- You have unique use cases
- You have different processes
- You have multiple groups with different requirements

The evolution of the product lends itself to configurable options that don't require team members to re-learn processes and terms!

Project vs. Custom Investment Type (aka CIT)



Project

- Delivered out of the box (don't need to add fields for standard stuff)
- Supports timelines, Gantt charts, grid
- Supports tentative plans and auto-scheduling



CIT

- Need to be created, custom. Some traditional fields and modules come over (from the investment object) but you may need to create fields, sub-objects, etc
- Supports timelines, Gantt charts, grid
- Supports tentative plans and auto-scheduling
- Ex: Other Work (PTO, Admin), different group w/in same organization, non-traditional projects (Executive Recruiting, Decision Support, Strategy)

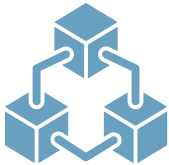
**No baselines, copy from templates, MSP exports or subprojects*

Idea vs. a Custom Investment Type



Idea

- Capture business case information
- Capture timelines, financials, staff requirements
- Can convert, after approval, to an investment (and even move data forward)
- Require a viewer license to update



CIT

- Capture business case information
- Capture timelines, financials, staff requirements
- Custom process to convert to another investment type
- Require a full license to update (similar to project)

Objectives vs. Custom Investment Type



Objectives

- OOTB with no creation necessary
- Includes the Investment tab to associate Investments to Objectives
- Allow grid nesting to view Objectives and Key Results in a single view
- Requires a different Hierarchy type that cannot be combined with Investments
- Clarity's product roadmap shows significant enhancements in future releases



CITs

- Require manual build one or more CIT
- Will include all fields from the investment object
- May require custom processes to achieve roll-ups
- May be combined with Investments in a Hierarchy

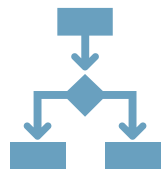
Roadmaps vs. Hierarchies



Roadmap

- Roll up chosen work
- Provide many visual insights
- And updates are NOT pushed back to investments
- Allow for what if scenarios
- Allows for modeling against constraints and targets
- Only shows “current state” after job has been run
- Ex: 5 Year Strategic, Product Roadmap, Annual Operating Planning, Prioritization

GREAT for planning and showing “where we are going”



Hierarchy

- Roll up chosen work
- Provide many visual insights
- Show real-time, current state without a job
- Any updates pushed back to Investments
- Cannot do comparisons or versions of the hierarchy
- Can roll up into dashboards and canvases current information
- Ex: Portfolios, Programs, Department level, multi-project grouping

GREAT for portfolio and program roll ups to communicate progress

Agreements vs. Project/Roadmap Dependencies



Agreements

- Properties usually managed via Canvas
- Can be utilized across Roadmaps and Investments
- Includes standard fields out of the box
- Investment to Investment only
- Capture additional information like Narrative, Get Well Plan and any other custom fields



Project/Roadmap

- PRJ – Can be done at the task level across projects
- PRJ – Visualize dependent tasks in Investment Gantt
- PRJ – Utilize the Agreements module to visual
- RDMP – Exist only in that specific roadmap
- RDMP – Investment to Investment only
- RDMP – Need to be manually created

Live Product

How to leverage Clarity to personalize, configure and change using Administration.

Discussion – When to use CITs vs OOTB?

Questions?





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