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# A Day in the Life - Project Manager

Your Guides:  
Josh Childers & Brian Hazelzet



# Introductions

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



# Agenda

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- Typical PM Activities
- Typical PM Challenges
- Work Management
- Use Clarity: Get Off of Excel
- Make Information Easier to Access
- Make Flags Easy to Identify
- Simplify & Automate Reporting
- Work with a Regular Cadence
- Sample Schedule

# Format of This Session

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- In the next set of slides, Rego has compiled a set of best practice points related to functionality.
- Focus on providing tips and tricks with Clarity's work management capabilities.
- All attendees are encouraged to ask questions, provide examples, and make this a collaborative working session.



# Open Discussion #1

- How many of you are PMs or are a part of the PMO?
- How many projects do you (or your PMs) typically manage at one time?
- What are the most common Methodologies?
  - Waterfall
  - Agile
  - Iterative
- What are your greatest challenges to successful delivery and collaboration?

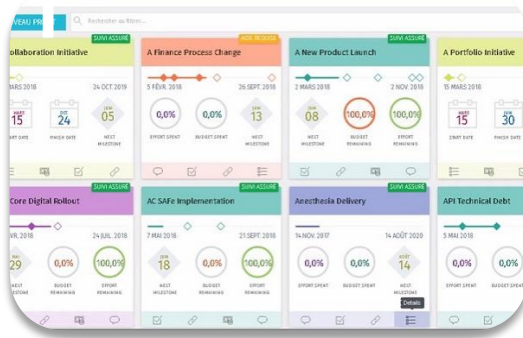


# General Project Management



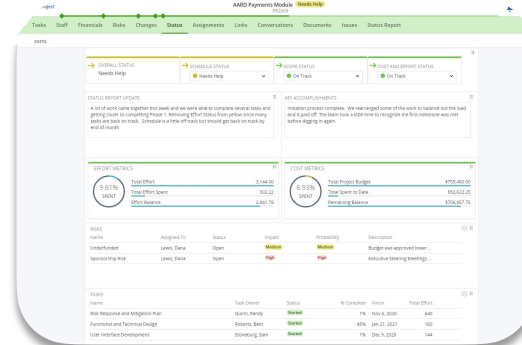
6

## Initial Set-Up



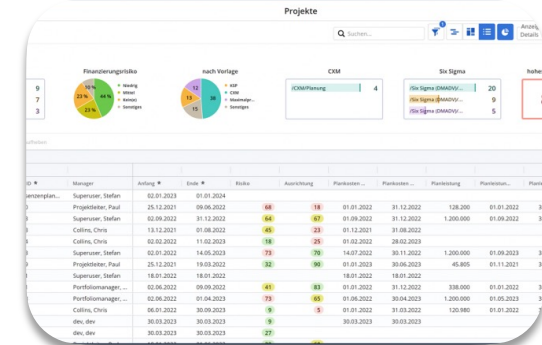
Create project & populate necessary data.

## Monitor and Control



- Add/risks, issues, and change requests
- Create status reports (weekly/monthly)

## Closure



- Set “Open for Time Entry” to no on project
- Ensure all risks, issues, and changes are closed or resolved.
- Complete final status report

# Team Management



7

## Initial Set-Up

Application for Tracking Implementations Project PR2090 (At Risk)

Properties Tasks Baselines Financials Staff Assignments Risks Issues Changes Decisions Checklist

Add Staff

Per-Period Metrics - 6 Periods

Group By	Staffing	2025-01	2025-02
Staffing			
Conversation	Resource * 2+	Role 1+	Default Allocation (Average)
Total		100%	288
	Hayes, Justin	Architect	100%
	Business Analyst	Business Analyst	100%
	Engineer	Engineer	100%
	ML Engineer	ML Engineer	100%
	Product Manager	Product Manager	100%
	Project Manager	Project Manager	100%
	QA	QA	100%
	Baker, Isaac	Security Architect	100%

Determine project work needed, estimate staffing needs and request roles or resources.

## Monitor and Control

Replace: QA (QA)

Investment: Application for Tracking Implementations Project

With:

Resource \*

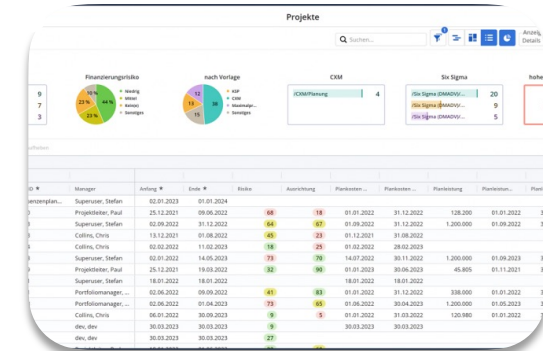
-- Select --

Search...

Full Name	Resource ID
ABM Marketing	ABM Marketing
Admin, PMO	csk.admin
Administrator, Moventus	no-reply@moventus.com
AI Team	TM00001
Amos, Cheryl	cherylAmos

- Confirm roles filled with named resources.
- View variances between planned allocation, ETCs and actual hours.
- Modify resource allocations as needed.

## Closure



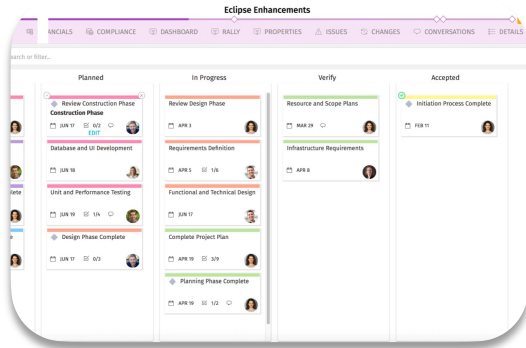
- Set resource allocations to reflect project close date.
- Set “Open for Time Entry” to no for all resources

# Task Management



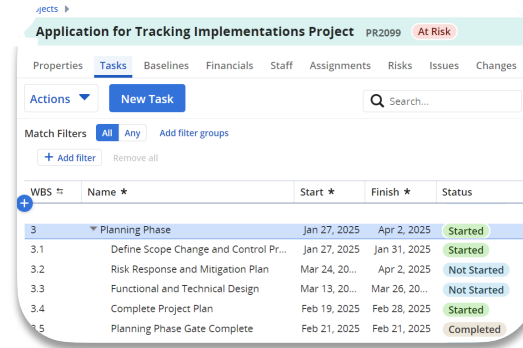
8

## Initial Set-Up



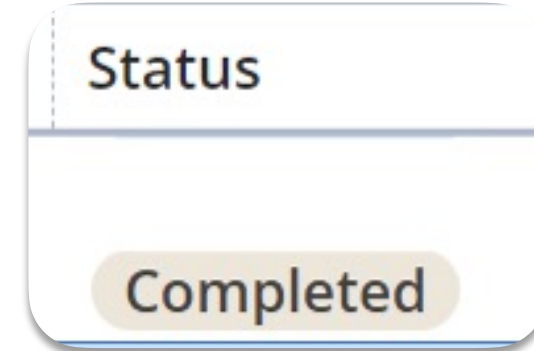
- Build project schedule/WBS.
- Sequence task/milestones, add dependencies, and link tasks.
- Assign resources to tasks and add ETCs.
- Run Auto-Schedule to identify critical path.
- Set Baseline

## Monitor and Control



- Update project schedule with task status (started/complete)
- Monitor for proposed ETCs. Adjust ETCs as needed.

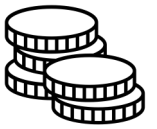
## Closure



- Set task/milestone status to complete.
- Zero out ETCs
- Close tasks for time entry
- Ensure all future dates on tasks/milestones are set no later than project close date

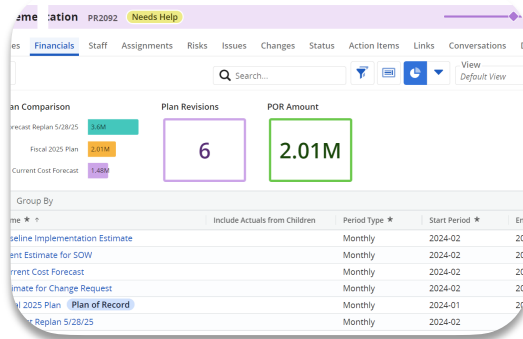


# Financial Management



9

## Initial Set-Up



Create Cost/Budget/Benefit plans

## Monitor and Control

Totals	
Cost Variance	
	80,560
	156,800
	314,880

View project variance between budget and actuals. Introduce change requests as needed.

## Closure



Ensure financial obligations are met

# Soft Skills and Leadership



- Active listening, conflict resolution, motivation, and team morale.
- Real-life PMs spend much of their day navigating interpersonal dynamics.



# Project Management Challenges

Day to Day Challenges



# Scope Creep

Uncontrolled expansion of project scope without proper change control.

## FIRST CHALLENGE

# 01

Delays, budget overruns, and team frustration.

- 1 Define scope clearly from the start
- 2 Get stakeholder sign-off on scope
- 3 Establish a formal change control process
- 4 Track work against scope regularly
- 5 Train the team to recognize scope creep
- 6 Document decisions



1

## 3

4

5

1

2

(1)

Review objectives,  
goals, success criteria  
with project team.

# Poor Communication

Gaps in information sharing between team members, stakeholders, or departments.

1

2

## THIRD CHALLENGE

4

5

Missed deadlines, duplicated work, or conflict.

1

Use a centralized communication tool

2

Create a communication plan

3

Encourage two-way communication

4

Be consistent and proactive

# Resource Constraints

Limited access to skilled personnel, time, or budget.

1

2

3

## FOURTH CHALLENGE

5

# 04

Inability to meet project deliverables efficiently.

1

Prioritize investments w/clear documented criteria

2

Utilize staff module with resources, roles, and allocations to capture demand

3

Implement resource management practices

4

Utilize Clarity's Staffing module – Allocations by Investment and Allocations by Resource

# Managing Stakeholder Expectations

Balancing differing or conflicting interests among stakeholders.

1

2

3

4

FIFTH CHALLENGE

05

Dissatisfaction or resistance during delivery or change implementation

1

Set clear expectations early

2

Maintain transparent and regular communication

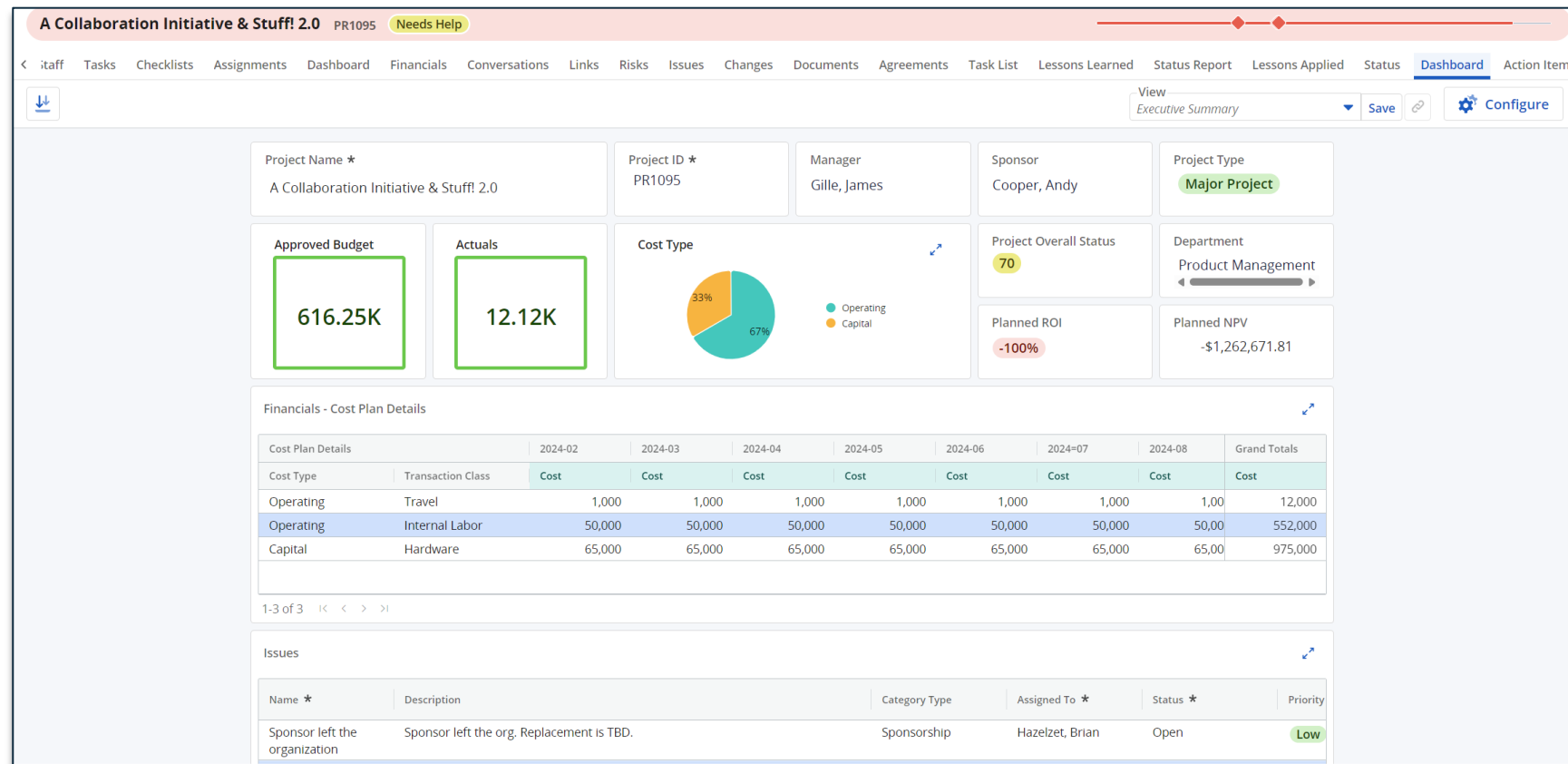
3

Manage changes through a structured process



# Sample Communication

Dashboard canvas provides a customizable, visual workspace where users can design interactive dashboards using drag-and-drop widgets to track project performance, KPIs, and resource allocations in real-time. It enables project managers and stakeholders to quickly access critical insights and make informed decisions through intuitive, data-driven visualization.



# Understanding Capacity and Demand Gaps

## Planning and Monitoring

- Staffing Page
- Roadmap
- Hierarchy

**Staffing**

Allocations by Investment | **Allocations by Resource** | Assignments by Investment | Assignments by Resource | Staff

View Architect Demand Save

Hide empty groups 1-50 of 50 Columns

Name	Staff OBS Unit	Start	Finish	2024-01	2024-02	2024-03	2024-04	2024-05	2024-06	2024-07	2024-08	2024-09	2024-10	2024-11	2024-12
<b>Account Manager</b>		7/1/19	2/12/25	9.50	9.50	10.00	9.00	9.00	9.00	8.34	7.91	3.14	3.02	3.02	2.52
Battery Monitor		9/1/22	4/11/25			0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	
Billing AutoPay		10/29/23	8/28/25	1.99	1.99	1.99	1.99	1.99	1.99	1.99	1.81				
Billing AutoPay Platform		10/30/23	9/6/25	1.99	1.99	1.99	1.99	1.99	1.99	1.99	1.81	0.00			
Eco tracking system		1/1/23	12/31/25	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Implementation for Blue Cross Blue ...		4/24/23	8/24/25	1.00	1.00	1.00	1.00	1.00	1.00	1.00	0.77				

**Resource Availability** 1-100 of 477 Columns

Full Name	Primary Role	Manager	Person Type	2024-01	2024-02	2024-03	2024-04	2024-05	2024-06	2024-07	2024-08	2024-09	2024-10	2024-11	2024-12
Cocoa Puffs				3.00 / 6.00	3.00 / 6.00	6.00 / 6.00	6.00 / 6.00	6.00 / 6.00	3.00 / 6.00	3.00 / 6.00	3.00 / 6.00	3.00 / 6.00	0.00 / 6.00	0.00 / 6.00	0.00 / 6.00
Coder, Tammy		Miller, Rosie	Employee	1.00 / 1.00	1.00 / 1.00	1.00 / 1.00	1.00 / 1.00	1.00 / 1.00	1.00 / 1.00	1.00 / 1.00	1.00 / 1.00	1.00 / 1.00	1.00 / 1.00	1.00 / 1.00	1.00 / 1.00
COE															
Coleman, Joyce	Architect	Joseph, Derrick	Employee	2.21 / 1.00	2.21 / 1.00	2.21 / 1.00	2.21 / 1.00	2.21 / 1.00	2.96 / 1.00	3.21 / 1.00	3.21 / 1.00	3.21 / 1.00	3.25 / 1.00	2.70 / 1.00	2.70 / 1.00
Computer	Material	Miller, Rosie		69.00 / 23.00	63.00 / 21.00	63.00 / 21.00	66.00 / 22.00	69.00 / 23.00	60.00 / 20.00	66.00 / 22.00	66.00 / 22.00	63.00 / 21.00	69.00 / 23.00	63.00 / 21.00	66.00 / 22.00
Cooper, Andy	Developer	Joseph, Derrick	Employee	3.00 / 1.00	3.00 / 1.00	3.00 / 1.00	3.00 / 1.00	3.00 / 1.00	3.00 / 1.00	3.00 / 1.00	3.00 / 1.00	2.80 / 1.00	1.60 / 1.00	1.60 / 1.00	1.60 / 1.00

Remaining Capacity by Month (Hours)												
	Feb-15	Mar-15	Apr-15	May-15	Jun-15	Jul-15	Aug-15	Sep-15	Oct-15	Nov-15	Dec-15	Total
0.00	0.00	0.00	0.00	8.00	46.00	64.00	80.00	0.00	0.00	0.00	0.00	198.00
0.00	0.00	0.00	20.00	8.00	120.00	0.00	0.00	0.00	0.00	0.00	0.00	148.00
3.00	0.00	0.00	-45.31	-13.99	-28.00	0.00	0.00	0.00	0.00	0.00	0.00	-71.30
0.00	0.00	0.00	-44.00	-68.00	-100.00	-40.00	-168.00	-76.00	-16.00	0.00	0.00	-512.00
0.00	0.00	160.00	52.00	48.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	260.10
0.00	0.00	0.00	-113.60	-56.80	-17.60	0.00	0.00	0.00	158.40	151.20	115.60	237.20
0.00	0.00	0.00	0.00	0.00	0.00	0.00	-40.00	0.00	0.00	0.00	0.00	-40.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	140.00	125.00	27.00	28.00	16.00	336.00
0.00	0.00	0.00	136.00	168.70	0.00	0.00	0.00	0.00	0.00	0.00	0.00	304.70
0.00	0.00	0.00	0.00	0.00	0.00	-16.00	-18.00	-78.10	-176.00	-168.00	-80.00	-712.10
-8.00	-12.00	0.00	0.00	13.99	-21.00	-55.99	-2.10	22.00	8.00	113.99	104.00	162.89
0.00	0.00	12.00	0.00	-168.00	-144.00	-196.00	-130.00	-176.00	0.00	0.00	0.00	-802.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-17.00	-16.00	-80.60	-113.60
0.00	0.00	-4.00	120.00	32.00	80.00	-102.00	-32.00	0.00	0.00	0.00	0.00	94.00
0.00	0.00	-54.00	-100.00	-84.00	-56.00	-32.00	0.00	0.00	0.00	0.00	0.00	-326.00
0.00	0.00	0.00	-76.00	-72.00	48.00	0.00	-22.00	0.00	0.00	0.00	0.00	-122.00
0.00	0.00	0.00	0.00	0.00	0.00	-84.00	-168.00	-176.00	-100.88	-168.00	-80.00	-776.88
0.00	0.00	0.00	108.91	72.40	27.00	65.01	2.10	22.00	0.00	43.99	0.00	341.41
-4.00	-8.00	0.00	-140.00	-160.00	-120.00	-104.00	0.00	0.00	0.00	68.00	84.00	-384.00
0.00	0.00	0.00	0.00	-152.00	-66.10	-18.00	0.00	0.00	0.00	0.00	0.00	-236.10
0.00	0.00	0.00	0.00	-16.00	-34.00	-26.00	-168.00	-176.00	-17.60	-168.00	-84.00	-689.60
0.00	0.00	0.00	36.00	-36.00	-88.00	-8.00	28.00	24.00	176.00	8.00	18.00	158.00
17.60	-15.00	0.00	-10.60	-32.80	62.40	21.60	11.20	158.40	-158.40	-51.20	-65.60	-62.40
0.00	0.00	0.00	130.00	144.00	28.00	120.00	36.00	24.00	176.00	168.00	184.00	1,010.00
-8.00	0.00	0.00	-25.31	-13.99	-11.00	-57.00	0.00	0.00	0.00	-34.99	16.00	-134.29
0.00	0.00	0.00	76.00	-52.00	-178.00	28.70	26.00	117.00	16.00	0.00	0.00	33.70
12.00	24.00	0.00	0.00	-8.00	-12.00	-38.00	-40.00	-44.00	-77.00	-68.00	-84.00	-335.00
25.60	-11.00	114.00	124.09	-438.39	-480.30	-479.68	-524.90	-331.60	-1.48	-93.01	63.40	-2,033.27

## Additional Resources:

- Capacity vs. Demand by Resource Report
- Capacity vs. Demand by Role or OBS
- Over/ Under Allocation by Resource
- Capacity Overview Portlet
- Role Capacity Portlet

# Open Discussion

- How much time do you spend managing the data in Clarity?
- What functions seem to be cumbersome?
- Which parts of the tool make things easier?
- How do we make the cumbersome items easier?
- Suggested features to be added/removed?



# Use Clarity: Transition Away from Supplemental Tools

- Use Clarity to manage all aspects of your Investments, wherever possible:
  - Issues / Risks / Change Requests
  - Use Action Items
  - Use Milestones / Tasks
  - Use Baselines
  - Use Financial Plans
  - Monitor Team Allocations/Availability



*\*Excel is offline, often unshared, not real-time and most critically, not centralized. Centralizing any and all of the modules above will reduce complexity and increase accuracy and ease in reporting information to all project stakeholders.*

*\* Eliminate multiple data entry points, improve data integrity*

*\* SharePoint is often “one more place” to go to review project data.*

*\*If your stakeholder has more than one PM or set of projects, they’re going to enjoy not getting emails with spreadsheets.*



# Project Management and Work Management in the New UX

Highlights of the New UX improvements



# Staffing Improvements

- As you can in Classic, you can now allocate multiple instances of the same role to a project and rename the role if necessary to differentiate among the two (e.g., Developer – Junior, Developer – Senior).
- The two roles can now be assigned and replaced independently of each other.
- In 16.3.2, Resource Reallocation and Resource Replacement capabilities support partial reallocation and partial replacement. Partial allocation ensures that Clarity only updates allocations within the specified date range and allocation percentage.

Reallocate: Architect (Architect)

Investment: Analytics and ERP Implementation

Default Allocation \*

100%

Start

Jan 24, 2025

Finish

Jan 2, 2026

☒ Use Investment Start

☒ Use Investment Finish

Override Type

☐ Partial - (keep investment allocations outside of the chosen date range)

☒ Total - (reset investment allocations outside of the chosen date range)

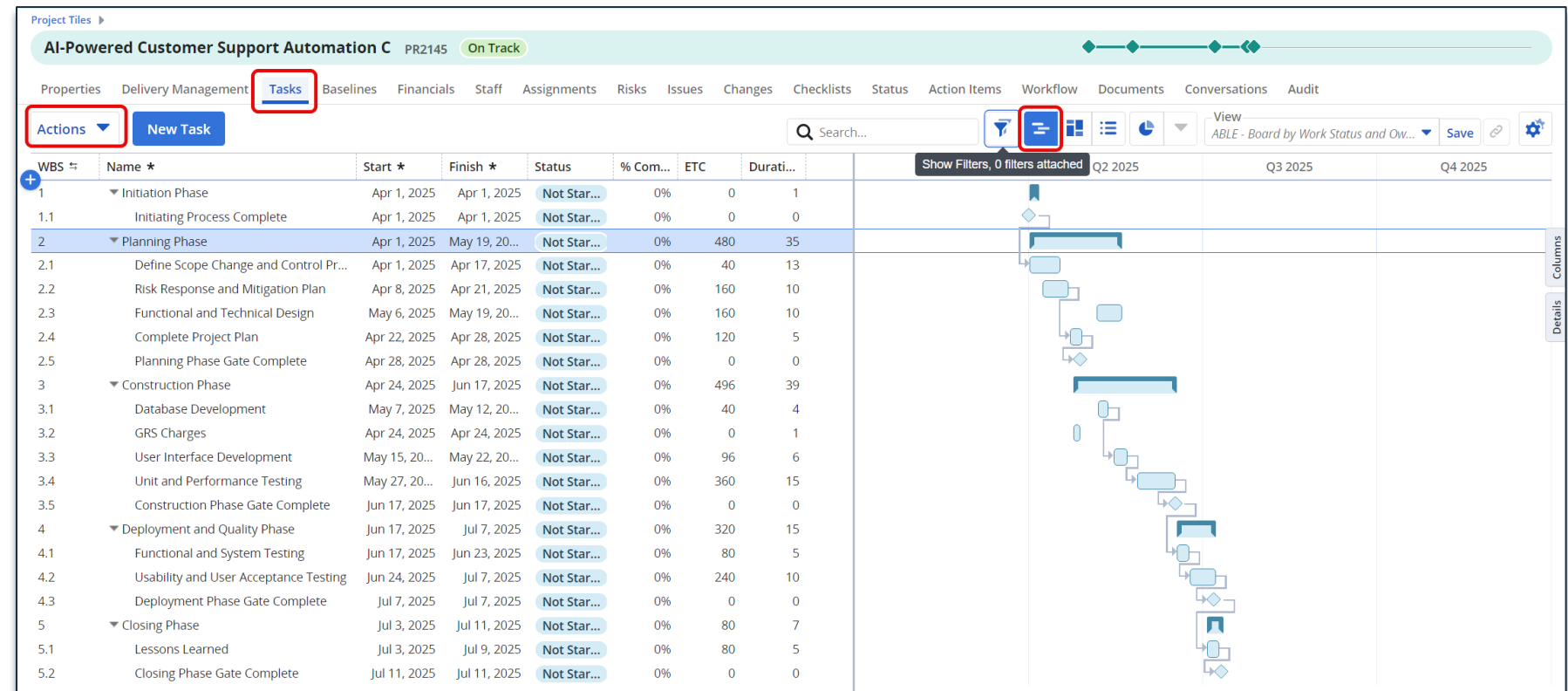
Cancel

Reallocate



# Tasks Tab – Timeline (Gantt) View

- A Gantt/Timeline view is available for Project Tasks.
- Can still launch Classic Gantt and MSP/OWB using the Actions menu in upper left.
- Inline editing of tasks and Details flyout view.
- Supports multiple levels of indent.
- Drag and drop to create dependencies in timeline portion.



# Common Grid Layout for Tasks

- The Common Grid layout has been applied to tasks.
- Custom task fields can be added to the view, and can be edited here. This is the first time you've been able to edit custom task attributes in the New UX.

AI-Powered Customer Support Automation C PR2145 On Track

Properties Delivery Management **Tasks** Baselines Financials Staff Assignments Risks Issues Changes Checklists Status Action Items Workflow Document

Actions New Task

Select all Deselect all

Group By

	WBS Sort ↑	Name *	Start *	Finish *	Custom Picklist	Status	% Complete	ETC
<input type="checkbox"/>	1	Initiation Phase	Apr 1, 2025	Apr 1, 2025	Value 1	Not Started	0%	0
<input type="checkbox"/>	2	Initiating Process Complete	Apr 1, 2025	Apr 1, 2025	Value 1	Not Started	0%	0
<input type="checkbox"/>	3	Planning Phase	Apr 1, 2025	May 19, 2025	Value 1	Not Started	0%	480
<input type="checkbox"/>	4	Define Scope Change and Control Process	Apr 1, 2025	Apr 17, 2025	Value 2	Not Started	0%	40
<input type="checkbox"/>	5	Risk Response and Mitigation Plan	Apr 8, 2025	Apr 21, 2025	Value 2	Not Started	0%	160
<input type="checkbox"/>	6	Functional and Technical Design	May 6, 2025	May 19, 2025	Value 2	Not Started	0%	160
<input type="checkbox"/>	7	Complete Project Plan	Apr 22, 2025	Apr 28, 2025	Value 3	Not Started	0%	120
<input type="checkbox"/>	8	Planning Phase Gate Complete	Apr 28, 2025	Apr 28, 2025	Value 3	Not Started	0%	0
<input type="checkbox"/>	9	Construction Phase	Apr 24, 2025	Jun 17, 2025	Value 3	Not Started	0%	496

# Details Panel for End User Configuration

- PMs can use the Details flyout to update Project data on the fly.

**Projects**

Actions ▾ New from Template

Search...

Per-Period Metrics - 4 Periods

View Financial Forecast

Save

Planned Cost: 3.96M

Actuals YTD: 431.1K

Forecast: 2.62M

Cost by PM

45% Clark, Patrick  
55% Granger, Pa...

Top Projects

eCommerce Portal 1.79M

Minimal Online Shoppi... 1.27M

DPM Loan App Rel 4.0 557.49K

Select all Deselect all

Group By

St...	Project Name * ↑	Finish *	Manager	Totals
<input type="checkbox"/>	★ Digital Banking User Experience	Jan 1, 2026	Clark, Patrick	25
<input type="checkbox"/>	★ DPM Loan App Rel 4.0	Dec 29, 2025	Clark, Patrick	55
<input type="checkbox"/>	★ eCommerce Portal	Oct 12, 2026	Granger, Paula	1,79
<input type="checkbox"/>	★ GDPR Compliance - Loan Application	Apr 1, 2026	Clark, Patrick	8
<input type="checkbox"/>	★ Minimal Online Shopping Release 4.0	Aug 19, 2026	Clark, Patrick	1,27

Search...

Material Exchange Rate T... ▾

Material Rate Matrix ▾

Objective

Objectives Risk ▾

Open for Time Entry ▾

Opportunity/Problem

Organizational

DPM Loan App Rel 4.0 (PR2002)

Details

Done

Project Name \*

Financial Status ▾

Manager

Sponsor ▾

Work Status

Project Type

Description

Objective



# To Do

- PM's and Task Owners can capture To Do items on Projects
- To Do items may be assigned to one resource, or to one Team
- Date must fall within the Project dates.

Properties Delivery Management **Tasks** Baselines Financials Staff Assignments Risks Issues Changes Checklists Status Action Items Workflow Documents Conversations Audit

Actions **New Task** Search...

WBS	Name *	Start *	Finish *	Status	% Com...	ETC	Durati...
1	▼ Initiation Phase	Apr 1, 2025	Apr 1, 2025	Not Star...	0%	0	1
1.1	Initiating Process Complete	Apr 1, 2025	Apr 1, 2025	Not Star...	0%	0	0
2	▼ Planning Phase	Apr 1, 2025	May 19, 20...	Not Star...	0%	480	35
2.1	Define Scope Change and Control Pr...	Apr 1, 2025	Apr 17, 2025	Not Star...	0%	40	13
2.2	Risk Response and Mitigation Plan	Apr 8, 2025	Apr 21, 2025	Not Star...	0%	160	10
2.3	Functional and Technical Design	May 6, 2025	May 19, 20...	Not Star...	0%	160	10
2.4	Complete Project Plan	Apr 22, 2025	Apr 28, 2025	Not Star...	0%	120	5
2.5	Planning Phase Gate Complete	Apr 28, 2025	Apr 28, 2025	Not Star...	0%	0	0
3	▼ Construction Phase	Apr 24, 2025	Jun 17, 2025	Not Star...	0%	496	39
3.1	Database Development	May 7, 2025	May 12, 20...	Not Star...	0%	40	4

Define Scope Change and Control Process (00000215)

Details **To Dos** Assignments Dependencies Links Conversations

Group By

Completed 4↑

Name \*

Owner

Due Date

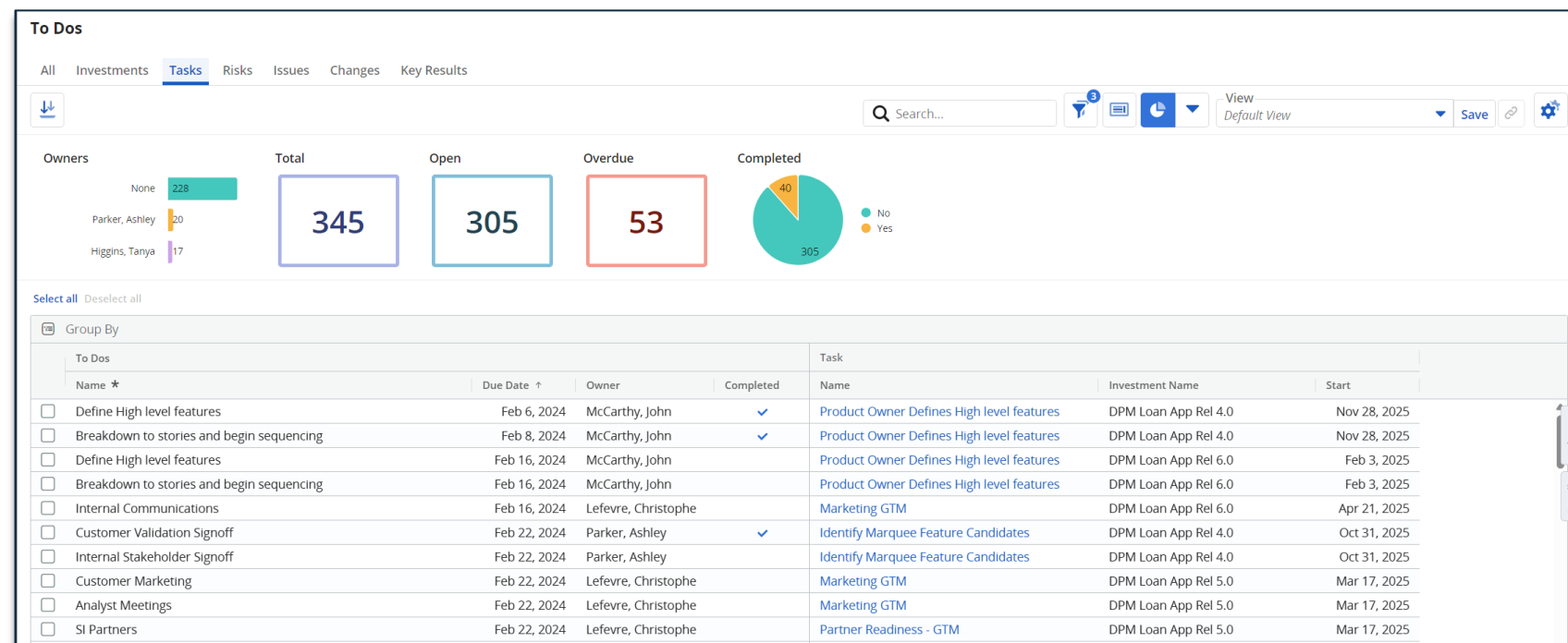
Blocked

Blocked Reason

Schedule the meeting

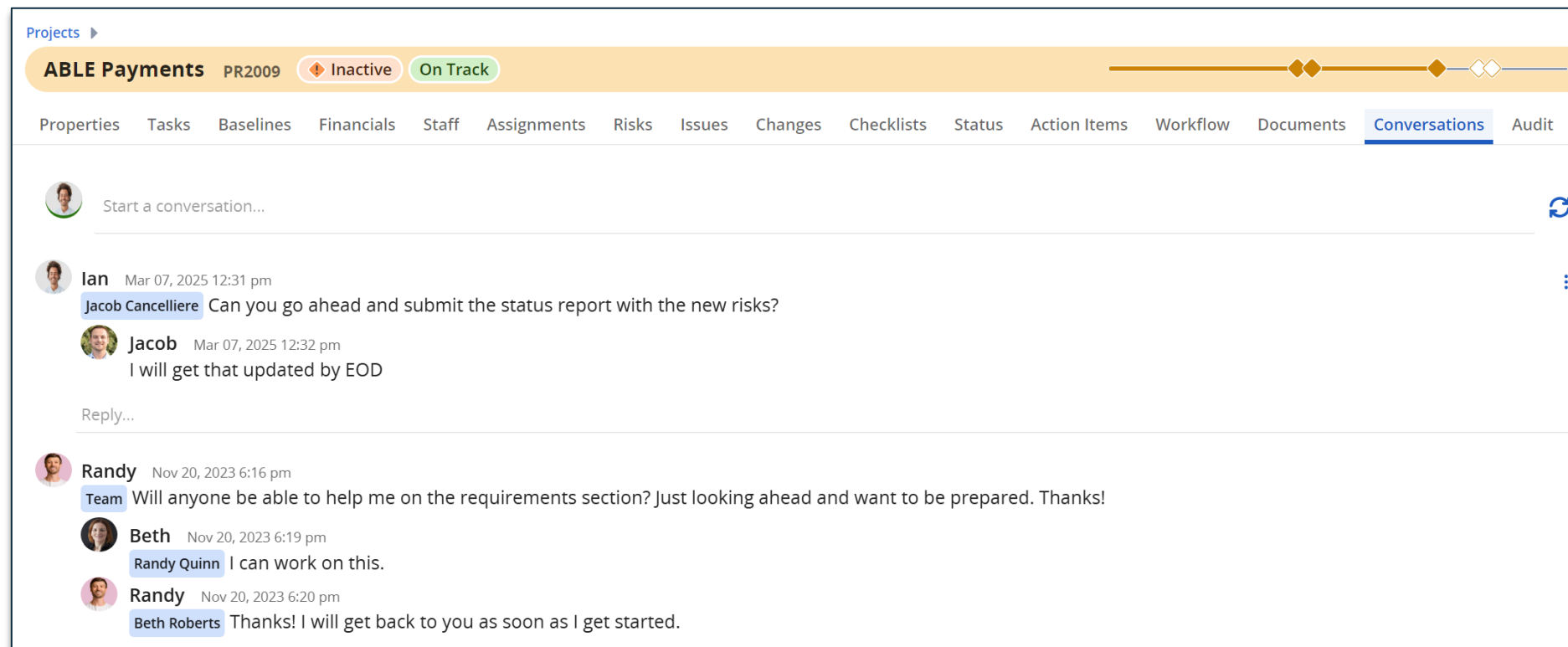
# To Do – Status

- A view can be created with widgets within the Tasks module to provide metrics on the status of each To Do.
- Adjust the Dates and filters to analyze completion data.



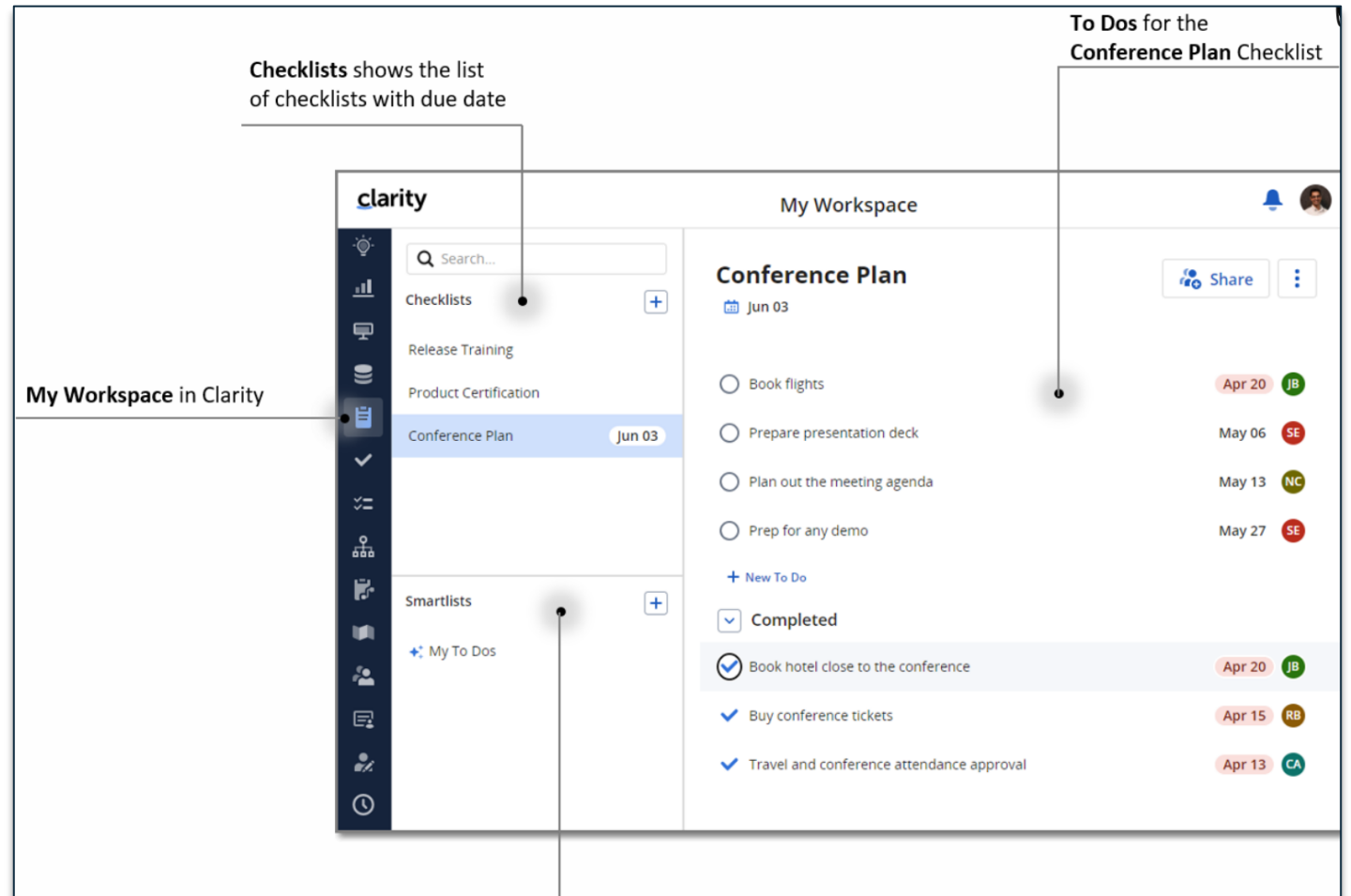
# Conversations

- Conversations are a collection of replies to an original theme or question. Conversations provide a collaborative forum for all team members to discuss, document, and solve investment-specific issues



# Checklists

- Checklists is designed to help create, edit, and track checklists specific to investments.
- This feature serves as a comprehensive task management system that promotes visibility for all team members and stakeholders, ensuring everyone stays well-informed about project progress and requirements





# Optimize Clarity

Improve Visualization, Productivity and Classic user experience






# Make Information Easier To Access

*\*Having your data organized, structured and current will allow for better communications and decisions.*

- Save filters and configure list views specific to you & your projects
  - Targeted information – they emphasize areas you need to manage
- Keep data current by using email reminders (e.g., regoXchange “stalkers”)

Clarity - Project Compliance Inbox x

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**clarity@ca.com** <clarity@ca.com> 1:53 PM (1 minute ago) ☆

to chris ▾

**Project Manager: Wuenstel, Chris**

You are receiving this email because at least one project currently assigned to you has data that is out of compliance. Please review the list below and address all compliance issues ASAP.

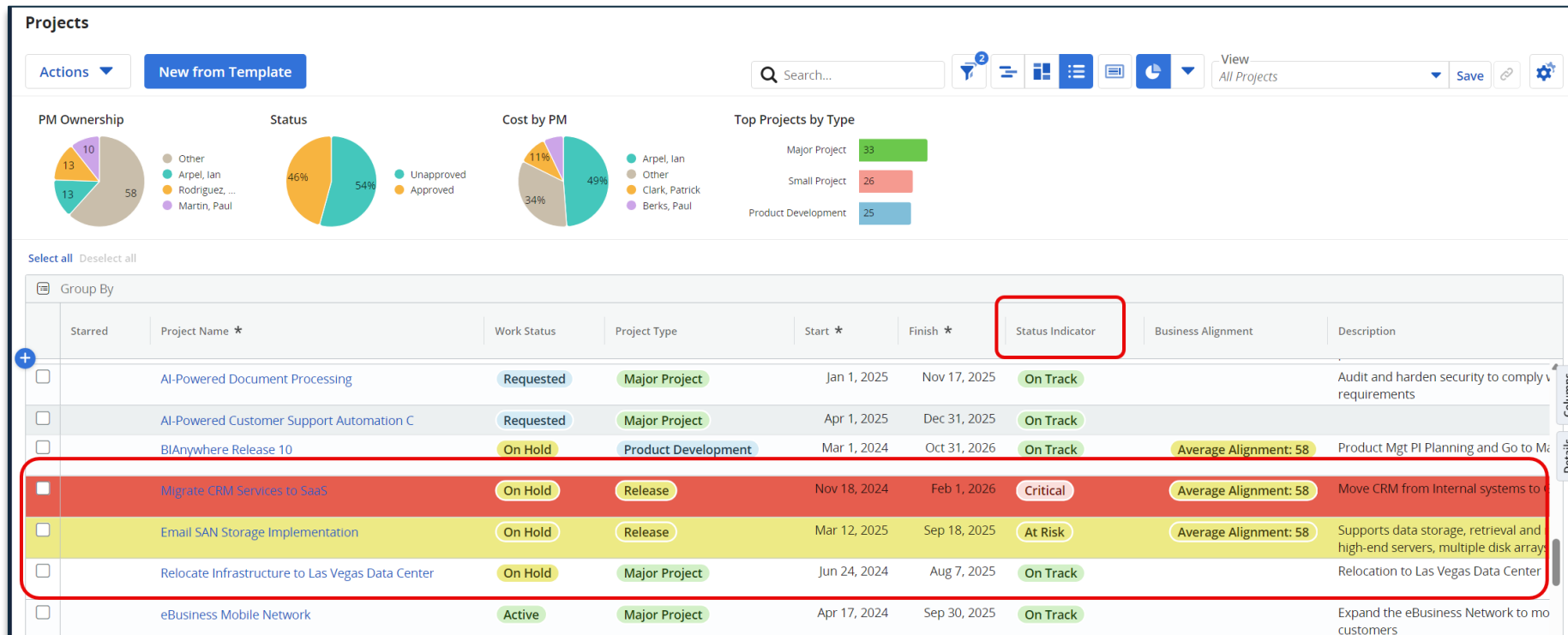
These projects have data compliance issues:

Project ID	Project Name	Stale Task Count	Late Issue Count	Late Risk Count	Late Status Report	Total Count
<a href="#">PR9232</a>	Deploy Windows 7	<a href="#">18</a>			<a href="#">No Status Reports created</a>	19
<a href="#">PRJ03</a>	Create Webcam Conference	<a href="#">3</a>	<a href="#">1</a>	<a href="#">2</a>	<a href="#">No Status Reports created</a>	7

-----  
This is an automated message. Please do not reply.

# Make Flags Easy To Identify

- Utilize conditional formatting in Modern UX to identify what needs attention.
- Allows you to focus on the items putting the team, department, or company at risk.

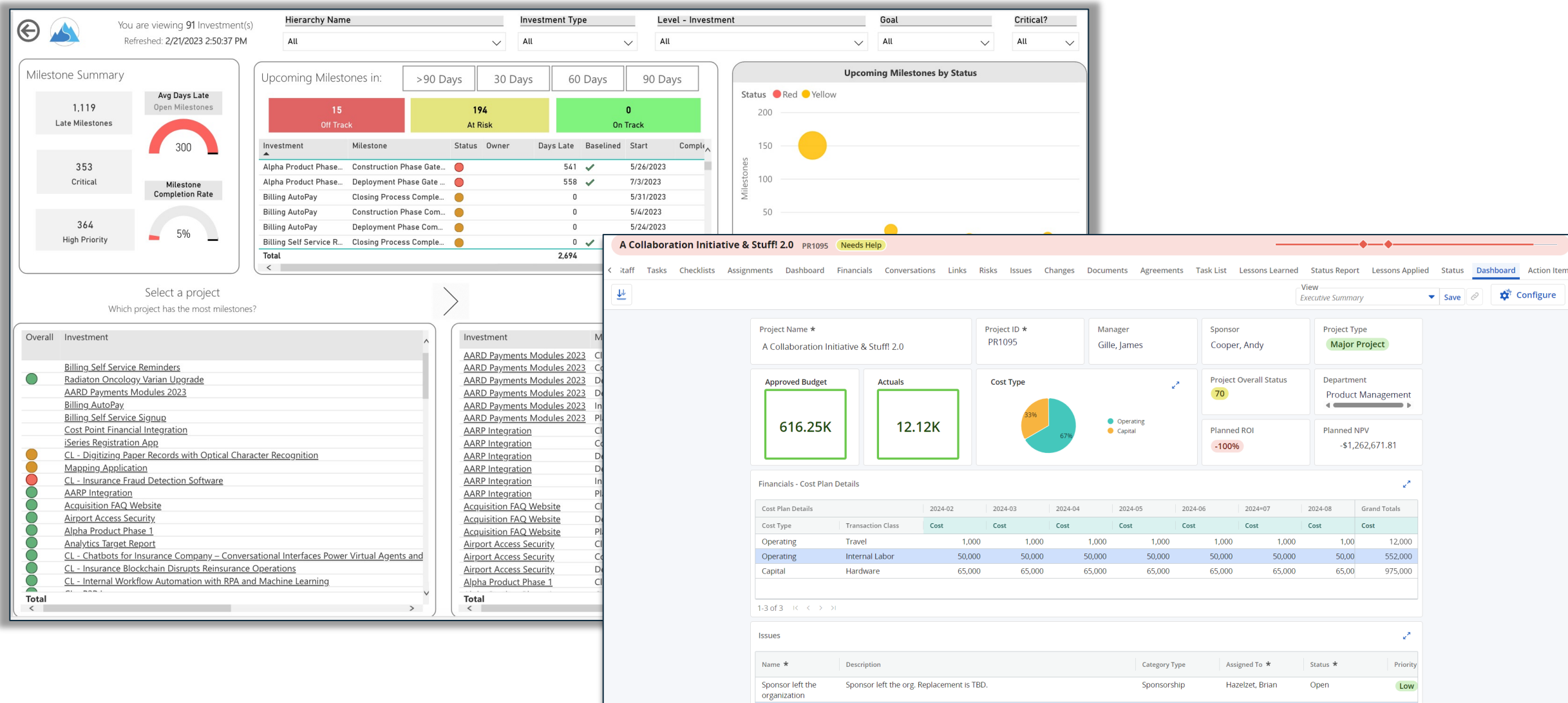


# Simplify & Automate Reporting

- Status Reports should be automated based on Clarity information you already update – no time to build a separate PowerPoint.
- Stakeholder information should be just the most important things:
  - More icons, less text.
  - Focus on key milestones, not tasks.
  - Highlight changes from last time, not everything.

*\*Scheduled reports or a formatted/filtered portlet will reduce the time and complexity required to compile stakeholder reports!*

# Report Examples





# Open Discussion

- How many of you have more work than hours in the day?
- What helps you make sure you get everything done?



# Work With A Regular Cadence

- A predictable cadence allows the project manager to make sure they are continually focused on the right tasks at the right time.
  - Reports and portlets in Clarity are only as good as their data. It is critical that your data is always up to date. If you don't have a regular schedule for updating your projects, you risk reporting (and managing your project) on stale or inaccurate data.
- The real power of cadence is in the habits it forms.
  - Cadence encourages discipline & discipline results in predictability. A predictable cadence helps to set expectations and provides a less stressful environment.
- Set up a consistent work schedule, one that makes sense for your team.
  - Schedules are critical, without them we have a harder time committing to a task. Like exercise, managing a project takes commitment and discipline. Making a weekly chart of tasks helps encourage this discipline.

# Sample Schedule

- The following is an example of a Project Manager's weekly schedule.
  - Based on a Friday status/project team meeting.
  - Can be adjusted based on the Clarity features used.

Process	Time per Project	Sat	Sun	Mon	Tue	Wed	Thu	Fri
Team members submit their time sheet	5 min							X
Project Managers Review Pending Actuals (morning)	10 min			X				
Resource Managers Approve Timesheets (afternoon)	30 min			X				
Posted hours show up on project. PM reviews hours.	10 min				X			
Project Manager compares the planned vs actual cost to budget	30 min				X			
Project Manager updates the WBS	20 min					X		
Project Manager updates allocation for resources	10 min					X		
Project Manager reviews/updates risks, issues, changes (as needed)	30 min						X	
Project Managers Publish Status Report	20 min						X	
Weekly Team Meeting	30-60 min							X



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- ✓ **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.



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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**
- 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!  
Don't forget to fill out the class survey.



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- 1 Use [RegoXchange.com](https://RegoXchange.com) for instructions and how-tos.
- 2 Talk with your account managers and your Rego consultants.
- 3 Connect with each other and Clarity experts at [RegoGroups.com](https://RegoGroups.com).
- 4 Sign up for webinars and join in-person Rego groups near you through at [RegoConsulting.com](https://RegoConsulting.com)
- 5 Join us for the next [Rego University](https://RegoUniversity.com)!

