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Adoption Roundtable

Your Guides:
Wes McCoubrie and Brian Hazelzet

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Introductions

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



For Discussion Consideration ...

- Are adoption strategies at your organization formal or informal?
- Will you / did you implement Clarity with an understanding of who will monitor adoption and how?
- Are you measuring adoption? What metrics do you use? Do you share the metric with users to express value?
- If you did not see the adoption you wanted, what did you do to increase usage and data integrity?



For Discussion Consideration ...

- Does anyone survey end users for satisfaction in support of adoption? (Boom, we have a survey object for you!)
- Is adoption impacted by people that cannot access Clarity today? What is your strategy for non-Clarity users that need data?
- Are you investing enough in Clarity? Enough people internally and external help?
See examples of support required for good adoption.



Support Considerations

Let Rego be your guide.



Supported Needed for Good Adoption

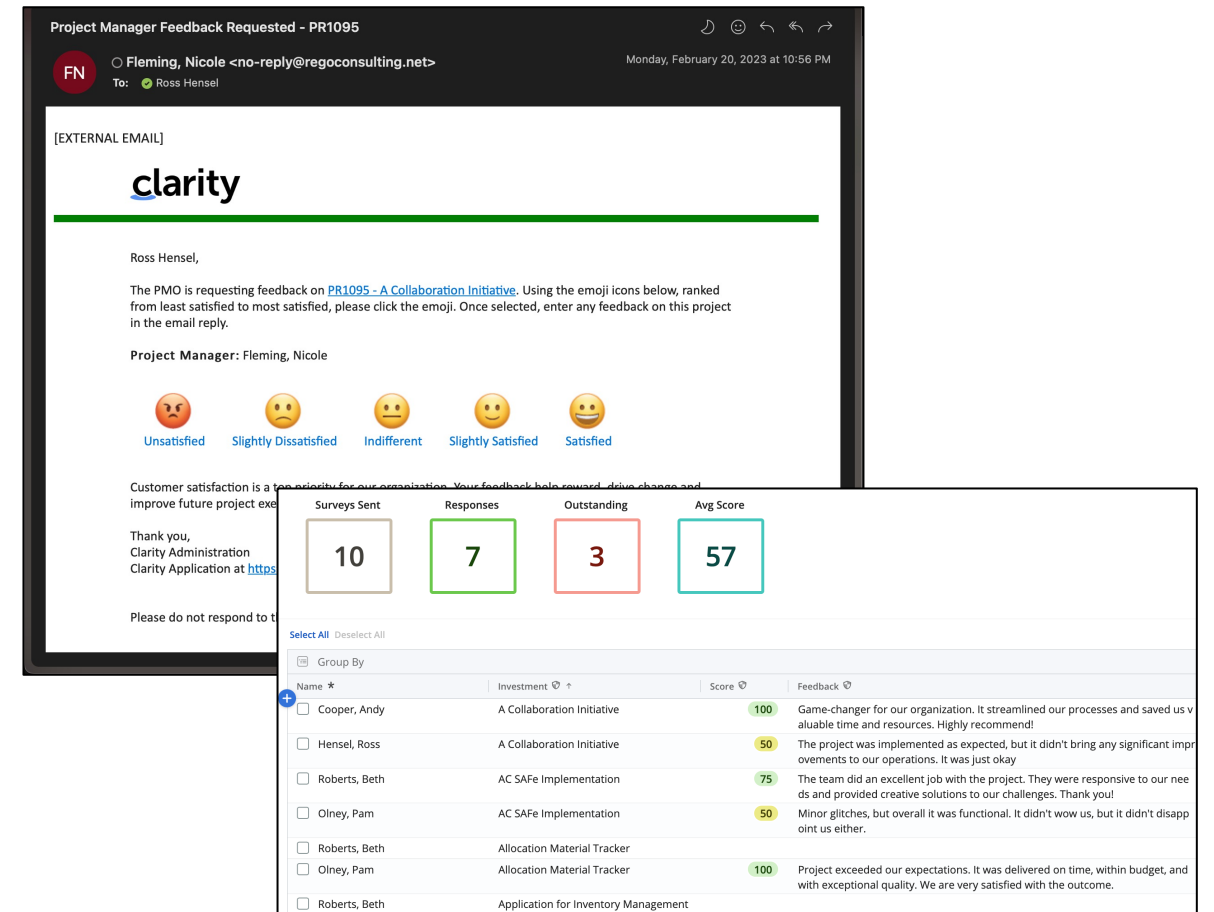
Users:	50-100	100-400	400-1000	1000-2000	2000-5000
Basic System Support	.25 - .5 Tech .25 - .5 Funct .25 - .5 SME	.25 - .75 Tech .25 - .75 Funct .25 - .75 SME	.5 - 1 Tech .5 - 1 Funct .5 - 1 SME	1- 2 Tech .75 - 1.5 Funct .75 - 1.5 SME	2 - 3 Tech 1 - 3 Funct 1 - 3 SME
ADD Project Mgmt: Scheduling (OWB/MSP), Issues/Risks/Status	0 Tech 0 Funct .10 - .25 SME	0 Tech 0 Funct .25 - .75 SME	0 Tech .25 - .5 Funct .5 - 1 SME	0 Tech .5 - 1 Funct 1 - 2 SME	0 Tech .75 - 1.5 Funct 2 - 3 SME
ADD Resource Mgmt	0 Tech 0 Funct .10 - .25 SME	0 Tech 0 Funct .25 - .75 SME	0 Tech .25 - .5 Funct .5 - 1 SME	0 Tech .5 - 1 Funct 1 - 2 SME	0 Tech .75 - 1.5 Funct 2 - 4 SME
ADD Financial Mgmt: Cost Plans, Rates, Transactions	.10 - .25 Tech 0 Funct 0 SME	.10 - .25 Tech 0 Funct 0 SME	.25 - .75 Tech .25 Funct .25 SME	.5 - 1 Tech 0 Funct 0 SME	.5 - 1 Tech 0 Funct 0 SME
ADD Demand and Portfolio Mgmt	0 Tech 0 Funct 0 SME	0 Tech 0 Funct 0 SME	.25 Tech 0 Funct .25 SME	.25 Tech 0 Funct .25 - .5 SME	0 Tech 0 Funct .5 - 1 SME
Total FTE Ranges :	1.05 - 2.25	1.35 – 4.0	4.75 – 8.5	10.5 – 13.0	10.5 – 21.0

Survey Module

Survey Module

Purpose: Allow clients to create feedback surveys to stakeholders and users from within Clarity, allow them to respond from email, and then aggregate and analyze that feedback.

- Users respond to surveys directly within email
- 100% out-of-the-box capabilities so it works in SaaS and On-Premises
- Configurable questions and question types (icon, thumbs up/down, numbers, etc.)
- Responses are collected and analyzed via a Survey Dashboard
- Sample Surveys could include:
 - Application Feedback
 - Project Stakeholder on Closure
 - Project Stakeholder on Milestone
 - Process Feedback (ie: Ideation or Stage Gate Process)
 - Project Manager Feedback
 - Team Feedback

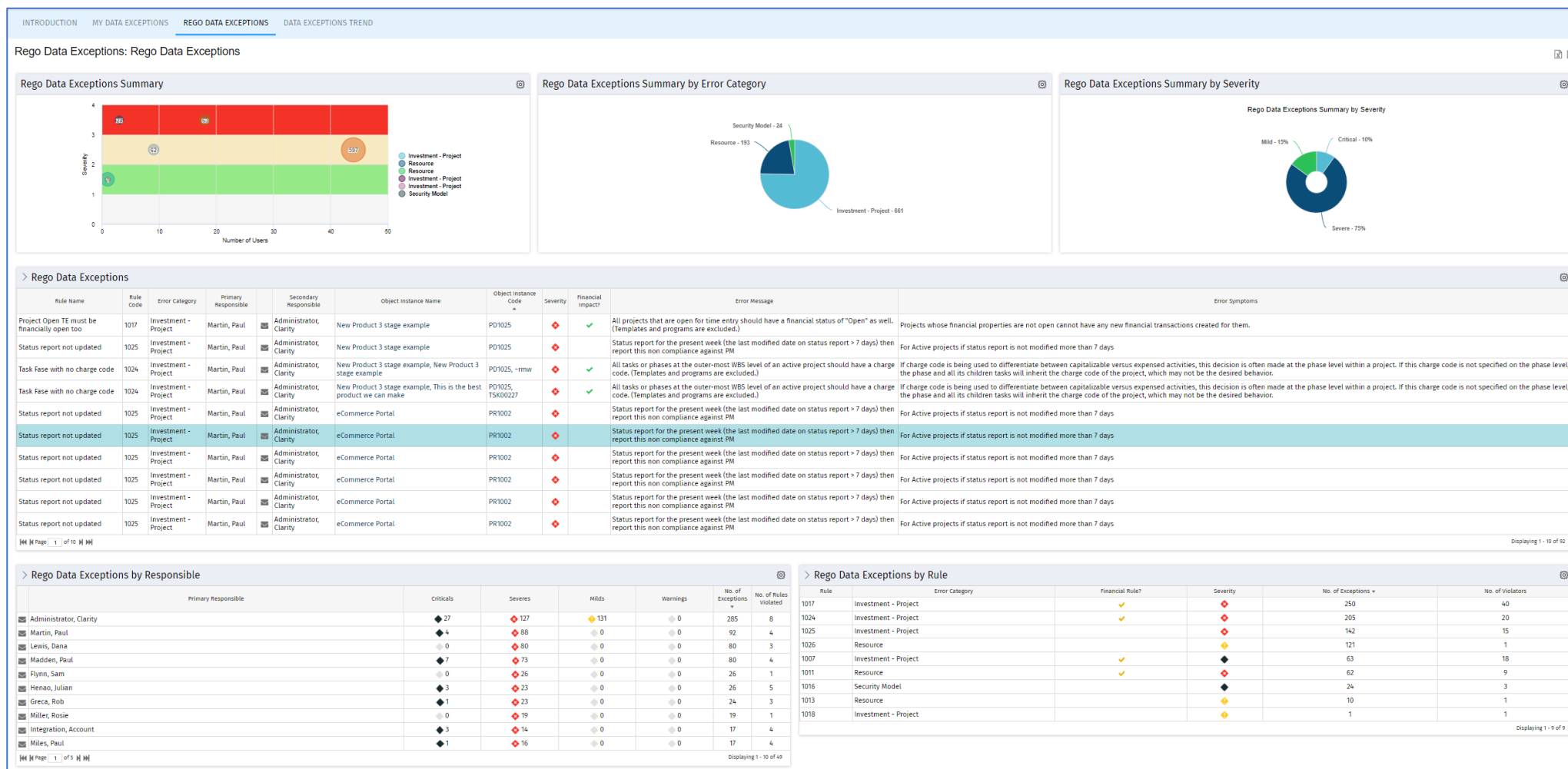


Adoption Metrics Module

Let Rego be your guide.



RegoXchange – Adoption Metrics



Adoption Metrics - Oracle - RegoXchange (regoconsulting.com)

Let Rego be your guide.

regoUniversity2025

Project Adoption



Who has the least average score? Select a category:

Project Manager

OBS Level 2

OBS Level 3

Baseline

Budget Variance

Commitment

Data Quality

Issue Adoption

Milestone/Key Tasks

Overall

Past ETCs

Risk Adoption

Schedule

Schedule Variance

Status Reporting

Unfilled Roles

Donegal, Amy

Clark, Patrick

Granger, Paula

Lewis, Dana

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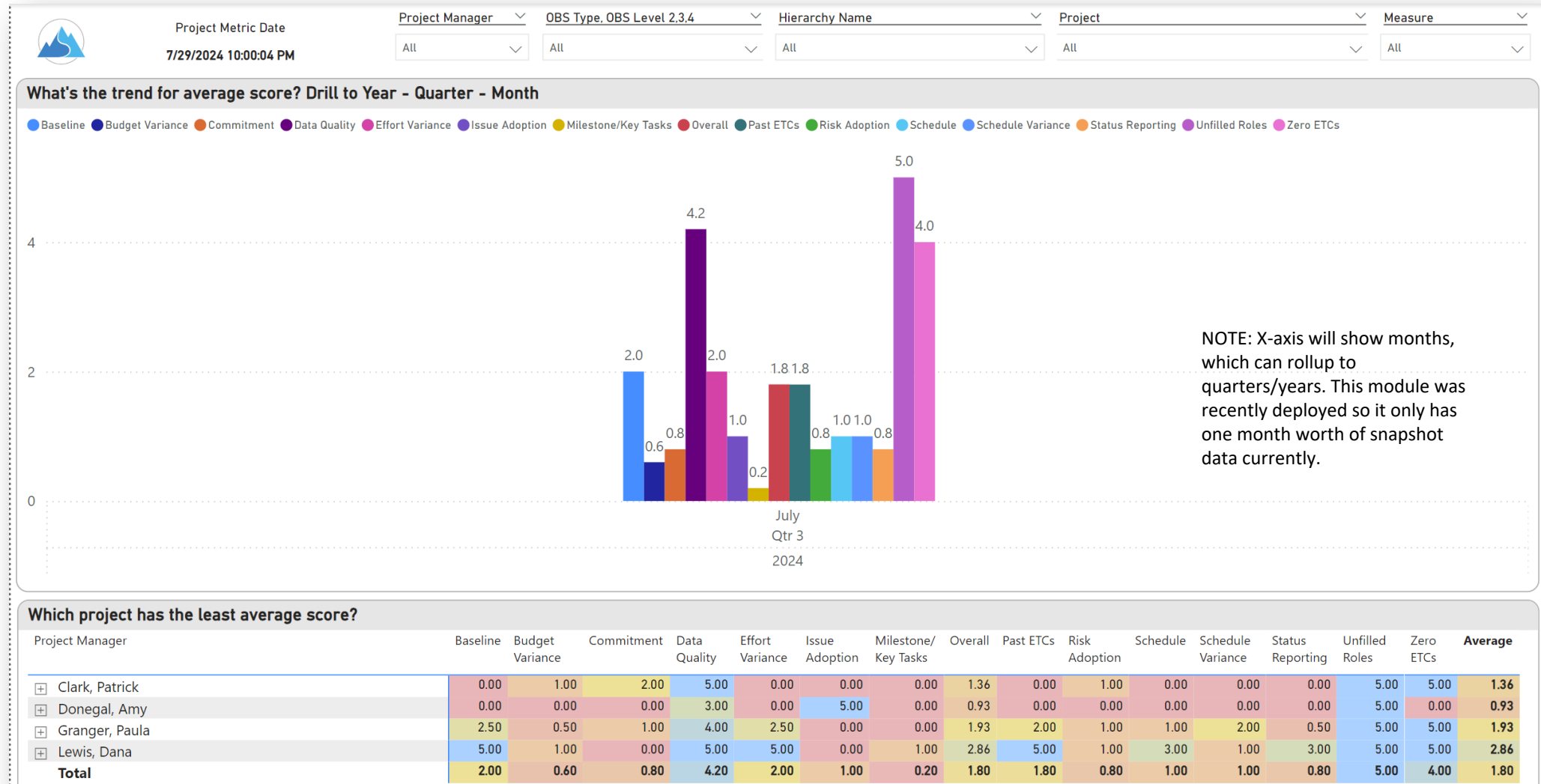
Which project has the least average score?

Project Manager	Baseline	Budget Variance	Commitment	Data Quality	Issue Adoption	Milestone /Key Tasks	Overall	Past ETCs	Risk Adoption	Schedule	Schedule Variance	Status Reporting	Unfilled Roles	Zero ETCs	Average
Clark, Patrick	0.00	1.00	2.00	5.00	0.00	0.00	1.36	0.00	1.00	0.00	0.00	0.00	5.00	5.00	1.45
GDPR Compliance - Loan Application	0.00	1.00	2.00	5.00	0.00	0.00	1.36	0.00	1.00	0.00	0.00	0.00	5.00	5.00	1.45
Donegal, Amy	0.00	0.00	0.00	3.00	5.00	0.00	0.93	0.00	0.00	0.00	0.00	0.00	5.00	0.00	1.00
International Trade Show	0.00	0.00	0.00	3.00	5.00	0.00	0.93	0.00	0.00	0.00	0.00	0.00	5.00	0.00	1.00
Granger, Paula	2.50	0.50	1.00	4.00	0.00	0.00	1.90	1.50	1.00	1.00	2.00	0.50	5.00	5.00	1.85
eCommerce Portal	5.00	1.00	2.00	5.00	0.00	0.00	2.79	3.00	1.00	2.00	4.00	1.00	5.00	5.00	2.63
Relocate Infrastructure to Las Vegas Data Center	0.00	0.00	0.00	3.00	0.00	0.00	1.00	0.00	1.00	0.00	0.00	0.00	5.00	5.00	1.07
Lewis, Dana	5.00	1.00	0.00	5.00	0.00	1.00	2.86	5.00	1.00	3.00	1.00	3.00	5.00	5.00	2.70
Total	2.00	0.60	0.80	4.20	1.00	0.20	1.79	1.60	0.80	1.00	1.00	0.80	5.00	4.00	1.77

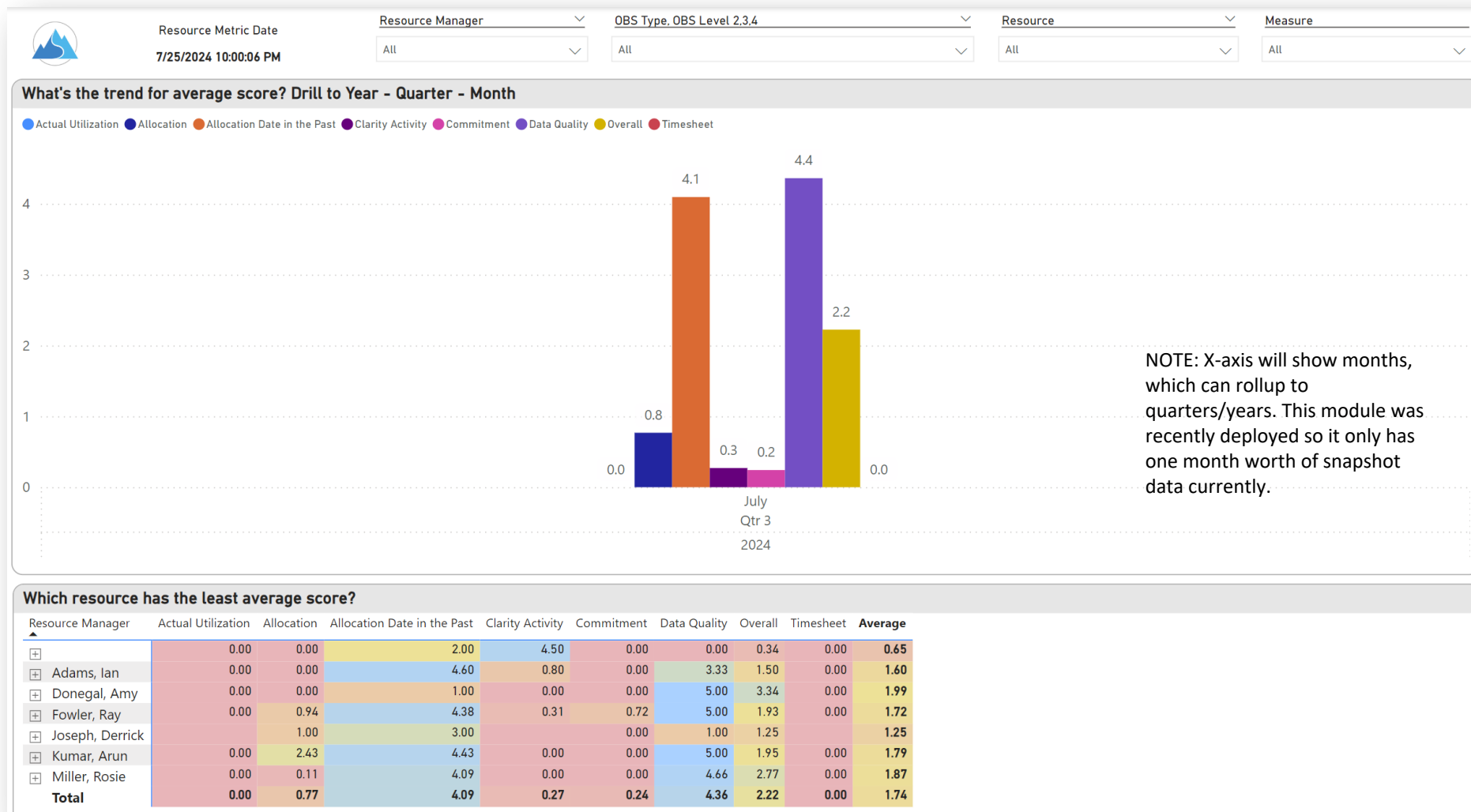
Resource Adoption



Project Adoption Trend



Resource Adoption Trend

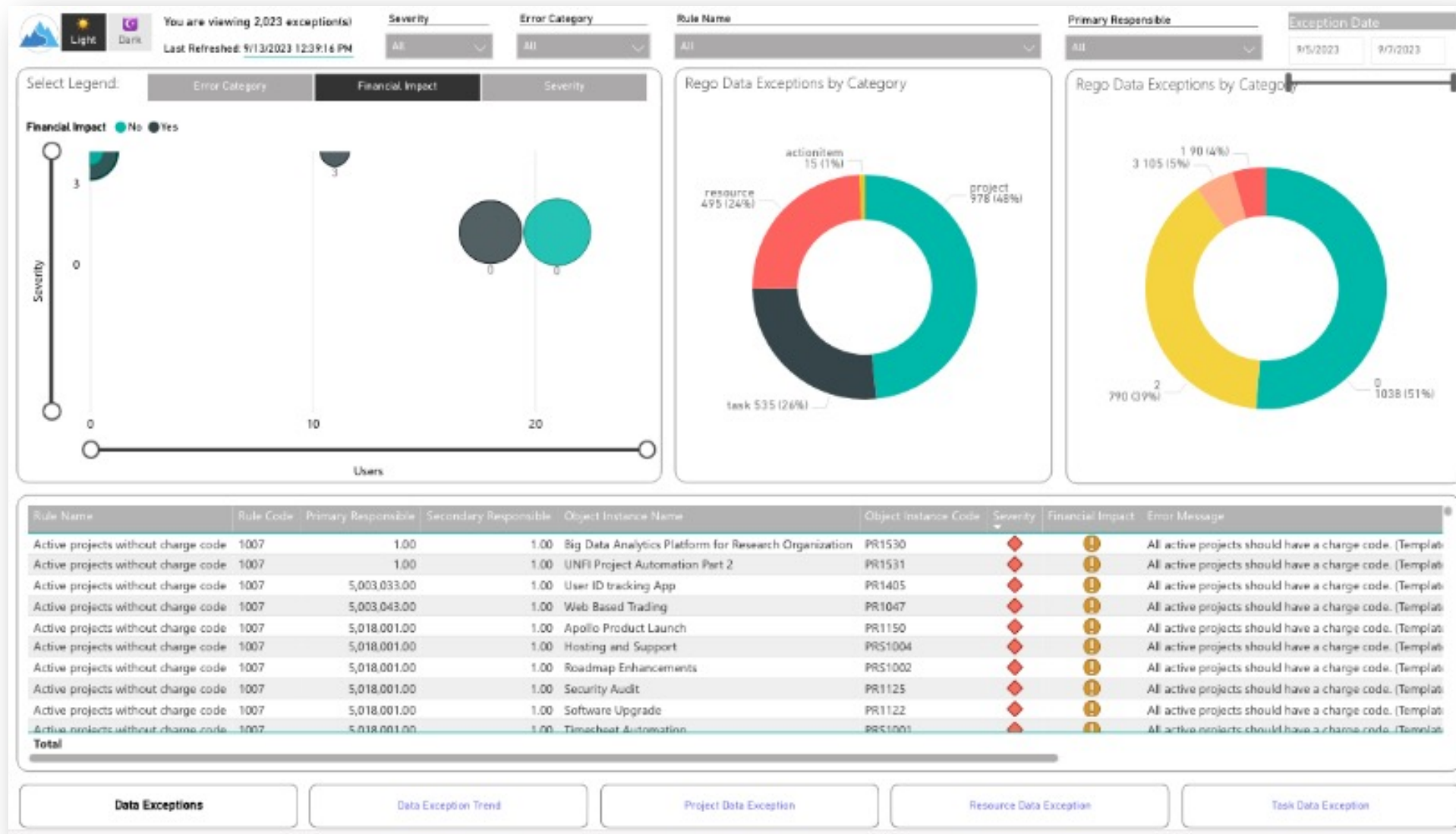


Power BI: Data Integrity

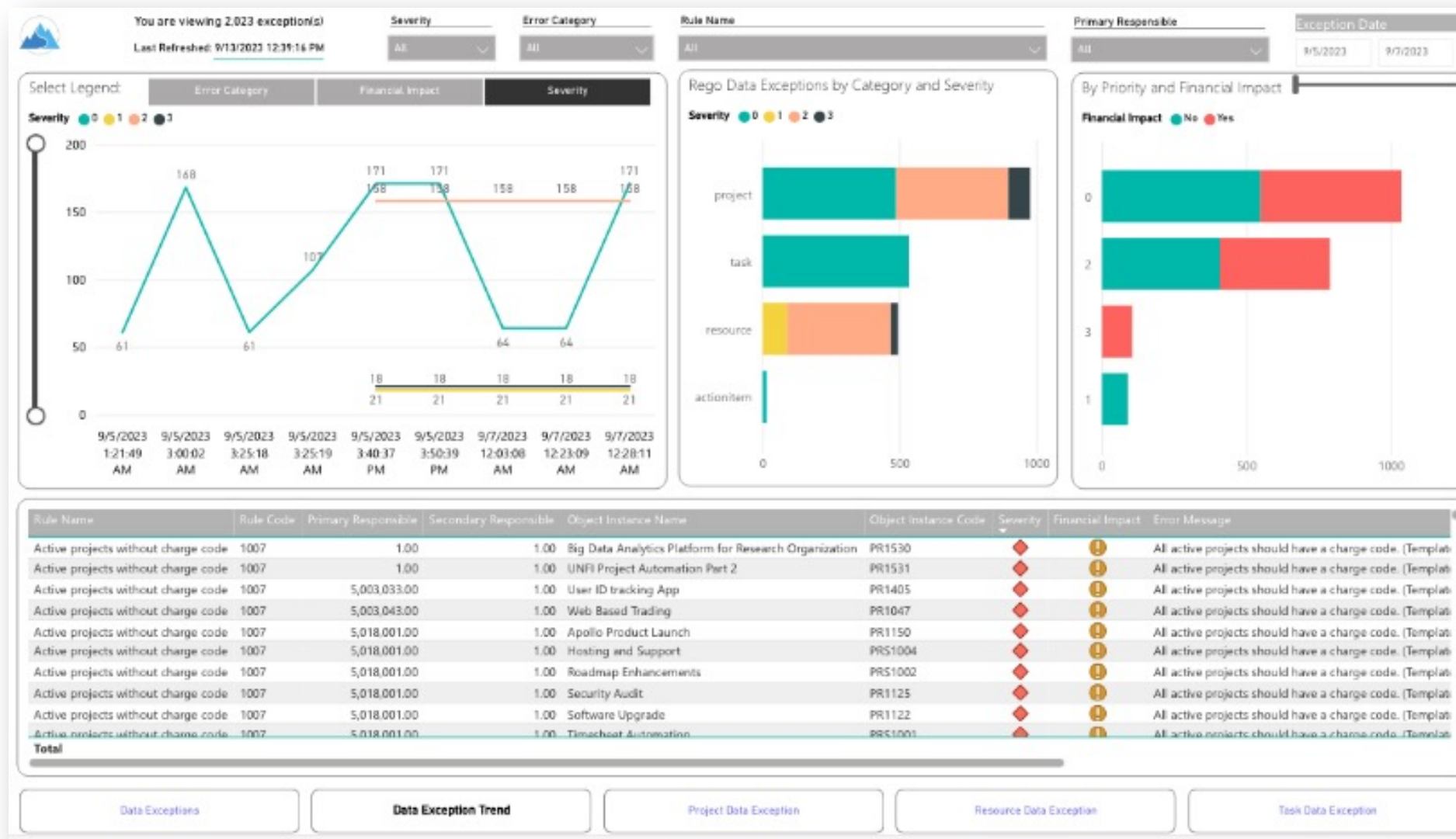
Let Rego be your guide.



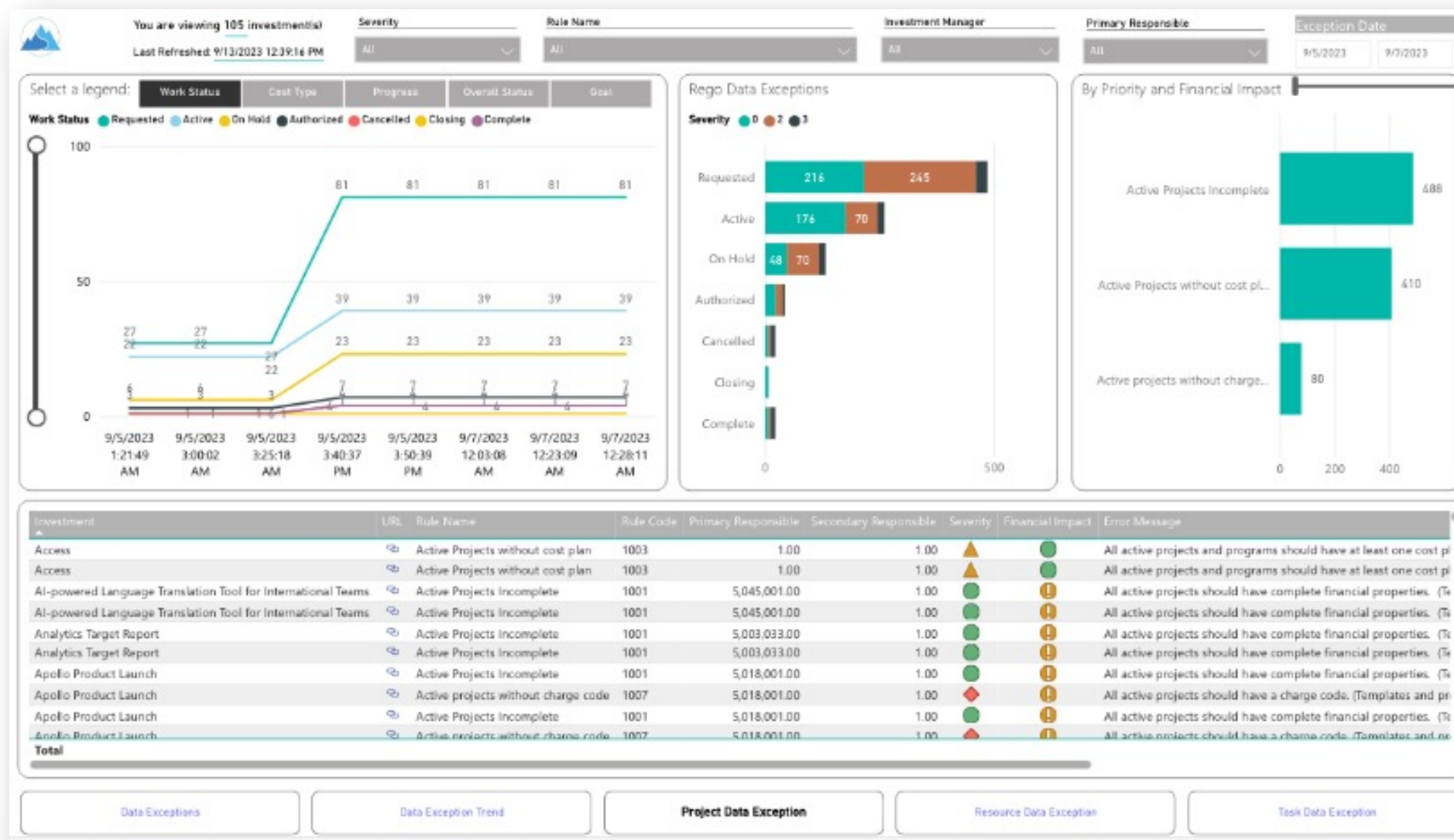
Power BI Suite: Data Exceptions



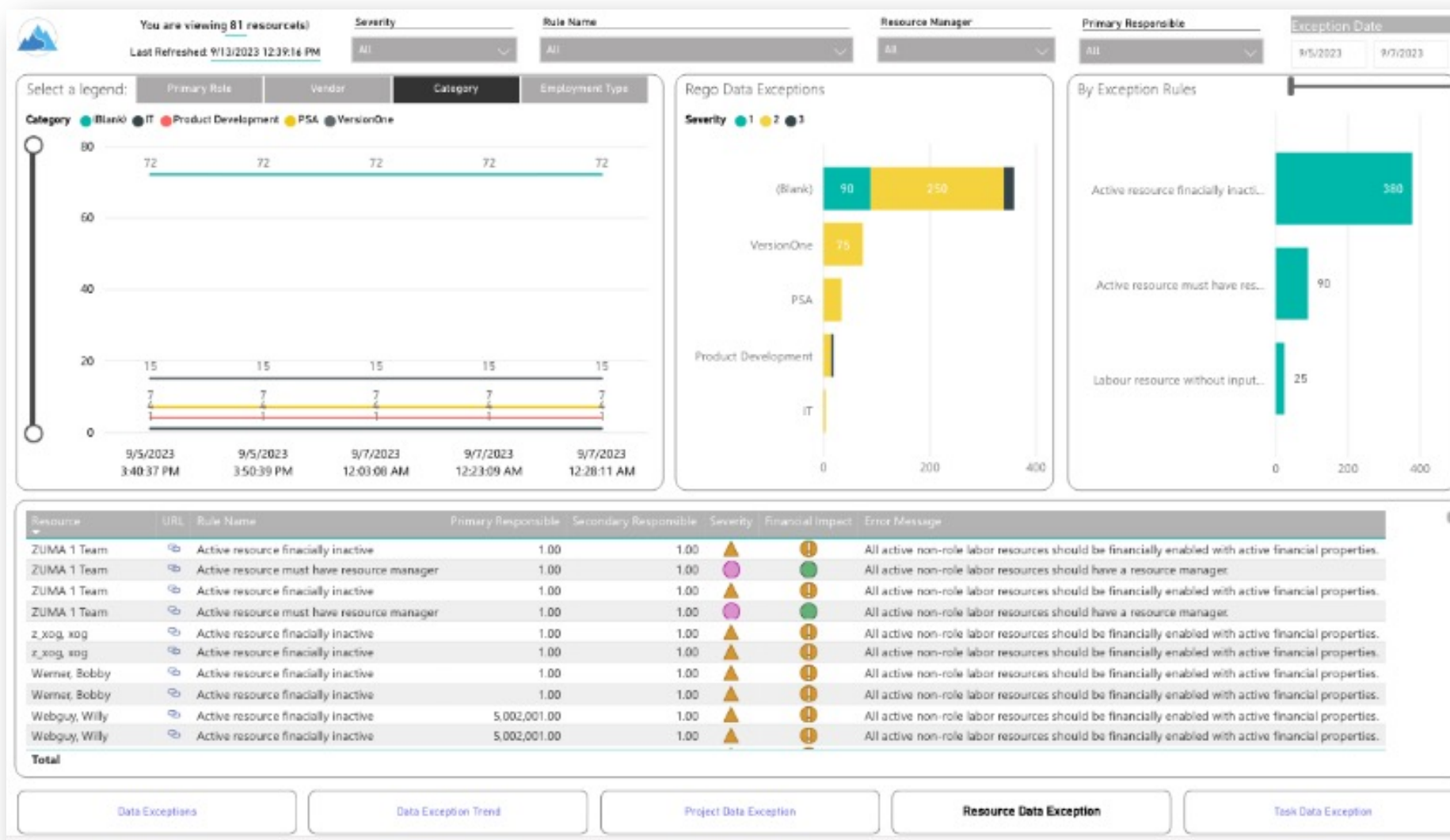
Power BI Suite: Data Exception Trend



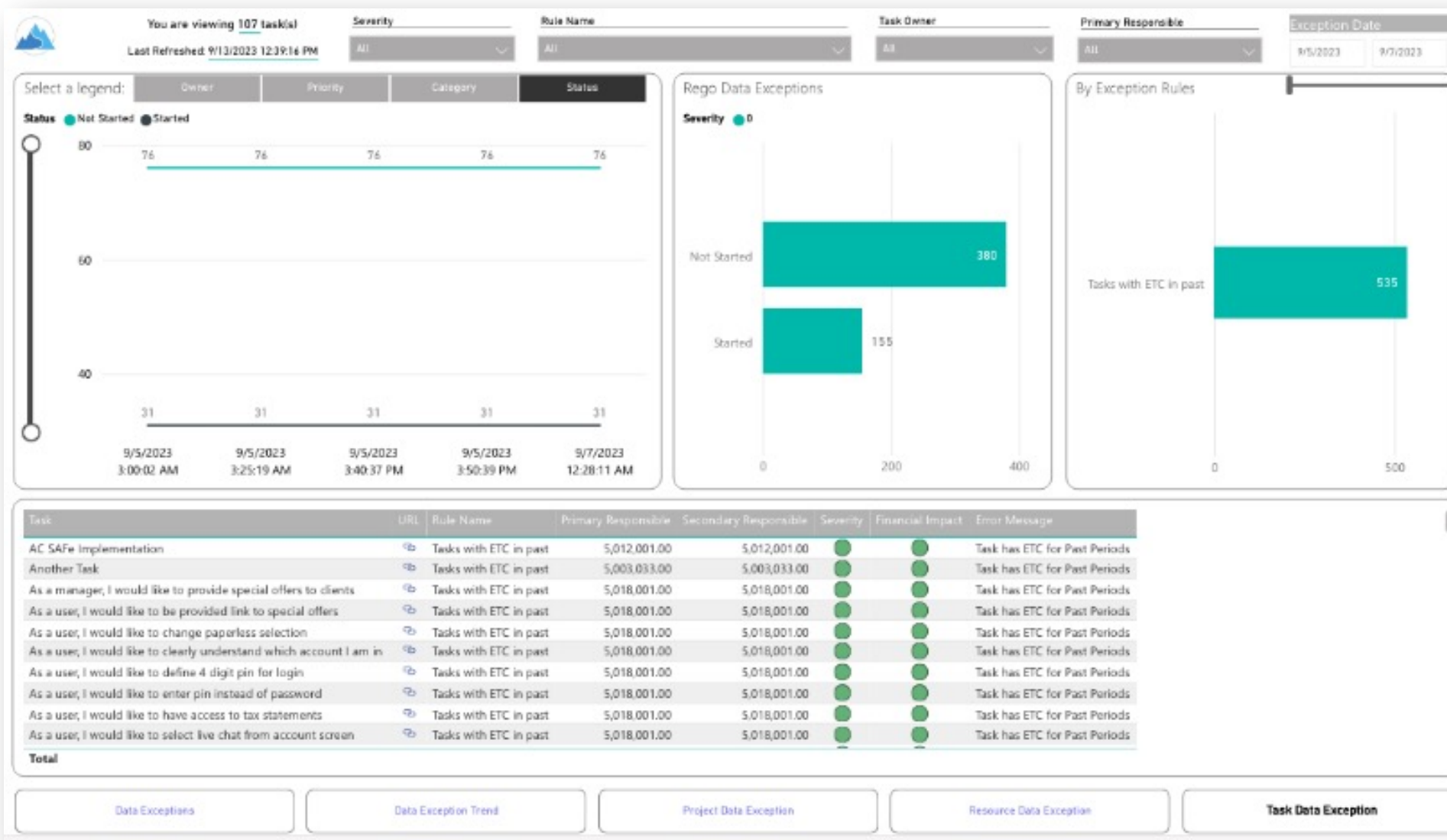
Power BI Suite: Project Data Exception



Power BI Suite: Resource Data Exception



Power BI Suite: Task Data Exception



Questions?





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Administration, Leadership,
and Technical Proficiency

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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 = **Rego University**
- 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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www.regouniversity.com

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