LAS VEGAS

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Best Practice Use of Clarity for Resource Management

Your Guides:
Hayley Surmann and Michelle Merriam-Day

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Introductions

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

Agenda

- Overview
- Building Blocks
- Best Practices

What Is “Resource Management & Capacity Planning”?

Broadly speaking, Resource Management and Capacity Planning is about optimizing your organization’s resources for near-term operations and long-term planning.

Done effectively, Resource Management and Capacity Planning helps organizations

- Align resources and strategic priorities
- Smooth workloads and reduce instances of overworked/underutilized staff
- Mitigate project risks
- Make data-driven portfolio decisions
- Respond to change

What Is the Related OTB Functionality in Clarity?

Functionality	RM-Related Capability
Resources	Understand Who/What Resources exists, key information about those resources, and how much time they are available
Investment Staff (& Assignments)	Who (or what Resource qualities) are planned on each Investment and for how much time?
Timesheets	How much time *was* spent on different Investments?
Staffing Workspace	Analyze data above to view workloads, staffed and unstaffed demand, and create what-if scenarios
Roadmap	Plan investments with an understanding of capacity to deliver
Hierarchies	Analyze staffing on Portfolios, Business Units, or other 'slices' of investment data
Financials	Leverage staffing data to estimate costs
Plans	Plan headcount for upcoming periods

Open Discussion #1

- Who is using Resource Management functionality?
- Does your organization have a standard Staffing request and fulfillment process?
- Is your organization using Resource Management data for Intake or Headcount planning?

Some Rego Thoughts …

What is Success

- Effective business processes exist to use the data for decisions
  - Proper prioritization and pacing of new projects
  - Fewer schedule delays waiting for resources
  - Identify and escalate resource risks to delivery
  - Understand the impacts of change
- Data is Comprehensive, Reliable, Timely & Directionally Accurate
- Separation of duties/checks and balances

Stumbling Blocks

- Finding the right level of granularity
- Enterprise decisions require comprehensive data
- Difficulty updating allocations
- Effective OCM
- Reporting goldilocks – nothing just right
- Effective communication between Resource, RM, PM
- Complexity, inconsistent process
- Management support

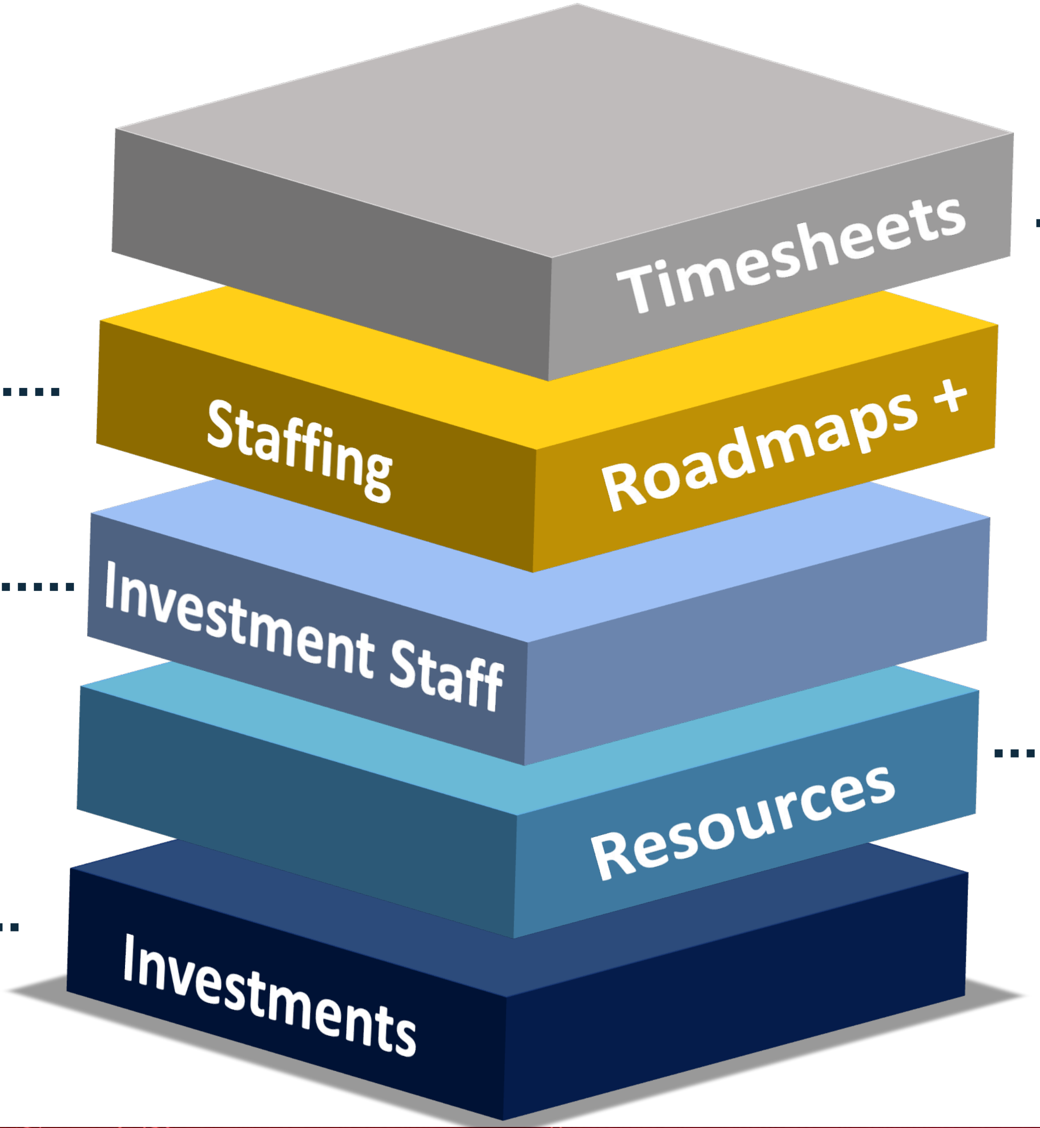
Building Blocks

Resource Management Building Blocks

Review and Plan to address gaps or impact of change in Staffing, Roadmaps, Hierarchies

Add Roles/Resources or Teams to Investments in Staff tabs or Staffing Workspace

Track Projects, Products, Value Streams or other Investments



Resources can track Time to Investments where they are allocated / assigned, enabling comparison of estimates and actuals *

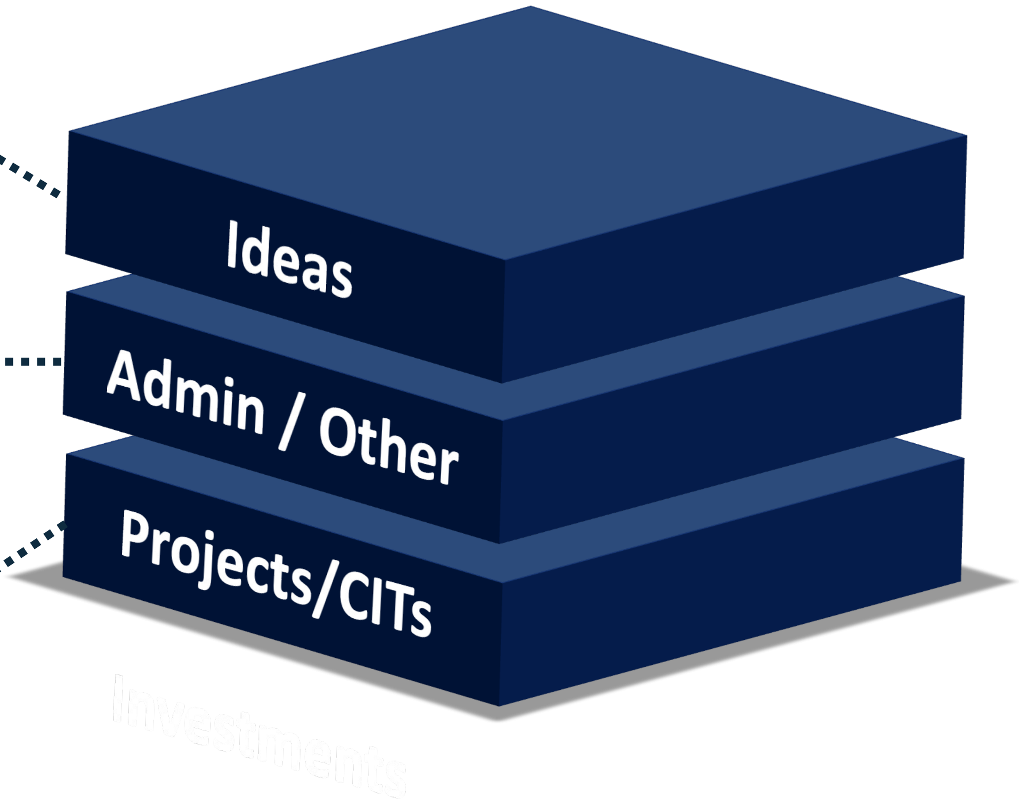
List Resources & Roles or Teams

RM Building Blocks: Investments

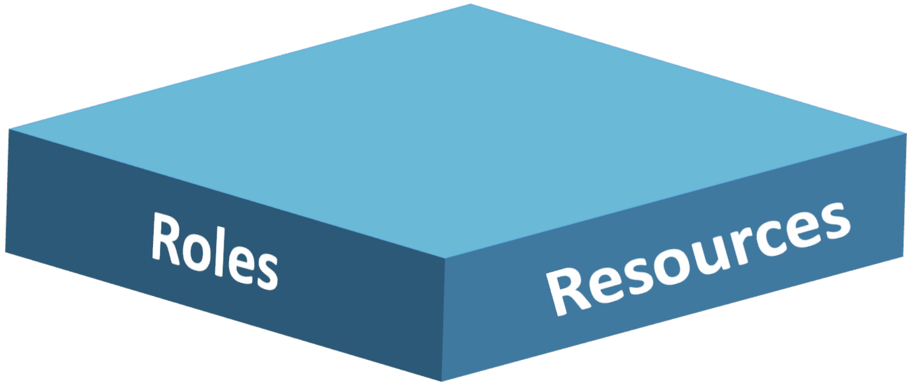
Planning staff on Ideas extends the planning horizon

Additional types of work can be added. Document a full picture of resources' workloads

Typically, an implementation may start with a list of in-flight work



RM Building Blocks: Resources



Roles represent high-level planning functions.
Roles can be added to Investment staff as placeholders during planning, and Resources have a Primary Role to enable comparison.

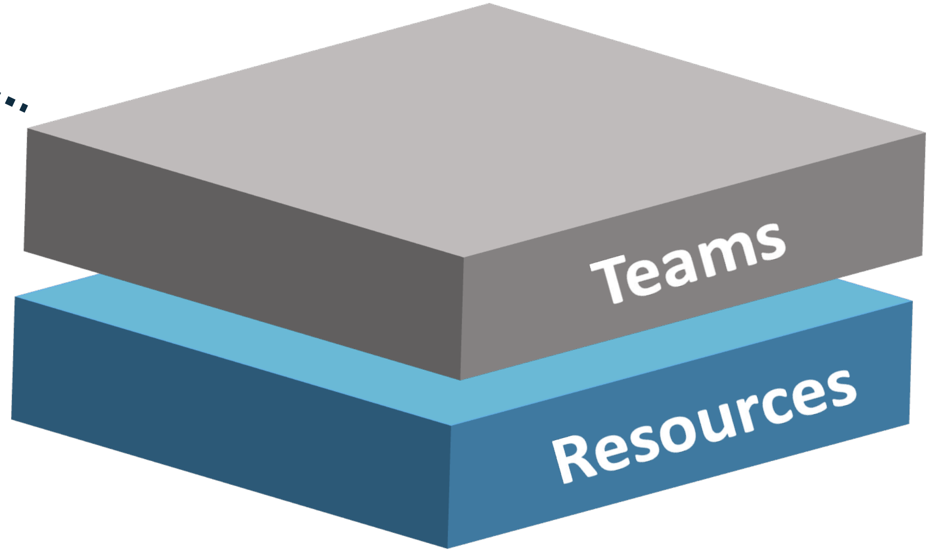
Capture additional data about Resources for planning and analysis.

A typical Resource Profile includes:
- Primary Role
- Availability
- Resource pool OBS

Holidays in the Resource Calendar are automatically deducted from Availability

RM Building Blocks: Teams

Optionally, Resources can be added to Team investments, and the Team is added to Investments



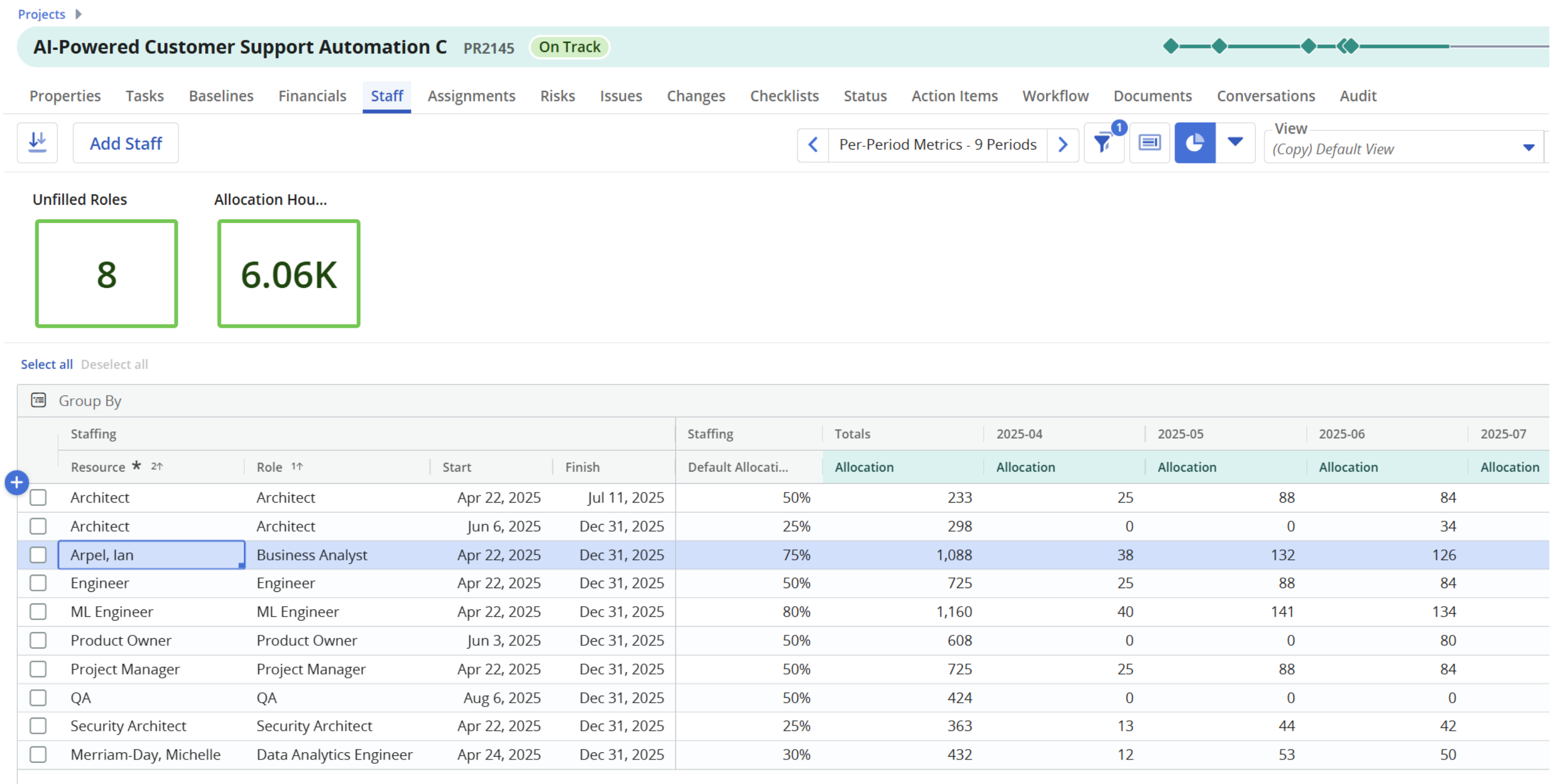
RM Building Blocks: Investment Staff

Investment Staff

Investment Staff is where Roles / Resources are added to an Investment.

Planned hours on the Project are added as Allocations.

Staff planning can be further described by Assigning Resources to Tasks and estimating the time per Resource and Task as ETCs.



Staffing				Staffing	Totals	2025-04	2025-05	2025-06	2025-07
Resource	Role	Start	Finish	Default Allocati...	Allocation	Allocation	Allocation	Allocation	Allocation
Architect	Architect	Apr 22, 2025	Jul 11, 2025	50%	233	25	88	84	
Architect	Architect	Jun 6, 2025	Dec 31, 2025	25%	298	0	0	34	
Arpel, Ian	Business Analyst	Apr 22, 2025	Dec 31, 2025	75%	1,088	38	132	126	
Engineer	Engineer	Apr 22, 2025	Dec 31, 2025	50%	725	25	88	84	
ML Engineer	ML Engineer	Apr 22, 2025	Dec 31, 2025	80%	1,160	40	141	134	
Product Owner	Product Owner	Jun 3, 2025	Dec 31, 2025	50%	608	0	0	80	
Project Manager	Project Manager	Apr 22, 2025	Dec 31, 2025	50%	725	25	88	84	
QA	QA	Aug 6, 2025	Dec 31, 2025	50%	424	0	0	0	
Security Architect	Security Architect	Apr 22, 2025	Dec 31, 2025	25%	363	13	44	42	
Merriam-Day, Michelle	Data Analytics Engineer	Apr 24, 2025	Dec 31, 2025	30%	432	12	53	50	

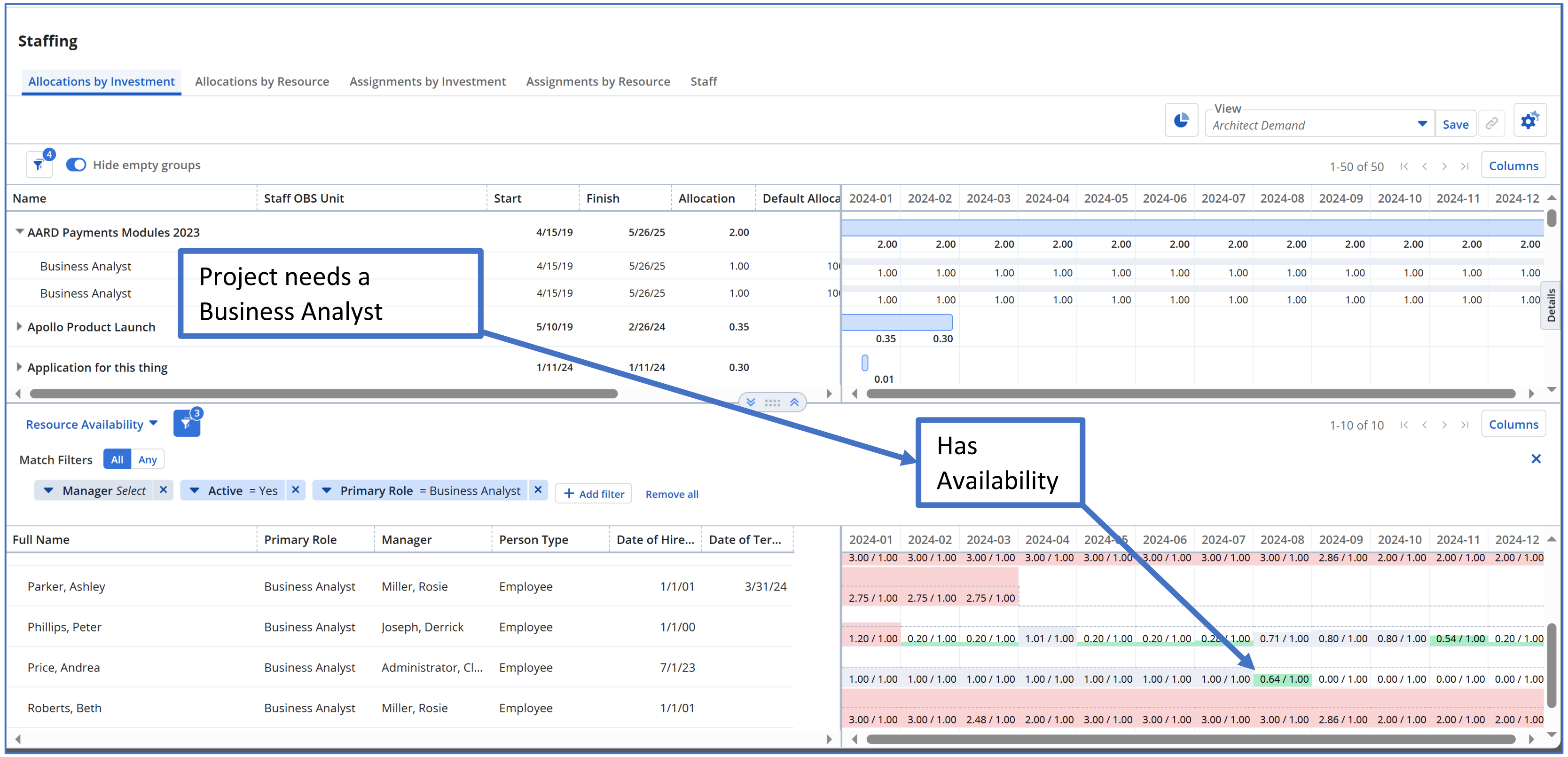
RM Building Blocks: Staffing Workspace

Staffing Workspace

The Staffing page shows Investment Staff information across all Investments and Resources.

The Staffing page supports *many* processes, such as:

1. Staffing Unfilled Roles
2. Reviewing Workloads
3. Assessing the impact of Change
4. Ad hoc Research

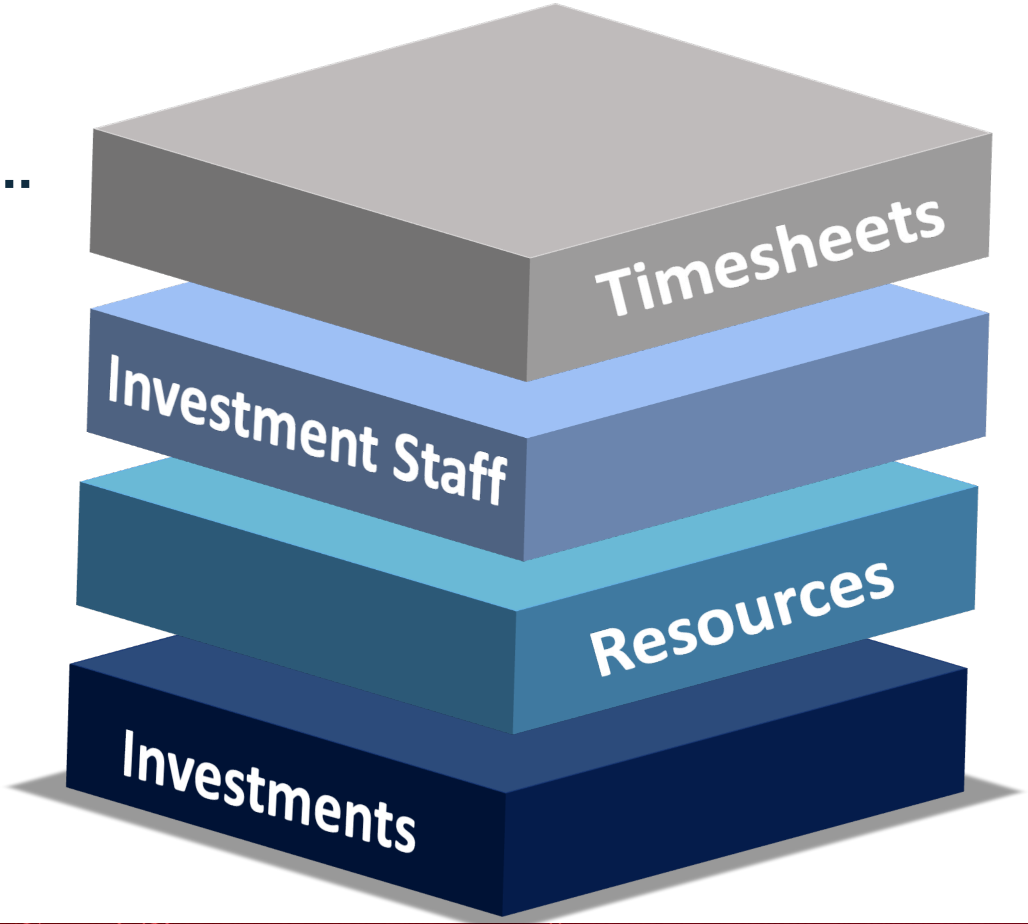


Investment, Resource, and Staff building blocks are required to get value from the Staffing Workspace. Timesheets are not strictly required.

RM Building Blocks: Timesheets

Timesheets record actual hours spent on Investments.

Investment, Resource, and Staff building blocks are required to implement Timesheets.



Implementation Best Practices

Implementation Best Practices – Start Simple

- You don’t need a high degree of precision to make effective resource management decisions
- The more precision you attempt to get, the more time and effort will be required. There is a point of diminishing returns

- Staffing & Resource Management is about building effective business processes and takes coordination and consistency across many groups and functions. Take a crawl, walk, run approach—start simple and then build it out further as needed
- OCM and Sponsorship are key for enterprise planning

- Assume you have directionally accurate forecast data in the tool. What mechanisms, processes, roles and responsibilities are in place to act on that information? Clearly define the outputs and who is accountable for them.

Implementation Best Practices – Design for Key Outputs

- Design functionality and business processes to require the MINIMUM amount of work necessary to meet Business Goals

- Keep the end in mind and design the building blocks appropriately. If Employee / Contractor splits are a key element in planning, capture that data. If the primary goal is to improve pipeline planning, then adding demand to pipeline investments is necessary

- Simplify the end user experience with persona-specific views and homepages

Align Tactical Processes with Decision Support Data Capture

Roles & Resources

- Integration, Admin or Resource Managers maintain
  - Primary Role
  - Availability
  - Resource pool OBS
  - Standard Calendar

Investment Staffing

- Investment Managers add Roles, Resources, or Teams to Investments and Enter Allocations over time
- Investment or Resource Managers replace Roles with named Resources on Investments (e.g. "Investment Staffing Process")
- Optional: Investment Managers create Assignments and enter ETC

Staffing Workspace+

- Balance Individual or Team workloads in Staffing
- Review Staffing to find and address upcoming demand / capacity gaps through staffing or planning changes
- Assess ability to deliver when planning new work in Roadmaps
- Assess impact of change in Staffing or Roadmaps

Decision Support Data

- How many resources do we have?
- What is our capacity to do work?
- How are resources aligned within the organization?
- What is high-level capacity by role?

- When are people or groups available for work or overallocated?
- What percentage of time is planned for each investment type?

- What is the most constrained Role?
- When will we have capacity to deliver new work?
- What needs to shift to address new priorities?

Open Discussion #2

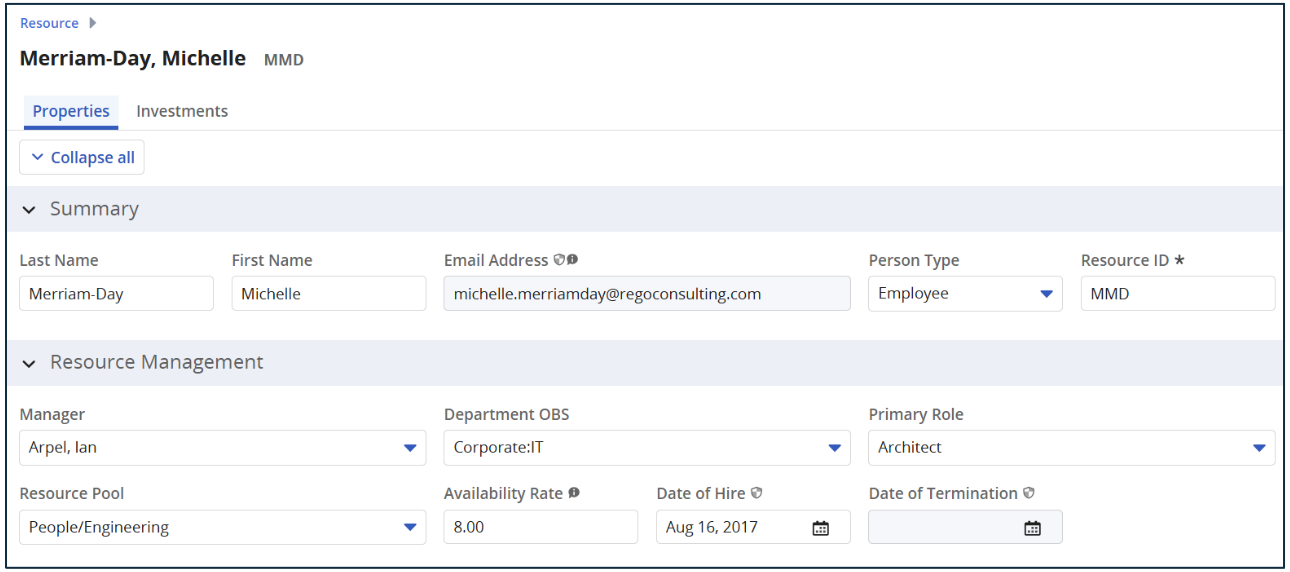
- For those that have a successful implementation of resource management
  - What are some of your best practices?
  - What are your lessons learned?

Clarity Setup Best Practices

Resource Profile

- Consider Automation for Resource Data
- Resources should have a meaningful, *high-level* Primary Role, Employment Type, and Resource OBS
  - Remember – these are ways to group information. Keep those elements to a manageable set of values / complexity
- Maintain Date of Hire and Date of Termination
- For contractors, consider maintenance of a Contract End Date

- Remember – managing resources does <u>not</u> consume a license per resource



Availability Best Practices

- Avoid high degrees of precision
  - We need the minimal amount of information to make an informed decisions
- Add corporate holidays to the base calendar
  - In multi-national organizations, it is best to use multiple calendars to represent various holidays and work times (8hr day vs. 7hr day)
- Date of Hire and Date of Termination bound the total availability over time

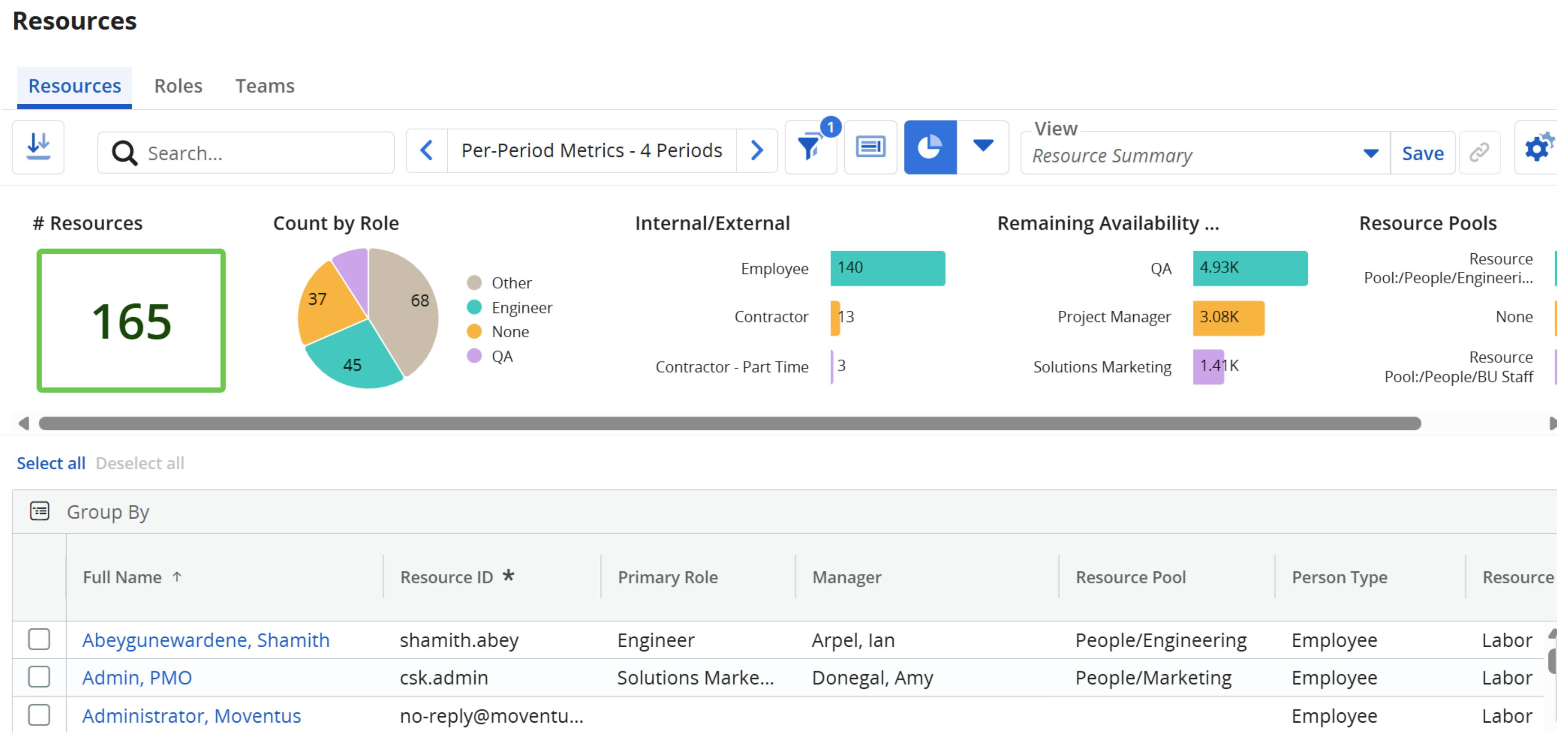
Group By

Full Name ↑	Person Type	Date of Termination	2025-09 Availability	2025-10 Availability	2025-11 Availability
Awad, Rashid	Employee		176	184	160
Baj	Employee	Sep 30, 2025	176	0	0
Baker, Isaac	Employee		176	184	160
Barry, Debra	Employee		176	184	160
Bauer, Joyce	Employee		176	184	160
Beasley, Frank	Contractor - Par...		88	92	80

Resource Profile - Outputs

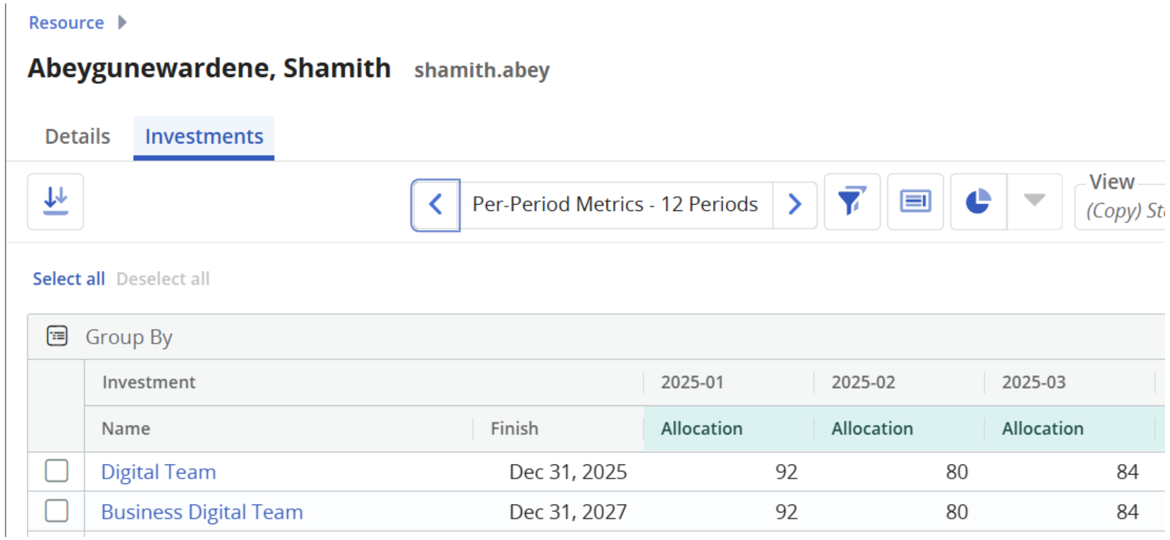
Set up your Resource List views to show key decision support outputs such as:

- How many resources do we have?
- What is our capacity to do work?
- How are resources aligned within the organization?
- What is high-level capacity by role?



Investment Staff: Allocation Best Practices

- Manage allocations by the month
- Adjust expectations of accuracy and granularity according to the time horizon
- Use color-coding or filters to highlight exceptions
- Ensure users are aware of the Unit of Measure
- Need help with estimation? Users making allocation updates can compare Allocation and prior two months of Actuals to inform estimation



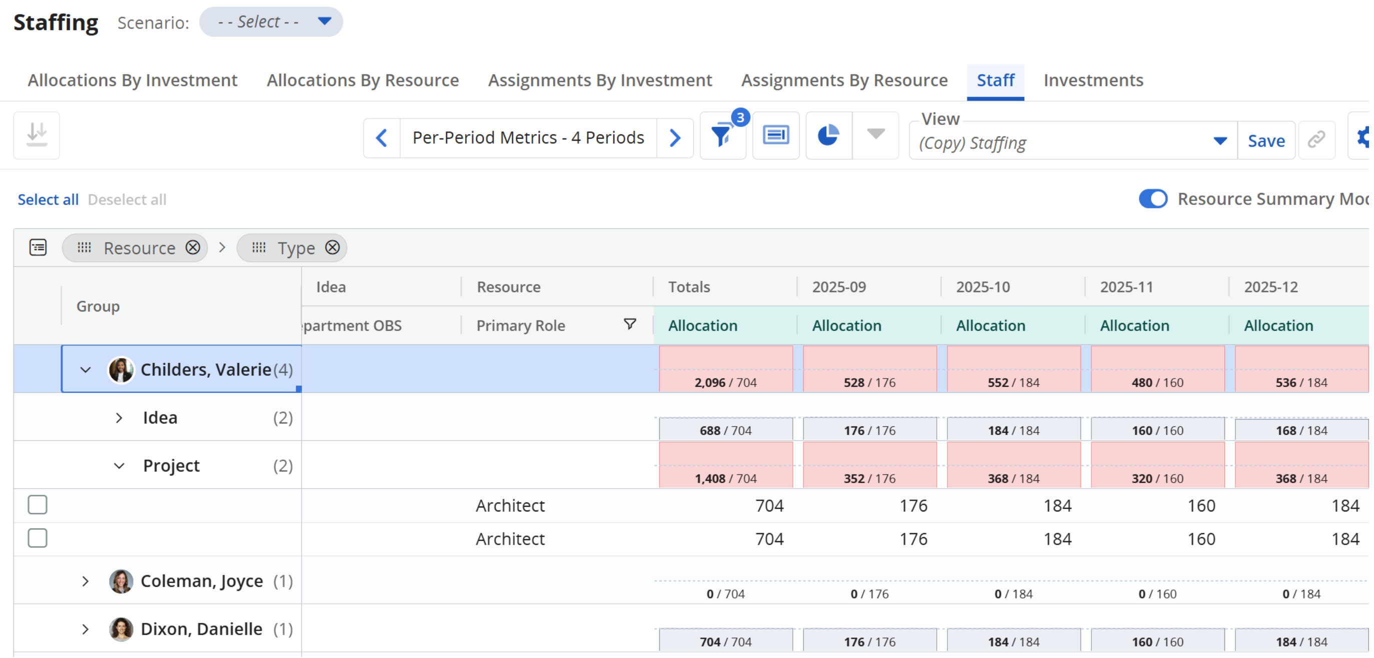
Investment Staff: Assignment Best Practices

- Choose allocations or assignments – not both. Allocations are simpler and easier to manage for initial rollout
- If using ETC – then run job to update allocations from assignments.
- Adhere to the “8-80” rule. Tasks and assignments should not be less than 8 hours or more than 80
- Add ETC to the project team detail view
  - Allows the PM to see where ETC may be pilling up (slower burn on the tasks)
  - Allows the PM to see where the allocation may be greater than ETC (faster burn on tasks)
- When using ETC, be aware of start dates and tasks open for time. Delayed starts, without and adjustment of Task Start Date will push ETC forward

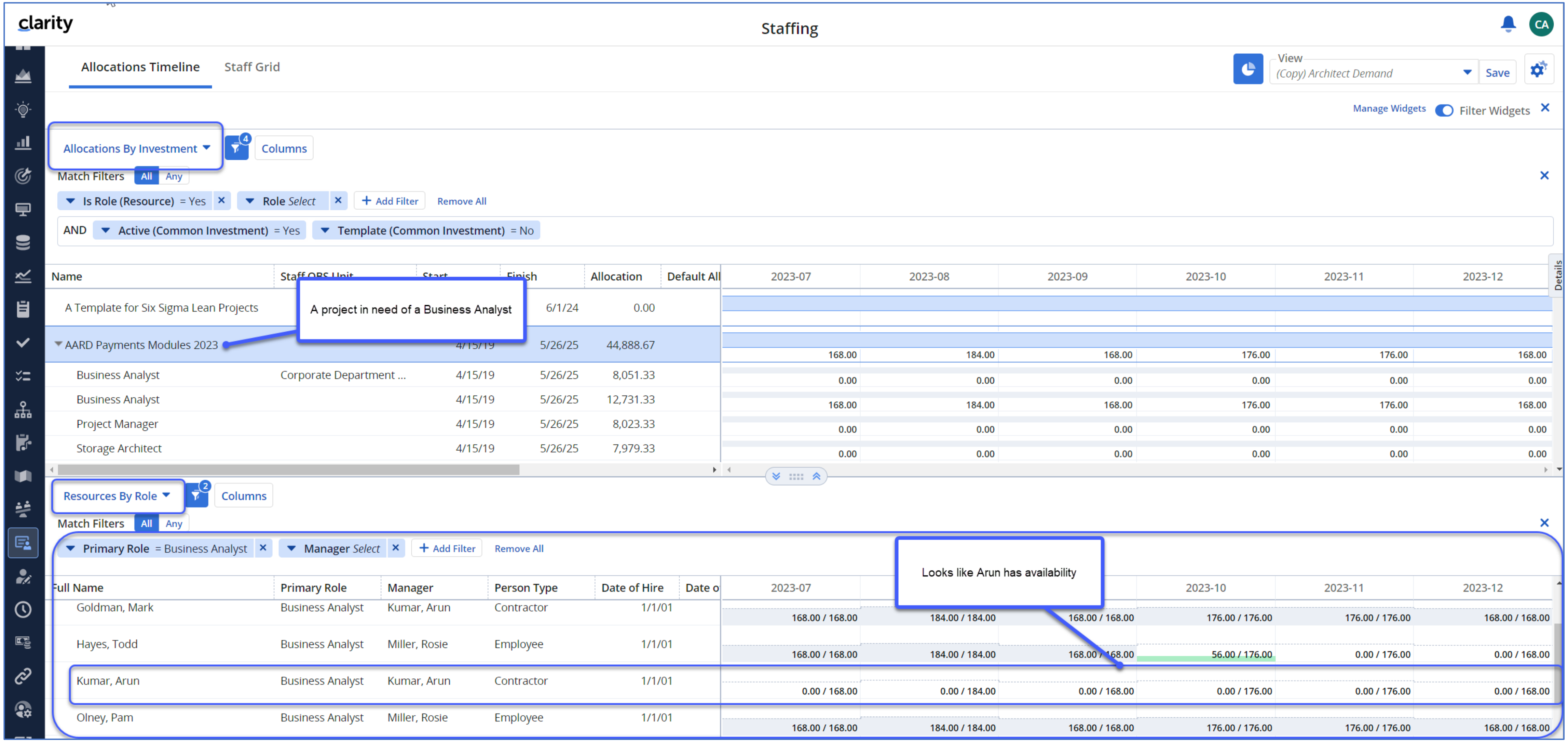
Investment Staff Outputs

Set up Staffing views to show key decision support outputs such as:

- When are people or groups available for work or overallocated?
- Who is Over or Under-Allocated?
- What percentage of time is planned for each investment type?
- Does Planned work align with our Strategy?



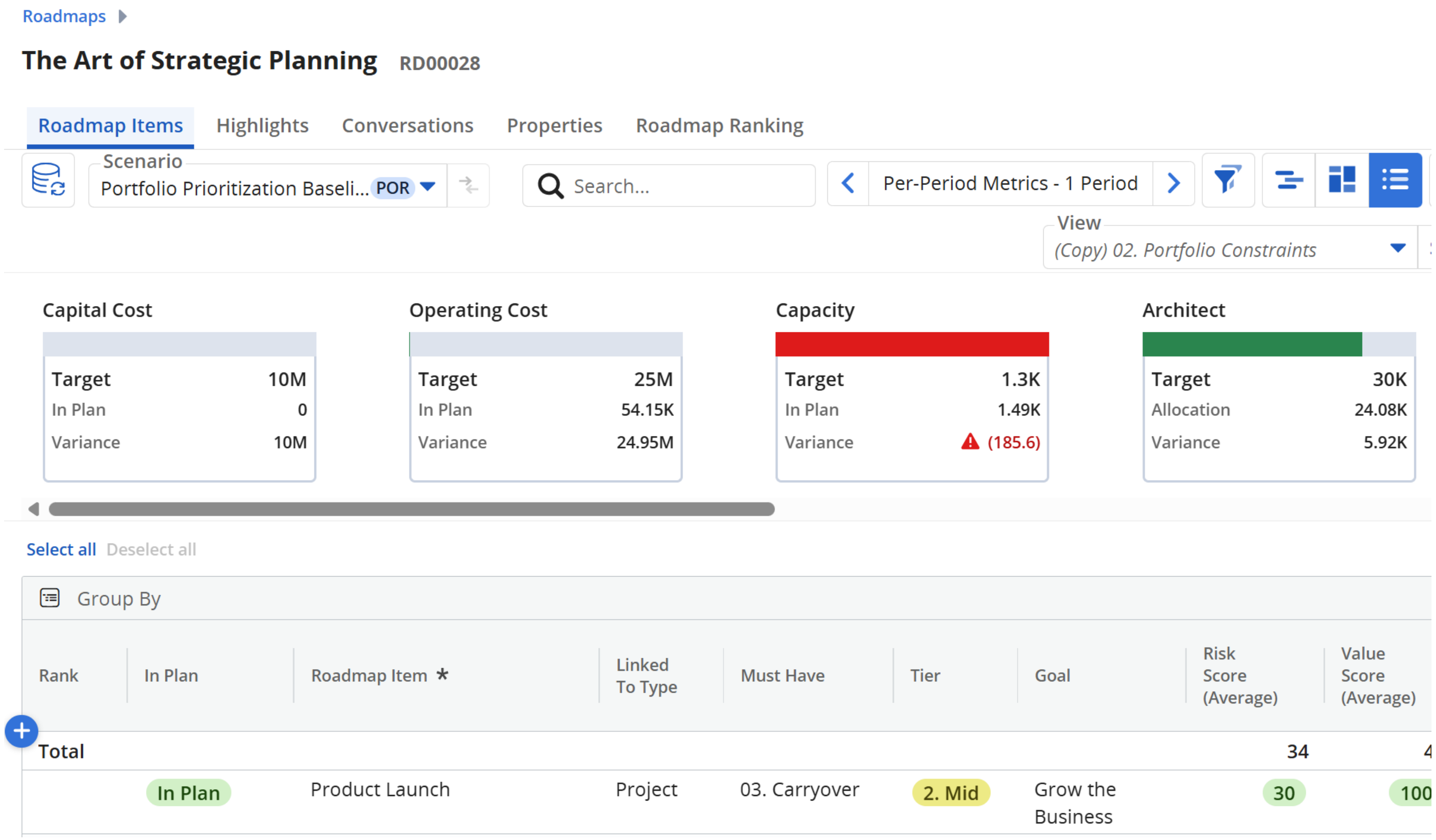
Staffing Process Support: Staffing Unfilled Allocations



Investment Staff Outputs: Roadmap Planning

Add Pipeline and In-flight work to Roadmaps and align with Target Capacity

- OTB Roadmaps include an overall Capacity Target widget
- Roles in the MUX Roadmap functionality available on Rego Xchange



Additional Capabilities: Plans

Leverage Resource and Investment Staff data for high-level Headcount Planning

Plans ▸

2025 FTE Capacity 00000057

Published 2024-02-29 08:23:38 | Recall | Sync Resour

Plan | Resources

Totals

Configure

2024 Plan

	Actual
Total	102

2025 Plan

	+ Add	(-) Remove	2025
Total	0	0	102

Resource Breakdown

Primary Role	Actual	+	(-)	2025
Analyst Relations	1			1
Architect	6			6
Business Analyst	5			5
Corporate Marketing	1			1
Engineer	44			44

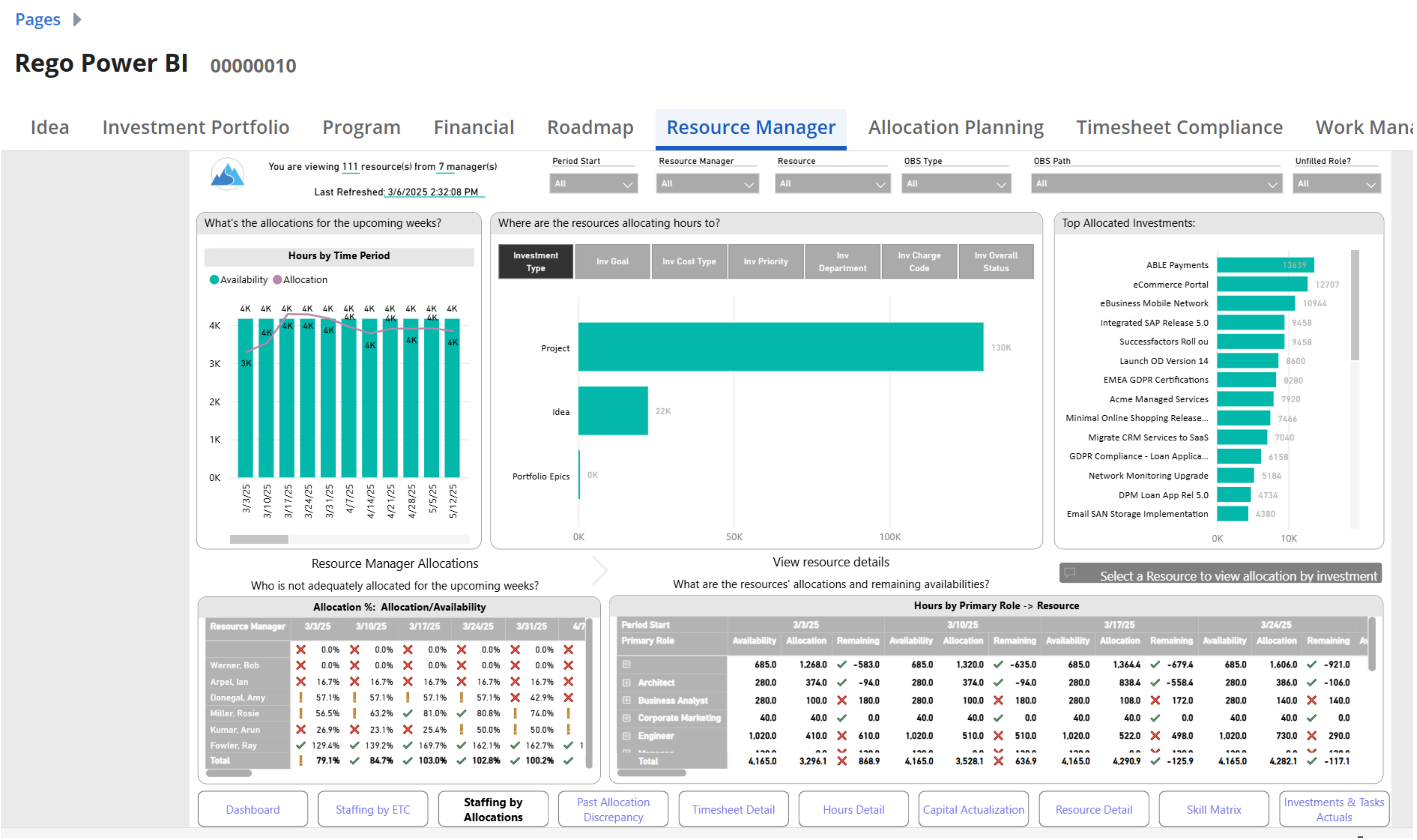
Investment Breakdown

Plan Investment Categ...	Actual	+	(-)	2025
Defect Resolution	14			14
DevOps SaaS	12			12
Innovation	30			30
RFE	9			9
Technical Currency	14			14

Reporting Best Practices

- Create multiple views in Staffing to support different use cases
- Hierarchies (and dashboards w/in Hierarchies) are a great way to focus on a particular slice of data
- Data can be pulled into PowerBI reports
- Additional reporting can assist to ensure the data is:
  - Personalized for the user and use case
  - Summarized to see issues immediately
  - Drillable to allow quick view and update of issues

Sample PowerBI Report



Notification Best Practices

- Use notifications for specific actions needed; you do not want to over communicate
- Emails will provide direct links into Clarity for an action.
- Some popular notifications:
  - Allocations to individual resources – if this is incorrect, talk to a manager
  - Exceptions (over/under allocation) to booking manager
  - Leadership summary reports for RMs and division managers

Questions?

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- Class Provider = **Rego Consulting**
- Class Name = **rego University**
- Course **Description**
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