Aligning Clarity with Your Ecosystem for Better Outcomes

Your Guides:
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Agenda

- What is a Digital Ecosystem Assessment (DEA)?
- Rego Perspective on Current Themes
- What are the potential deliverables or outcomes?
- Summary
- Q&A / Additional Resources

Open Mic – Framing the Challenge

- Do you have a backlog or roadmap for Clarity features and adoption?
  - If yes, what is included? What horizons does it cover? What's the definition of success/done?
- Are work management or other point solution tooling creating siloed data and processes, that makes it difficult for leadership to have a single lens into trusted insights?
- Does your organization have a common understanding of systems of record vs. systems of reference in your digital ecosystem?
- How many tools in your ecosystem perform similar functions, and do you know where duplication is increasing cost and reducing efficiency?

Why Regularly Assess Your Clarity Investment

1 **Ensure Clarity Remains Connected to Your Evolving Ecosystem**

- *HR, Finance, Agile, Service Management, AI and Reporting platforms continue to evolve*
- *Validate integrations, data flows, and process alignment*

2 **Maximize Adoption and Business Value**

- *Identify underutilized capabilities*
- *Address adoption challenges*
- *Deliver greater return from existing investments*

3 **Align to Organizational Change and Emerging Ways of Working**

- *Teams, responsibilities, operating models, & governance frameworks evolve over time.*
- *Regular reviews ensure Clarity continues to support transformational initiatives such as Strategic Portfolio Management (SPM), Product Management, Hybrid Delivery Models.*

Why Regularly Assess Your Clarity Investment

4 **Strengthen Decision-Making**

- *Improve data quality, transparency, and executive insights*
- *Enable better investment and prioritization decisions*

5 **Eliminate Redundancy and Simplify the Tool Landscape**

- *Identify overlapping capabilities across your ecosystem*
- *Reduce complexity and duplicate effort*
- *Consolidate where appropriate*

6 **Build a Roadmap for Continuous Improvement**

- *Identify quick wins*
- *Close functional gaps*
- *Prioritize future enhancements based on business value*

What Is a Digital Ecosystem Assessment?


STOP. COLLABORATE. LISTEN.
The REGO Digital Ecosystem Assessment (DEA)
STOP
• Reflect on current state
• Understand your Clarity maturity
• Assess what you own vs. what you use
• Identify unrealized value
COLLABORATE
• Engage a wide range of stakeholders
Executives, PMO, Product, Finance, HR, Technology, Delivery Teams
• Understand differing perspectives
• Build a shared improvement roadmap
LISTEN
• Listen to the data
• Listen to the users
• Listen to the ecosystem
"IF THERE WAS A PROBLEM, DEA WILL SOLVE IT...
Identify duplication
Uncover hidden capabilities
Surface quick wins
Build a roadmap for greater value
REGO
DEA
ASSESS. DISCOVER. OPTIMIZE. MAXIMIZE VALUE.
KNOW YOUR ECOSYSTEM. UNLOCK YOUR VALUE.
ONE ECOSYSTEM. ONE SOURCE OF TRUTH. MAXIMUM VALUE.

Assessment Overview

A holistic assessment that evaluates the current state of your project management practices across the following 4 key pillars to compare against industry best practice. Rego will then develop recommendations for a future state.

People

- Well defined roles and responsibilities for optimal execution
- Alignment of location and skills to right roles to execute capabilities

Process

- Streamlined and standardized execution processes
- Standardized key decision points, handoffs, and interdependencies

Technology

- Aligned technologies that enable planning, execution, and measurement
- Ensure data interoperability across all platforms

Governance

- Clearly defined stewardship over platforms, solution capabilities, performance metrics, and execution
- Definition and compliance oversight of policies and regulatory requirements

Rego Perspective on Current DEA Themes

Current Themes in the DEA Program

- Intake/Demand Management and Prioritization Practices
- Resource Management, Agile or not: What are people working on?
- Aligning work to Strategic Plans / Goals / OKRs – Strategic Portfolio Management (SPM)
- Agile/Hybrid Journey, moving forward or stepping back
- Capability Alignment, use the correct tool for the job – Eliminate process & data siloes
- Reporting Strategy, in UI or External BI?
- Simplify Financials, new ways of capitalization
- Project to Product Journey

What Are the Steps?

The Digital Ecosystem Assessment Process

The assessment work will take 4-6 weeks. The work will include the following activities:

Landscape Analysis

Focused review sessions to understand leadership perspective and analyze the current state of your digital landscape as a whole.

Detailed Review

Review people, process, technology, and governance through interviews, team sessions, systems review to determine pain points and identify opportunities.

Recommendation Map

Discuss preliminary findings and best practice recommendations.

Ecosystem Roadmap

Receive expert guidance for your ecosystem architecture, including quick wins, mid-term, and long -term improvements.

Illustrative Interview Roster (Example)

Name	Job Title	Primary PPM Function/Use Case	Date/Time (EST)
	Director, IT Finance	Financial Services & Project Accounting	
	Project Manager	PM/BA user perspective	
	Director, Resource Management Office	Resource Capacity & Allocations Planning	
	Manager, End User Experience	Resource Manager	
	Manager, DBA & Integration	Resource Manager	
	Team Lead, Data Analytics	Resource Manager	
	Director, Business Solutions	Business relationship management	
	Business Success Manager	Business relationship management	
	Director, Business Solutions	Business relationship management	
	Application Support Specialist	Clarity application support	
	Project Manager	Project Management	
	IT Delivery Manager	Project Management	
	Agile Delivery Lead	Agile Delivery / Solution Train Planning	
	VP, Strategy & Transformation	Executive Reporting / Strategic Planning	
	Director, PPM Platform Services	PPM Process & Data Governance	

Art or Science?

What Are the Potential Deliverables or Outcomes?

What we Heard

Example

“the new Clarity UI is a GAME CHANGER; I would dump everything that I have to have this version setup”	“Clarity has fallen behind the organisational and process changes as it hasn’t been developed”	“We are crying out for a PPM tool – Demand Mgmt. and Resource Mgmt. is on Spreadsheets”	"I can spend 6+hours a week on preparing reports"
“We need the performance to be improved if we are going to improve adoption"	“We need more support for changes. There is only one SME”	“Only 30% of our current Clarity usage is in the Modern UX”	“We have lost the ability to innovate centrally as its all silo's and its offline and doesn’t scale”
“Clarity is Just a Financial / Timesheet System”	“We Know Clarity can do more but we don’t know how to get there	“Execs will only look at PPT - and will not look at tooling directly ”	“We need all of the work in one place, some of it is still outside of the tool”

…and many more!

Recommendation Themes

Example

Integrate, Automate, and Streamline

Integrate Data In/Outbound, Automate Repeatable Tasks and Streamline user experience

Improve Perception of Clarity / Unlocking new value

Changing the perception of Clarity and Long Term Planning for Improving Clarity including unlocking new modules

Increase End User Support

Improve the User Experience and Empower users with Role based education

Make Clarity a system we can trust - A Single Source of Truth

Reduce overlap in disparate systems, Get alignment on Standards

Increase usage, data quality and supporting processes

Improve Current Uses Cases and action Quick Wins

Executive Summary (Details in Subsequent Slides)

Example

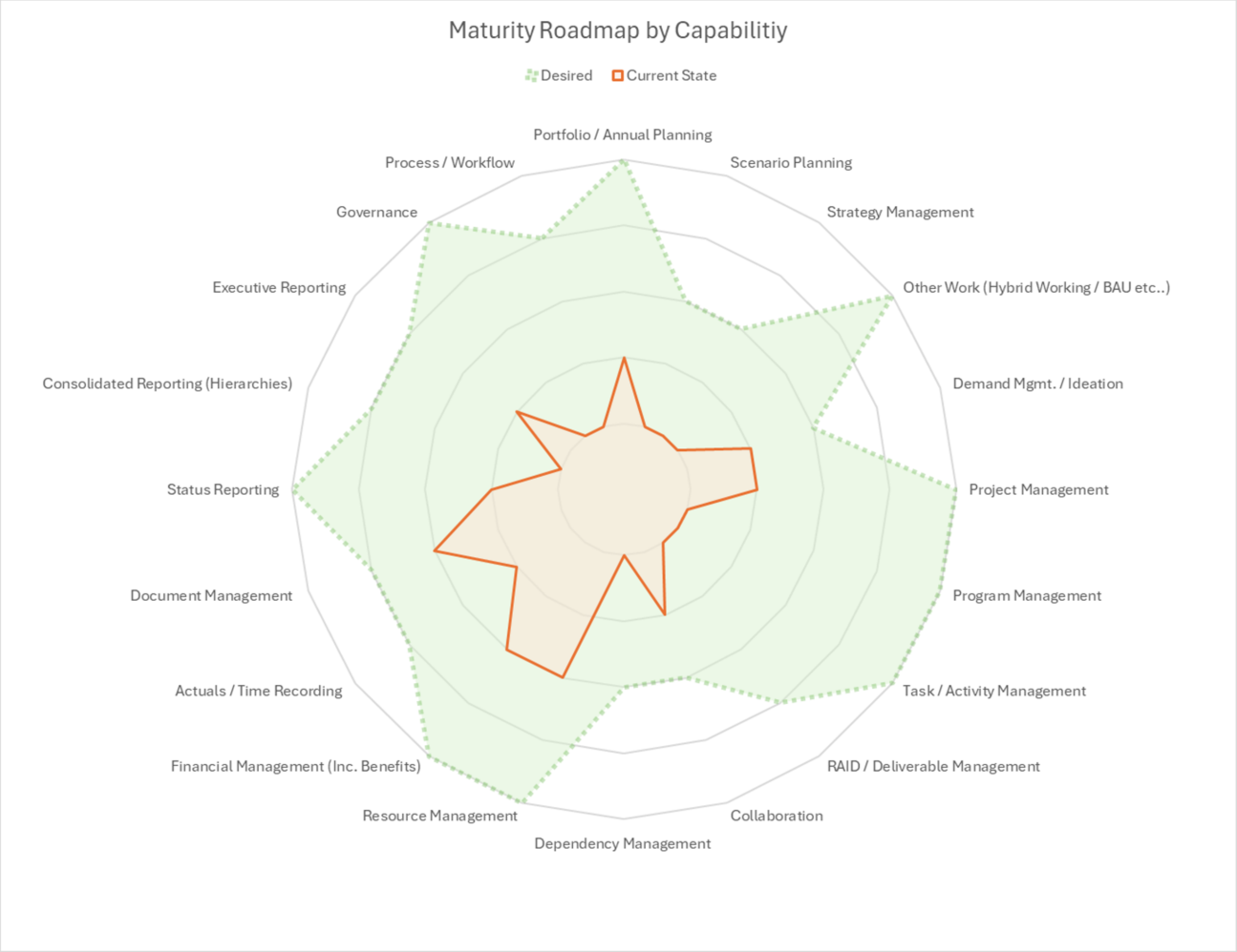
	Current State Challenges	Recommended Transition Steps	Enabling Principles, Behaviors & Tools	Future State
People & Process Change	End user community has limited understanding of Clarity's capabilities and how its features are best intended to be utilized to support common business processes.	Conduct Clarity "Roadshows" to demonstrate the Art of The Possible; Demand Intake, Top-Down Strategic Planning & Prioritization, end to end Resource & Financial Management, Project Planning/Scheduling, and visualizations and dashboards.	Demonstrate and communicate a commitment and understanding that Clarity has immense untapped strategic value for that can readily be attained.	Users will begin to see Clarity differently and begin to challenge pre-existing beliefs that it is too complicated and too technical-focused and be more open to change.
	End user community wants more empowerment, less friction and less complicated procedures. They want to maintain consistency while benefiting from configuration and processes specifically designed to address their needs and use cases.	Formalize a long-standing Community of Practice (CoP) to act as champions who empower users and support consistent business processes across the sectors (Power User Network, Train the Trainer, Office Hours, PM Coaching, Change Agency Board)	Aligning with Mission and Vision, we need to begin with a mindset that relentlessly puts people first, helping them to be better, faster, and stronger.	Users will experience more trust and collaborative efforts. They will learn from each other, feel more empowered and better equipped, and begin to demonstrate more consistent processes and ways of working. Friction and siloes will be reduced.

Maturity Overview – Now vs Future

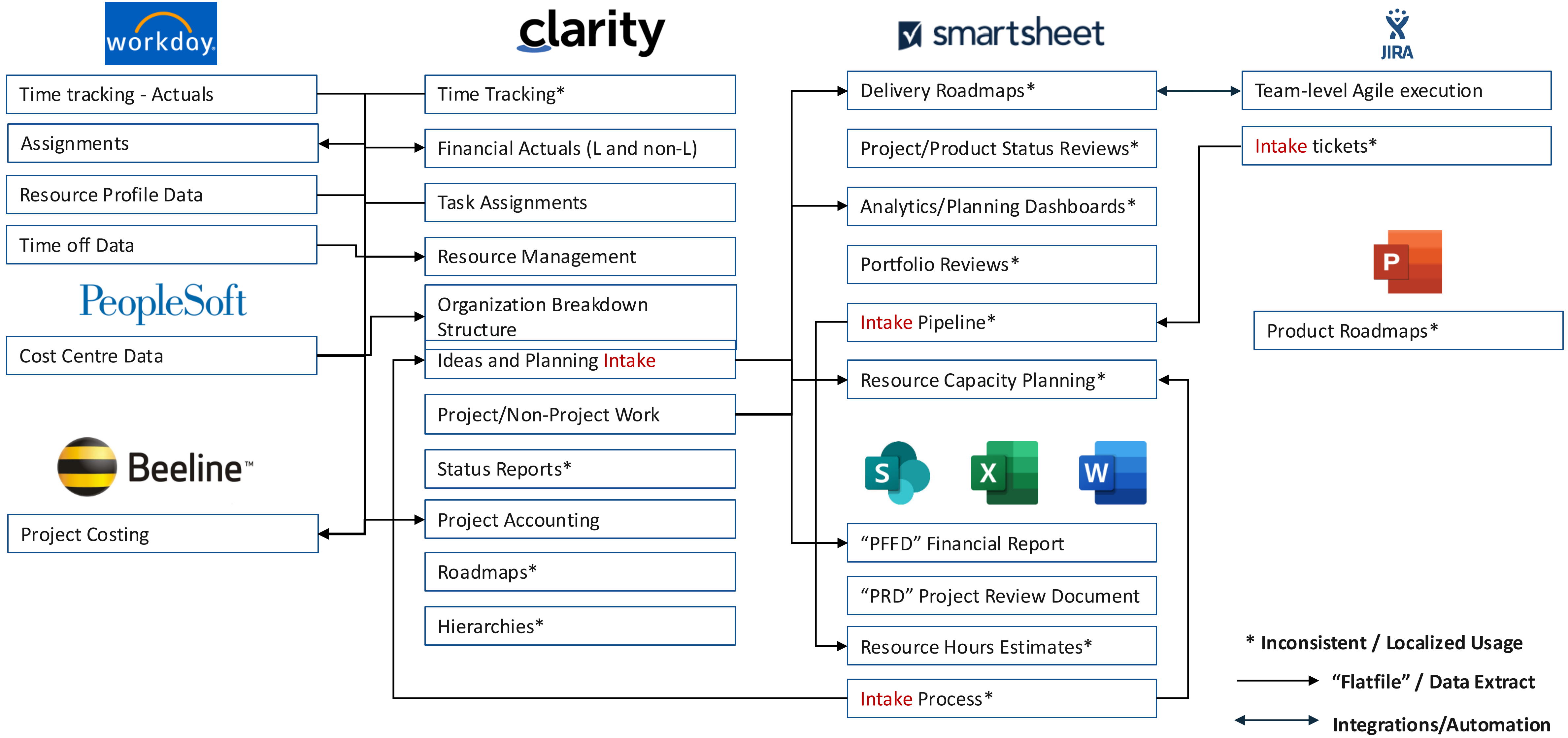
Example

	Current State	Desired
Portfolio / Annual Planning	2	5
Scenario Planning	1	3
Strategy Management	1	3
Other Work (Hybrid Working / BAU etc..)	1	5
Demand Mgmt. / Ideation	2	3
Project Management	2	5
Program Management	1	5
Task / Activity Management	1	5
RAID / Deliverable Management	1	4
Collaboration	2	3
Dependency Management	1	3
Resource Management	3	5
Financial Management (Inc. Benefits)	3	5
Actuals / Time Recording	2	4
Document Management	3	4
Status Reporting	2	5
Consolidated Reporting (Hierarchies)	1	4
Executive Reporting	2	4
Governance	1	5
Process / Workflow	1	4

Focus Areas



Capability Stack Current State



Capability Stack Possible Future State

Example

SAP

- Financials and Costing

clarity

- Time Tracking
- Financial Forecast/Cost Plan
- Resource Management
- Capacity Planning
- Budgeting
- RAIDE
- Status Reporting
- Ideas and Planning Intake
- Product Roadmaps
- CAR

Jira Align

- Delivery Roadmaps
- Agile Train/Program metrics

JIRA

- Team-level Agile
- Kanban boards
- DevOps
- Agile Team metrics
- Product Discovery plug-in

servicenow

- Intake – Global Ops & Security
- CAR Approval Workflow

smartsheet

- Project Schedule
- RAIDE
- Status Reporting

Integrations/Automation

Future State Process RACI

Example

Role \ Step	Prepare New Submissions	Create/Initialize Roadmap	Prep Waterline Scenario	Perform Waterline / Balancing	Align and Approve Scenario	Publish for Execution	Update Work Items
PPM Team	I	R	R	C, I	I	R, C, I	R, C, I
Portfolio Managers	I	A, C, I	R, A, C	R, C, I	R, C, I	R, A, C, I	R, C, I
Project Managers	R			C	C	I	R, A, C, I
Team / Delivery Leaders	C		I	C, I	R, C, I	I	C, I
Executive Leaders				A, C, I	R, A, C	I	I
Finance Partners	C			C	R, C, I	I	I
BUs/Requestors	R, A, C			C	C	I	R, C, I

R	RESPONSBILE – Performs the action step	C	CONSULTED – Assists with or provides input to the action step
A	ACCOUNTABLE – Ensures the step is performed (There can only be one ACCOUNTABLE for each step	I	INFORMED – Notified after the action step is complete

Change Impact Guide

Example

Role Estimated Impact (L/M/H)	START	CONTINUE	STOP
PPM Team (High)	1. Using Roadmaps for Waterline scenario process 2. Maintaining new data elements and taxonomy 3. Make system adjustments as guided by the business 4. Monitor process and iteratively improve	1. Support and enable stakeholders 2. Utilize legacy data elements required to maintain continuity of process (e.g. Portfolio OBS) 3. Monitor and maintain data integrity	1. Utilizing Portfolios in PPM Classic 2. Accepting / Prioritizing ad hoc out of cycle requests
Portfolio Managers (High)	1. Using Roadmaps for Waterline scenario process 2. Utilize new data elements and taxonomy 3. Facilitate ongoing monthly review cadence 4. Identify gaps/improvements; report to PPM Team	1. Prioritize in accordance with strategies and goals 2. Validate and review with business/stakeholders	1. Utilizing Portfolios in PPM Classic 2. Accepting / Prioritizing ad hoc out of cycle requests
Project Managers (Low)	1. Adjust to new data requirements (if applicable) 2. Adhere to new monthly cadence for submissions	1. Follow current sizing/estimating procedures 2. Make work item updates as appropriate following approved Waterline scenario	1. Submitting new requests ad hoc (out of cycle)
Team / Delivery Leaders (Mid)	1. Participate in Waterline scenario alignment and approvals using Roadmaps 2. Utilize Canvasses and other new visualizations provided in ProPM (TBD)	1. Monitor funding targets / constraints 2. Review requests and waterline scenarios and provide input	1. Utilizing Portfolios in PPM Classic
Executive Leaders (Mid)	1. Participate in Waterline scenario alignment and approvals using Roadmaps 2. Utilize Canvasses and other new visualizations provided in ProPM (TBD)	1. Oversee alignment to strategies and goals 2. Review requests and waterline scenarios and make executive decisions to approve/reject items 3. Enforce adherence to financial targets / constraints	1. Utilizing Portfolios in PPM Classic 2. Approving new requests ad hoc (out of cycle) – unless by Exception process
Finance Partners (Low)		1. Communicate funding targets / constraints 2. Review requests and waterline scenarios and provide input	
BUs / Requestors (Low)	1. Capture Project proposal detail in PPM (recommended) 2. Adjust to new data requirements (if applicable) 3. Adhere to new monthly cadence for submissions	1. Submit requests in accordance with strategies, goals, and financial considerations 2. Follow current sizing/estimating procedures	1. Using Excel or PowerPoint for Project Proposals (recommended) 2. Submitting new requests ad hoc (out of cycle)

Best-of-Fit Tools: Rego's Perspective on Alignment

Example

Capability*	Clarity (Best fit for Enterprise SPM)	Azure (Best fit for Agile DevOps)	monday.com (Best fit for isolated work)	ServiceNow (Best fit for automation/ITIL)	Spreadsheets & Custom tools
Demand Intake & Assessment	Ideas (self-service support, View Only licensing) (Ideal Fit; Current Use Case)	Manual Configuration (Some/Limited Ability)	Limited, not enterprise-focused (Some/Limited Ability)	Manual Configuration (Some/Limited Ability; Current Use Case)	N/A, fully manual (Poor Fit / Manual; Current Use Case)
Top-Down Investment Planning & Work Hierarchy	Industry-leading SPM/VSM Investment Planning (Ideal Fit)	Limited (Some/Limited Ability)	Limited, not enterprise-focused (Some/Limited Ability)	Extremely limited (PPM Module), manual/custom (Poor Fit / Manual)	N/A (Poor Fit / Manual)
Top-Down or Bottom-Up Financial Planning and Project/Product Financials	Native, robust, built-in functionality (Ideal Fit)	No native ability (Poor Fit / Manual)	Limited, not enterprise-focused (Poor Fit / Manual)	Extremely limited, manual (Poor Fit / Manual)	N/A, fully manual (Poor Fit / Manual; Current Use Case)
Traditional Project Management (Schedules, Risk, Issues, Status)	Native, robust, built-in functionality (Ideal Fit; Current Use Case)	No native ability (Poor Fit / Manual)	Native, highly configurable, limited native advanced PM capabilities (Current Use Case)	Native (PPM Module), requires heavy customization (Poor Fit / Manual)	N/A, fully manual (Poor Fit / Manual; Current Use Case)
Resource Capacity & Allocation Management	Native, robust, built-in functionality (Ideal Fit)	No native ability (Poor Fit / Manual)	Limited, not enterprise-focused (Poor Fit / Manual)	Native (PPM Module), requires heavy customization (Poor Fit / Manual)	N/A, fully manual (Poor Fit / Manual; Current Use Case)
Roadmaps (Portfolio, Product, Solution) & Scenario Planning	Native, robust, built-in functionality (Ideal Fit)	Ability to show timelines for Epics and features (Some/Limited Ability)	Some native; mainly Gantt focused (Some/Limited Ability)	Some capabilities (PPM Module), manual (Poor Fit / Manual)	N/A (Poor Fit / Manual; Current Use Case)
Collaboratively plan, automate, track, and visualize work tasks and deliverables	Native, traditional schedules, Gantt, Boards, Datasheets, Checklists and To Do items. Native social collaboration. (Ideal Fit)	Native, built-in functionality using Boards (Ideal Fit; Current Use Case)	Native, good for high-level collaboration (Ideal Fit; Current Use Case)	Native (Ideal Fit; Current Use Case)	N/A (Poor Fit / Manual; Current Use Case)
Executive level insights and dashboards (Enterprise/Portfolio)	Flexible, user-configurable dashboards, widgets,& canvasses. DWH & BI support (Ideal Fit)	Native, built-in functionality (Agile/Sprint focused) (Some/Limited Ability; Current Use Case)	Native ,built-in functionality (Some/Limited Ability; Current Use Case)	Very limited, manual (Some/Limited Ability)	N/A, fully manual (Poor Fit / Manual)
PI/Sprint Planning & User Story / Epic Delivery	Possible through custom configuration (Some/Limited Ability)	Native, built-in functionality (Ideal Fit; Current Use Case)	N/A (Poor Fit / Manual)	Custom configuration (Poor Fit / Manual)	N/A (Poor Fit / Manual)

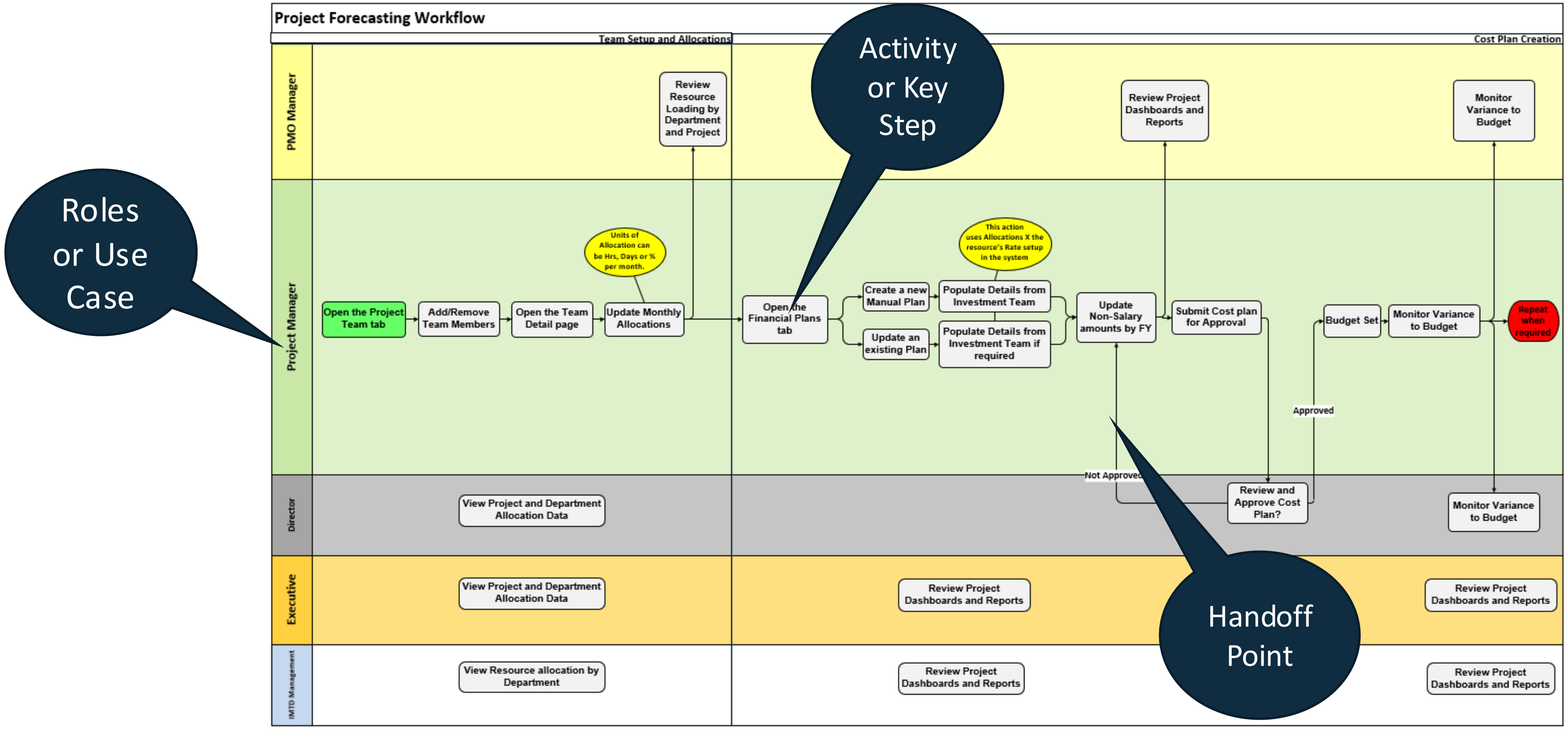
Not Inherent · Poor Fit / Manual · Some/Limited Ability · Ideal Fit · Current Use Case

** Total solution capabilities go beyond what is displayed here*

Process Mapping

Example

Mapping key steps inside each phase of work will identify current state slow and possible gaps.



Priority Summary

Example

Immediate (0-6 months)

- Produce a Capability Matrix & Data Mapping diagram
- Improve Performance
- Raise Clarity's Profile / Relaunch the Positioning
- Improved communication to wider audience of Clarity Strategy, Roadmap and Positioning
- Existing User/Access Group reconciliation / User Maintenance
- Define Roles & Responsibilities / Increase Change Governance and Adopt a Product Centric Approach
- Review Reporting Tooling Options
- Investigate bringing Headcount Forecast into Clarity
- Investigate Timesheet Automation

Dependent on Upgrade (Dec 25 >)

- Replace all Data Extracts with Data Extractor
- Launch Roadmaps
- Increase Use of Templates & Blueprints
- Provide Exec / Committee Level Dashboards & Reporting
- Improve user Experience / 100% Modern UX
- Awareness of Unused OOTB features to add immediate value
- Launch a new Reporting and Visualizations Strategy and Roadmap

Mid Term (6-12 months)

- Integrate with Option to Replace Smartsheet
- Integration – Agile Tooling
- Improve SAP Integration
- Awareness of transformational topics
- Review BAU Support Model
- Automate Missing Timesheets and Notifications
- Reduce & Automate Recurring Manual Admin
- Monitor & Increase User Adoption
- Leverage Clarity for more of the common investment artefacts
- Increase Investment Hierarchy Maturity
- Investment Lifecycle - Ideas > Custom Investment

Long Term Goals (Beyond Next Year)

- SPM Education
- Review Timesheet Accrual Process
- Improve Integration with Workday
- Investigate a Capitalization % Setup
- Revisit Team Based Planning

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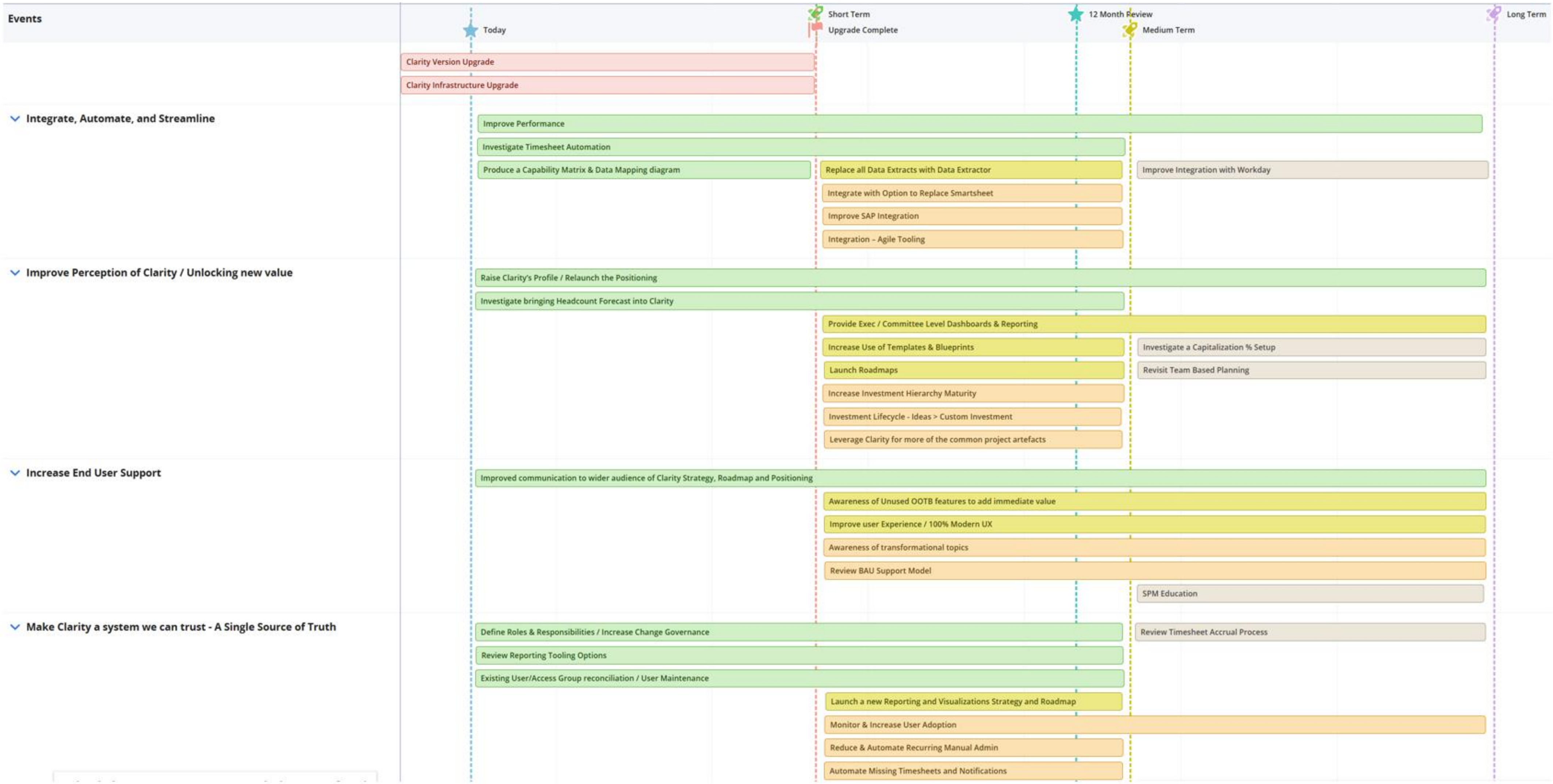
Legend – Primary Lead for Work
Customer Rego Shared

Timing by Priority

Example

Backlog Priority > Pre-Requisite | Immediate | Dependent on Upgrade | Medium Term | Long Term



Order of Magnitude – Immediate Recommendations

Example

Roadmap Item	Rego OoM	Customer OoM
Produce a Capability Matrix & Data Mapping diagram	Small	Small
Improve Performance	Large	Large
Raise Clarity's Profile / Relaunch the Positioning	Medium	Medium
Improved communication to wider audience of Clarity Strategy, Roadmap and Positioning	Small	Medium
Existing User/Access Group reconciliation / User Maintenance	Medium	Medium
Define Roles & Responsibilities / Increase Change Governance and Adopt a Product Centric Approach	Small	Medium
Review Reporting Tooling Options	Small	Small
Investigate bringing Headcount Forecast into Clarity	Small	Small
Investigate Timesheet Automation	Small	Small

Order of Magnitude	Days of Effort
Small	< 10 Days
Medium	10-20 Days
Large	> 20 Days

Legend – Primary Lead for Work		
Customer	Rego	Shared

Details for Each Recommendation

Example

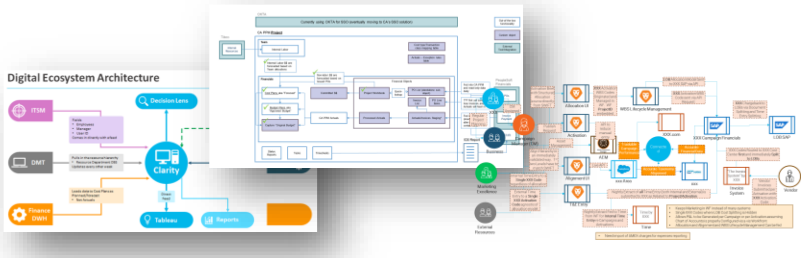
Overview	Key Challenges Addressed	Value and Key Results
Produce a capability matrix and data mapping / ownership diagram between the various tools that were mentioned in the interviews better understand overlaps and master source of data entry. **Use this to drive centralised guidance on preferred tooling strategy as well as defining a preferred integration approach between direct integrations, leveraging the ERP middleware solution already in place in Sky or investigating the value of an integration platform ConnectALL**	• **No clear definition of existing and "to be" ecosystem** • **Overlapping functionality and use cases** • **Lack of documented "master source" of data** • **Limited centralised knowledge on which to build integrations noted in Roadmap**	• **Visibility of Clarity & associated ecosystem** • **Reduction in Functionality overlap** • **Single "master source" for each dataset** • **Baseline for future integration design and approach**

Recommended Actions	Dependencies / Related Recommendations
• *Rego to produce a capability matrix for the "in scope" tools based on the available functionality in each system* • *Add customer specific use cases, existing integrations and notes/constraints* • *Discuss, Agree and Document a proposed master source for each dataset and capability, along with proposed integrations and integration approach*	

Additional Examples of Deliverables

Roadmaps

- Product roadmaps
- Portfolio roadmaps
- Epic and Feature roadmaps
- Architectural enablement roadmaps



Architecture

- System architectures
- Application architectures
- Governance models

Additional Examples of Deliverables

Metrics

- SMART – Specific, Measurable, Achievable, Relevant, Time-bound
- OKR and KPI metrics
- Behavior metrics
- Sentiment metrics (CSAT, NPS)
- Cost-of-delay
- Direct feedback
- Product usage tracking
- Customer health metrics

Journey and Value Mapping

- Identify product steps
- Identify and Eliminate Waste
- Visualize Flow of Work
- Blueprint for Improvement

Integration Maps

- Detailed integration maps of impacted systems

Summary

Assessment Value

For the Client, the DEA will create tactical recommendations and a roadmap to align tools, streamline process and enable people manage project information effectively.

For Broadcom and Rego, the DEA will allow us to gain insight into project practices in detail so we can position offerings for long term engagements. A roadmap of future enhancements, work and growth.

Ecosystem Assessment Summary

- Gain an objective view of your Clarity ecosystem
- Assess Clarity's role within the broader technology landscape
- Understand how teams work, collaborate, and derive value from Clarity
- Align business stakeholders, end users, and platform owners around a shared vision
- Identify opportunities for greater value realization
- Support evolving operating models and business priorities
- Enable better decisions through trusted data and transparency
- Build a practical roadmap for continuous improvement

Questions?

Survey

Please take a few moments to fill out the class survey.

Your feedback helps us improve future events.

Jacob Cancelliere, PMP

VP of Account Enablement

Rego Consulting

Let’s Connect on LinkedIn

Ben Raper

Principal Consultant – Clarity

Let’s Connect on LinkedIn

Thank you!

Let's continue the conversation! Connect with us on LinkedIn!

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Let us know how we can improve!
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