



Mastering the PPM and Agile Toolset – Clarity and Agile Integrations

Your Guides:
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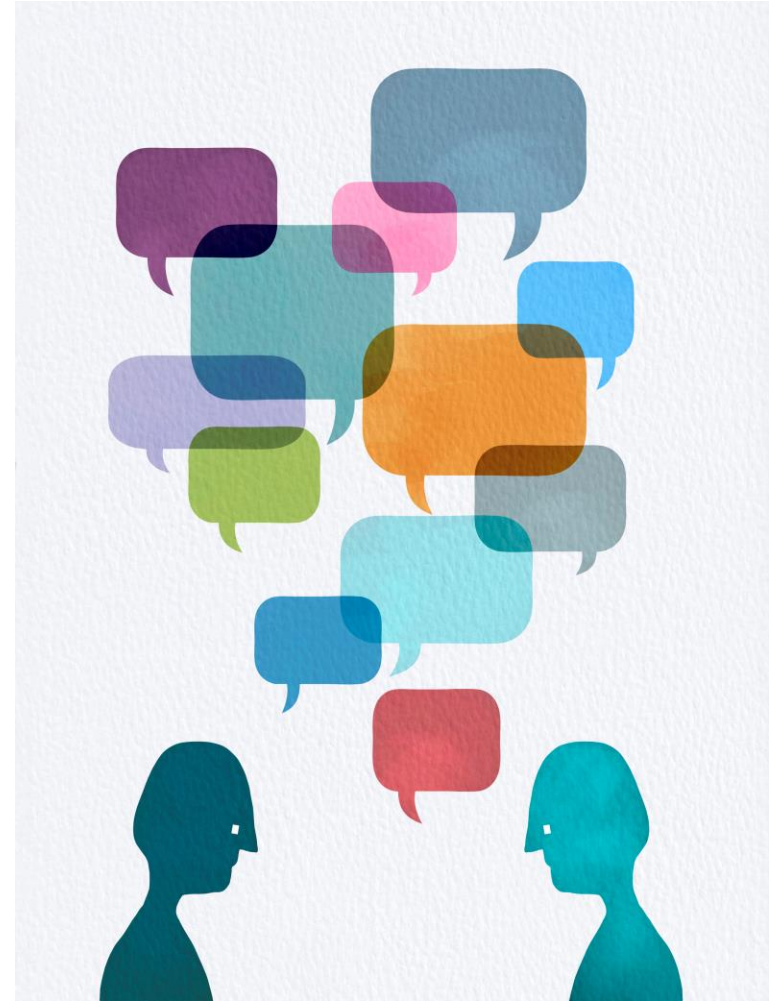
Introduction

Are you struggling to implement Agile tools alongside Clarity?

This class reviews best practices for implementing agile tools in conjunction with Clarity in a bimodal environment. We will explain how Clarity can be used to govern both types of work and teams and how Agile tools should interface into Clarity.

Introductions

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

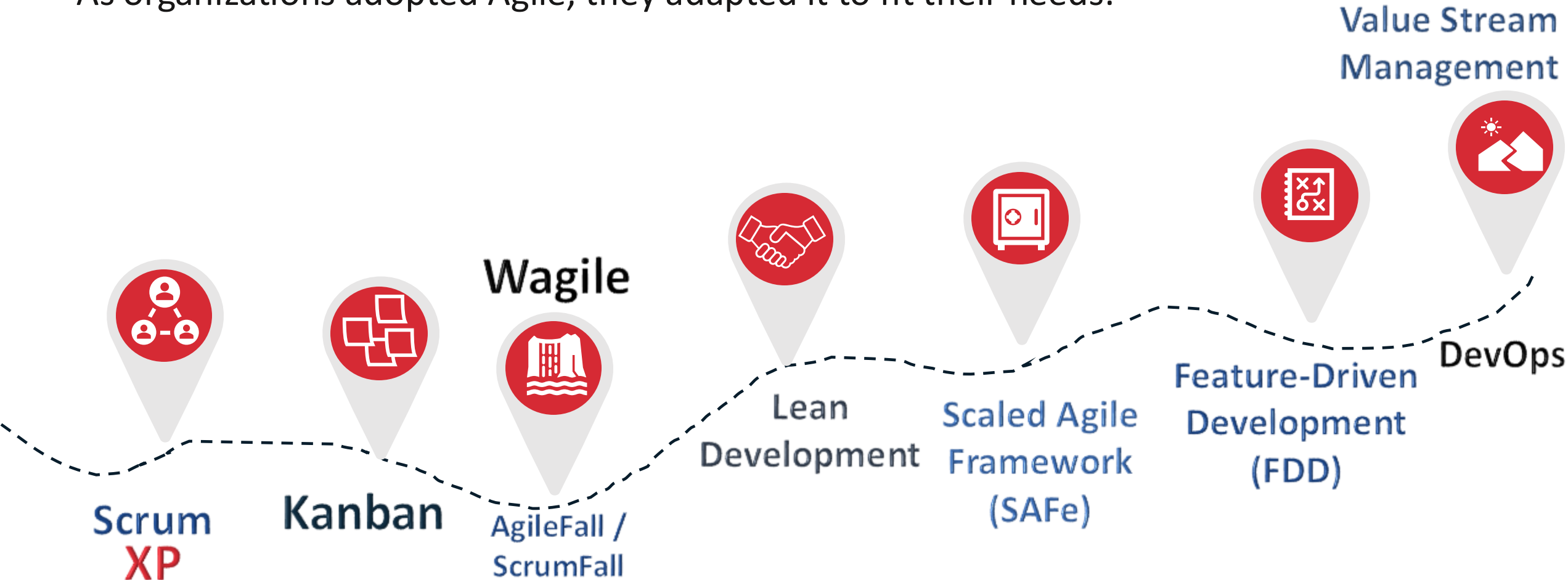


Agenda

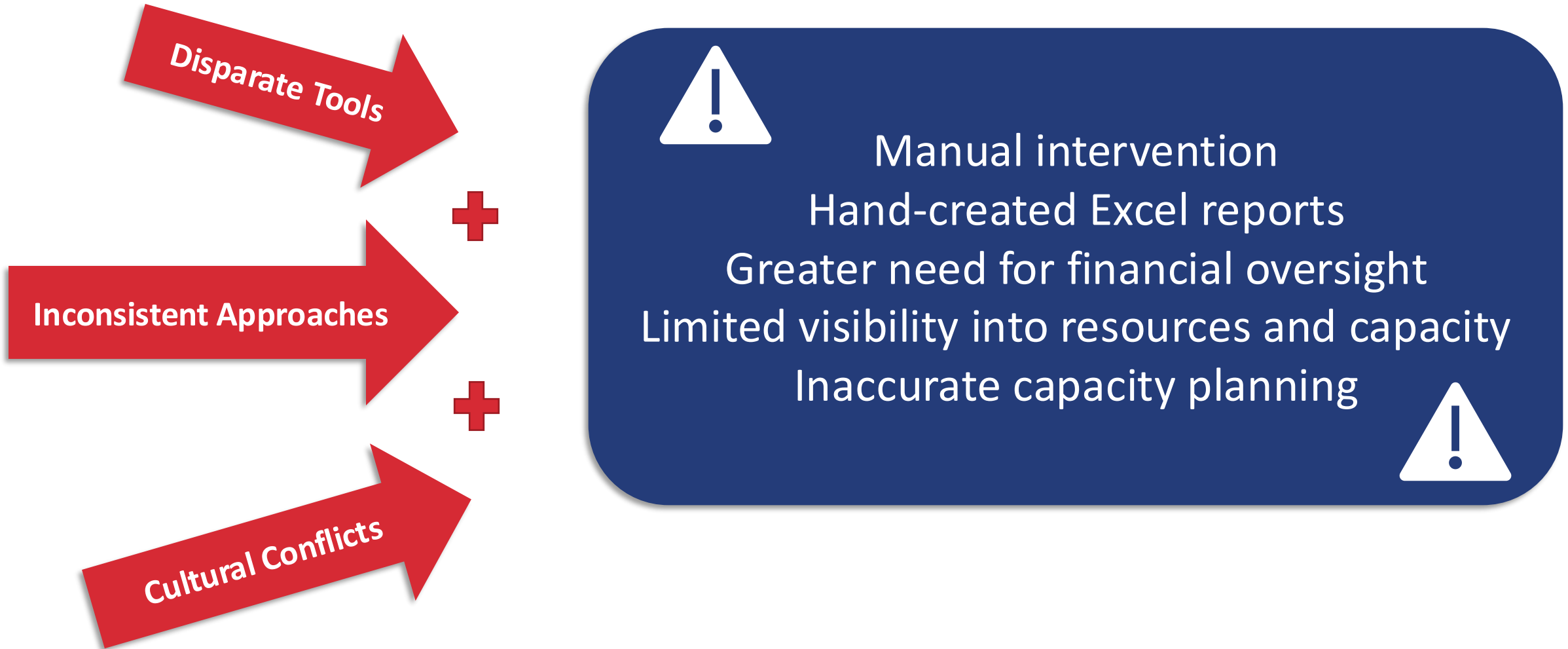
- An Agile Revolution and Evolution
- Integrations
- Consolidations
- Transformation
- Personas
- Connectors

An Agile Revolution and Evolution

- ✓ Agile development approaches were introduced more than 20 years ago!
- ✓ As organizations adopted Agile, they adapted it to fit their needs.



Agile Doesn't Always Mean Organizational Agility



General Reasons for Connecting Your PPM and Agile Tools



Right Tool, Right Granularity

Tools have a core “purpose and granularity.”
Use the right ones, for the right use cases.



Financial

Send time-tracking data from Agile tools to Clarity.



Reporting and Transparency

Decision-makers want a “one-stop-shop”
for monitoring investments.



Resource Management

Show how people are allocated
across work.



Time Tracking

Avoid duplicate time-entry.



Work Management Across Delivery Methods

Gain insight and consistency no matter
what delivery methods are used.



What is driving the decision to integrate your Agile tool with Clarity?

But One Size Does NOT Fit All

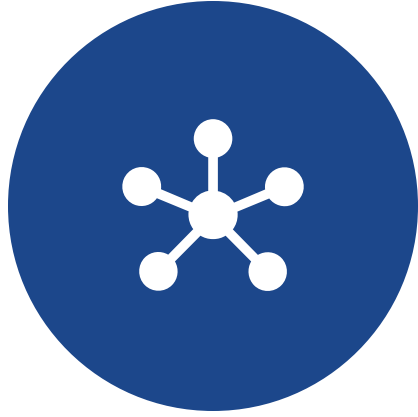
Here at Rego, we meet you where you are on your journey. If you are looking for simple tool integration or more organizational transformation, we are here to help.



Question: Where Are You?



Three General Approaches



INTEGRATE



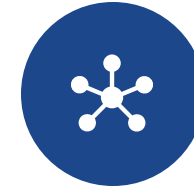
CONSOLIDATE



TRANSFORM

Integration Approach

Rego's Most Basic Approach: System-to-system integration



INTEGRATE

- **Is a GOOD fit, if you:**

- Have mature tools and processes
- Have aligned with finance on needs and expectations
- Need tool-to-tool integration (Clarity to your Agile tool) for information and updates

- **Is not for organizations that need:**

- More consolidated data and reports
- Need coaching or organizational change help
- Need to normalize data across lots of Agile and PPM tools

Consolidation Approach

Rego's Intermediary Solution:

In addition to integration, we help with data consolidation and normalization



CONSOLIDATE

- **Is a GOOD fit, if you:**

- Are maturing your methodologies
- Have begun aligning with finance on needs and expectations
- Need tool-to-tool integration (Clarity to your Agile tool) for information and updates
- Want to normalize data and remove manual intervention between systems

- **Is not for organizations that need:**

- Transformational help
- Need coaching or organizational change help
- Need only tool-to-tool integration

Transformation Approach

Rego's Most Advanced Approach:

We help you transform your delivery model



TRANSFORM

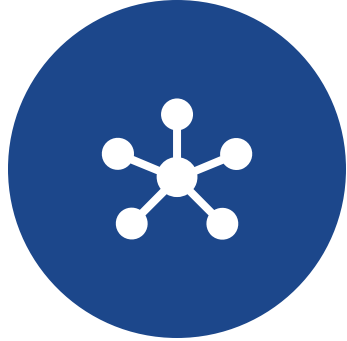
- **Is a GOOD fit, if you:**

- Have leadership buy-in
- Have commitment from finance
- Want transformational coaching
- Want help with reporting and consolidated outputs

- **Is not for organizations that:**

- Want only tool-to-tool basic integration
- Still need finance or leadership support
- Don't want to change approaches

Three General Approaches



INTEGRATE

Agile and PPM Tools
Targeted Integration



CONSOLIDATE

Agile and PPM Tools +
Data and Content Normalization



TRANSFORM

Agile and PPM Tools +
Data and Content Normalization +
Coaching and Transformation

Develop Your Plan!



Understand Your Problem, Then Integrate

Successful integration begins with a clear understanding of the systems and data you're integrating.



Understand Your Data



Develop a Data Dictionary for each tool



Identify every entity and field, type, and values



Identify actual data usage and quality for each



Map data between tools and confirm that each element belongs in the integration



Clean Up Your House Before You Put More in It



 Who is impeded by their system being the wild west?

Integration Governance - Establish Protocols



Questions to consider:

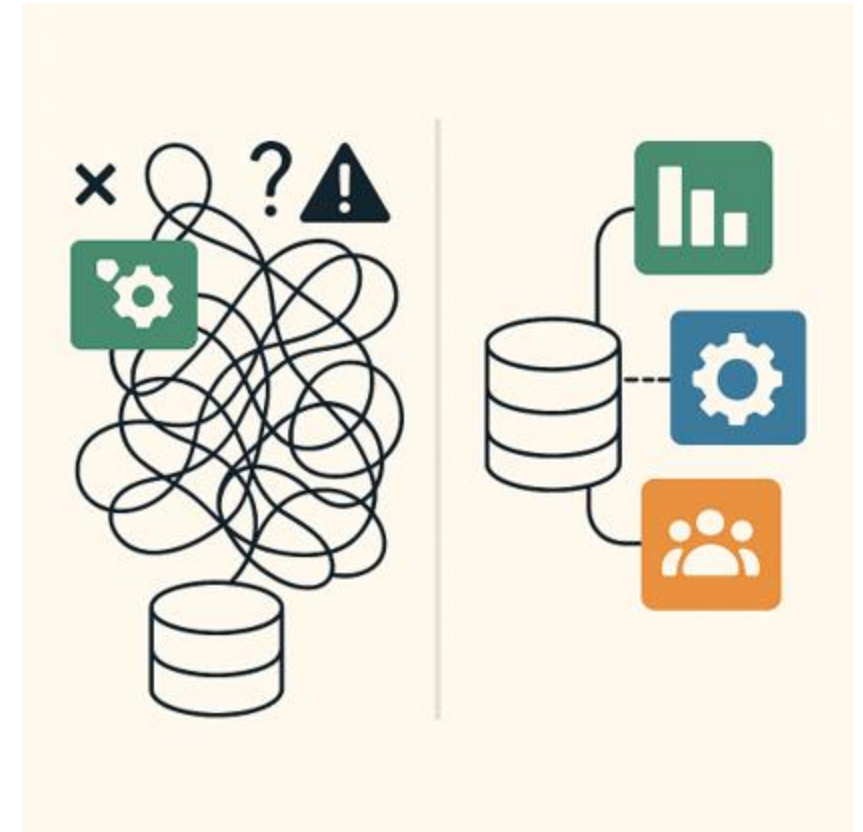
- Which the system is the source of record?
- Does it really add value in the other system?
- What problem or need will the integration solve?



Establish intake and approval processes for new data requests

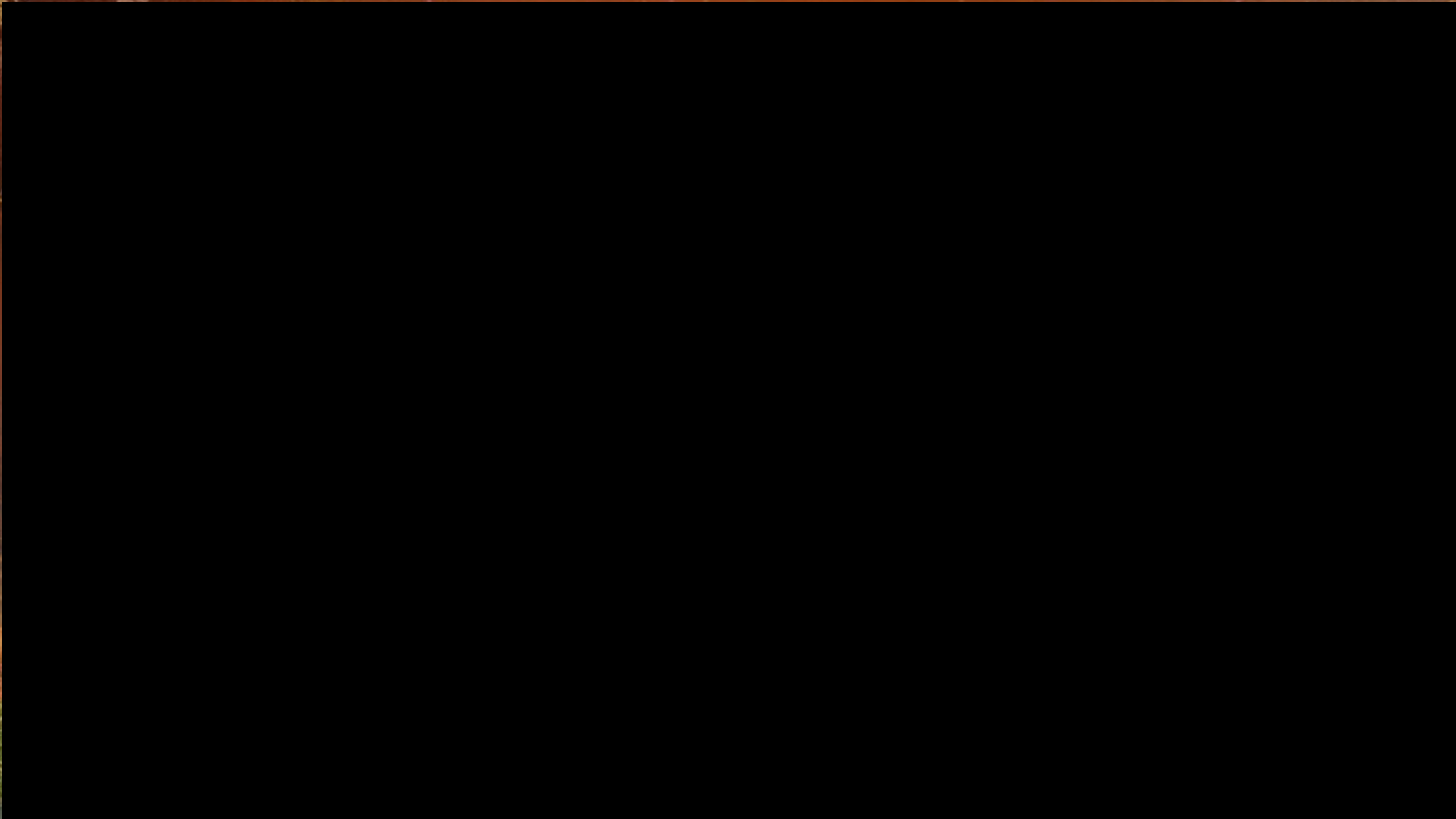


Develop a forum and cadence to review requests

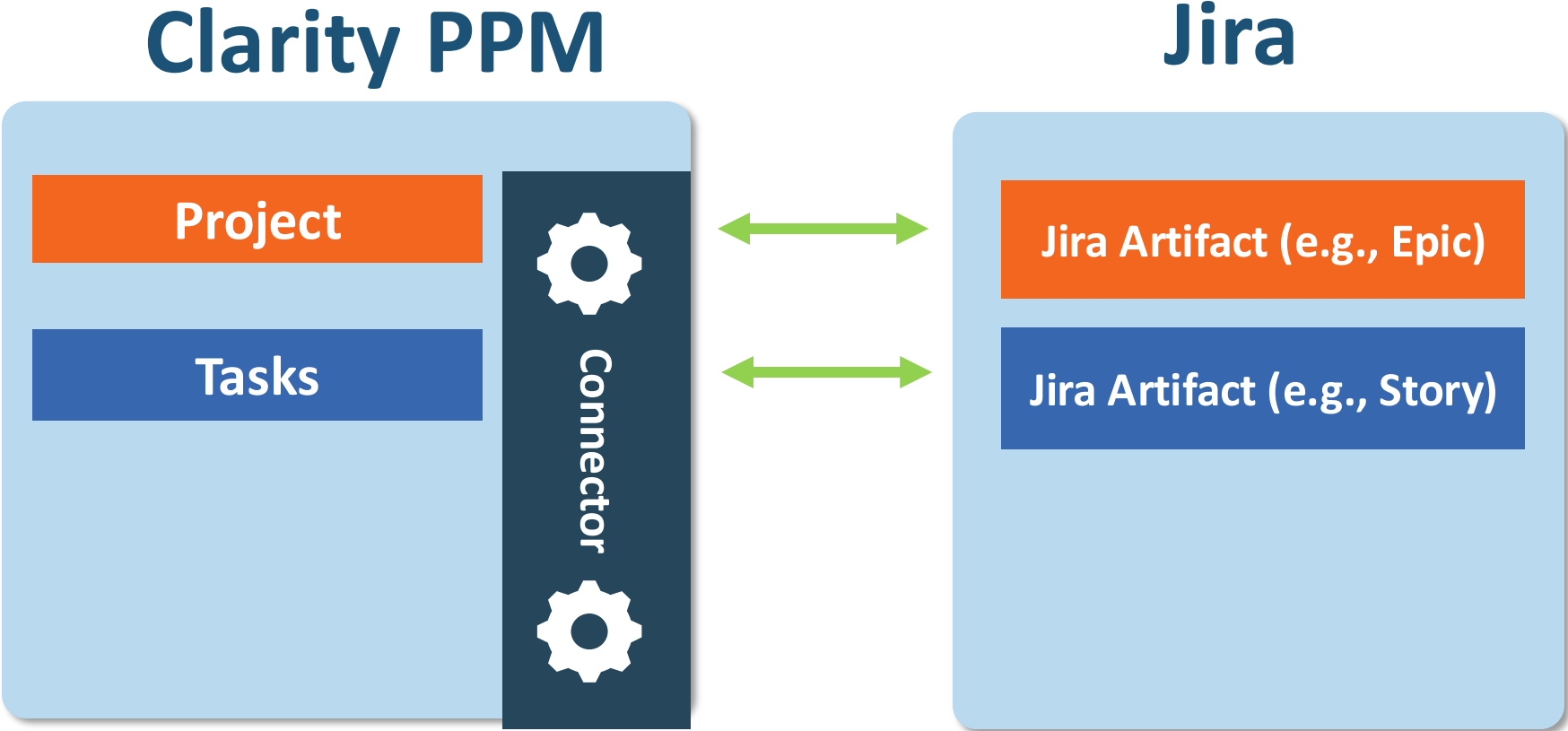


Bring It to Life: JIRA Connector by Rego

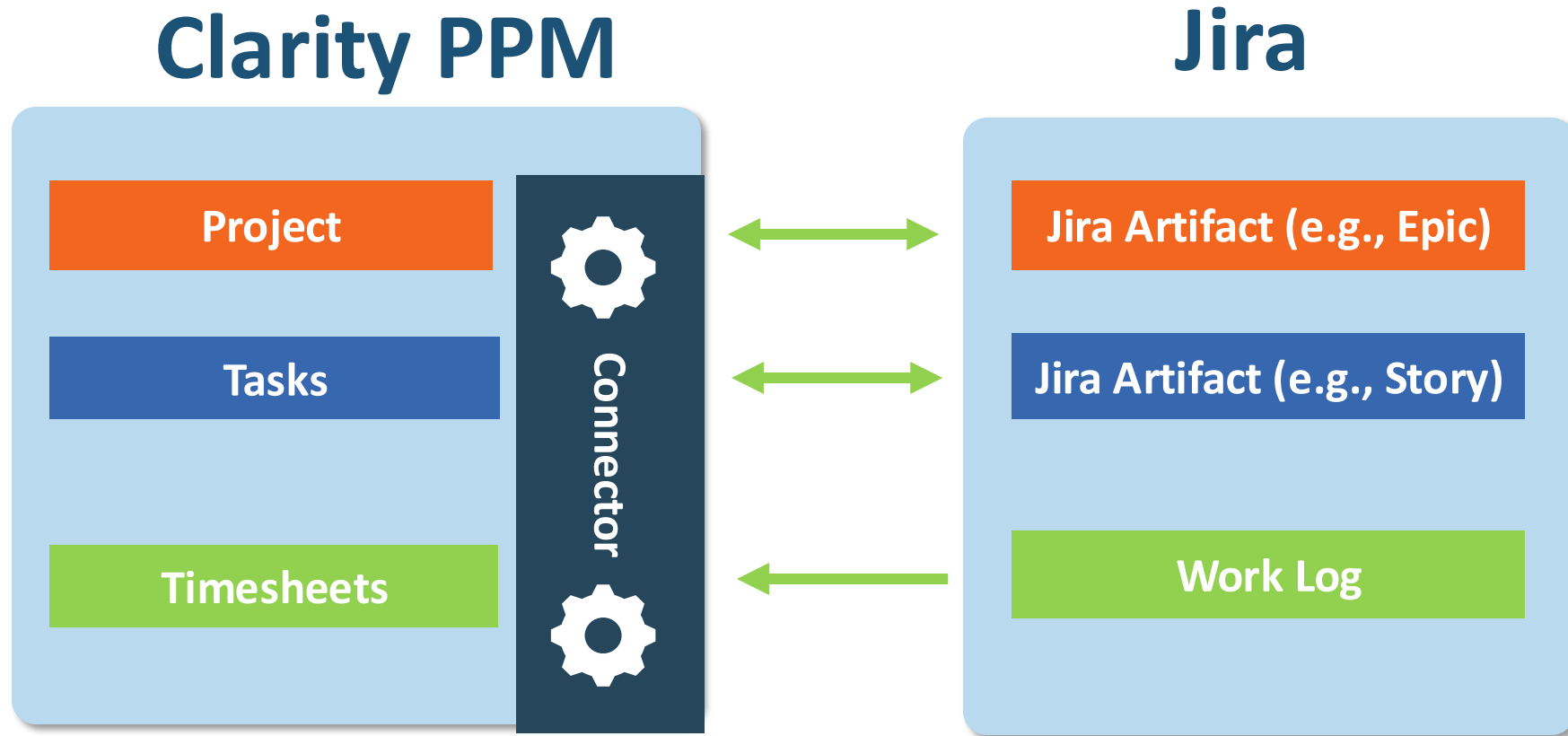




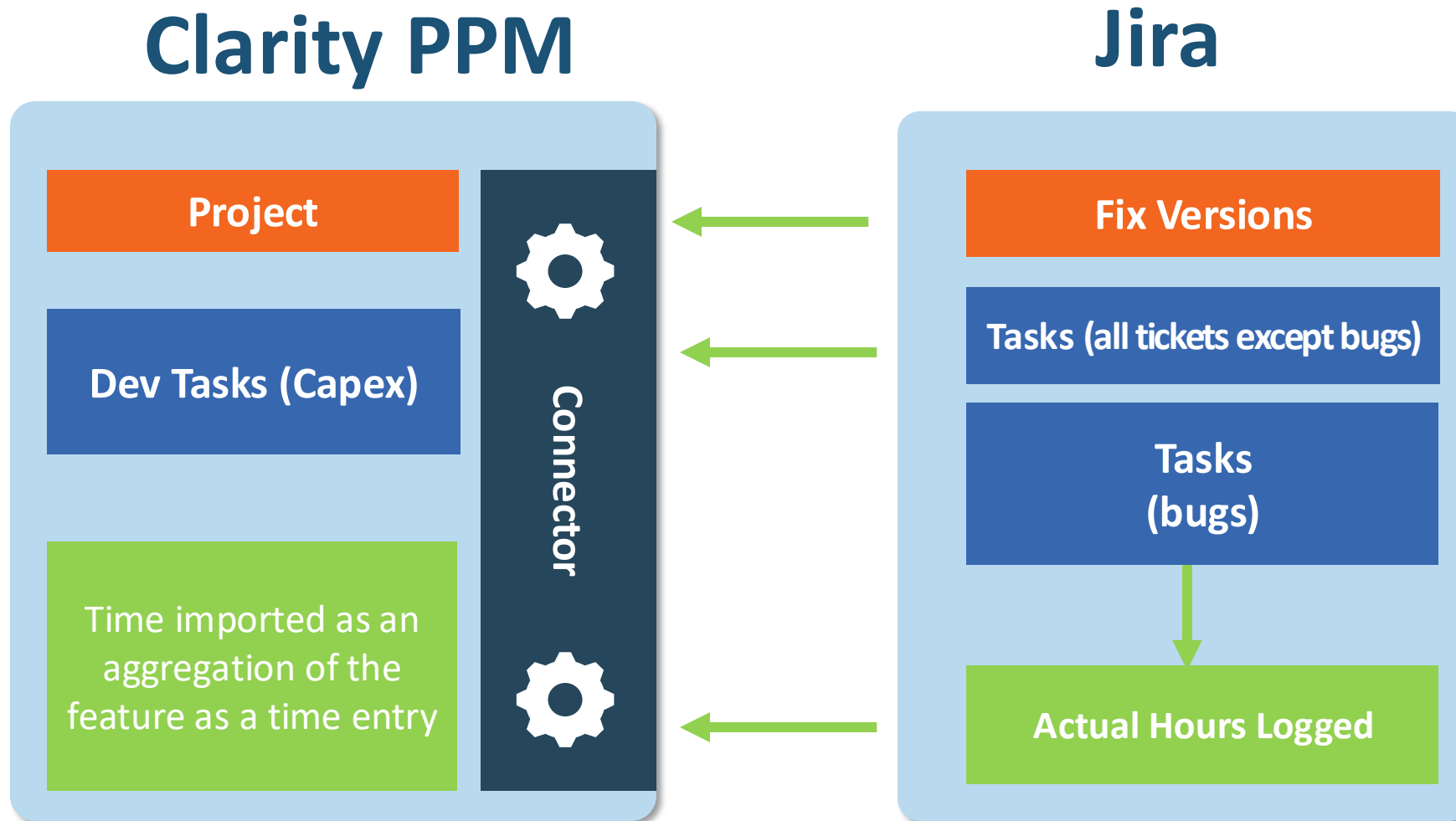
Standard Approach – Standard Integration of Jira and Clarity



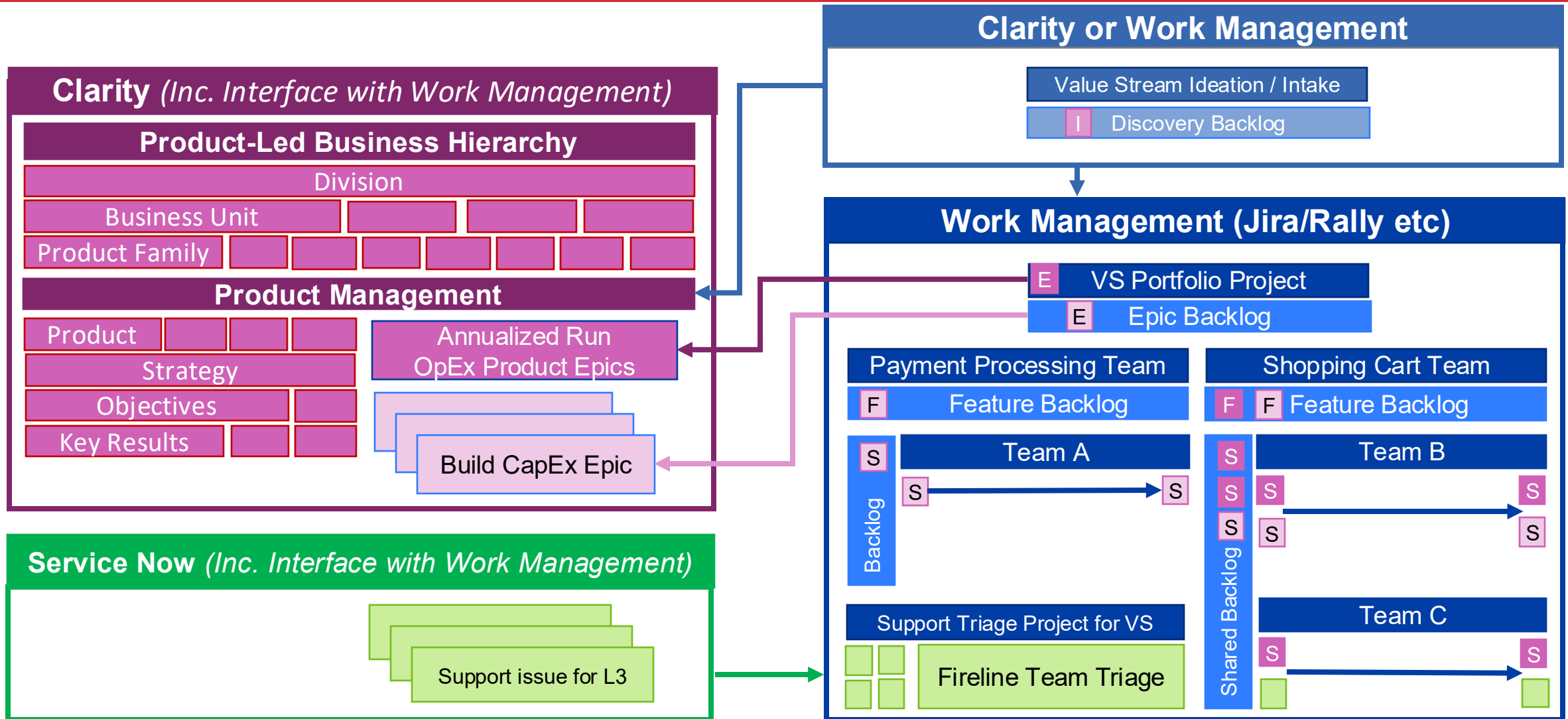
Standard Approach – Standard Jira with Worklog



Tailored Approach – Fix Versions (Customer Example)



Product Led Hybrid Ecosystem – (Customer Example)



Automated Time Tracking from JIRA



A client wanted a solution that created timesheets without their engineers having to fill out a timesheet.

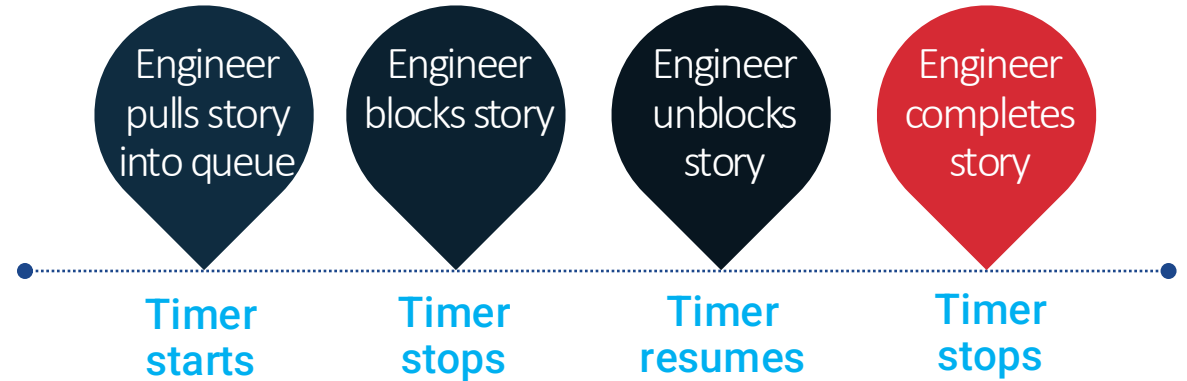


Rego built a solution that works like a stopwatch.

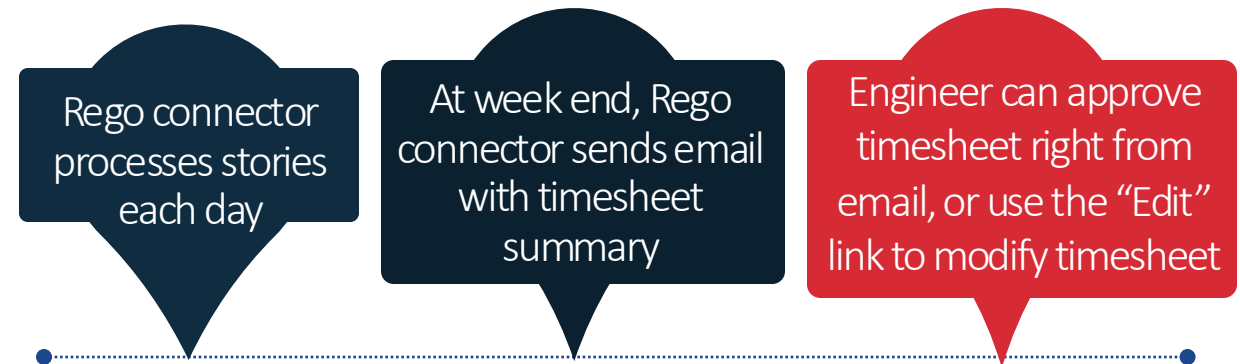


Any newly created JIRA Issues (associated with integrated Epic) OR updates to already imported JIRA Issues OR Time booked on JIRA Issues and sub-tasks is brought over to CA PPM by scheduled Jobs.

JIRA



Clarity PPM



Bring It to Life:

Agile > Clarity Screenshots

Agile Blueprint

Focused modules and a different dataset to Waterfall and other initiatives but still all part of the same system and dataset.

clarity

Home

Executive Dashboard

Ideas

Project Tiles

Projects

Value Streams

Strategy

Investments

Product

OKRs

Programs

Pages

Status Reports

Rego Power BI

Rego Power BI JS

My Workspace

Tasks

To Dos

Hierarchies

Agreements

Roadmaps

Resource Directory

Plans

Staffing

Teams

Resources

Enterprise Risks

Reporting

Timecharts

Collapse

Projects

EP1 - Data Quality Rule Engine Enhancement

PR2195

Needs Help

Agile Performance

Tasks

Properties

Bi-directional Agile Sync

Staff

Financials

Risks

Issues

Status

Collapse all

Project Summary

Project Name *

EP1 - Data Quality Rule Engine Enhancement

Project ID *

PR2195

Start *

Jan 29, 2024

Go Live Date

Jun 26, 2025

Finish *

Aug 19, 2026

Project Type

Product Development

Work Status

Active

Objective

This online shopping app is a full-featured website and shopping cart system will ensure that our customers have the flexibility needed to have an awesome online experience. This app will follow the basic concepts allowing the customer to shop virtually using the Internet and buy the items and articles of their desire from the store. All information pertaining to the products will be stored at the server side (store).

Lean Canvas

Problem

This online shopping app is a full-featured website and shopping cart system will ensure that our customers have the flexibility needed to have an awesome online experience. This app will follow the basic concepts enabling the customer to shop virtually using the internet and buy the items and articles of their desire from the store. All information pertaining to the products will be stored at the server side (store).

Solution

Introduce new features that align to the business objectives as prioritized by the business and the product owner.

Unfair Advantage

We have the best teams that work seamlessly together and have experience with the technology.

Unique Value Proposition

We must innovate to keep up with the digital transformation of the marketplace.

Agile Summary

Portfolio Item ID	Agile State	Agile Risk Score	Agile Value Score	Agile Investment Category
I1	Build	3	8	Short Term Growth
Agile Planned Start	Agile Planned Finish	% Done By Agile Plan Estimate	% Done by Story Count	Agile Preliminary Estimate
Jul 5, 2021	Nov 4, 2021	44.40%	45.07%	
Agile Actual Start	Agile Actual Finish	Estimated Story Points	Estimated User Stories	
Aug 23, 2021		268.00	71	
		Accepted Story Points	Accepted User Stories	

Nested Work Views

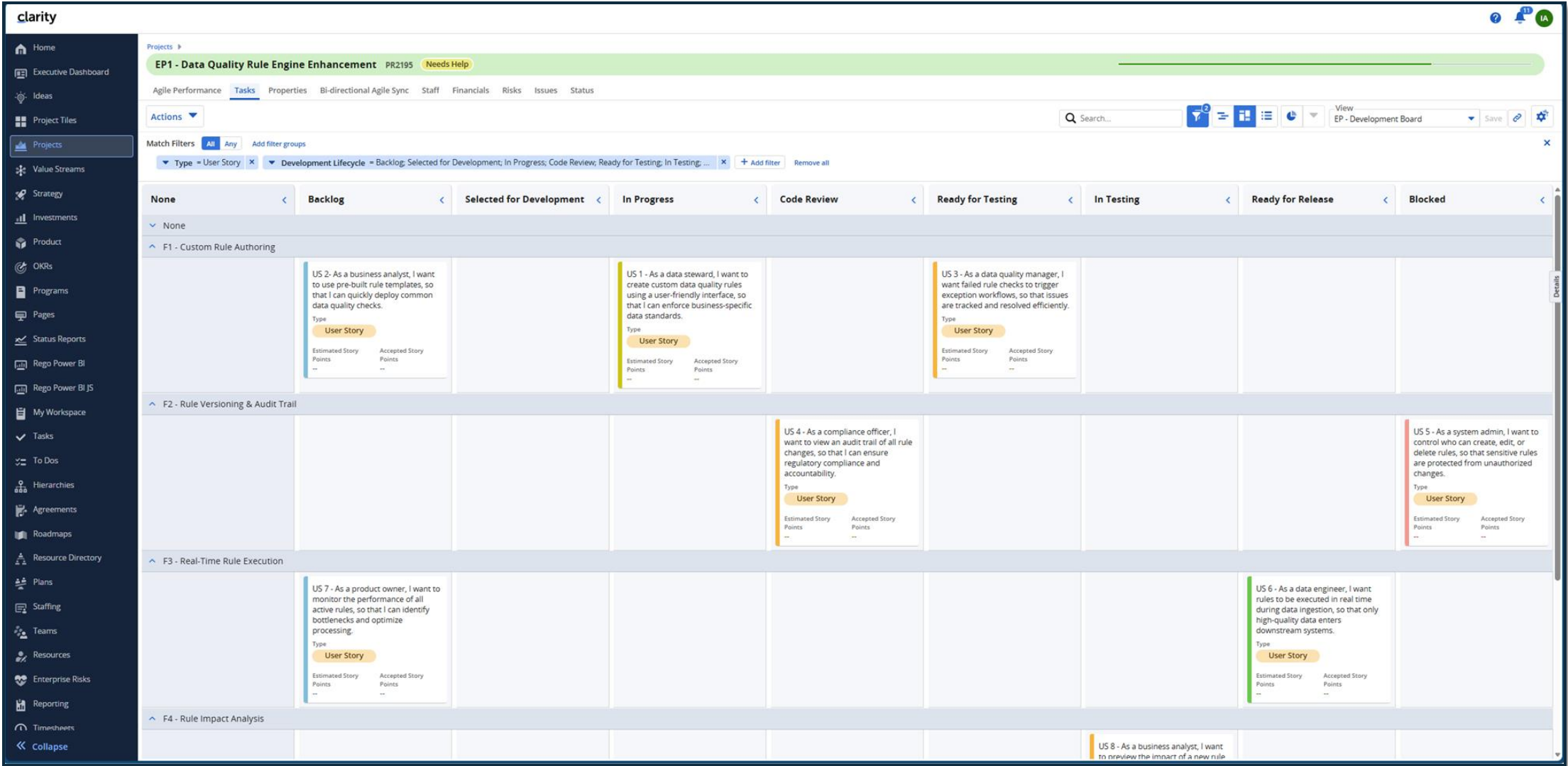
Summarize and organize Agile work with tags for type, development lifecycle, etc.

The screenshot displays the Clarity project management interface. On the left is a dark sidebar with navigation options: Home, Executive Dashboard, Ideas, Project Tiles, Projects (selected), Value Streams, Strategy, Investments, Product, OKRs, Programs, Pages, Status Reports, Rego Power BI, Rego Power BI JS, My Workspace, Tasks, To Dos, Hierarchies, Agreements, Roadmaps, Resource Directory, Plans, Staffing, Teams, Resources, Enterprise Risks, Reporting, and Timesheets. The main area shows a project titled 'EP1 - Data Quality Rule Engine Enhancement' with ID 'PR2195' and a 'Needs Help' tag. Below the title are tabs for 'Agile Performance', 'Tasks' (selected), 'Properties', 'Bi-directional Agile Sync', 'Staff', 'Financials', 'Risks', 'Issues', and 'Status'. A search bar and view options (EP - Epic Overview) are at the top right. The 'Match Filters' section shows 'All' and 'Any' filters. The main table lists tasks with columns: Type, Name, Task Narrative, Feature, Development Lifecycle, Accepted Story Points, and Estimated. The tasks are organized into a hierarchy: EP1 - Data Quality Rule Engine Enhancement (Epic) contains F1 - Custom Rule Authoring (Feature), which contains three User Stories (US 1, US 2, US 3). F1 contains F2 - Rule Versioning & Audit Trail (Feature), which contains two User Stories (US 4, US 5). F2 contains F3 - Real-Time Rule Execution (Feature), which contains two User Stories (US 6, US 7). F3 contains F4 - Rule Impact Analysis (Feature), which contains one User Story (US 8). F4 contains F5 - Role-Based Access Control for Rules (Feature), which contains two User Stories (US 9, US 10). The Development Lifecycle column shows various statuses: In Progress, Backlog, Ready for Testing, Code Review, Blocked, Ready for Release, and In Testing.

Type	Name	Task Narrative	Feature	Development Lifecycle	Accepted Story Points	Estimated
Epic	EP1 - Data Quality Rule Engine Enhancement					
Feature	F1 - Custom Rule Authoring	Allow users to define and manage custom data quality rules via a UI.				
User Story	US 1 - As a data steward, I want to create custom data quality rules using a user-friendly interface, so that I can enforce business-specific data standards.		F1 - Custom Rule Authoring	In Progress		
User Story	US 2 - As a business analyst, I want to use pre-built rule templates, so that I can quickly deploy common data quality checks.		F1 - Custom Rule Authoring	Backlog		
User Story	US 3 - As a data quality manager, I want failed rule checks to trigger exception workflows, so that issues are tracked and resolved efficiently.		F1 - Custom Rule Authoring	Ready for Testing		
Feature	F2 - Rule Versioning & Audit Trail	Track changes to rules, including who made them and when.				
User Story	US 4 - As a compliance officer, I want to view an audit trail of all rule changes, so that I can ensure regulatory compliance and accountability.		F2 - Rule Versioning & Audit Trail	Code Review		
User Story	US 5 - As a system admin, I want to control who can create, edit, or delete rules, so that sensitive rules are protected from unauthorized changes.		F2 - Rule Versioning & Audit Trail	Blocked		
Feature	F3 - Real-Time Rule Execution	Apply data quality rules in real time as data is ingested.				
User Story	US 6 - As a data engineer, I want rules to be executed in real time during data ingestion, so that only high-quality data enters downstream systems.		F3 - Real-Time Rule Execution	Ready for Release		
User Story	US 7 - As a product owner, I want to monitor the performance of all active rules, so that I can identify bottlenecks and optimize processing.		F3 - Real-Time Rule Execution	Backlog		
Feature	F4 - Rule Impact Analysis	Show the effect of a rule on data sets before deployment.				
User Story	US 8 - As a business analyst, I want to preview the impact of a new rule on historical data, so that I can avoid unintended data loss or errors.		F4 - Rule Impact Analysis	In Testing		
Feature	F5 - Role-Based Access Control for Rules	Restrict rule creation, editing, and deletion by user role.				
User Story	US 9 - As a system admin, I want to control rule access by user role, so that I can enforce governance policies.		F5 - Role-Based Access Control for Rules	Blocked		
User Story	US 10 - As a compliance officer, I want to restrict rule editing to authorized users, so that I can maintain audit integrity.		F5 - Role-Based Access Control for Rules	Ready for Release		

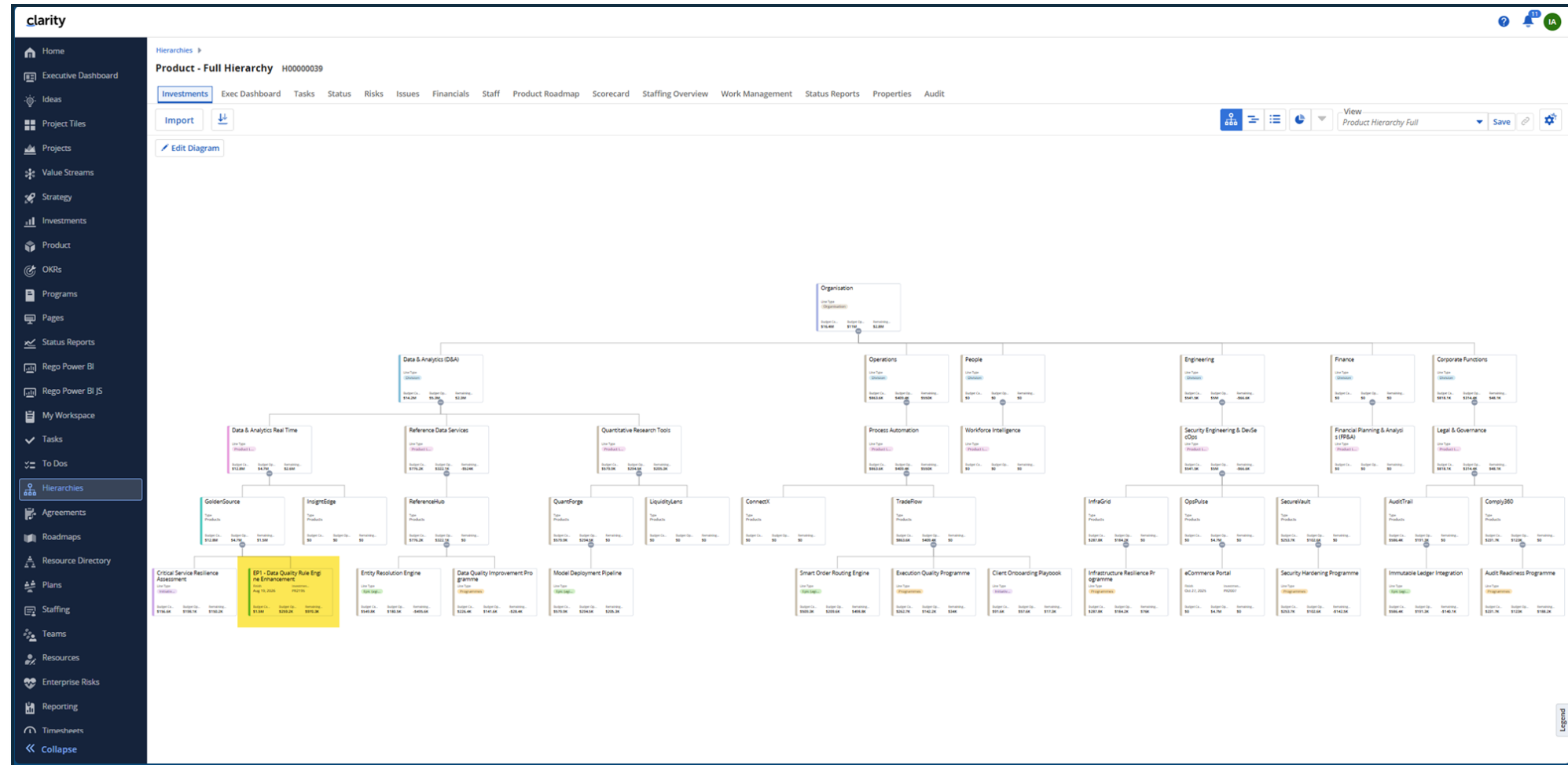
Kanban Boards

Show Epic summary – by features, user story, story point or % progress.
Track this work directly in Clarity or connect an Agile tool that users have already adopted.



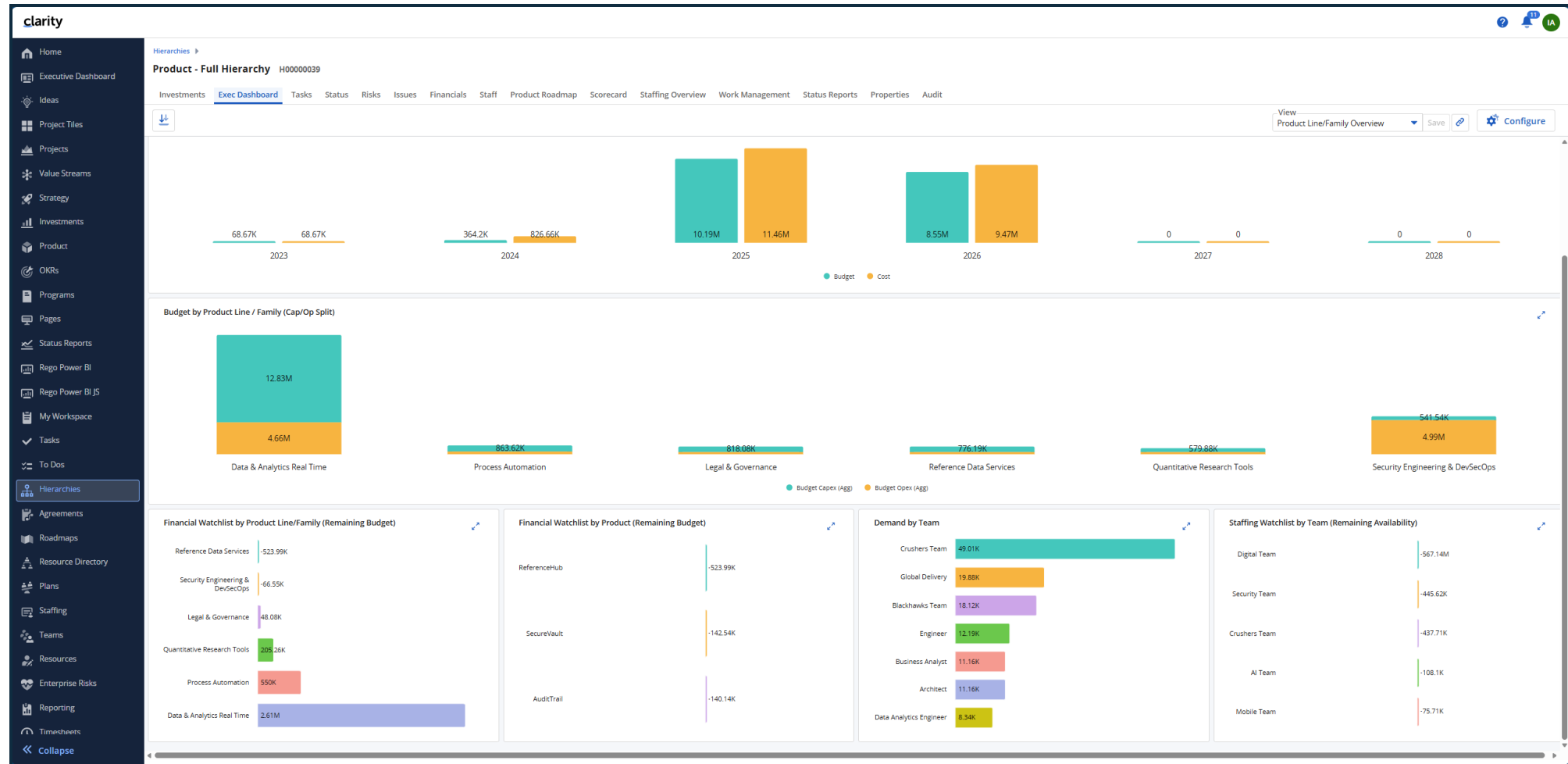
Hierarchies and Roadmaps (Methodology Agnostic)

Combine your entire portfolio (regardless of methodology) for a single holistic view of the work being performed and how it aligns to strategy, organizational pillars, teams, program increments (PIs), sprints, or another reporting lens.



Hierarchies and Roadmaps (Methodology Agnostic)

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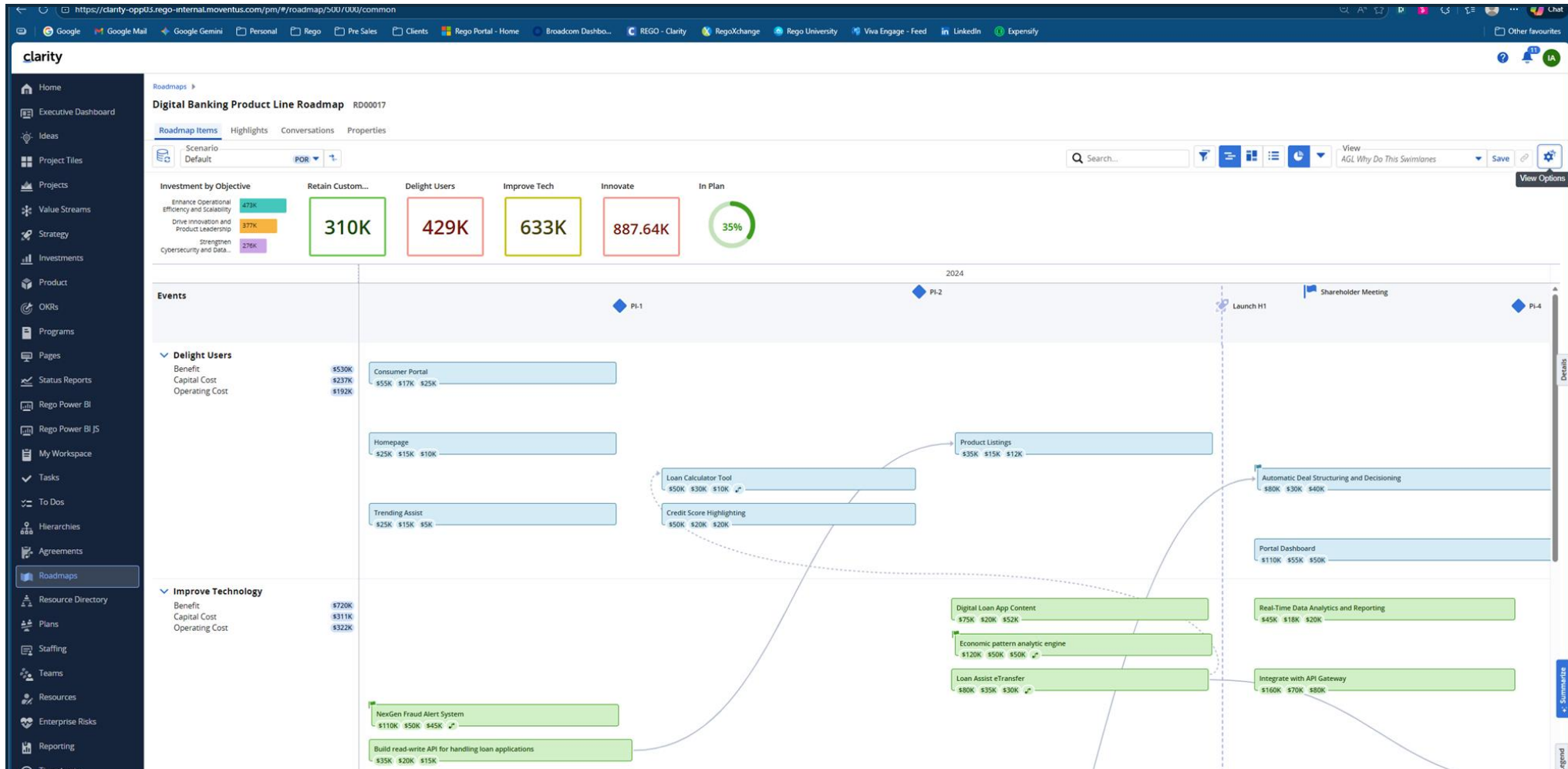
Combine your entire portfolio (regardless of methodology) for a single holistic view of the work being performed and how it aligns to strategy, organizational pillars, teams, program increments (PIs), sprints, or another reporting lens.

The screenshot shows the Clarity software interface with the 'Product - Full Hierarchy' view selected. The table displays resource allocation data for various teams across 12 periods (2026-01 to 2026-12). The table is organized into columns for Group, Staffing, Investment, Totals, and 12 monthly periods. The 'Group' column lists teams such as AI Team, Blackhawks Team, Crushers Team, Digital Team, Global Delivery, Integration Team, Jaguars Team, Jira Team, Legal, M&A Team, Mobile Team, Nighthawks Team, Operations, Security Team, vendor team 1, vendor team 2, and Vendor team 3. The 'Staffing' column shows the number of resources (e.g., (3), (5), (2), (1), (2), (3), (2), (3), (2), (3), (2), (1), (7), (1), (1), (1)). The 'Investment' column shows the name of the investment (e.g., Name, Manager). The 'Totals' column shows the total allocation (e.g., 7,991 / 14,616). The 12 monthly periods show the allocation for each month (e.g., 616 / 1,232, 560 / 1,120, 448 / 1,232, 616 / 1,232, 588 / 1,176, 728 / 1,232, 773 / 1,288, 706 / 1,176, 739 / 1,232, 739 / 1,232, 706 / 1,176, 773 / 1,288).

Group	Staffing	Investment	Totals	2026-01	2026-02	2026-03	2026-04	2026-05	2026-06	2026-07	2026-08	2026-09	2026-10	2026-11	2026-12
Resource *	Name	Manager	Allocation	Allocation	Allocation	Allocation	Allocation	Allocation	Allocation	Allocation	Allocation	Allocation	Allocation	Allocation	Allocation
> AI Team (3)			7,991 / 14,616	616 / 1,232	560 / 1,120	448 / 1,232	616 / 1,232	588 / 1,176	728 / 1,232	773 / 1,288	706 / 1,176	739 / 1,232	739 / 1,232	706 / 1,176	773 / 1,288
> Blackhawks Team (3)			4,820 / 10,962	13 / 924	252 / 840	424 / 924	508 / 924	485 / 882	592 / 924	628 / 966	573 / 882	374 / 924	323 / 924	309 / 882	338 / 966
> Crushers Team (3)			21,533 / 17,400	1,487 / 1,467	1,733 / 1,333	1,907 / 1,467	1,907 / 1,467	1,820 / 1,400	2,040 / 1,467	2,147 / 1,533	1,960 / 1,400	1,693 / 1,467	1,613 / 1,467	1,540 / 1,400	1,687 / 1,533
> Digital Team (5)			19,325 / 14,268	1,520 / 1,203	1,695 / 1,093	1,864 / 1,203	1,864 / 1,203	1,779 / 1,148	1,878 / 1,203	1,760 / 1,257	1,607 / 1,148	1,389 / 1,203	1,323 / 1,203	1,263 / 1,148	1,383 / 1,257
> Global Delivery (2)			6,134 / 17,748	1,496 / 1,496	1,360 / 1,360	1,496 / 1,496	748 / 1,496	0 / 1,428	136 / 1,496	156 / 1,564	143 / 1,428	150 / 1,496	150 / 1,496	143 / 1,428	156 / 1,564
> Integration Team (2)			0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -
> Jaguars Team (1)			632 / 10,858	0 / 915	0 / 832	0 / 915	0 / 915	0 / 874	83 / 915	96 / 957	87 / 874	92 / 915	92 / 915	87 / 874	96 / 957
> Jira Team (2)			361 / 1,044	88 / 88	80 / 80	88 / 88	44 / 88	0 / 84	8 / 88	9 / 92	8 / 84	9 / 88	9 / 88	8 / 84	9 / 92
> Legal (3)			0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -
> M&A Team (2)			0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -
> Mobile Team (3)			5,180 / 14,616	325 / 1,232	616 / 1,120	678 / 1,232	678 / 1,232	647 / 1,176	692 / 1,232	515 / 1,288	470 / 1,176	190 / 1,232	123 / 1,232	118 / 1,176	129 / 1,288
> Nighthawks Team (2)			1,352 / 6,960	147 / 587	133 / 533	147 / 587	147 / 587	140 / 560	200 / 587	148 / 613	56 / 560	59 / 587	59 / 587	56 / 560	61 / 613
> Operations (3)			0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -
> Security Team (7)			21,504 / 12,528	3,182 / 1,056	3,168 / 960	1,949 / 1,056	1,901 / 1,056	1,814 / 1,008	1,829 / 1,056	1,546 / 1,104	1,411 / 1,008	1,219 / 1,056	1,162 / 1,056	1,109 / 1,008	1,214 / 1,104
> vendor team 1 (1)			600 / 2,088	176 / 176	160 / 160	176 / 176	88 / 176	0 / 168	0 / 176	0 / 184	0 / 168	0 / 176	0 / 176	0 / 168	0 / 184
> vendor team 2 (1)			900 / 6,264	264 / 528	240 / 480	264 / 528	132 / 528	0 / 504	0 / 528	0 / 552	0 / 504	0 / 528	0 / 528	0 / 504	0 / 552
> Vendor team 3 (1)			6,752 / 4,176	0 / 352	0 / 320	448 / 352	704 / 352	672 / 336	704 / 352	736 / 368	672 / 336	704 / 352	704 / 352	672 / 336	736 / 368

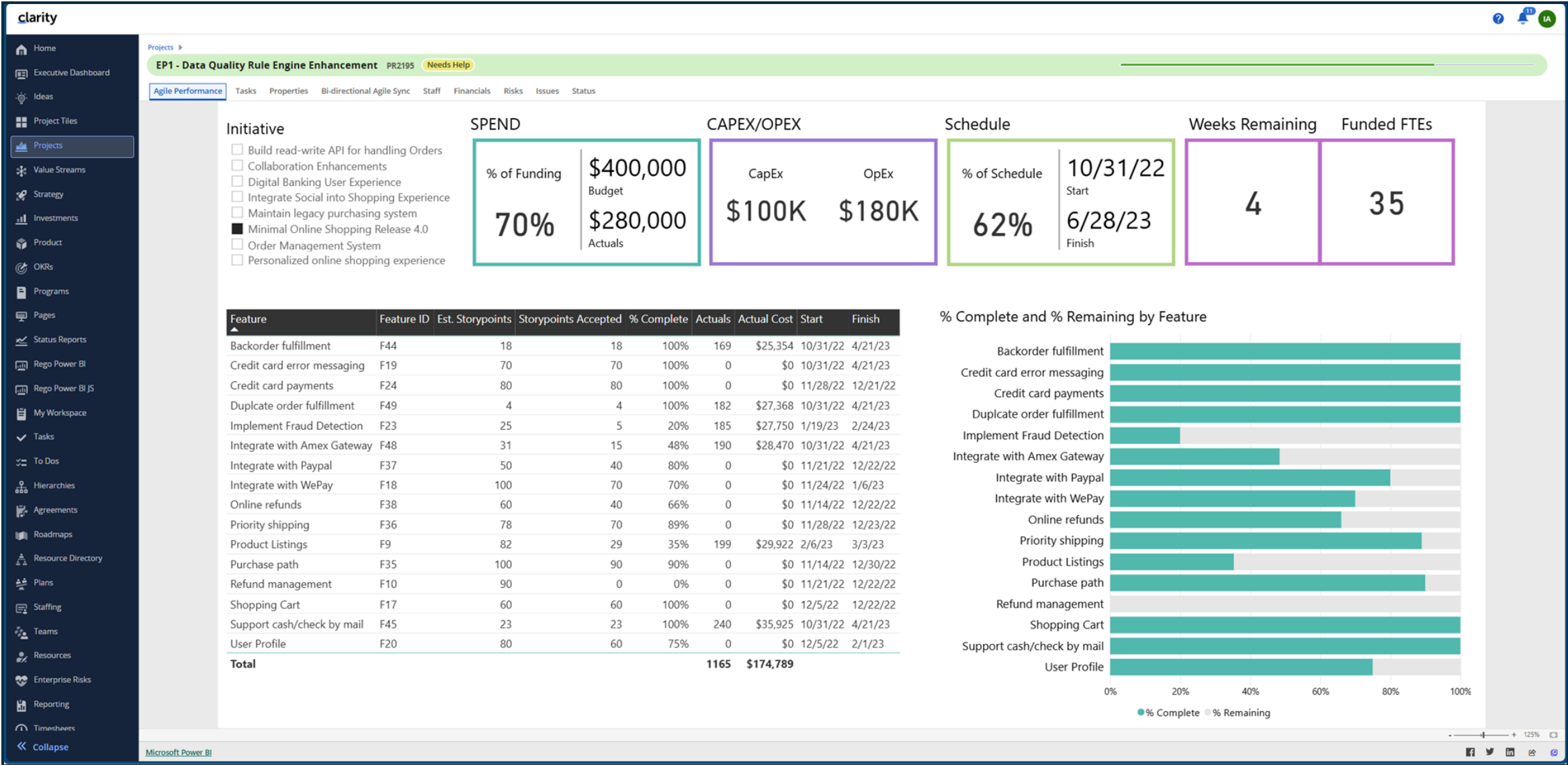
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Power BI and Dashboarding

Agile-focused Power BI reports and dashboards natively embedded in an Agile initiative.



Bring It to Life:

Frictionless Time Tracking with Rally®



Frictionless Time Tracking

Source: Reclaim Control Without Slowing Delivery:
A Guide to Frictionless Tracking e-book.

INTRODUCING FRICTIONLESS TIME

ValueOps Frictionless Time eliminates manual time entry by automatically capturing effort from the tools teams already use, like Rally, Jira, and more. It connects delivery data to financial and strategic frameworks in real time, without disrupting how work gets done.

With Frictionless Time, you get:

01 Automated time compliance that meets project and audit standards

02 Real-time traceability into effort, status, and progress

03 Reliable data to forecast accurately and manage resources with confidence

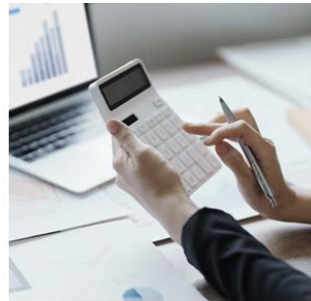
HOW VALUEOPS DELIVERS FRICTIONLESS TIME



Automated Time Capture from Delivery Tools

No behavior changes. Time is pulled directly from stories, tasks, and workflows — turning real activity into real insight.

- ✓ Invisible to teams
- ✓ Consistent across hybrid delivery environments



Financial Mapping That Aligns to Governance Needs

Custom rules map effort to timesheet codes, CapEx/OpEx categories, and audit frameworks.

- ✓ Standardized reporting, no matter how work is done
- ✓ Built-in audit support



Real-Time Visibility from Work to Investment

Time data flows seamlessly into traditional portfolio structures, powering smarter planning, faster forecasts, and better cross-functional coordination.

- ✓ Replace fire drills with foresight
- ✓ Align delivery, finance, and strategy around shared truth

Bring It to Life: Automation Management with ValueOps ConnectALL



ValueOps ConnectALL

Value Stream Automation

-  Automate the flow of information and activities across teams, organizations, and tools
-  Eliminate non-value-added activities, remove bottlenecks, and increase efficiencies
-  Integrate, interoperate, trigger, and monitor activities in the Value Stream

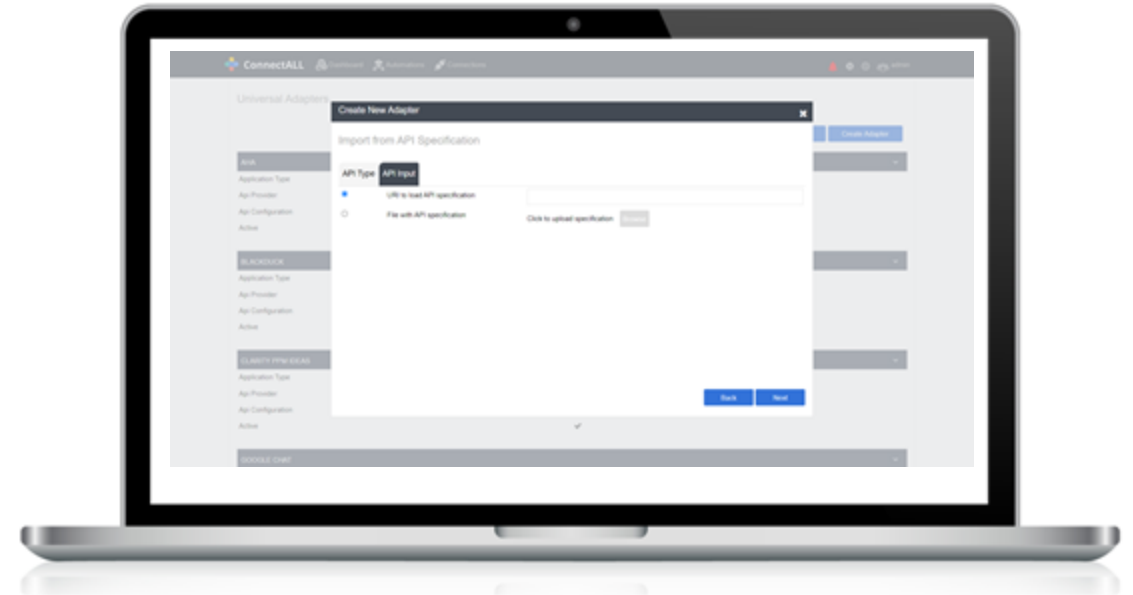


Create Alignment



Align the efforts of everyone in the organization, by uniting the enterprise and identifying bottlenecks.

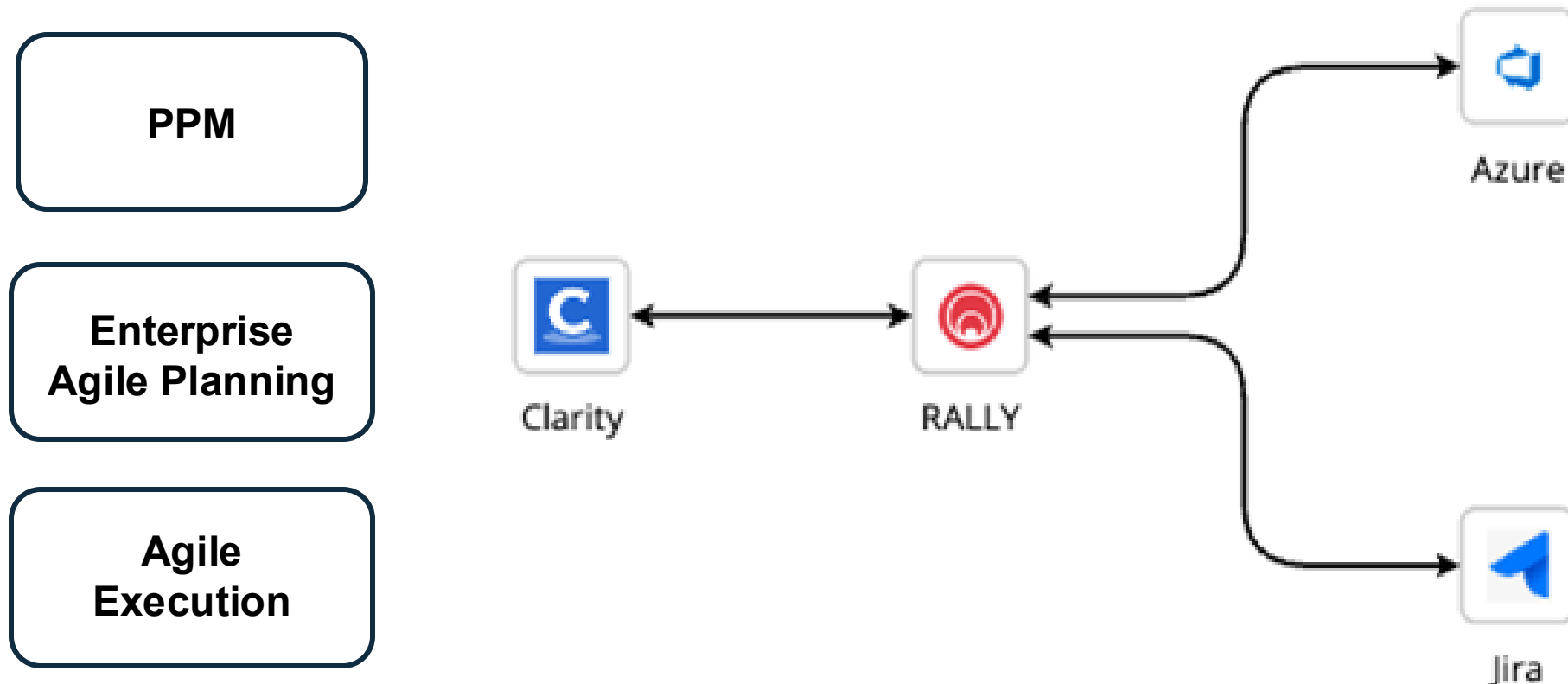
- Quickly connect any tool in the software delivery value stream
- Eliminate non-value-added activities
- Remove bottlenecks
- Sync records to and from any application with any database
- Reduce waste by identifying duplicate solutions and work
- Automate the value stream and control the flow of information with out-of-the-box data models that standardize data



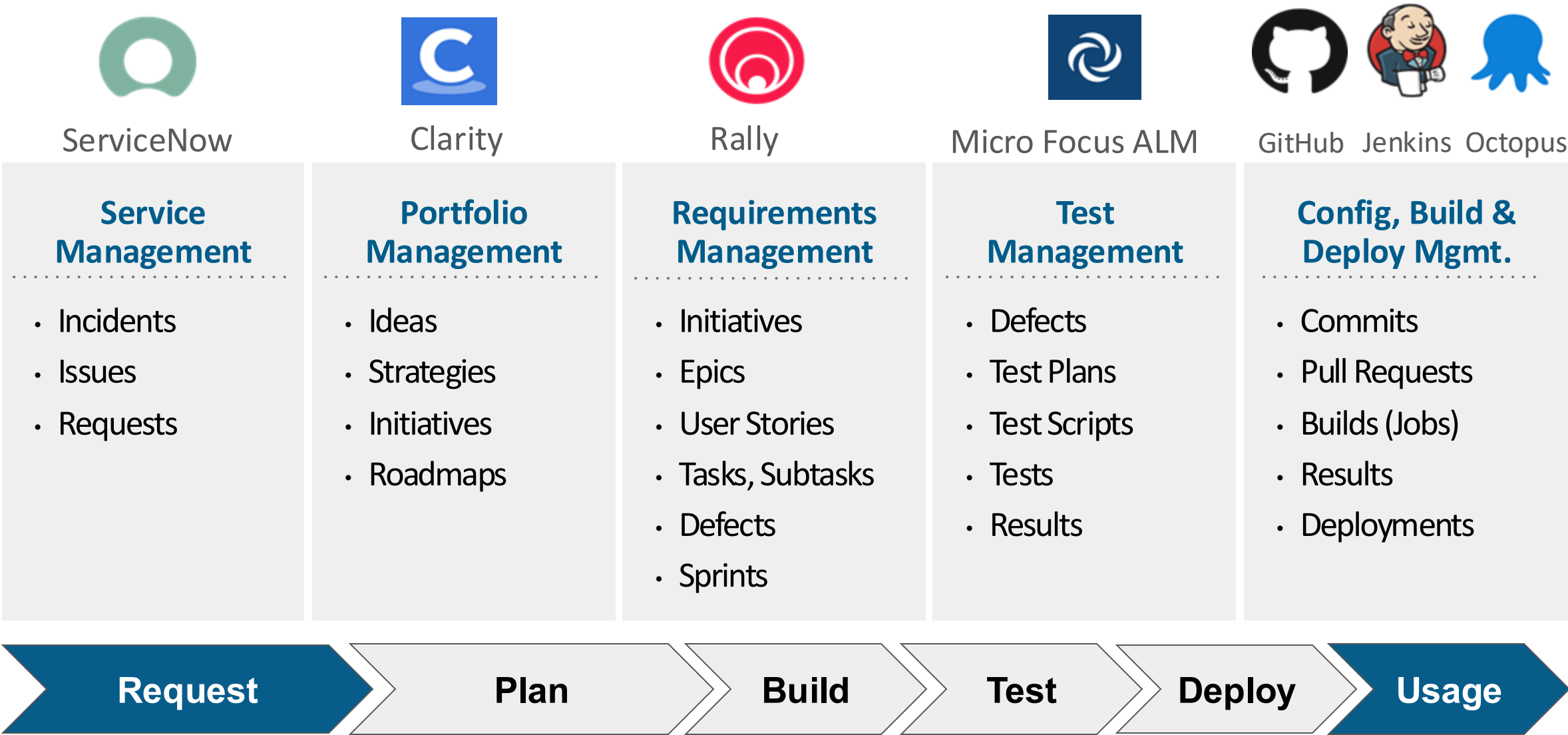
How It Works: Alignment

Features to align business and delivery, reduce friction, and foster collaboration

“We often have a breakdown in how our business strategy is translated into delivery plans, leading to overproduction.”



Automation at Every Step



Questions?



Survey



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

Your feedback helps us improve future events.



Earn Rego University Certifications and Professional Specializations

Your participation in this class may count toward Rego University certification progress.

Certifications

Build recognized Clarity expertise.
Complete 10 eligible learning units
within a certification track.



**Best Practice
Clarity Administrator**



**Best Practice
Clarity Lead**

Professional Specializations

Deepen your skills in focused topic areas.
Complete 4 eligible learning units within a selected
specialization, with the option to earn multiple specializations.



**Artificial
Intelligence (AI)**



**Reporting &
Analytics**



Technical



Important: Complete the class survey in the app after each session so your credits can be tracked.

More info: <https://regouniversity.com/certificates>

Earn PMI credit

Eligible Rego University sessions qualify for Professional Development Units (PDUs)

- 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!
Remember to fill out the class survey.



Phone

888.813.0444



Email

info@regoconsulting.com



Website

<https://regouniversity.com/pmi-credits/>

Continue to Get Resources and Stay Connected

- 1 Use RegoXchange.com for instructions and how-to guides.
- 2 Talk with your account managers and your Rego consultants.
- 3 Sign up for webinars and join in-person Rego groups near you at RegoConsulting.com
- 4 Join us for the next [Rego University](#)!

