regoUniversity
SAN ANTONIO • 2026

Mastering the PPM and Agile Toolset – Clarity and Agile Integrations

Your Guides:
Ben Raper & Mike Pokorny

Sponsored by ValueOps by Broadcom | Clarity by Broadcom · Rally by Broadcom · ConnectALL by Broadcom · Insights by Broadcom

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

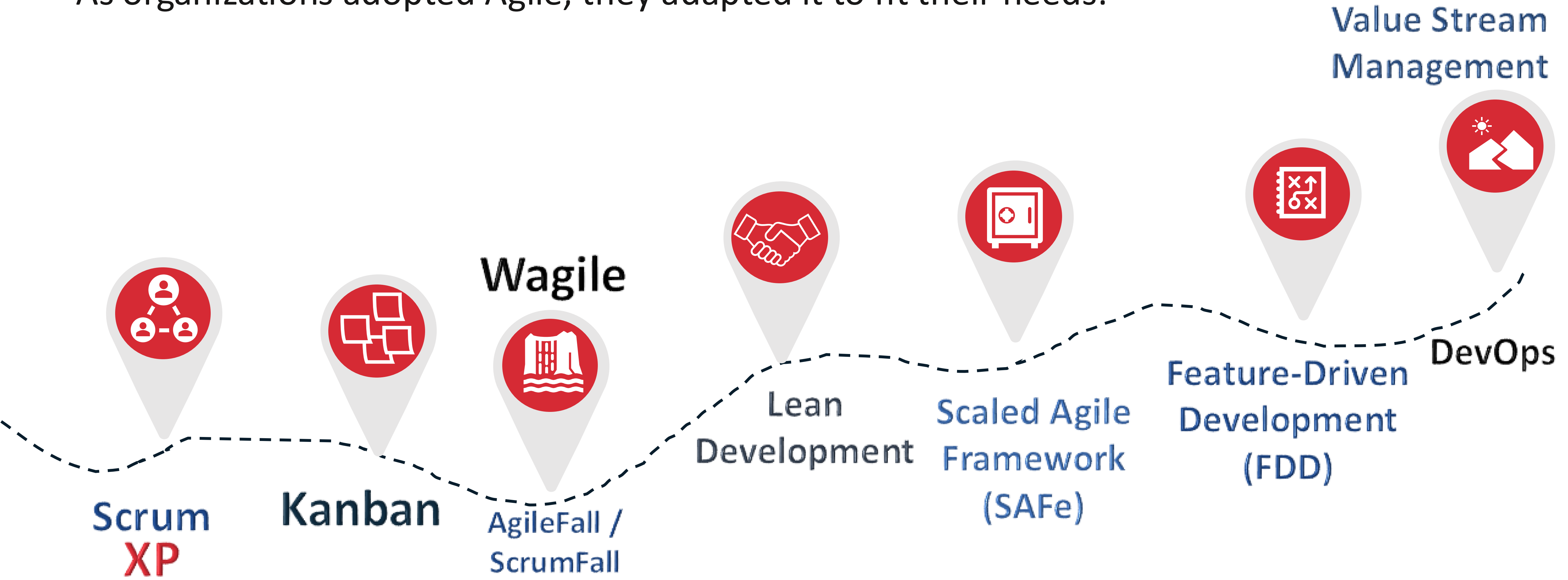
- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself

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

Disparate Tools

Inconsistent Approaches

Cultural Conflicts

Manual intervention
Hand-created Excel reports
Greater need for financial oversight
Limited visibility into resources and capacity
Inaccurate capacity planning

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.

Reporting and Transparency
Decision-makers want a ”one-stop-shop” for monitoring investments.

Time Tracking
Avoid duplicate time-entry.

Financial
Send time-tracking data from Agile tools to Clarity.

Resource Management
Show how people are allocated across work.

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.

We meet you where YOU are

Question:
Where Are You?

regoUniversity
SAN ANTONIO • 2026

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

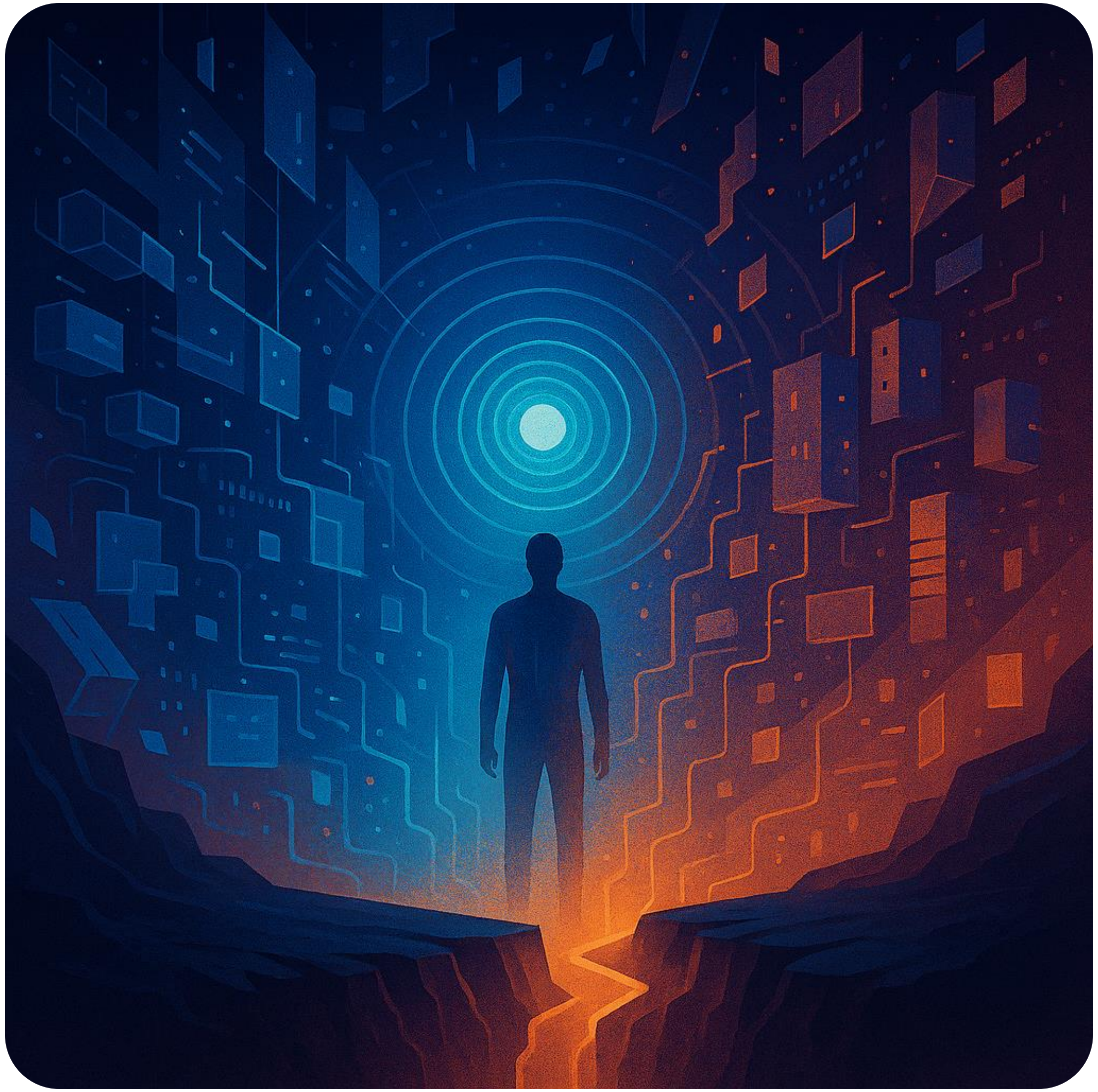
TRANSFORM

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?

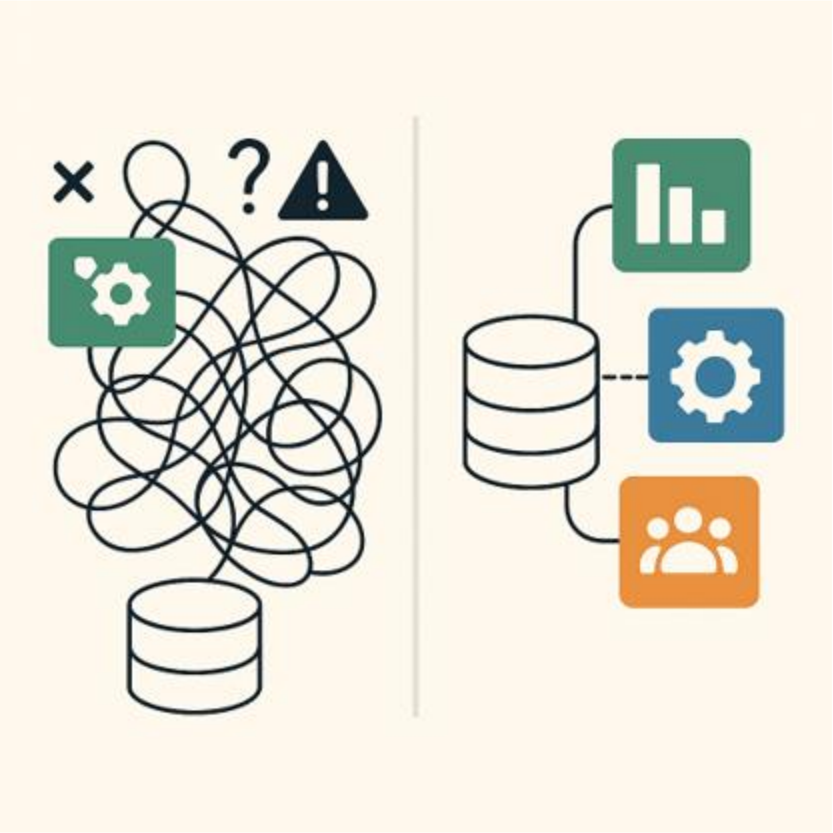
Integration Governance - Establish Protocols

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?

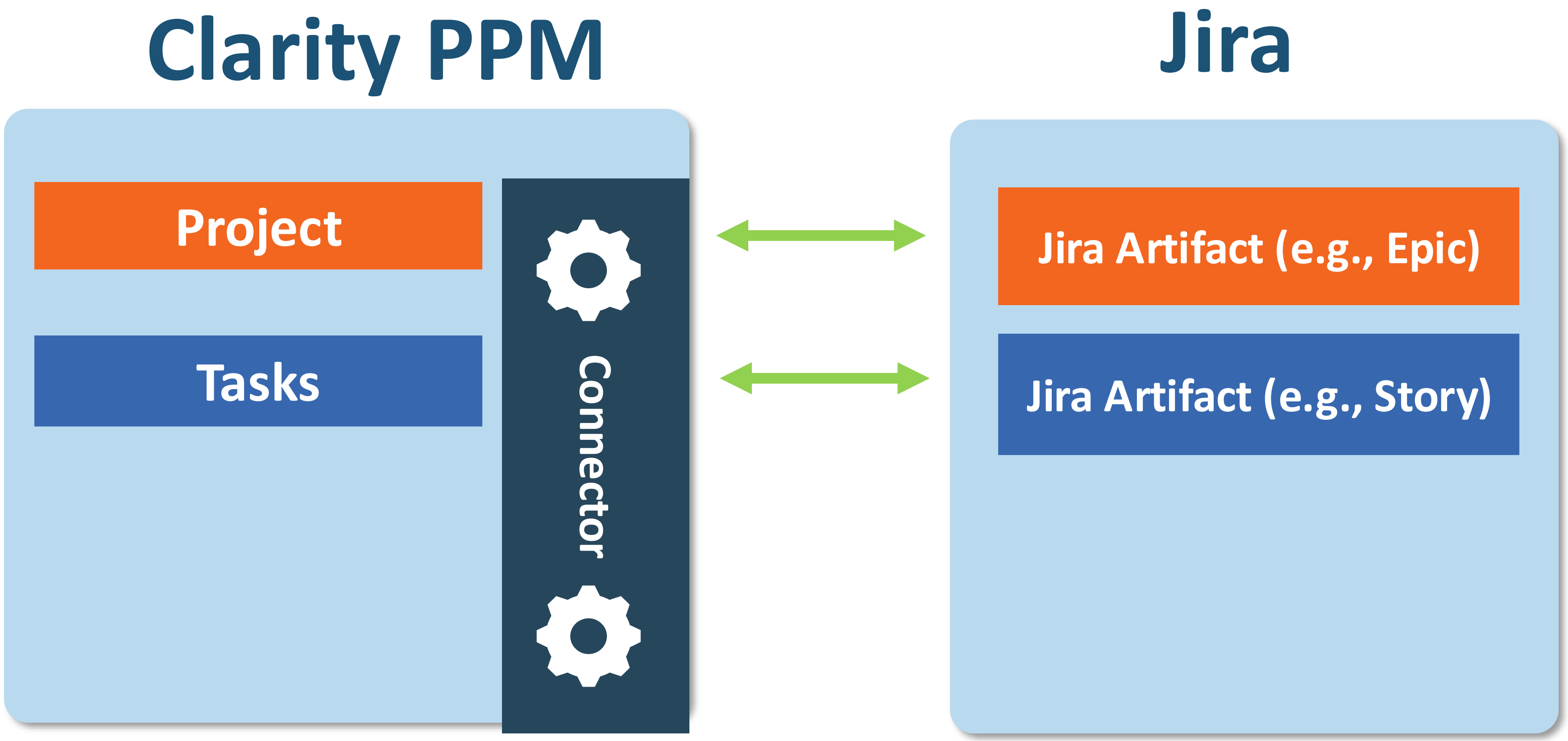
Establish intake and approval processes for new data requests

Develop a forum and cadence to review requests

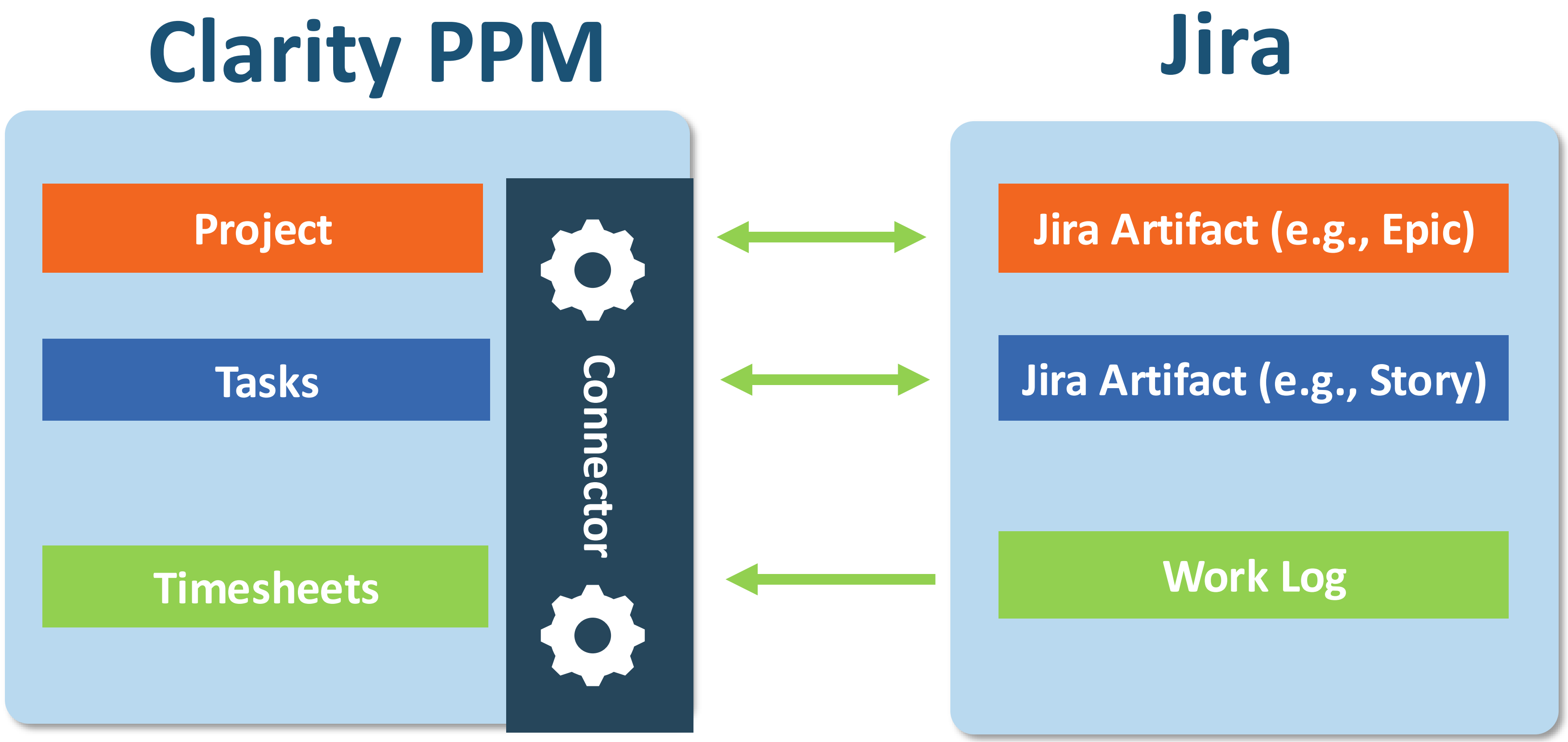


Bring It to Life:
JIRA Connector by Rego

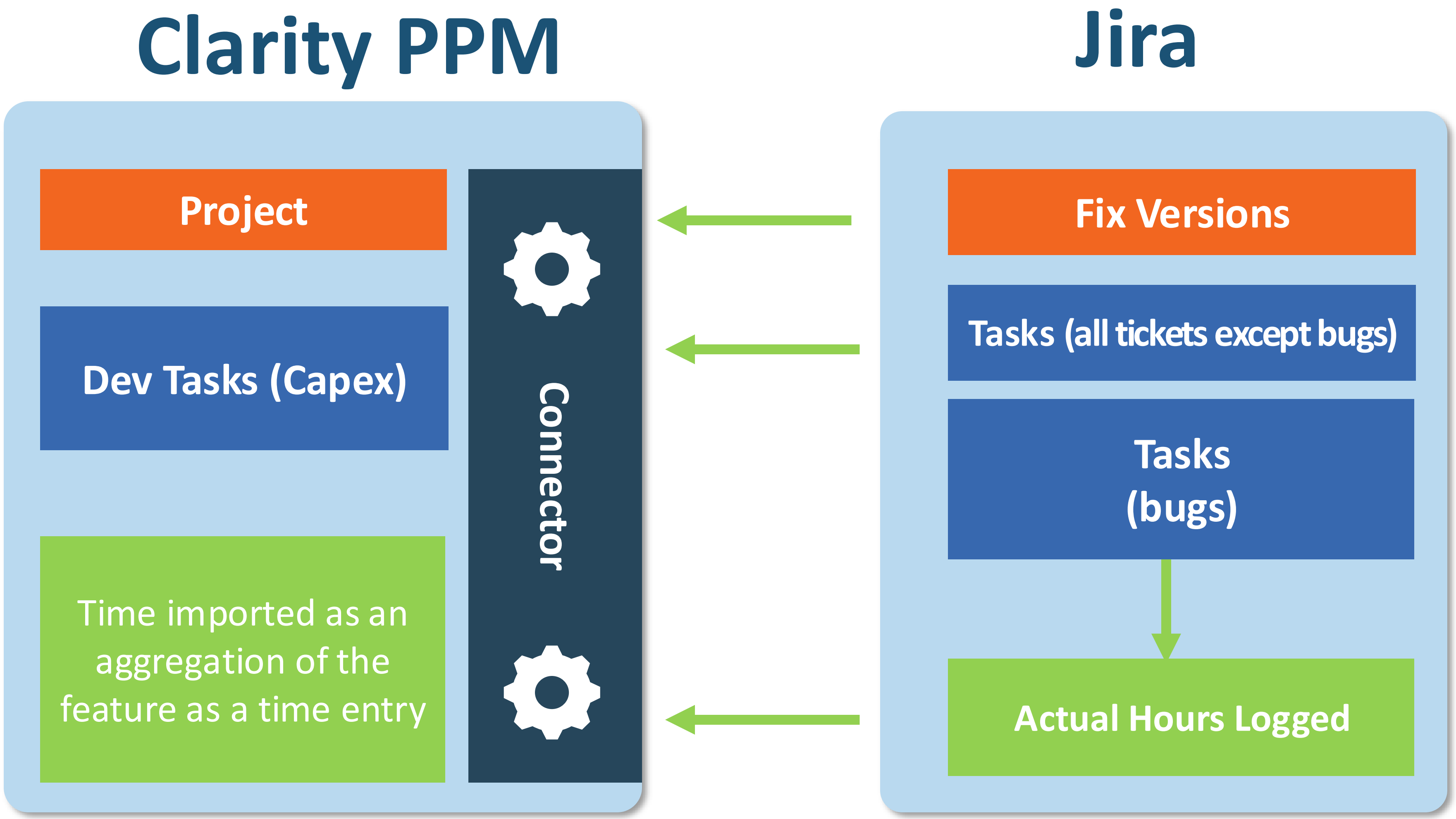
Standard Approach – Standard Integration of Jira and Clarity



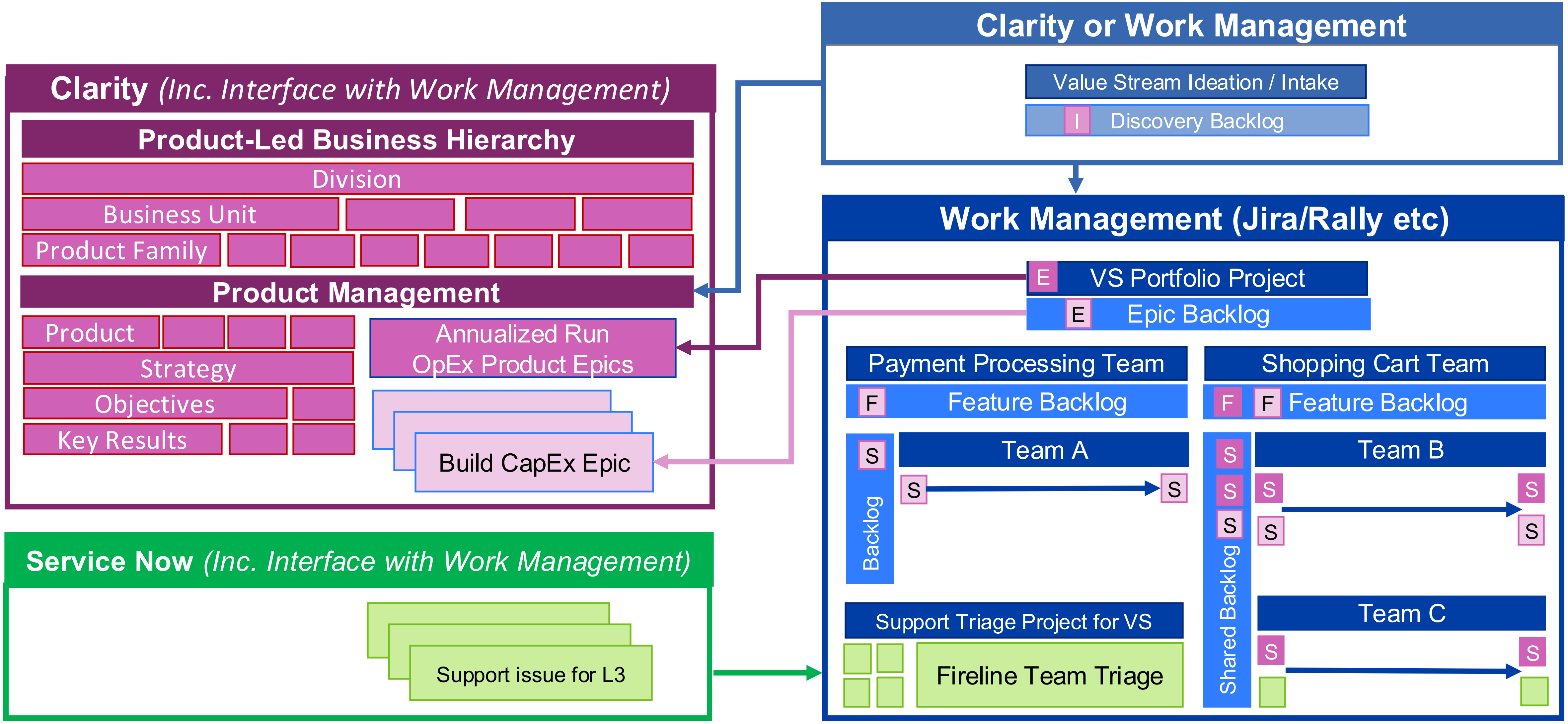
Standard Approach – Standard Jira with Worklog



Tailored Approach – Fix Versions (Customer Example)

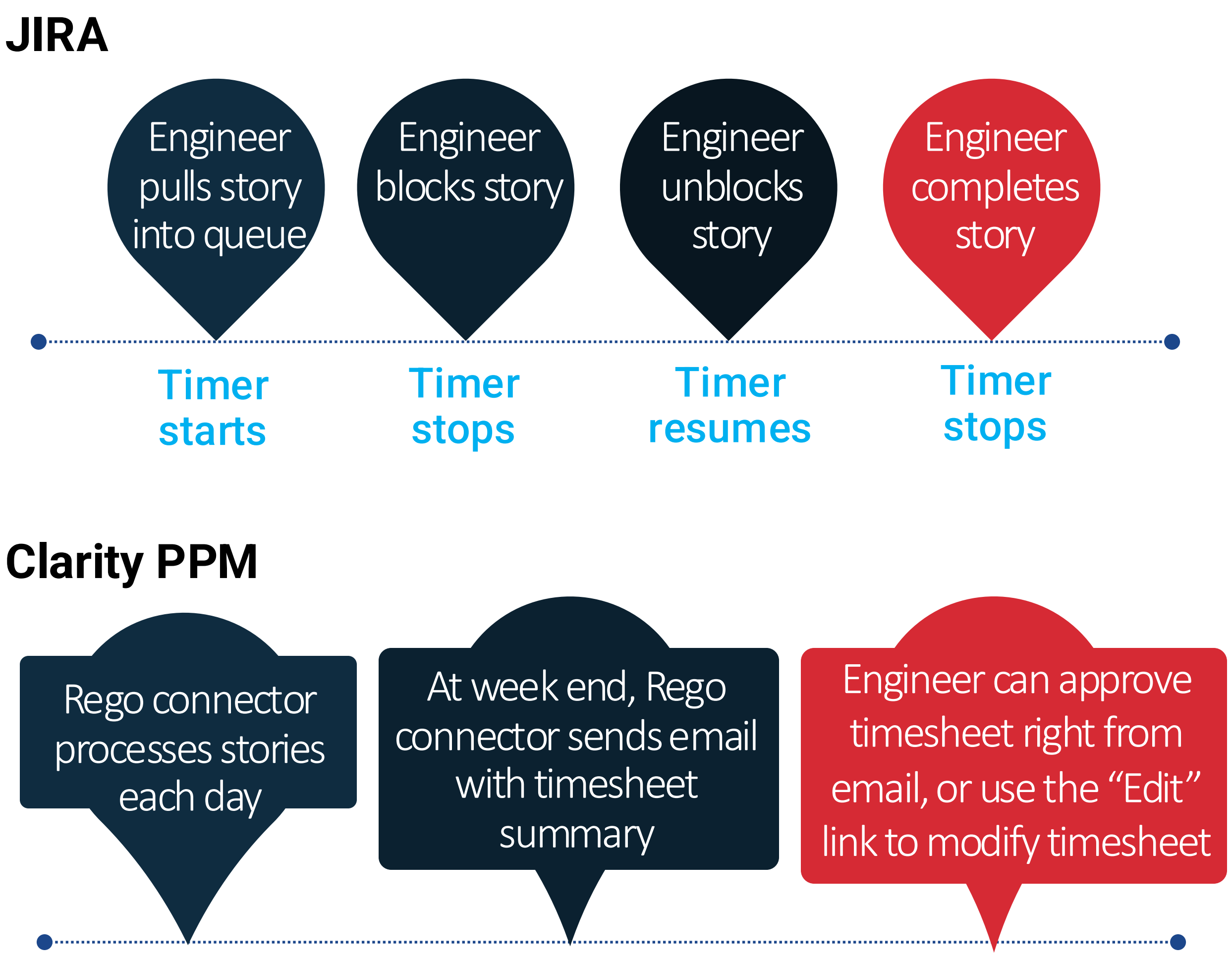


Product Led Hybrid Ecosystem – (Customer Example)



Automated Time Tracking from JIRA

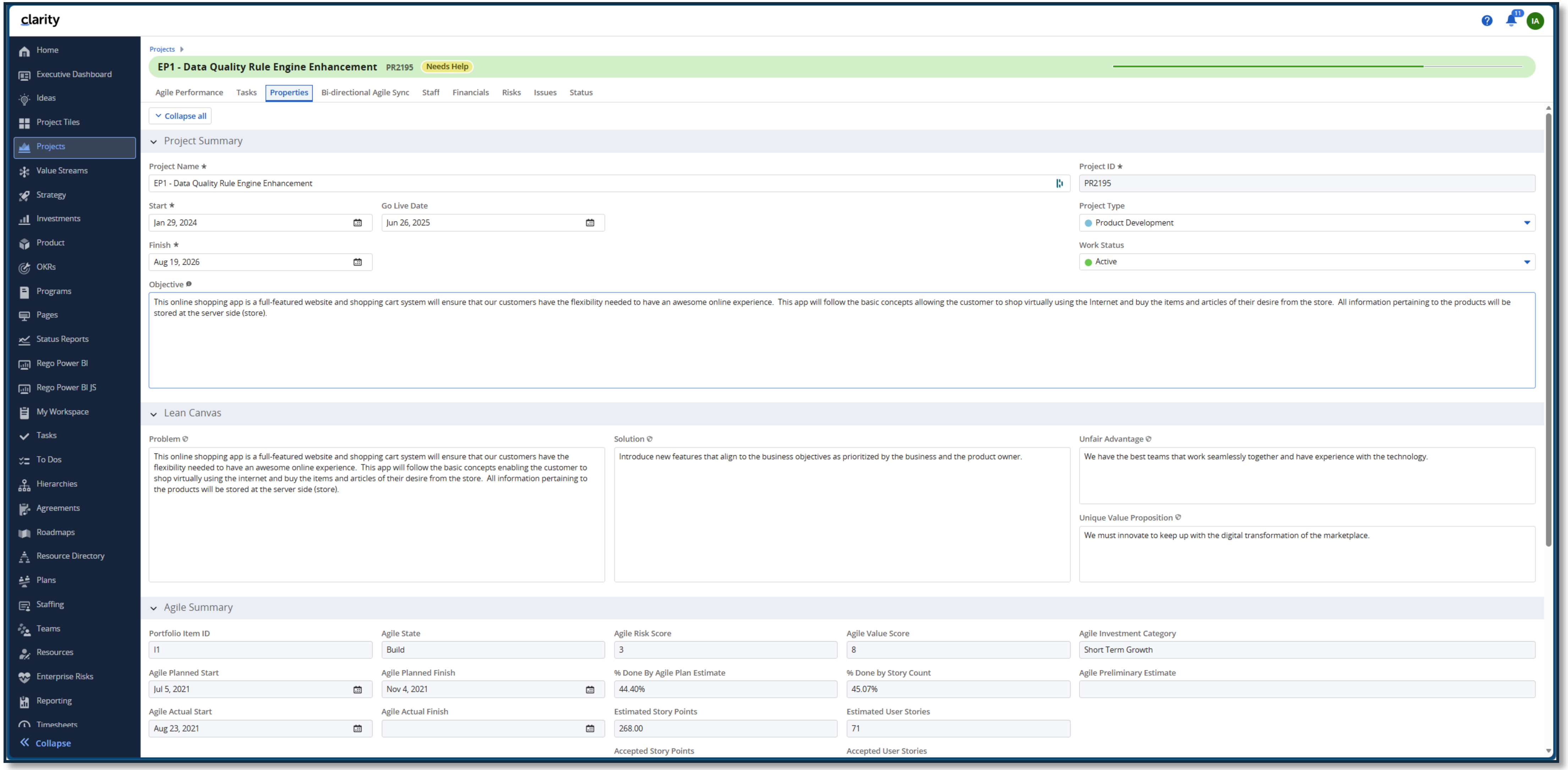
- A client wanted a solution that created timesheets without their engineers having to fill out a timesheet.
- Rego built a solution that works like a stopwatch.
- Any newly created JIRA Issues (associated with integrated Epic) OR updates to already imported JIRA Issues OR Time booked on JIRA Issues and sub-tasks is brought over to CA PPM by scheduled Jobs.



Bring It to Life:
Agile > Clarity Screenshots

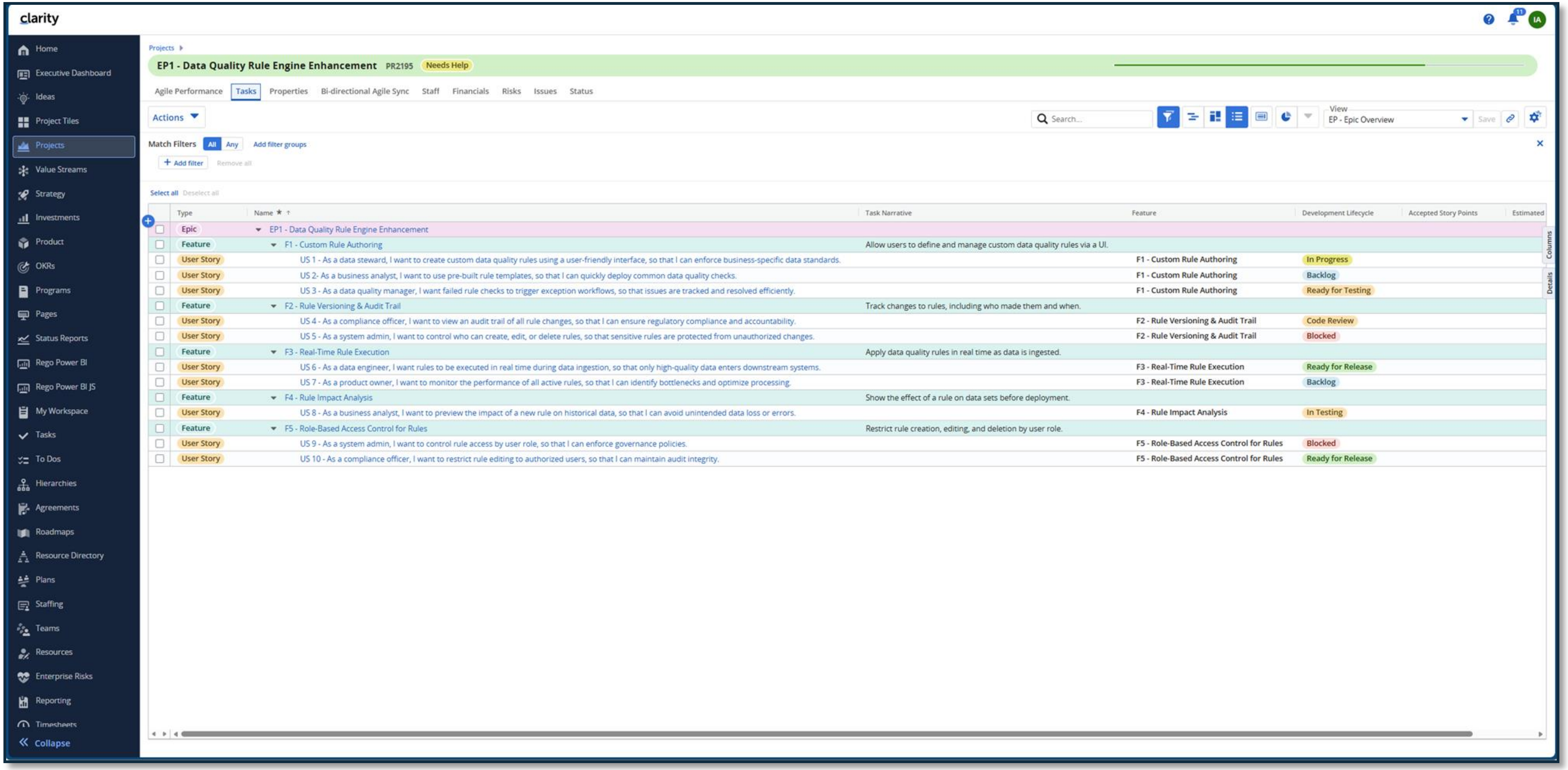
Agile Blueprint

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



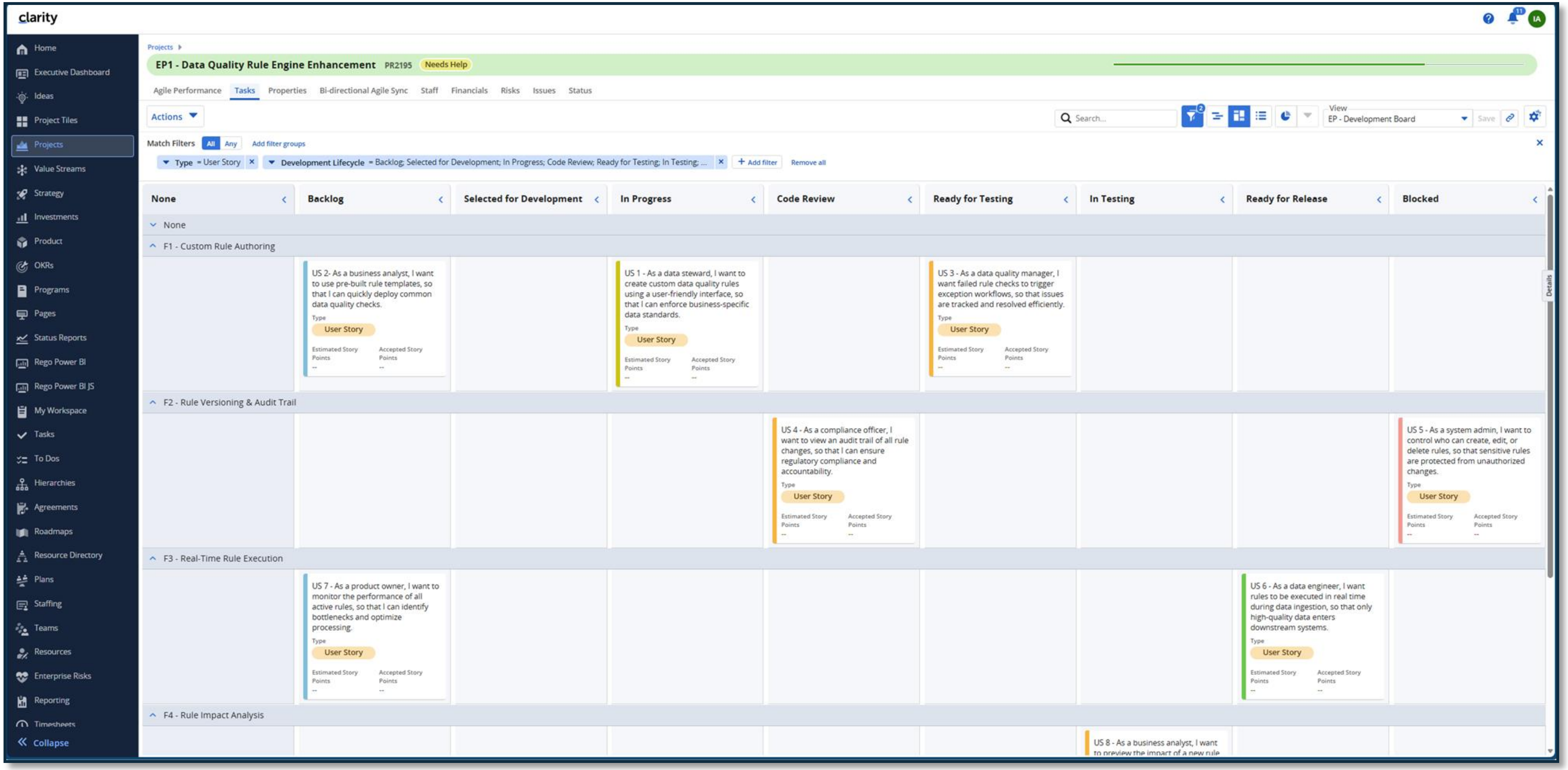
Nested Work Views

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



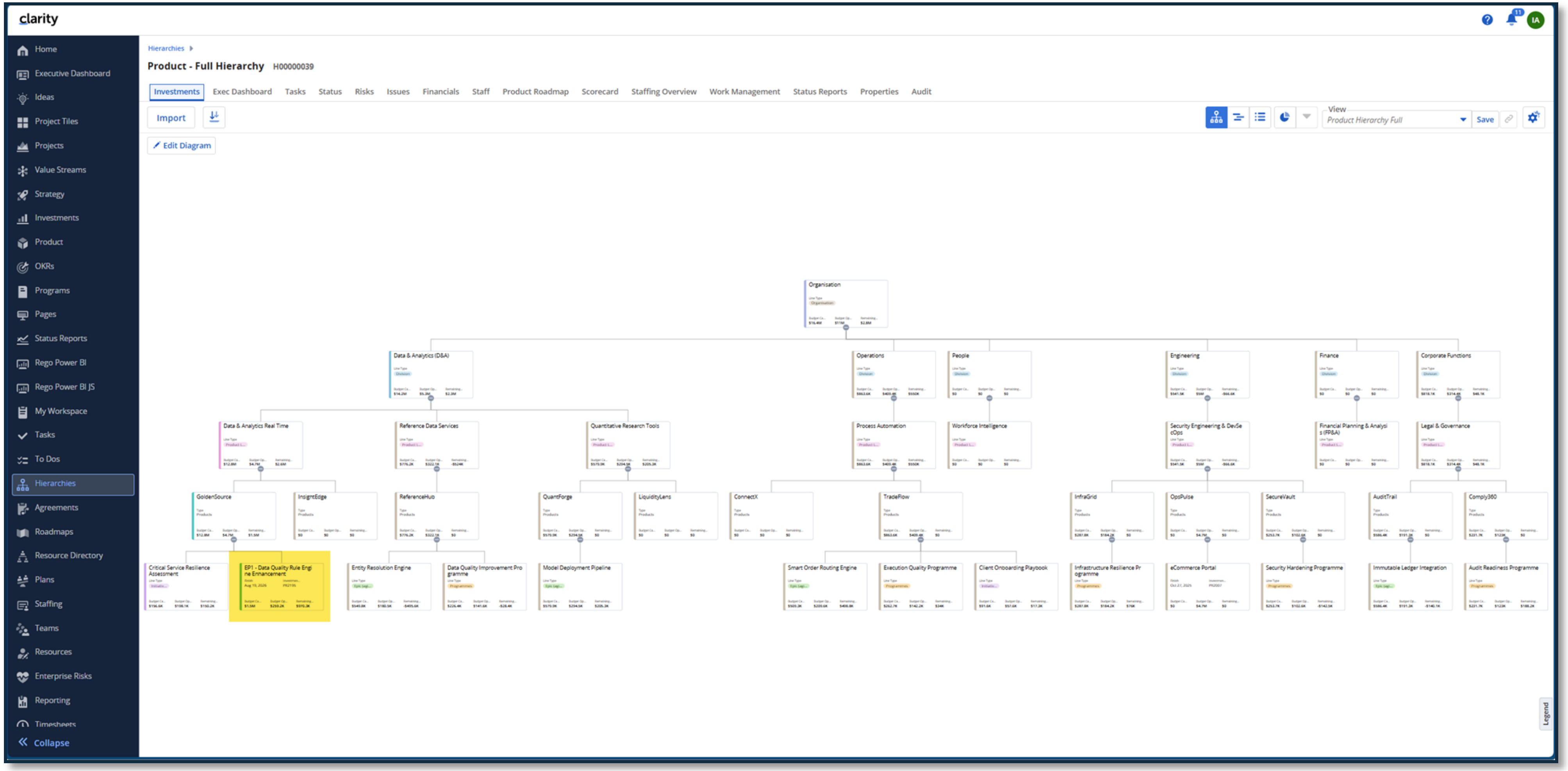
Kanban Boards

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.



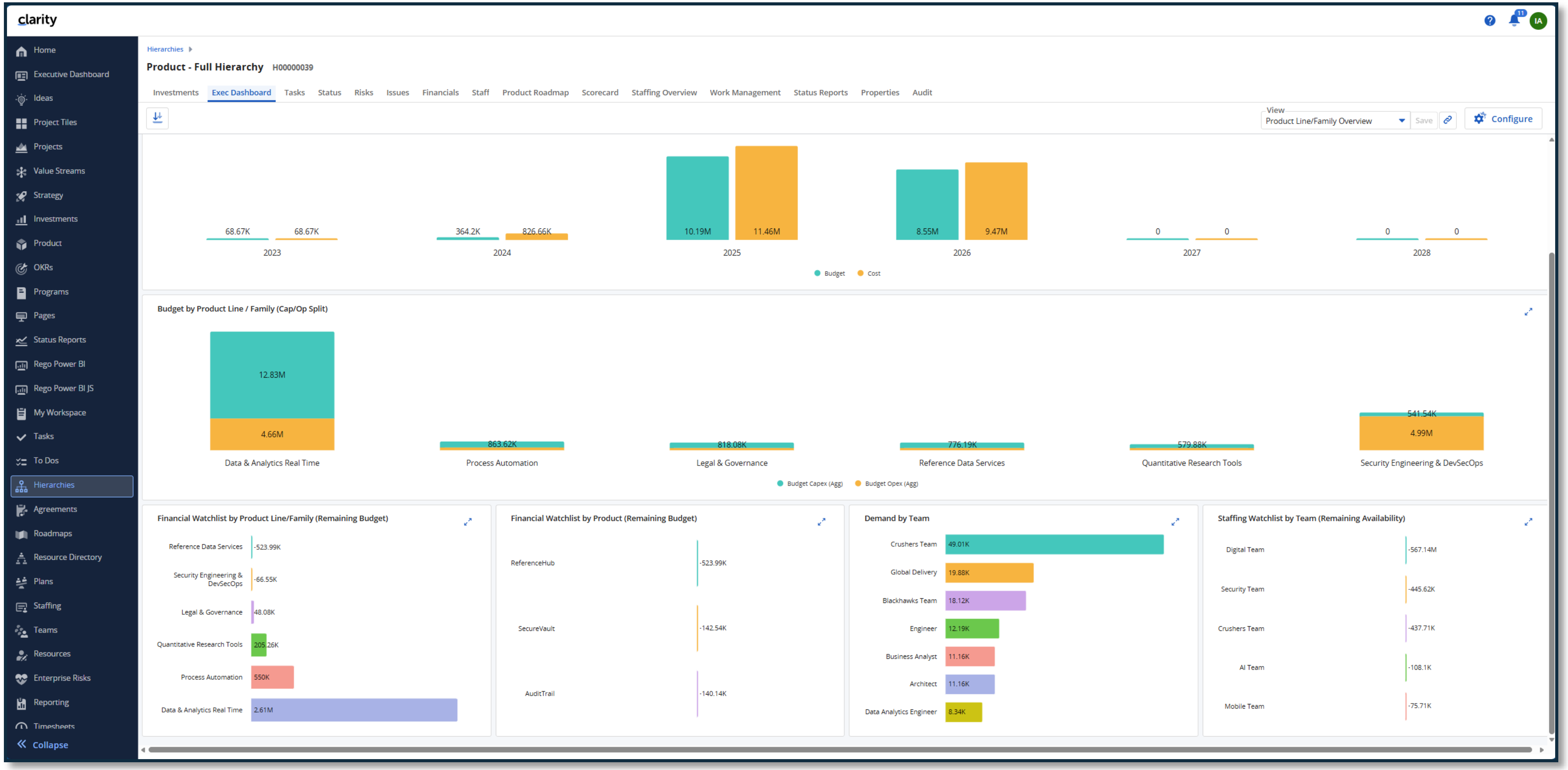
Hierarchies and Roadmaps (Methodology Agnostic)

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.



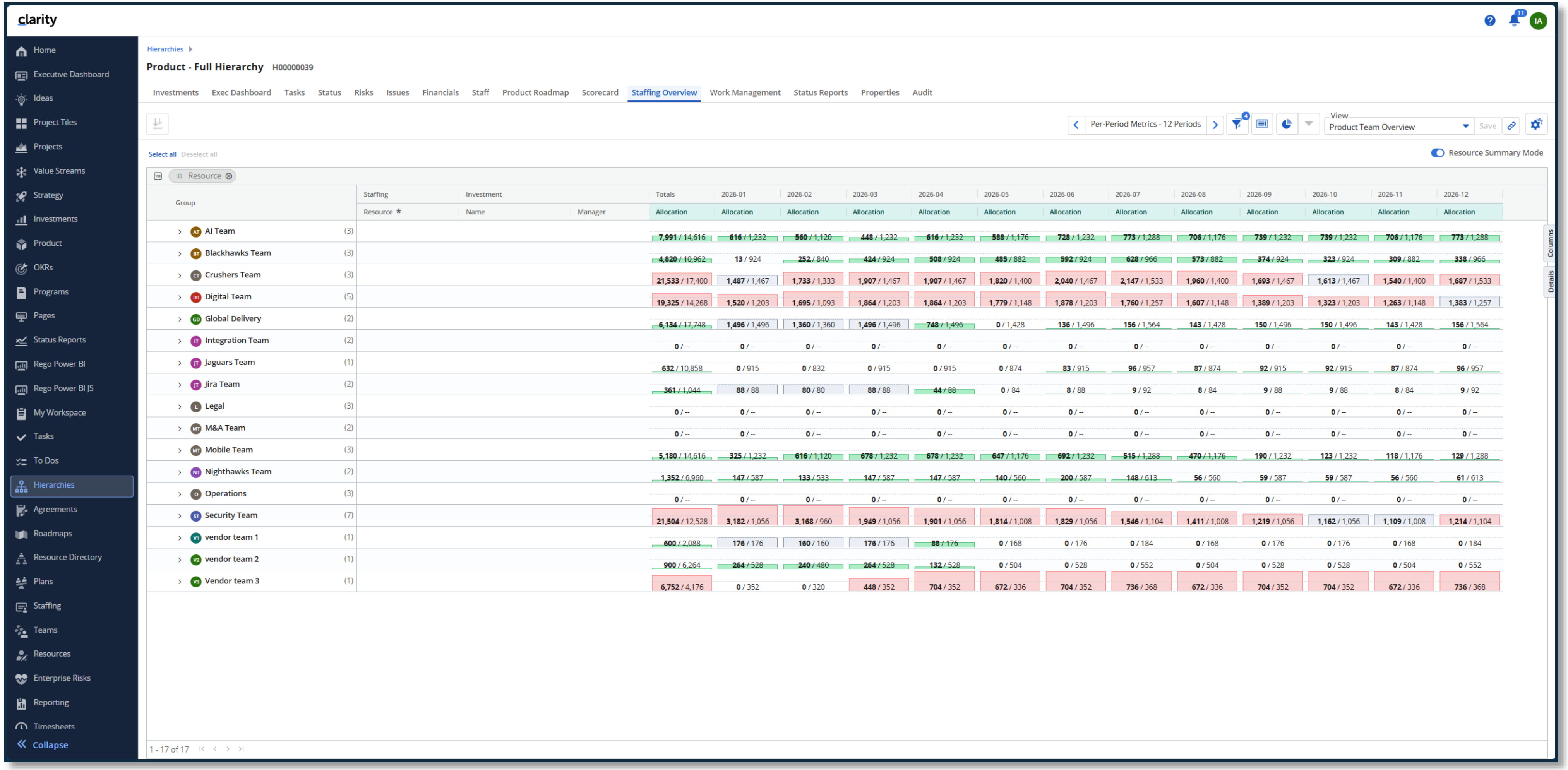
Hierarchies and Roadmaps (Methodology Agnostic)

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.



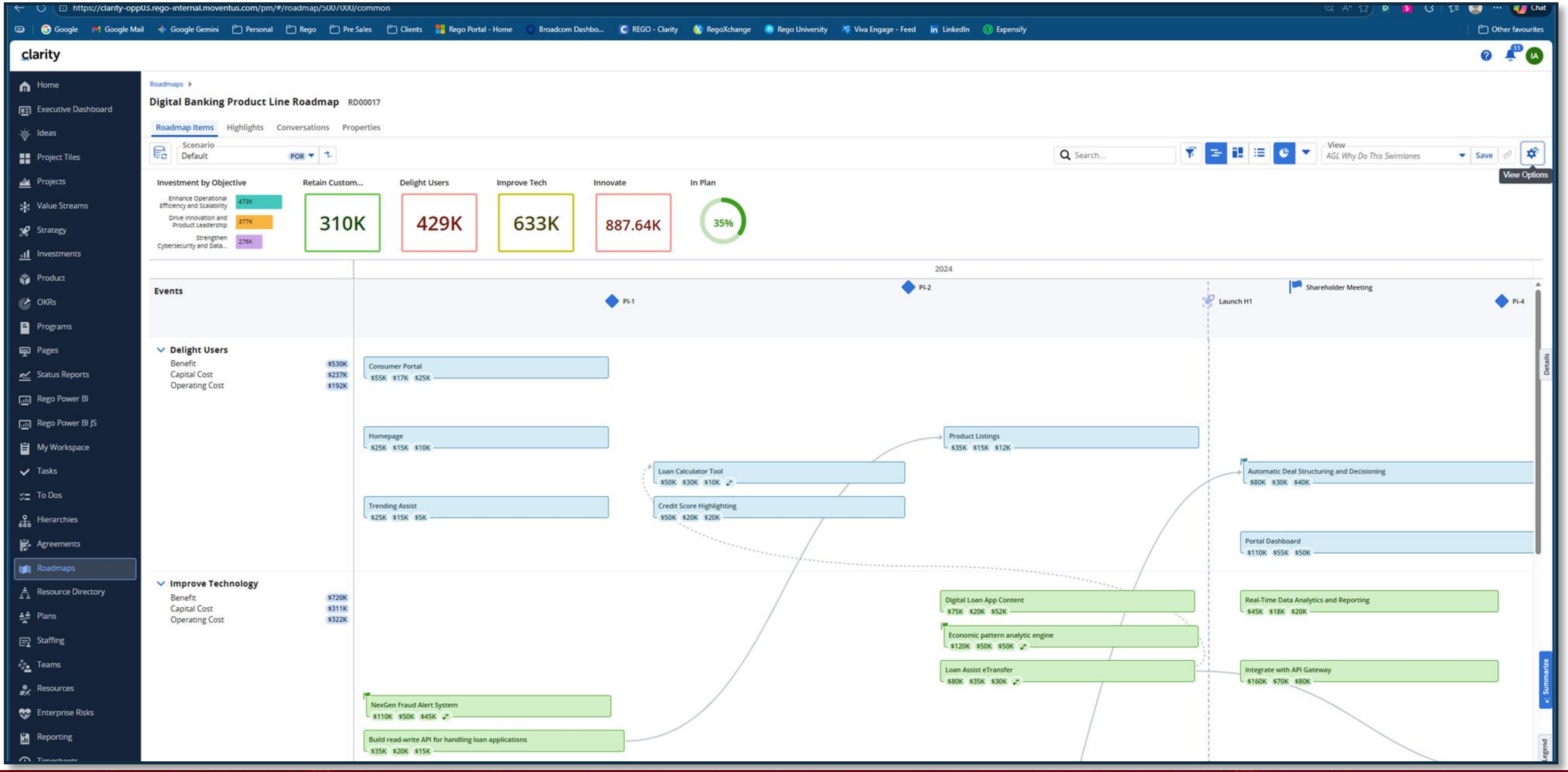
Hierarchies and Roadmaps (Methodology Agnostic)

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)

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.



Power BI and Dashboarding

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

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
- Timesheets
- Collapse

Projects

EP1 - Data Quality Rule Engine Enhancement PR2195 Needs Help

Agile Performance | Tasks | Properties | Bi-directional Agile Sync | Staff | Financials | Risks | Issues | Status

Initiative

- [ ] Build read-write API for handling Orders
- [ ] Collaboration Enhancements
- [ ] Digital Banking User Experience
- [ ] Integrate Social into Shopping Experience
- [ ] Maintain legacy purchasing system
- [x] Minimal Online Shopping Release 4.0
- [ ] Order Management System
- [ ] Personalized online shopping experience

SPEND

% of Funding: 70%
$400,000 Budget
$280,000 Actuals

CAPEX/OPEX

CapEx: $100K
OpEx: $180K

Schedule

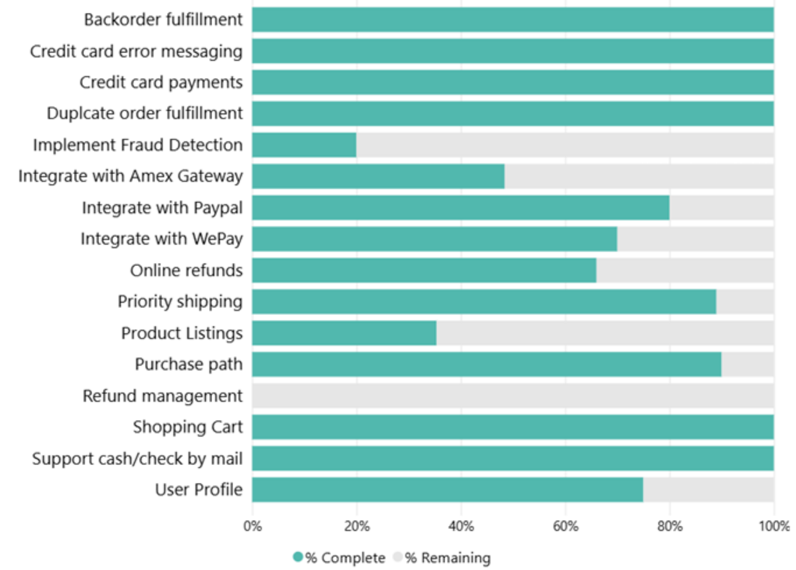
% of Schedule: 62%
10/31/22 Start
6/28/23 Finish

Weeks Remaining: 4

Funded FTEs: 35

Feature	Feature ID	Est. Storypoints	Storypoints Accepted	% Complete	Actuals	Actual Cost	Start	Finish
Backorder fulfillment	F44	18	18	100%	169	$25,354	10/31/22	4/21/23
Credit card error messaging	F19	70	70	100%	0	$0	10/31/22	4/21/23
Credit card payments	F24	80	80	100%	0	$0	11/28/22	12/21/22
Duplcate order fulfillment	F49	4	4	100%	182	$27,368	10/31/22	4/21/23
Implement Fraud Detection	F23	25	5	20%	185	$27,750	1/19/23	2/24/23
Integrate with Amex Gateway	F48	31	15	48%	190	$28,470	10/31/22	4/21/23
Integrate with Paypal	F37	50	40	80%	0	$0	11/21/22	12/22/22
Integrate with WePay	F18	100	70	70%	0	$0	11/24/22	1/6/23
Online refunds	F38	60	40	66%	0	$0	11/14/22	12/22/22
Priority shipping	F36	78	70	89%	0	$0	11/28/22	12/23/22
Product Listings	F9	82	29	35%	199	$29,922	2/6/23	3/3/23
Purchase path	F35	100	90	90%	0	$0	11/14/22	12/30/22
Refund management	F10	90	0	0%	0	$0	11/21/22	12/22/22
Shopping Cart	F17	60	60	100%	0	$0	12/5/22	12/22/22
Support cash/check by mail	F45	23	23	100%	240	$35,925	10/31/22	4/21/23
User Profile	F20	80	60	75%	0	$0	12/5/22	2/1/23
Total					**1165**	**$174,789**		

% Complete and % Remaining by Feature



Microsoft Power BI

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

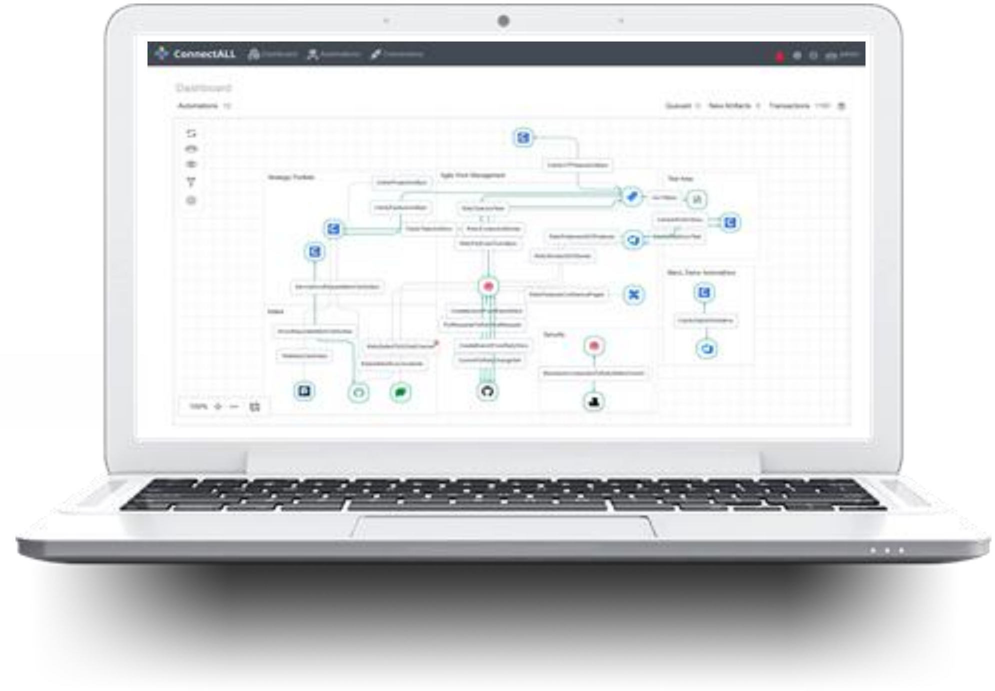
Bring It to Life:
Automation Management with ValueOps ConnectALL

regoUniversity
SAN ANTONIO • 2026

ValueOps ConnectALL

Value Stream Automation

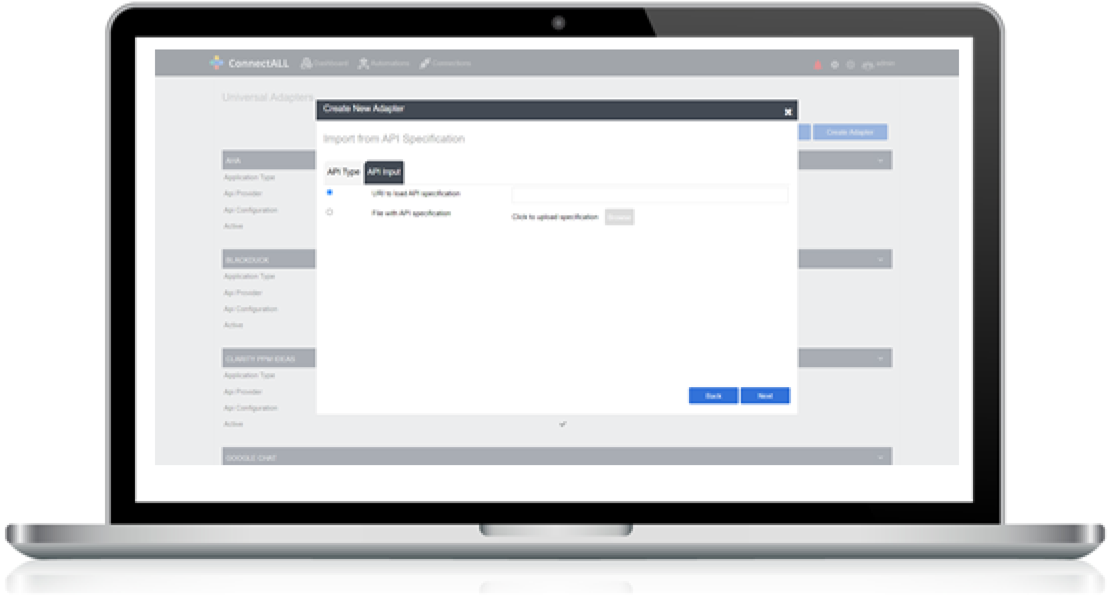
- Automate the flow of information and activities across teams, organizations, and tools
- Eliminate non-value-added activities, remove bottlenecks, and increase efficiencies
- Integrate, interoperate, trigger, and monitor activities in the Value Stream



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

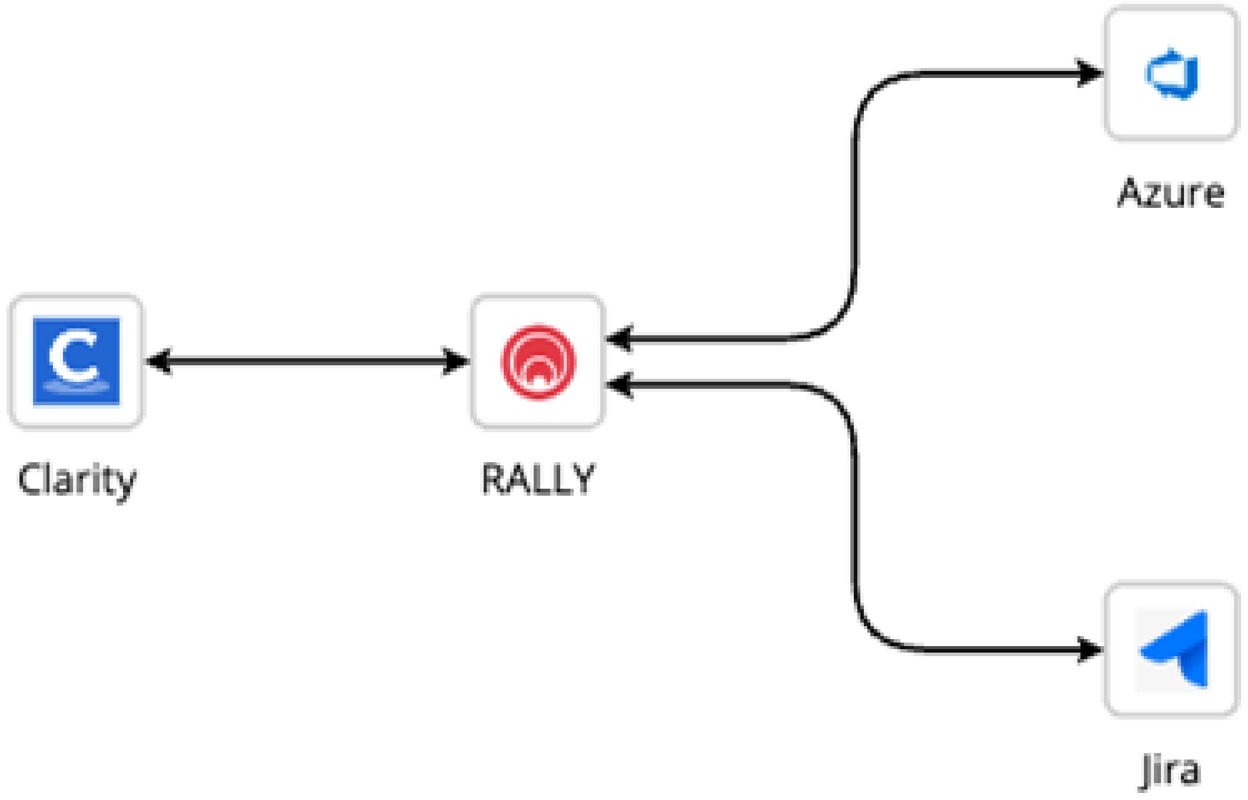
Features to align business and delivery, reduce friction, and foster collaboration

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

PPM

Enterprise Agile Planning

Agile Execution



Automation at Every Step

ServiceNow	Clarity	Rally	Micro Focus ALM	GitHub Jenkins Octopus
Service Management	**Portfolio Management**	**Requirements Management**	**Test Management**	**Config, Build & Deploy Mgmt.**
• Incidents • Issues • Requests	• Ideas • Strategies • Initiatives • Roadmaps	• Initiatives • Epics • User Stories • Tasks, Subtasks • Defects • Sprints	• Defects • Test Plans • Test Scripts • Tests • Results	• Commits • Pull Requests • Builds (Jobs) • Results • Deployments

Request → **Plan** → **Build** → **Test** → **Deploy** → **Usage**

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!