



Introducing Nudge: A New Dimension in Delivery Insights

Your Guides:
Peter Hughes and Katie Sherbondy

Sponsored by

ValueOps™
by Broadcom

Clarity™
by Broadcom

Rally®
by Broadcom

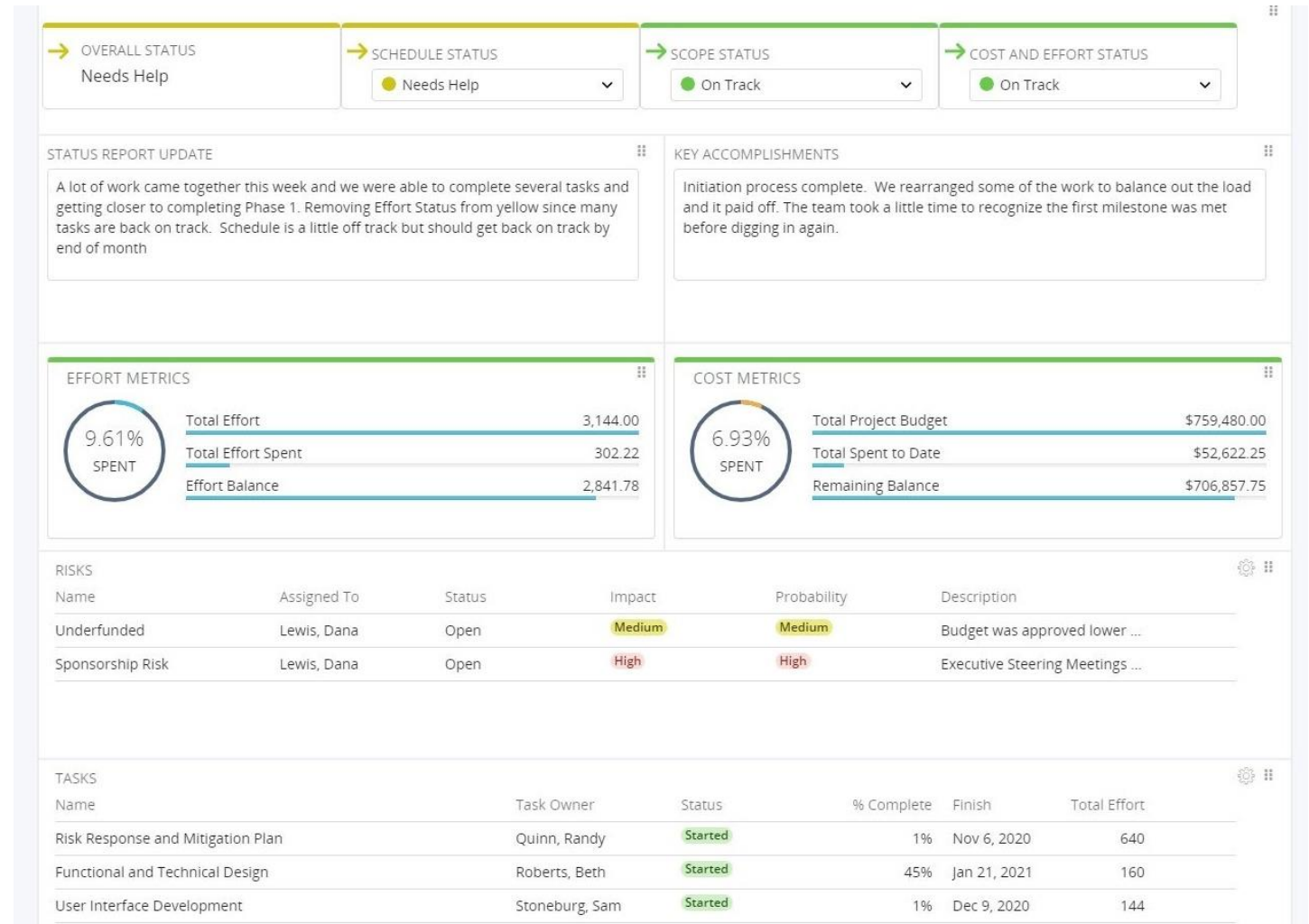
ConnectALL
by Broadcom

Insights
by Broadcom

Status Tracking Today

2

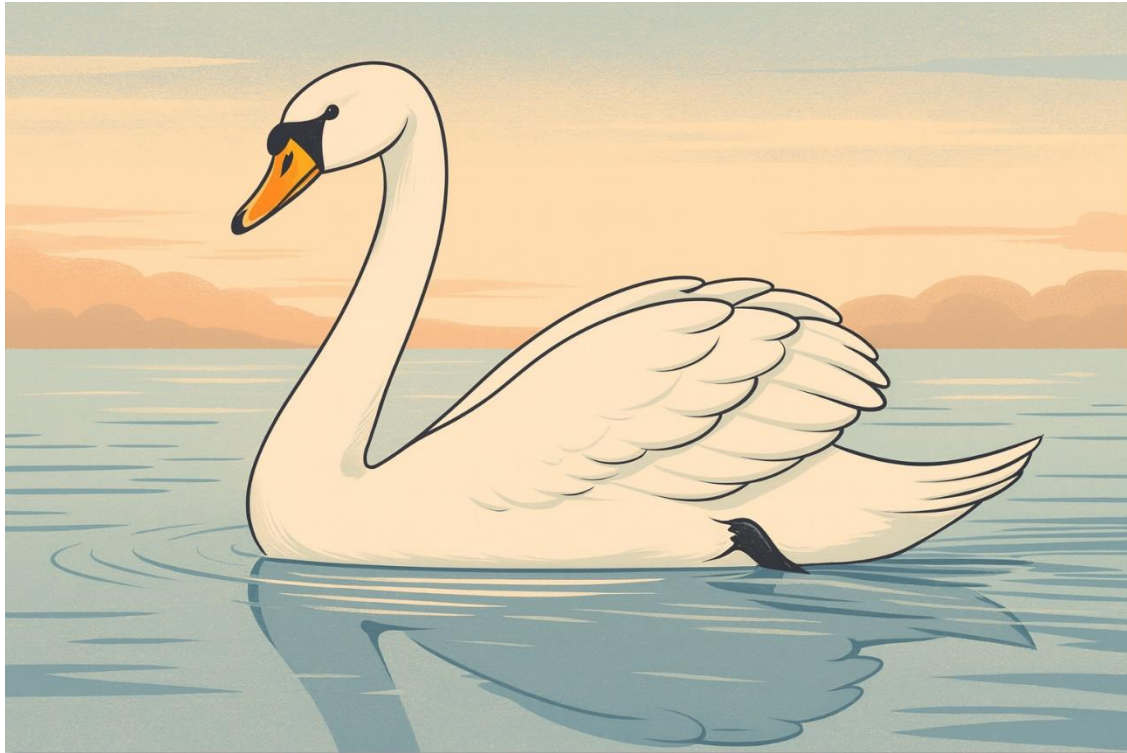
- Status Reports and Metrics
 - RAG
 - Cost vs Budget
 - Risk and Issues
 - Effort
 - Schedule vs Baseline
 - etc.



What Leadership Sees vs. Reality

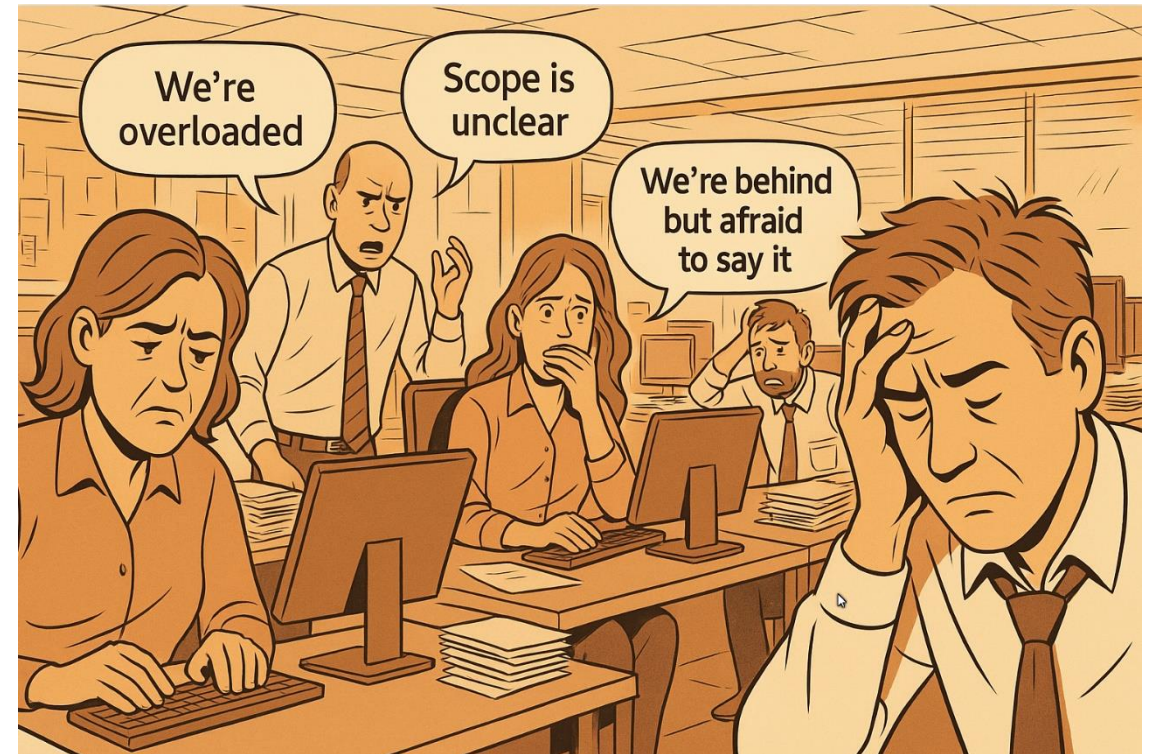
Leadership View

All good ... nothing to see here.

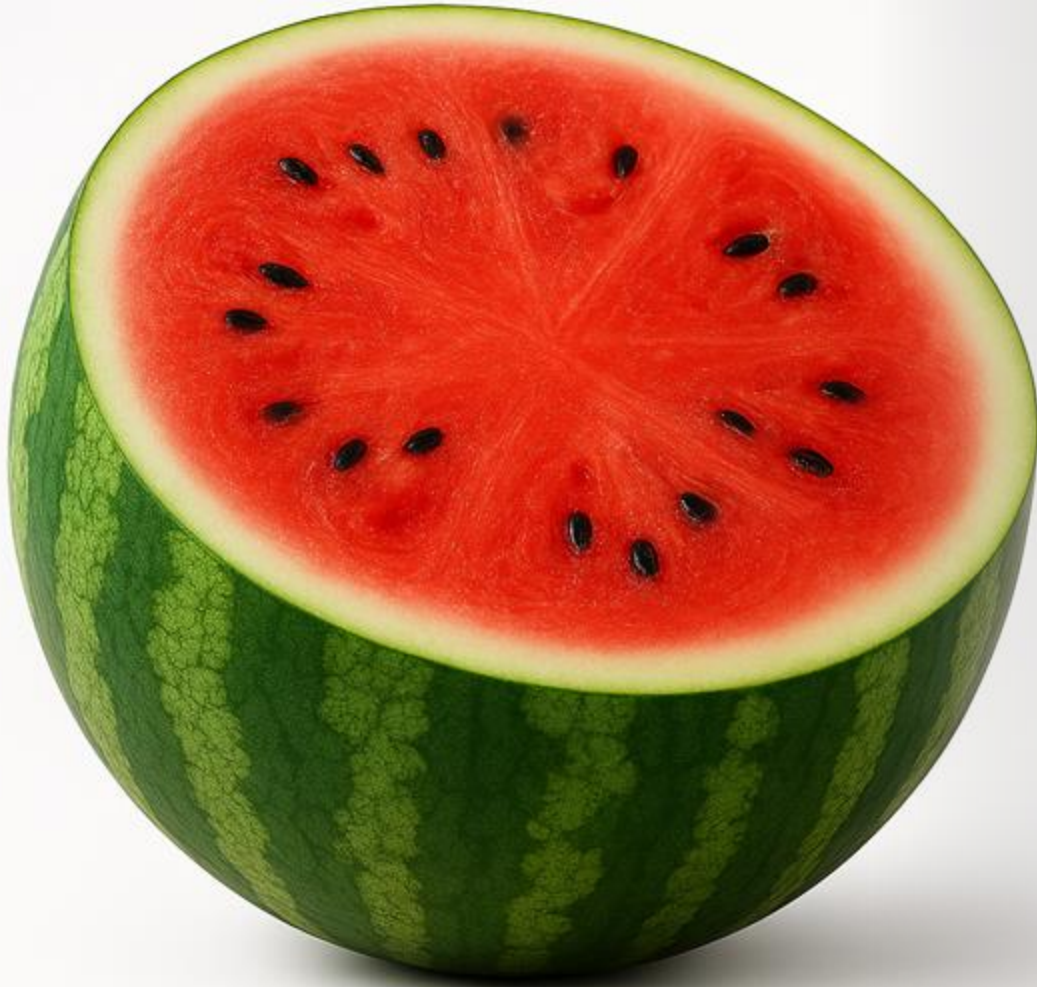


What's Really Happening

Team stress and hidden risks



Why Do Watermelon Initiatives Still Plague Us?

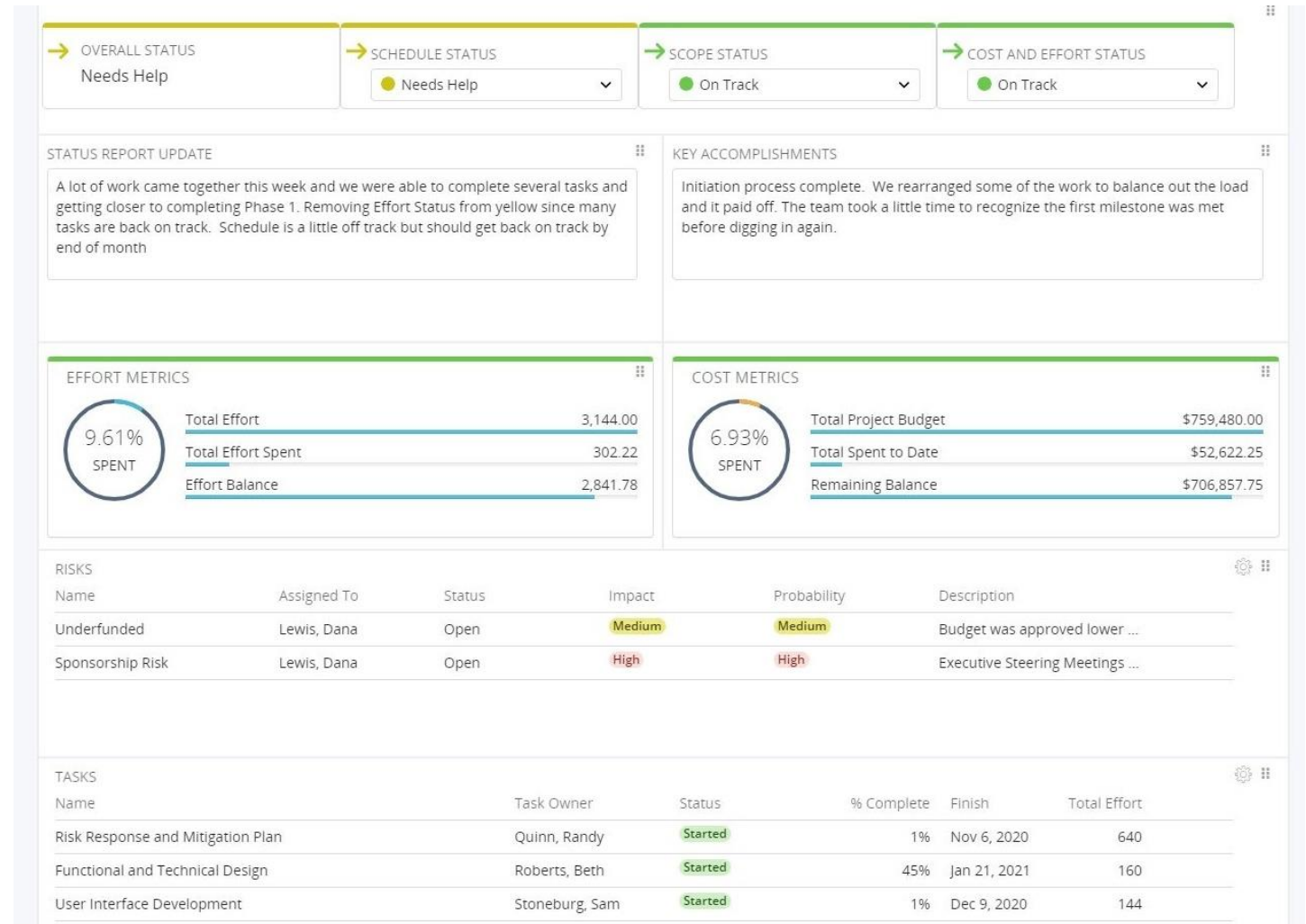


Are we
missing
something?

The Missing Signal

5

- Status Reports
- Metrics
 - RAG
 - Cost vs Budget
 - Risk and Issues
 - Effort
 - Schedule vs Baseline
 - Team Sentiment



Nudge Gives Us That Signal

6



Lightweight
Micro-Surveys



Team Sentiment
Signal



Early Risk Detection

Status reports tell us what leadership wants to hear.
Nudge tells us what the team needs us to hear.

The Scenario

You're working on a project, and you get a 'Nudge' through MS Teams

Rego Nudge 13/08 21:00

Welcome to RegoLink Nudge!

Last read Today

Rego Nudge 20:59

Clarity Nudge

Do you have the people, tools and support you need to complete your tasks on NextGen Innovation? *

☐ 1 = Severely understaffed

☐ 2

☐ 3

☐ 4

☐ 5 = Fully covered

Send

You cannot send messages to this bot

🗑️ 😊 🔄 📎 + ➡️



How would you use Nudge?

- Reminders
- Gathering stakeholder sentiment
- Identify training requirements
- Identifying improvements to delivery process
- Another great idea...



Clarity Express

Driving Clarity Adoption and Real-Time PPM Governance on the Go

Your Guides:
Peter Hughes

Sponsored by

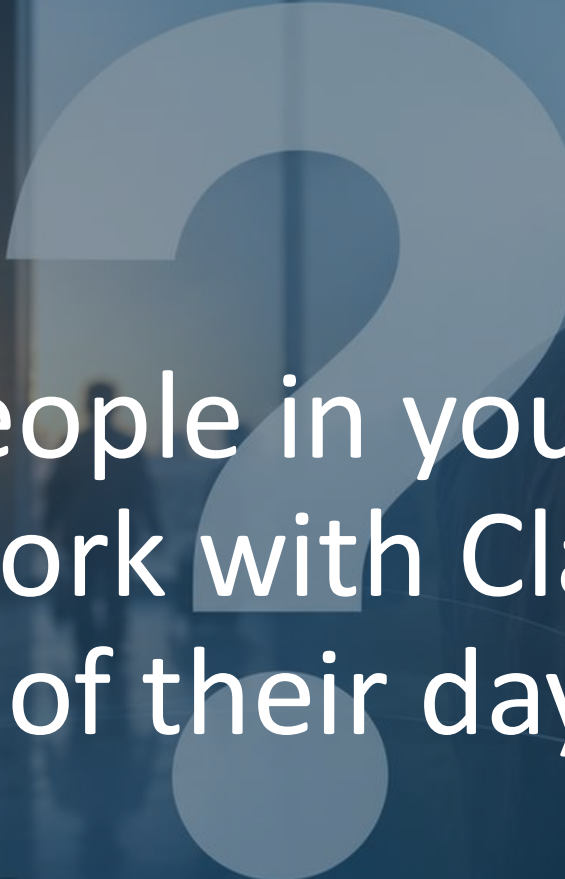
ValueOps
by Broadcom

Clarity
by Broadcom

Rally
by Broadcom

ConnectALL
by Broadcom

Insights
by Broadcom



Do you have people in your organisation who need to work with Clarity but don't spend most of their day at a desk?



Do you have problems
getting them to use Clarity?

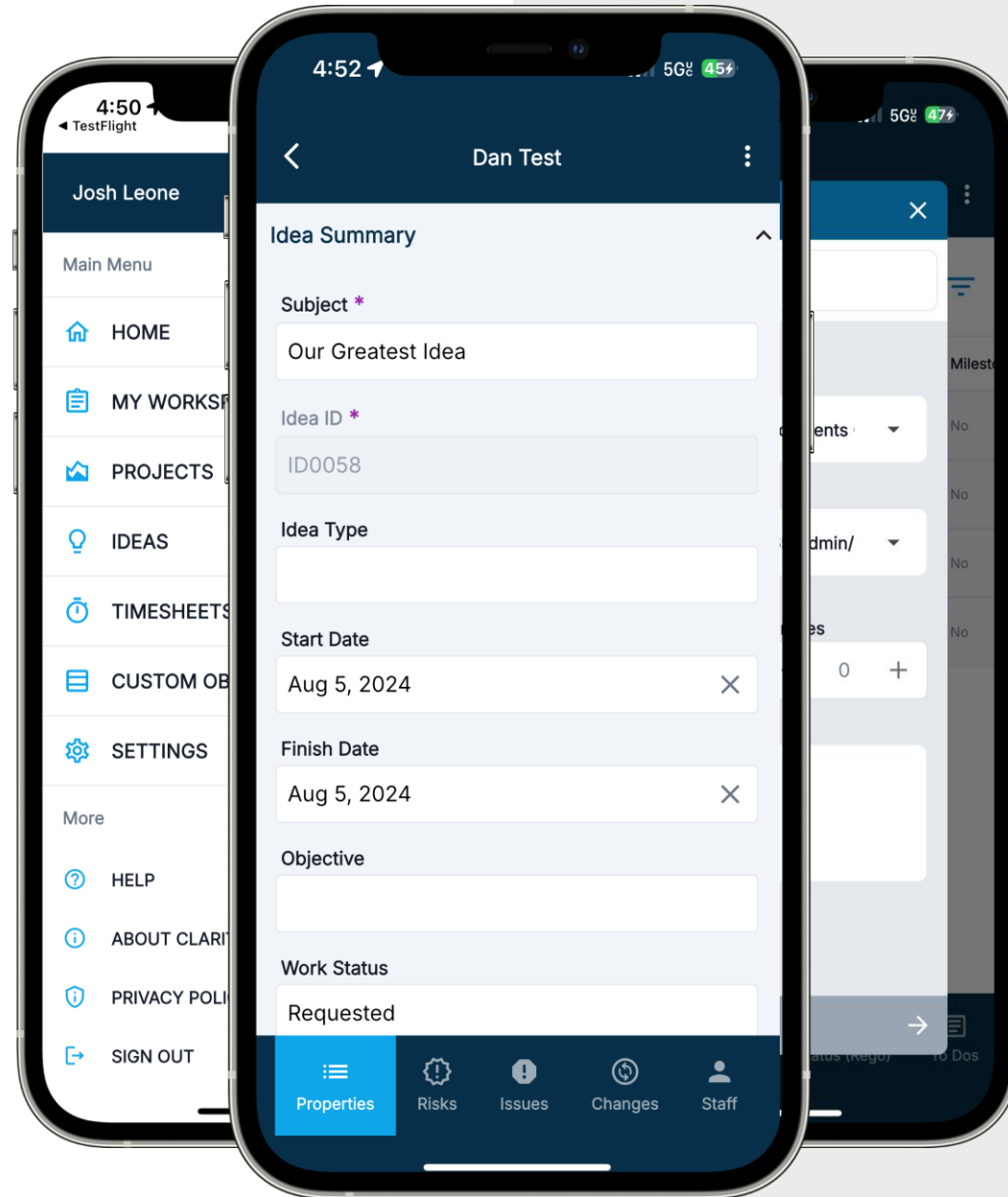


Clarity was built for people at a desk.
Work isn't.

CLARITY EXPRESS

Clarity, in the palm of your hand

Clarity Express brings the full Clarity experience to your mobile device.

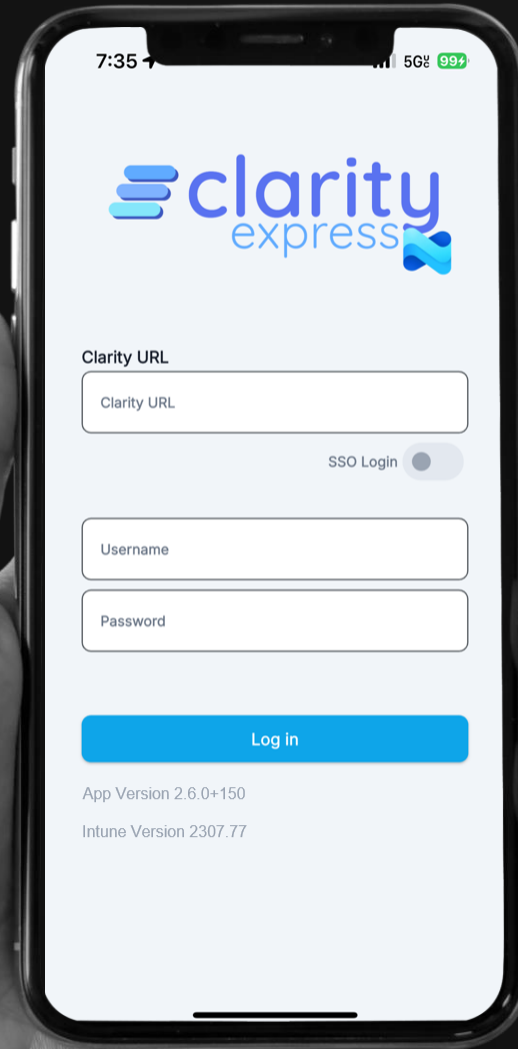


CLARITY EXPRESS

Mobile Timesheets Reimagined

Time entry has been redesigned for speed and simplicity. Hour and minute counters replace keyboards, reducing clicks and making updates effortless.

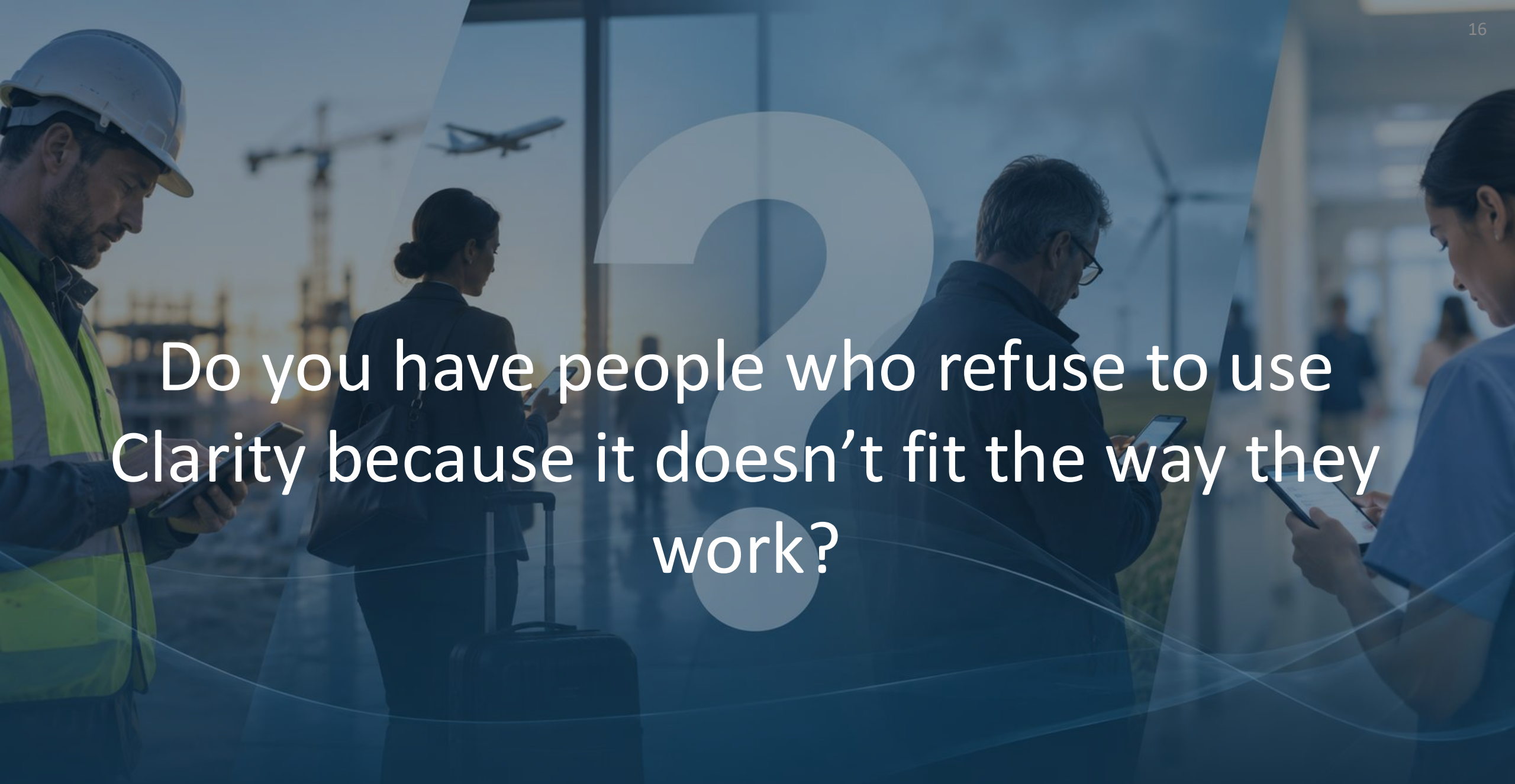
The image shows a smartphone screen with the 'Timesheets' app. At the top, there's a header with a menu icon, the title 'Timesheets', and a user profile picture. Below the header, a date range 'Feb 7, 2024 – Feb 13, 2024' is displayed. A progress bar shows 'HOURS 16.00 / 40.00' and 'PROJECT TIME 25%'. There are buttons for 'Open', 'Notes 5', 'Add Tasks', and 'Submit'. The main section is titled 'Friday 11, February' with a '40 Hours' badge. It lists tasks: 'Go to Market – Clarity Mobile (PR9099)', 'UX Development (TSK065510)' (1h 45min), 'Go to Market – Moventus (PR9099)', 'UI Development (TSK065510)' (6h 15min), and 'UX Development (TSK065510)' (1h 45min). The 'UI Development' task has a blue '5' next to it.



CLARITY EXPRESS

Enterprise Grade Security

Clarity Express now integrates seamlessly with Microsoft Intune, giving enterprises the security and management control they need without compromising user experience.



Do you have people who refuse to use
Clarity because it doesn't fit the way they
work?



Action Item Responder (AIR)

Your Guides:
Wes McCoubrie & James Gille

Sponsored by
ValueOps
by Broadcom

Clarity
by Broadcom

Rally
by Broadcom

ConnectALL
by Broadcom

Insights
by Broadcom

Agenda

- Problem Statement and AIR Overview
- Use Case Examples
- New Features
- Architecture and Security
- Solution Comparison
- Demonstration

Why this Solution?

- Clarity's workflow engine is one of the most powerful on the market, allowing all types of invested stakeholders the opportunity to participate directly in process-driven activities, reviews, and approvals.
- The stock solution that facilitates this interaction, however, is inefficient, rooted in the Classic UX, and requires licenses for each participant:
 1. Log into the system.
 2. Navigate to a workflow-generated action item.
 3. Click into the associated object to see its details.
 4. Return to the action item to finally provide an assessment.
- Solving this challenge was a top priority for Rego as a means to unlock the potential of Clarity's workflow engine, and why we have spent hundreds of hours researching for a simple way to respond directly within email to action items. This research has led to a solution that meets our high standards - simple, fast, and inexpensive.
- This service allows users to respond to actions simply and easily within their email - eliminating the extra login step while presenting all the information needed to make the decision within the body of the email. Some examples include:



Review/Approval/Rejection of Timesheets



Ideation Validation and Conversion Approval



Approval/Rejection of a Change Request or Budget Revision



Stage Gate Reviews

Overview

What You Can Do



- Create workflow process actions that route to anyone via email and allow those participants in the workflow processes to respond to action items simply and easily within email directly
- Notes can be added to the email response as well and are passed into Clarity

Value to Customers



- Increase adoption and perception; solution is simple and easy to use
- Reduce cycle time for responses

Compatibility



- 100% Out-of-the-box capabilities; supports workflows GEL and standard APIs
- On-premise and SaaS
- Any version of CA PPM 13.x and above

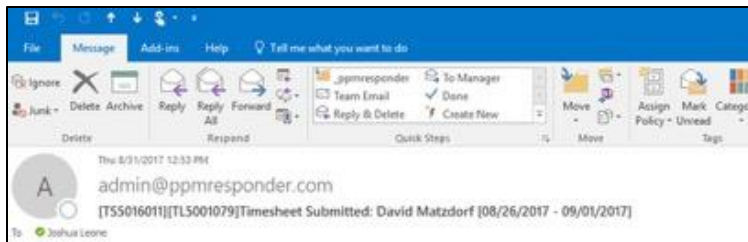
What You Get with Subscription



- Unlimited use in any workflow for any object; no restrictions
- Rego kick-off assistance; knowledge transfer and help creating your first workflow response

Examples

Example Timesheet Submission



Dear Josh Leone,

Here is the timesheet for **David Matzdorf** for the time period of **08/26/2017 - 09/01/2017**

Investment	Task	Sat 08/26	Sun 08/27	Mon 08/28	Tue 08/29	Wed 08/30	Thu 08/31	Fri 09/01	Total
Acme Development Project	Acme Development Project			3	3	1	5	3	15
Acme Development Project	Core Development			2	4	4	1	1	12
Acme Development Project	UI Development			1	1	3	1	1	7
Acme Development Project	Database Development			5	2	3	1	1	12
Acme Development Project	Testing			2	1	4	2	1	10
Total				13	11	15	10	7	56

Approve

Return

Example Idea Submission

Dear Leo Dsouza,

The **Idea** below has been submitted for your approval.
You may mark this Idea **Approved**, **Rejected** or **Incomplete** with the buttons below.
A new email will be generated where you can add notes. Click send on that email to submit.

Idea Name	Requestor	Type	Priority	Goal	Planned Cost	Planned Benefit	Department
Build a bunker	Josh Leone	Survival	3	Survive bad stuff	\$30,000	\$10,000	Infrastructure

Description

In order to survive the pending nuclear disaster, we need build a bunker to store all the important stuff.

Objective

If we keep the important stuff safe it will allow us to survive longer.

Approve

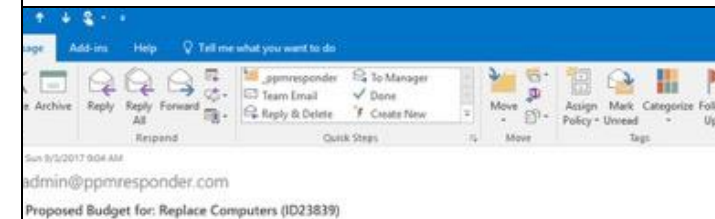
Reject

Incomplete

If you have questions or comments regarding this notification, please contact CA PPM Support.

Thank you!
CA PPM Admin

Example Budget Submission



Dear Josh Leone,

A cost plan for **Replace Computers (ID23839)** has been submitted as a proposed budget. Below are the details:

Project Manager: Josh Leone

Description: Replace all the computers in the IT department.

Overview: The replacement plan includes all hardware and labor costs.

Cost Type	Transaction Class	2018	2019	2020	2021	Total
Capital	Hardware	\$250,000				\$250,000
Capital	Software	\$500,000				\$500,000
Capital	Internal Labor	\$100,000	\$500,000	\$500,000		\$1,100,000
Capital	External Labor	\$50,000	\$300,000	\$300,000		\$650,000
Operating	Travel Costs	\$20,000	\$20,000	\$20,000		\$60,000
Operating	External Labor		\$50,000	\$50,000	\$50,000	\$150,000
Operating	Internal Labor	50,000	\$50,000	\$200,000	\$200,000	\$500,000
Total		\$970,000	\$920,000	\$1,070,000	\$250,000	\$3,210,000

Approve

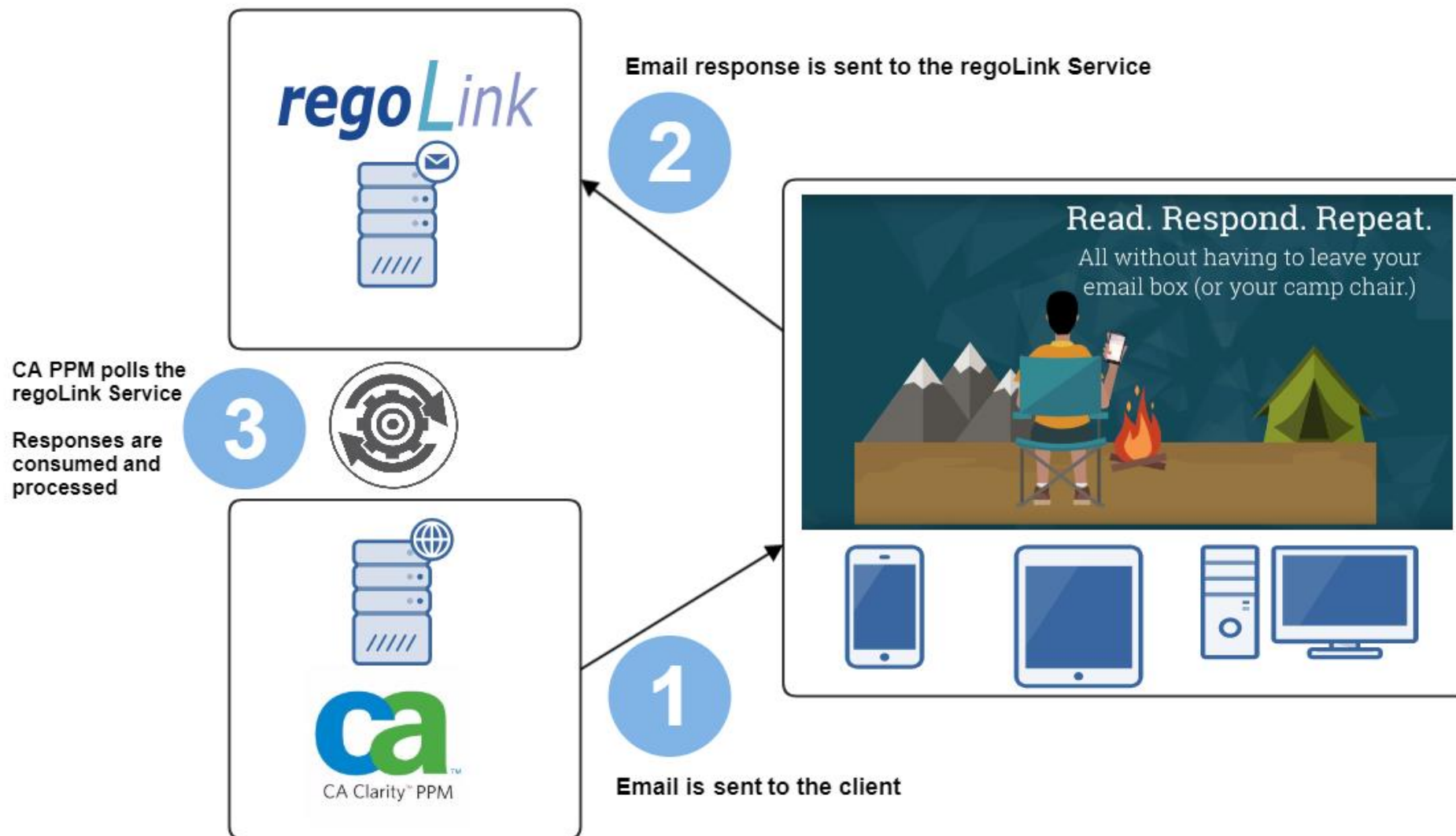
Reject

New Features

- Enhanced Flexibility
 - Template Functionality
 - Attachment, GEL, and SQL Parameters
 - Button Coloring
- Upgrade Simplification
- Localization
- Multiple Connection Instances
 - PROD, TEST, DEV
 - Token Management
- Security Group Override
- Upgraded Administrator Dashboard
 - Manually Resend Emails
 - Logger / Processor Object Maintenance



Architecture



Security

- No customer data is sent via the email response or stored
 - The only exception being the action item notes – if used
- Email response contains only hashed IDs plus the response itself (e.g., Approved/Rejected)
- The service uses MS Azure and Office 365
 - Authentication via OATH
 - Servers are in US-based data centers
 - Accounts are not shared; one account is dedicated per customer

Solution Comparisons

	Rego Action Item Responder	Native Action Responder	Mobile App (Rego or Native)
Timesheet Approvals	Yes	No	Yes
Process Action Item Approvals	Yes	Yes	Yes
Supports Notes	Yes	No	No
Email Formatting	Yes	No	No
Supported Mailbox Types	- IMAP/POP3 - Office 365 - Google Gmail - Rego Hosted Office 365	- IMAP/POP3 - Office 365 - Google Gmail	N/A
Error Handling and Logging	View all outbound and inbound entries	Limited visibility, runs in the background	N/A
Localization of messages	Yes	No	Yes
Select which Processes send an email	Yes	No	No
Send reminders for missed action items	Yes	No	No

AIR Demonstration

Sample Stage Gate Review Workflow



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](#)!

