



The Connected Enterprise: Scaling Collaborative Work Management in Clarity

Your Guides:
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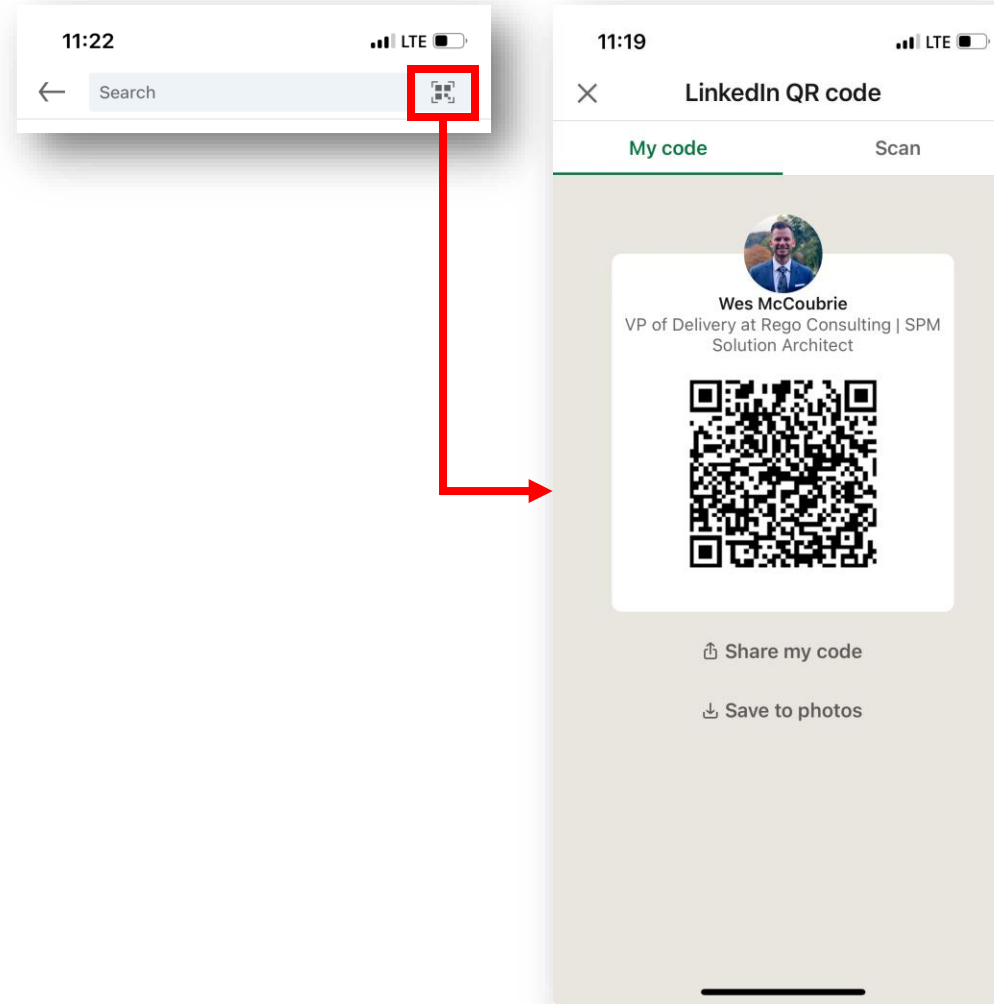
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Introductions

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- Take 5 Minutes
- Turn to a person near you
- Introduce yourself
- Connect on LinkedIn!



Agenda

Let's answer these questions...

- What is Collaborative Work Management (CWM)?
- How did Clarity enter this space?
- What features do various CWM platforms offer?
- What does Clarity CWM look like?
- Should you evaluate Moventus?

What Is Collaborative Work Management (CWM)?

Gartner:

The CWM market consists of vendors offering **task-driven team hubs** that empower business users to plan, carry out and manage their work. Team hubs combine task, planning, **workflow, integration and automation** capabilities, with conversations, **content publishing, reporting, analytics and dashboards**. Products in this market are defined by their purpose (work planning and execution), by their target users (nontechnical business users) and by their broad functionality.¹

¹ <https://www.gartner.com/reviews/market/collaborative-work-management>

What Is Collaborative Work Management (CWM)?

Gartner:

Key Findings

- **Collaborative work management (CWM)** products empower business users to plan, manage and automate common repeatable work activities.
- The level of interest in collaborative work management has been growing steadily over the last few years, with a notable rise consistent with the increase in hybrid work.
- CWM tools come with prebuilt work templates for business users engaged in agile teamwork, goal management, case management, issue tracking, strategic work planning, product management, marketing work, and legal work.
- Most organizations deploy CWM tools tactically, targeting specific situations applicable to small groups of employees. Multiple CWM tools in the same organization are common.²

² <https://www.gartner.com/en/documents/4022601>

Open Mic

 What are your organizations using for CWM?

 Are you aware of Clarity's CWM capabilities?

Customer Perspectives on Collaborative Work Management

- “Don’t worry about dominating here. All large enterprises have many of these products, whether from Microsoft or Google or Atlassian – you have an advantage because you’re a system of record – if it’s simple.”
- “You need something so simple they would want to use it. But don’t expect to capture the entire enterprise. Other parts of the organization do provide an opportunity for expansion if it’s simple.”
- “One big driver is the dashboards. If you can make sense of all this data. Users can create their own dashboards in most these tools. But they struggle to pull it all together – there are many versions of the truth. Clarity has an opportunity to federate all this data so the enterprise can make sense of it.”
- “The Enterprise Transformation Office for example, is struggling with a single source of truth. They have every flavor of CWM tool and were planning on building integrations to all of them. This will be a game changer to leverage a single platform and forget the whole integration thing.”

CWM Capabilities by Platform

Tool	Checklists and Tasks	Collaboration	Workflow	Project Management	Resource Management	Financial Management	Portfolio Management	Ad Hoc Dashboards
Asana	✓	✓	✓	✓	✓		✓	✓
Trello	✓	✓	✓					
monday.com	✓	✓	✓	✓	✓		✓	✓
MS Planner	✓	✓			✓			
ClickUp	✓	✓	✓	✓	✓		✓	
Smartsheet	✓	✓	✓	✓	✓		✓	✓
Clarity	✓	✓	✓	✓	✓	✓	✓	✓

Clarity expanded into team-centered work management through Modern UX in 2016, and has aggressively developed capabilities matching other top solutions. Because Clarity is best known as a robust enterprise platform, organizations may overlook its capabilities as an everyday, team-centric work management tool.

Clarity CWM Features



Core Functionality



Work Management

- To Do's
- Checklists
- Tasks Dashboard
- My Workspace



Collaboration

- Conversations
- Business Rules
- Action Items
- Notifications
- View Sharing



Usability

- Mobile app
- Global Search
- VAIA
- List, Calendar, and Board Views



Reporting

- Status Dashboard
- Expanded Canvas Reporting
- New Reporting Solution

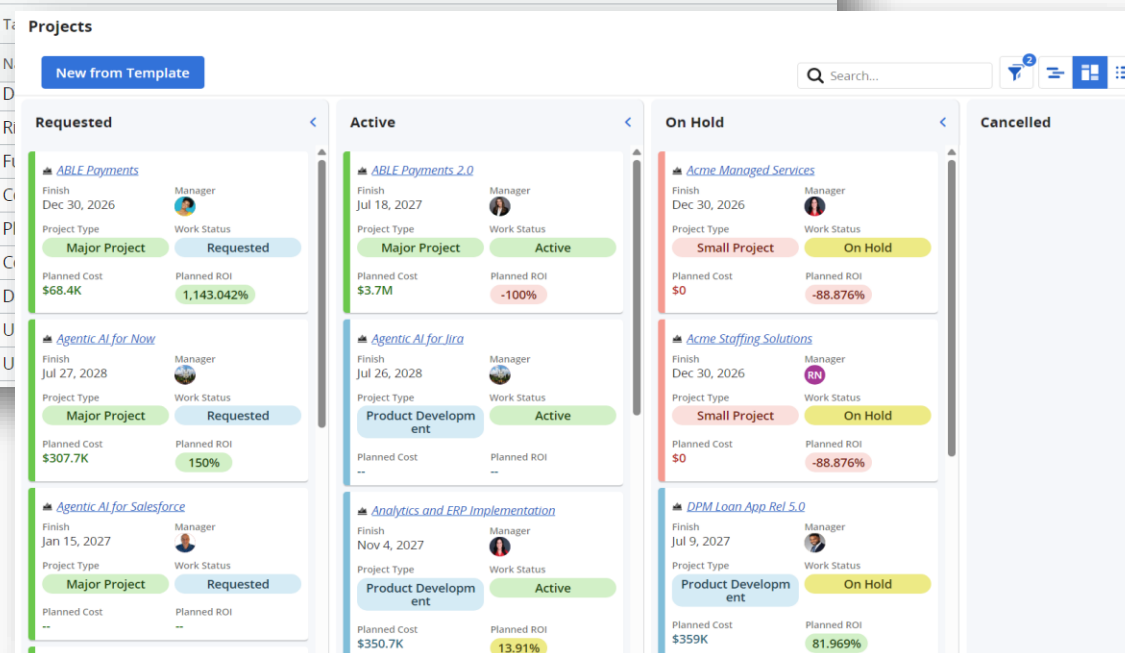
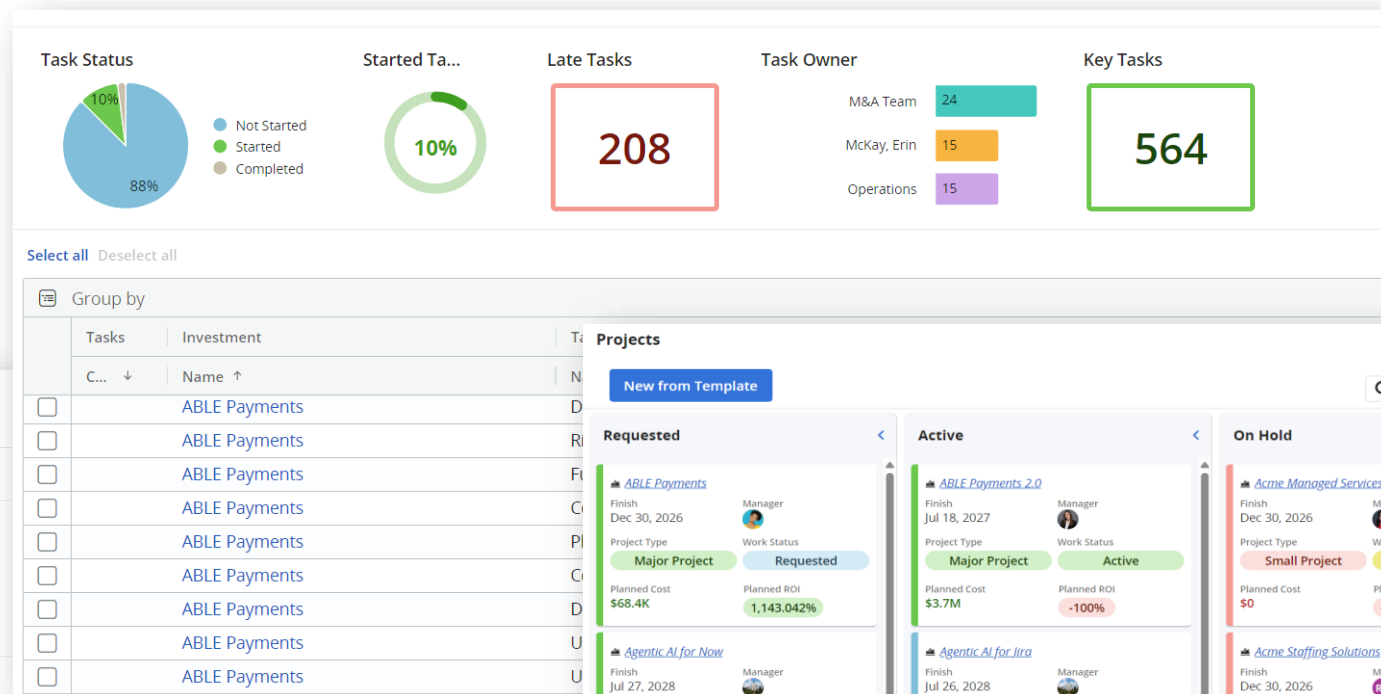
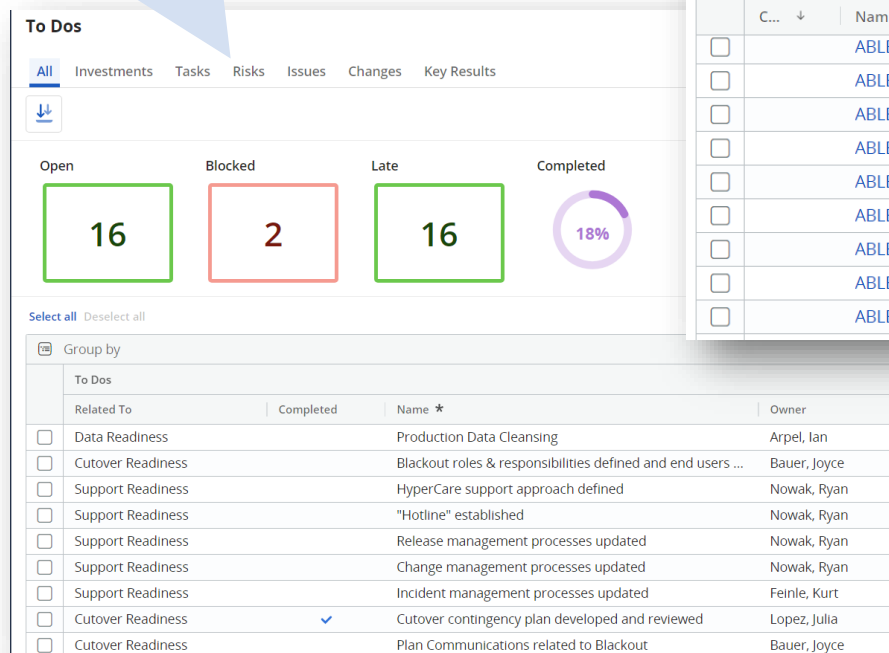
Task-Driven Team Hubs

The image displays three overlapping screenshots of a task management application. The top-left screenshot shows a 'Cloud Migration To Dos' hub with a sidebar containing 'Checklists' (CI/CD Pipeline Readiness, Communications Readiness, Cutover Readiness, Data Readiness, DOD IL4 Compliance Readiness) and 'Smartlists' (All 'Blocked' To Dos, Cloud Migration To Dos, Idea Checklists, My To Dos). The main area shows a 'Blocked' status with a task 'Establish & validate Blackout Exit Criteria' and a sub-task 'Cutover Readiness (Cloud Migration Workstream)'. The top-right screenshot shows a calendar view for January 2023, with tasks like 'Documentation of Dat.' and 'Blackout scenarios and proce'. The bottom-right screenshot shows an 'Idea Checklists' hub with a sidebar containing 'Checklists' (CI/CD Pipeline Readiness, Communications Readiness, Cutover Readiness, Data Readiness, DOD IL4 Compliance Readiness) and 'Smartlists' (All 'Blocked' To Dos, Cloud Migration To Dos, Idea Checklists, My To Dos). The main area shows a list of tasks with checkboxes and due dates.

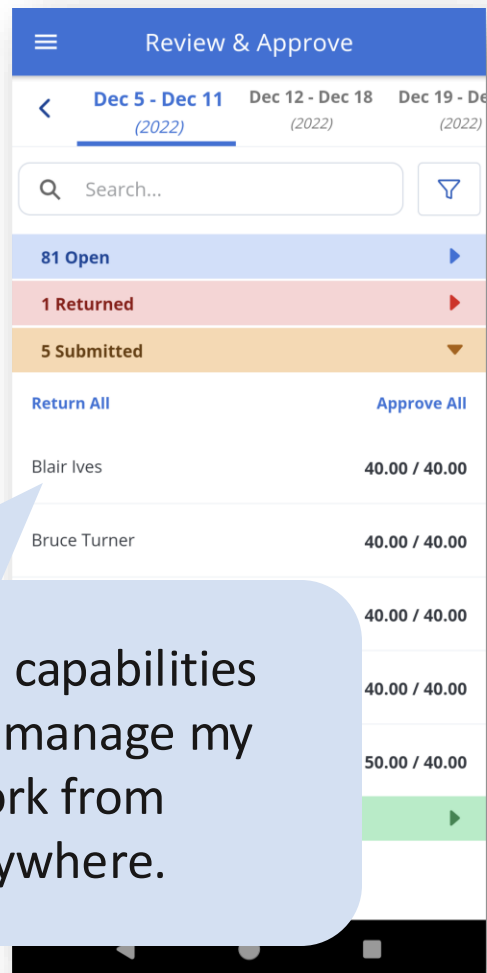
Personal workspaces help me organize and manage my work in the context of the larger team.

Task-Driven Team Hubs

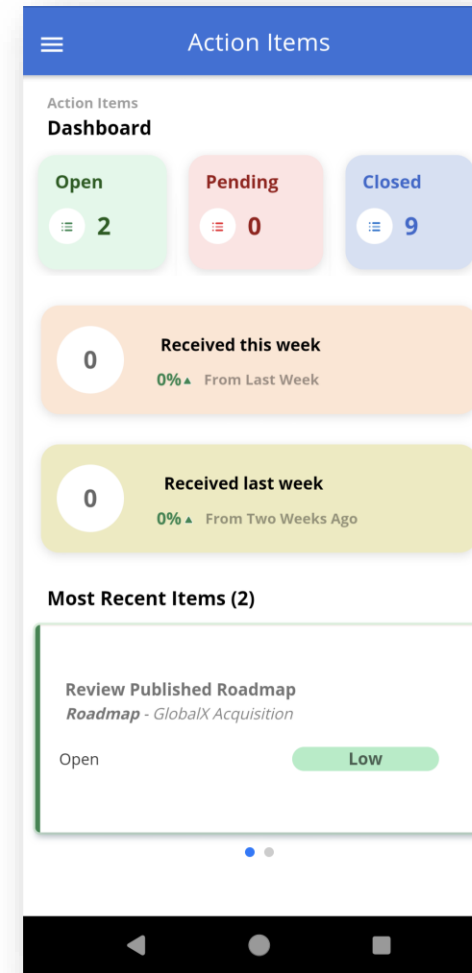
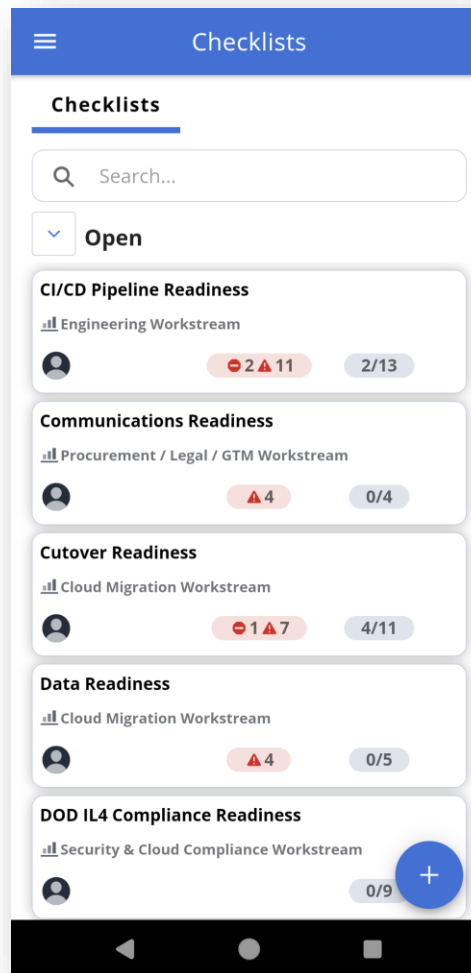
One simple way to update and interact with my teammates and project leads, regardless of methodology.



Task-Driven Team Hubs



Mobile capabilities
let me manage my
work from
anywhere.



Workflow, Integration, and Automation

Action Items

Open (3)
Pending
Closed (116)

Open Action Items

ABLE Payments Module has been placed On Hold Priority: High

Project: [ABLE Payments Module](#)

Please review your project to see why it has:

[Done](#)

[View History](#)

Review Published Roadmap

Roadmap: [GlobalX Acquisition](#)

[Approved](#) [Rejected](#)

[View History](#)

Please review the issue: Pacing Sales growth

Issue: [Pacing Sales growth](#)

Please resolve or escalate the following high priority issue.

Issue Name: Pacing Sales growth
Project Name: Overall M&A Playbook
Issue Category: Interdependencies
Issue Owner: Higgins, Tanya

Notifications

[New Notification](#)

Project - Major Published: Aug 14, 2023 [Edit](#)

[Properties](#) [Visuals](#) [Modules](#) [Rules](#) [Actions](#) [Create from Template](#)

[Search...](#) [View Default](#) [Save](#) [Link](#)

Rule Name ★ ↑	Enabled ★	Description	Last Updated By	Last Update
Hide Financials	✓	Hide the financial section for On Hold or Canceled Projects	Arpel, Ian	
Hide Modules When Completed	✓	Hide Modules when Project Work Status is set to completed	Arpel, Ian	
Make Strategy a Required Field when Project Work Status is Active	✓	Make Strategy a Required Field when Project Work Status is Active	Arpel, Ian	
Notify stakeholder when project goes On Hold	✓	Send action item to Primary Stakeholder when Work Status is set to On Hold	Arpel, Ian	
Status Reports not Editable once Submitted	✓	Once Final, the Status Report is not editable	Arpel, Ian	
When the Grow the Business goal is attached to a Project, do something.	✓	When the Grow the Business goal is attached to a Project, do something.	Arpel, Ian	

Workflow, Integration, and Automation

At the heart of Clarity's AI capabilities lies VAIA, Clarity's own AI assistant designed to transform data **into** actionable insights for enhanced organizational efficiency.

I can use VAIA to suggest scope changes, analyze pacing, and recommend proactive course corrections.

The screenshot displays the Clarity project management interface. The left sidebar shows navigation options like Home, Executive Dashboard, Project Tiles, Projects, Ideas, Events, Strategy, Investments, Products, Objectives, Value Streams, Programs, Pages, Custom Objects, Status Reports, Rego Power BI, My Workspace, My Profile, Tasks, To Dos, and Collapse. The main content area shows the 'ABLE Payments 2.0' project (PR2112) with a 'Needs Help' status. The 'Properties' tab is active, displaying project details: Project Name (ABLE Payments 2.0), Client (Crestview Trust), Project Type (Major Project), and Objective (Expansion of payments processing systems across all platforms). The 'Lifecycle' section shows the project is in the 'IT/Planning' stage. A progress bar at the bottom indicates the project is currently in 'G1: Initiation'. On the right, a 'Project Review' panel provides a 'Recommended Executive Summary' and 'Top 3 Actions Recommended'.

Recommended Executive Summary

ABLE Payments 2.0 is currently Amber / Needs Help. The project is still in planning and marked on track operationally, but overall health is weakened by **unapproved status, no execution progress, underfunding, weak steering participation, and dependency risks**. Schedule impact is currently minor, but the project is vulnerable to larger delays if funding and governance issues are not resolved soon.

Top 3 Actions Recommended

- 1. Resolve funding gap immediately**
 - Reconfirm scope vs approved budget
 - Identify contractor/resource shortfall
 - Escalate for budget adjustment or scope reduction
- 1. Strengthen governance**
 - Re-establish executive steering cadence
 - Confirm sponsor accountability and attendance
 - Secure formal project approval
- 1. Validate readiness before execution**
 - Confirm infrastructure dependency timeline
 - Review technical risks and critical path
 - Move from planning to approved delivery baseline

Suggested RAG Status

- Overall: Amber
- Schedule: Amber
- Budget/Financial: Amber-Red
- Risks: Amber

Buttons: Financial Detail, Exclude Financial Detail (Contractor version), Chat history, Ask VAIA AI.

Conversations and Content Publishing

The screenshot displays the Clarity software interface. On the left, a sidebar shows navigation options like 'To Dos', 'Action Items', and 'Conversations'. The main area is titled 'My Workspace' and shows a 'Digital Banking Product Line Roadmap'. A 'Conversations' panel on the left lists recent discussions. The central part of the screen shows a 'Status Reports' table with filters and a list of items.

Conversations

- Due to recent re-org, we ha
- Pods: Crushers Pod
Team: UX
You started a new conversa
- @Dana Lewis Please work v
- Objective: Accelerate company solutio
- New re
- @Team I will be scheduling
- Project: Minimal Online Shopping Rel
- Risk: Dependency on other teams for
- You started a new conversa
- @Ray Fowler We need a sec
- Project: ABLE Payments Module
- Team: Beth Roberts
- You started a new conversa

Status Reports

Match Filters: All Any Add Filter Groups

Report Status = Final x + Add Filter Remove All

AND Active (Common Investment) = Yes Template (Common Investment) = No

Select All Deselect All 10 Items Selected Edit Delete Export To PDF

Status Reports	Common Investm...	Status Reports
Starred	Investment ID	Latest
☒	Pro00000001	✓
☒	PRO00000010	✓
☒	PR2009	✓
☒	EPI00000038	✓
☒	WS00000001	✓

Report Status: Final

Report Date: Apr 15, 2022

Overall Status: Needs Help

Schedule Status: On Track

Scope Status: On Track

Cost and Effort Status: Needs Help

Status Report Update

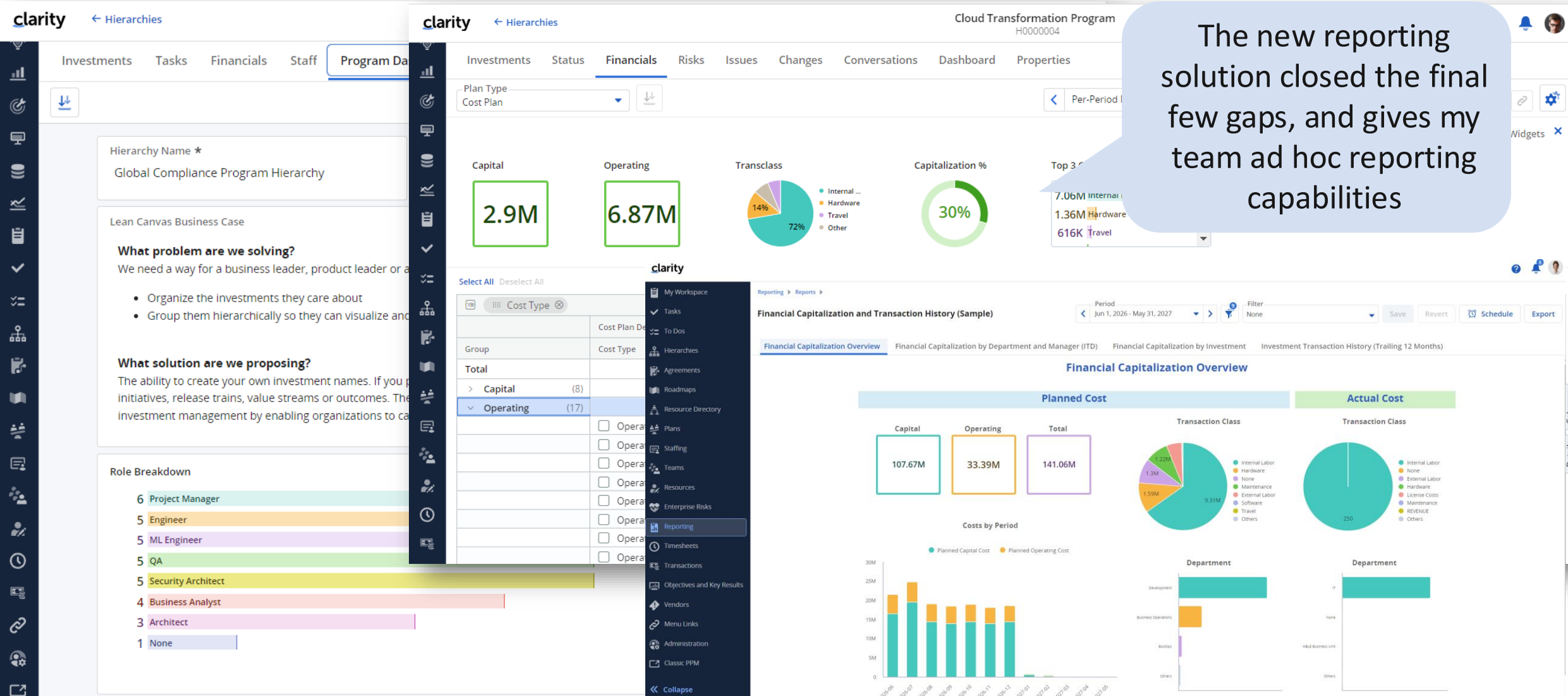
A lot of work came together this w... complete several tasks and gettin... Phase 1. Removing Effort Status fi... tasks are back on track. Schedule... should get back on track by end of

Conversations let me capture decisions and context within the work. Published reports and shared views keep my teammates aligned.

Reporting, Analytics, and Dashboards

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The new reporting solution closed the final few gaps, and gives my team ad hoc reporting capabilities



Introducing Moventus



Collaborative Work Management

Start simple. Grow smarter.

A work management platform that helps teams organize everyday work today — with a maturity path that includes projects, resources, reporting, and portfolio capabilities as organizational needs grow.

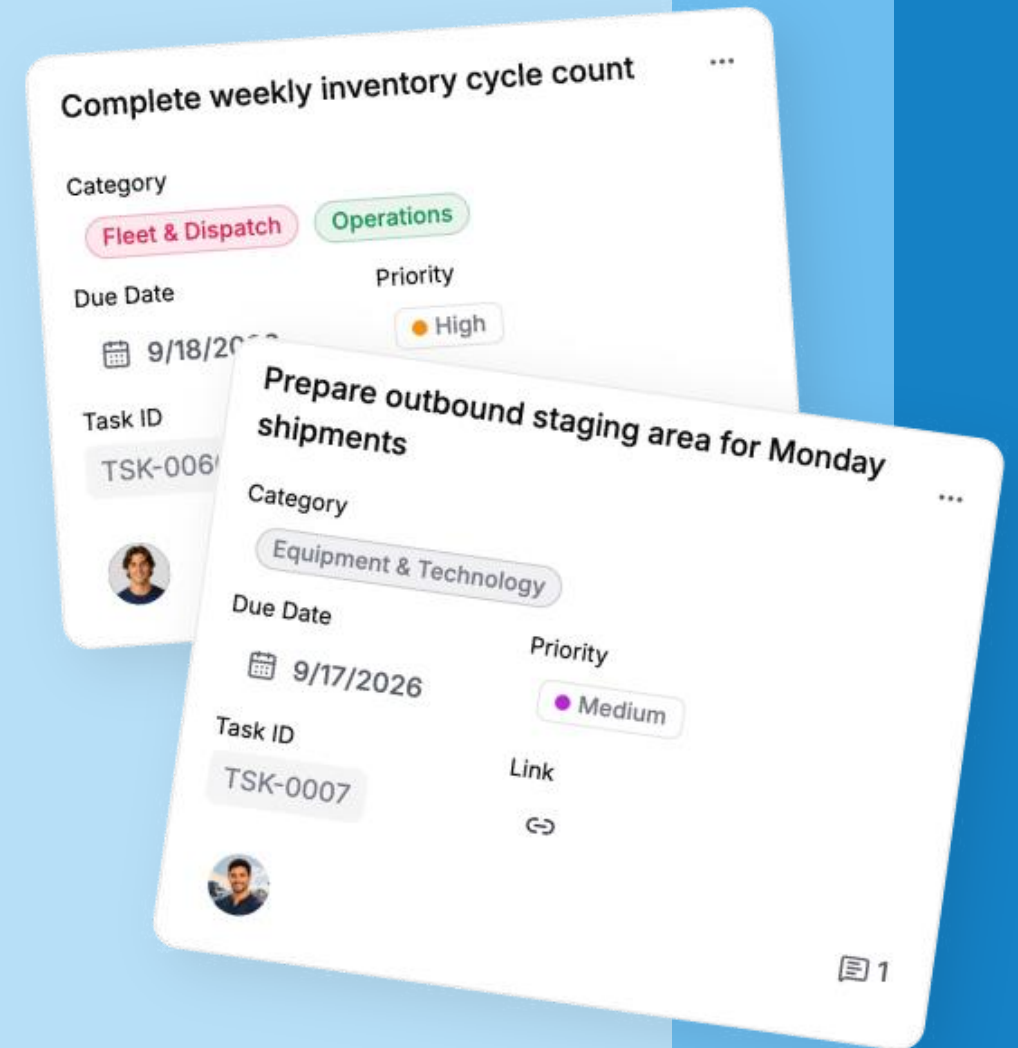


What is Moventus?

Moventus is a collaborative work management platform available on the web and mobile devices. It can scale to support project portfolio management (PPM).

It is designed for small businesses and teams of fewer than 50 users that want to work more efficiently.

Moventus Work is designed to be a self-service collaborative work management solution.



Start with **Work**. Add **Pro** when your team needs more

Today's Task List • Tomorrow's Strategic Portfolio • One Platform



Moventus Work

- Create, update, collaborate
- Workspaces
- Tasks and work items
- List, board, calendar, roadmap views
- @ mentions, collaboration
- Document linking
- Dashboard reporting widgets
- Resource allocation (non-financial)
- Mobile application
- Single sign-on
- 2-Factor authentication
- Audit log
- In-app help agent



Moventus Pro

All Work features, plus:

- Time tracking / time sheets with financials
- Project financials
- Dependencies
- Gantt charts and views
- Blueprints
- Portfolios
- Custom fields and objects
- Advanced resource management
- Governance controls
- Advanced reporting



Moventus Admin

All Work and Pro features, plus:

- Advanced Admin capabilities



Moventus View Only

- Read-only access to workspaces, widgets, and reports
- No editing, collaboration, or time entry

Ready to get to work?

- ✓ Get started in minutes.
- ✓ No complicated setup.
- ✓ Bring work, conversations, and reporting together.
- ✓ Grow into Pro capabilities when your team is ready.



To start your 14-day free trial,
scan the QR Code or visit
www.trial.Moventus.net

Demonstration

Questions?



Survey



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

Your feedback helps us improve future events.



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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



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- Click on **Report PDU's**
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- 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

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Website

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

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