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# The Connected Enterprise: Scaling Collaborative Work Management in Clarity

Your Guides:
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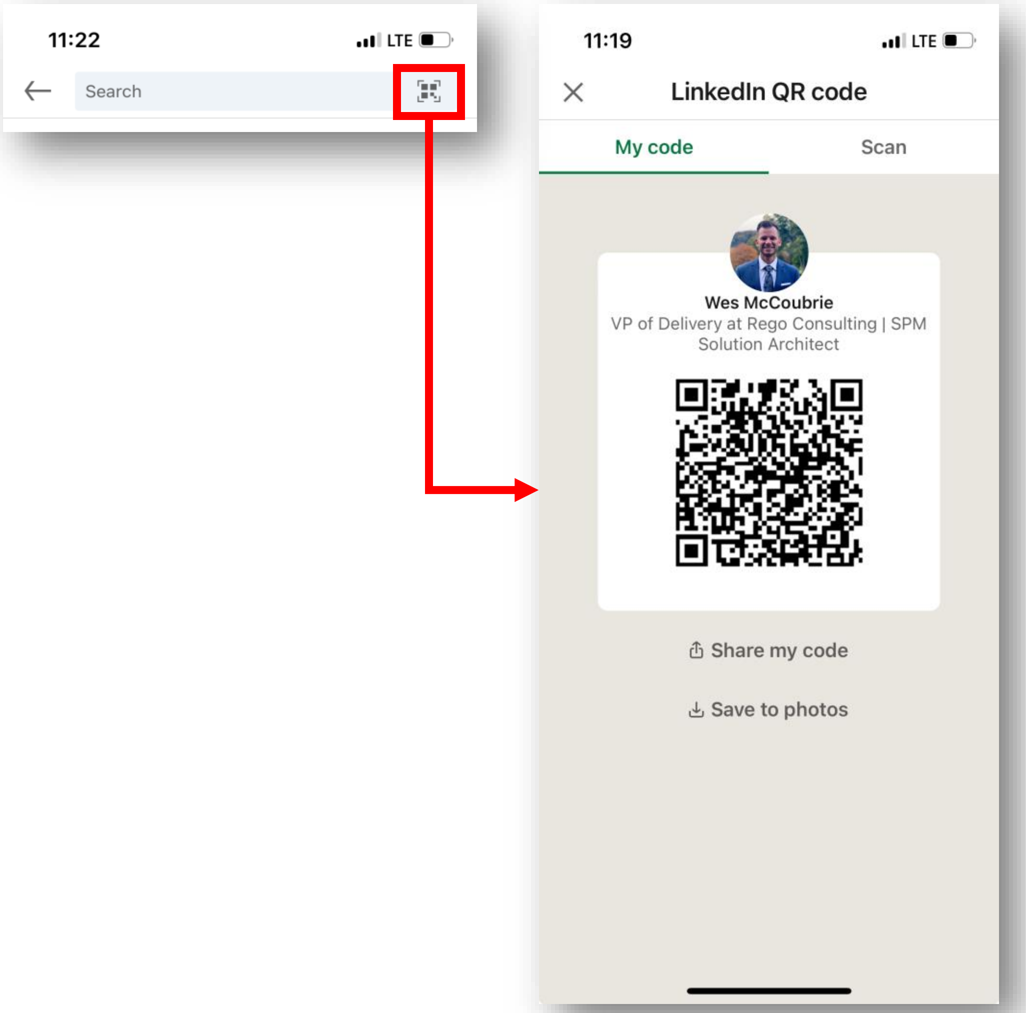
# Introductions

- 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

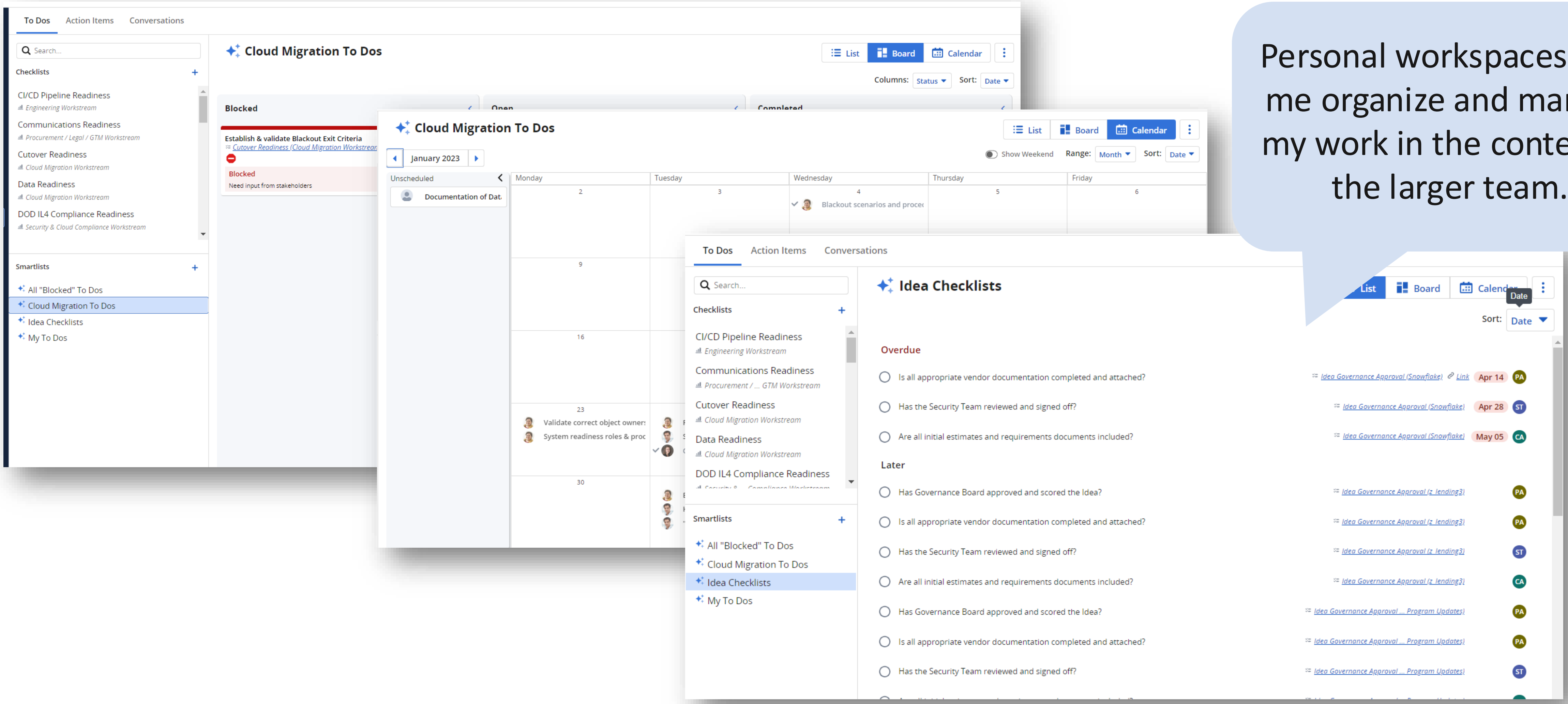
## Usability

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

## Reporting

- Status Dashboard
- Expanded Canvas Reporting
- New Reporting Solution

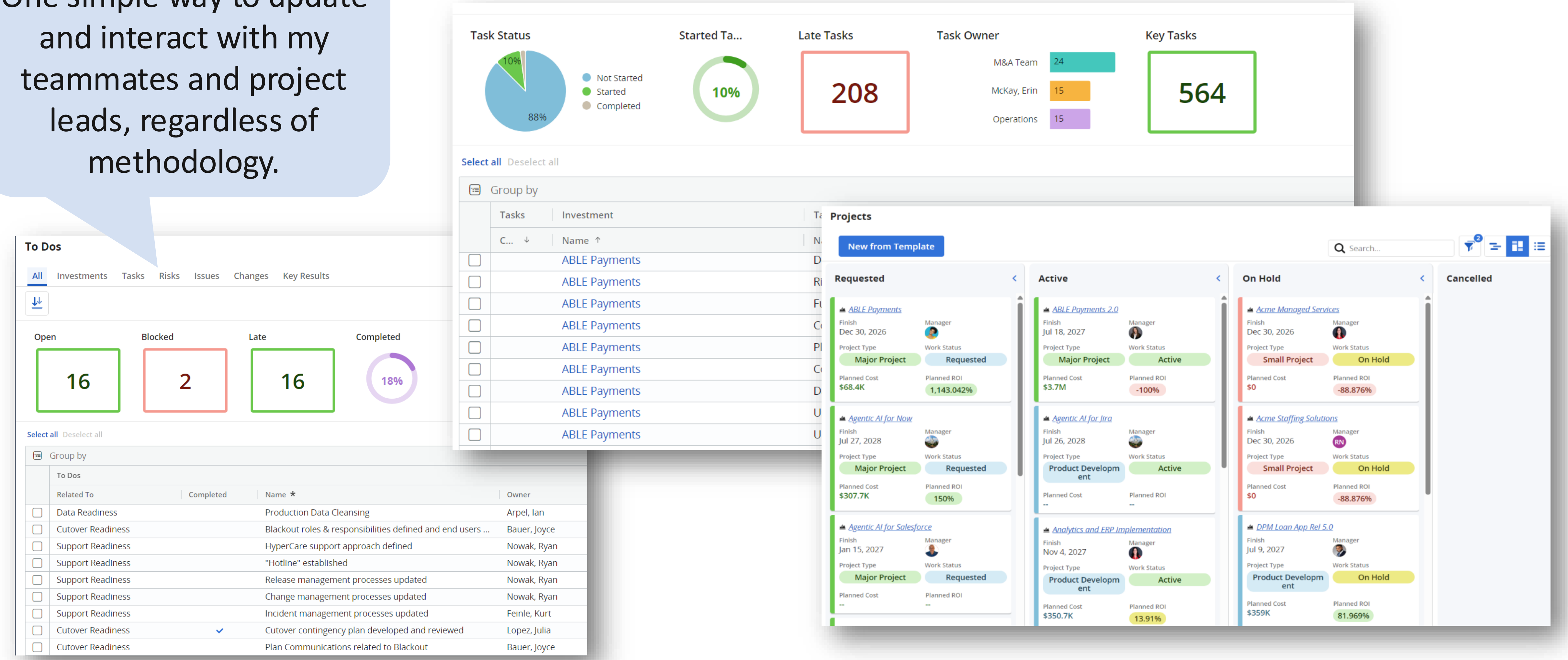
# Task-Driven Team Hubs



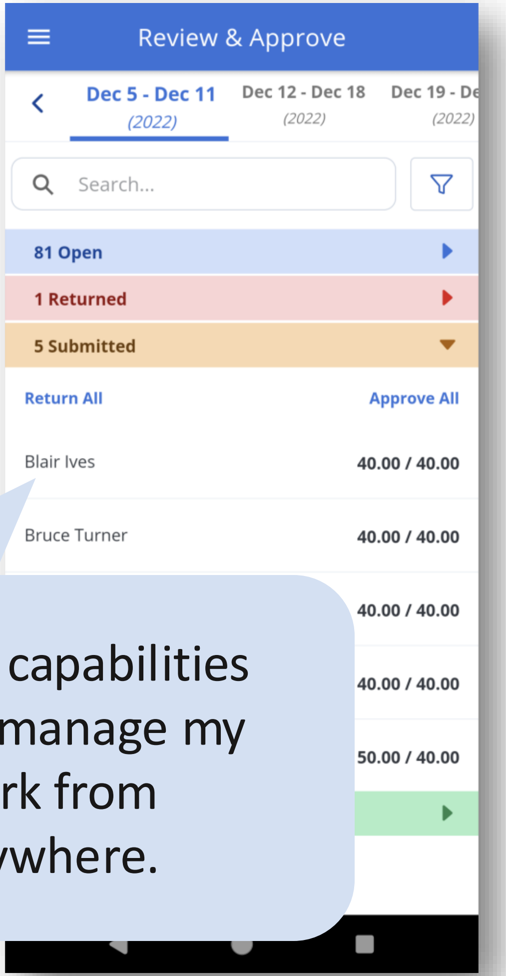

Personal workspaces help me organize and manage my work in the context of the larger team.

# Task-Driven Team Hubs

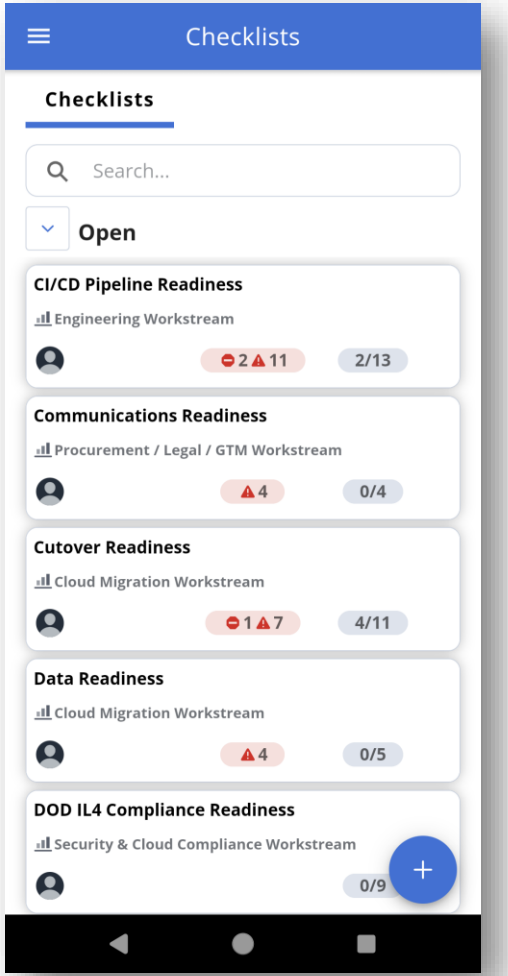
One simple way to update and interact with my teammates and project leads, regardless of methodology.

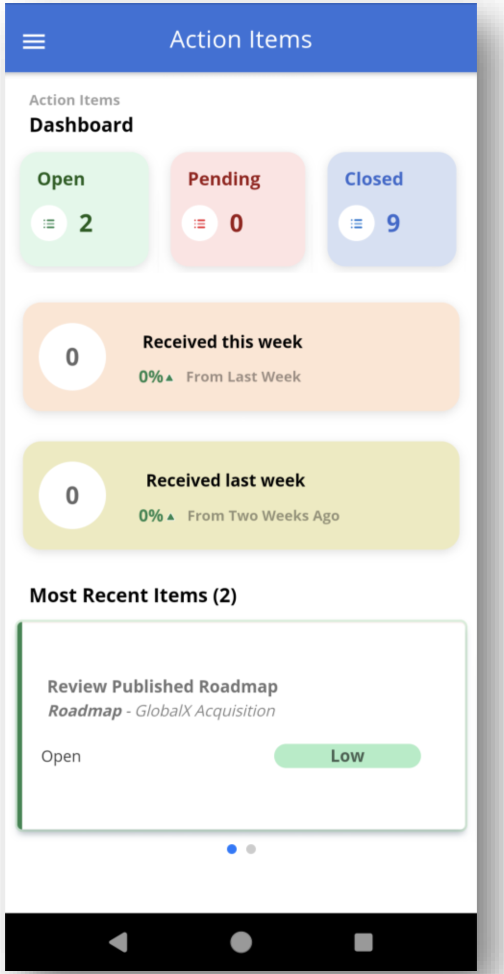


# Task-Driven Team Hubs

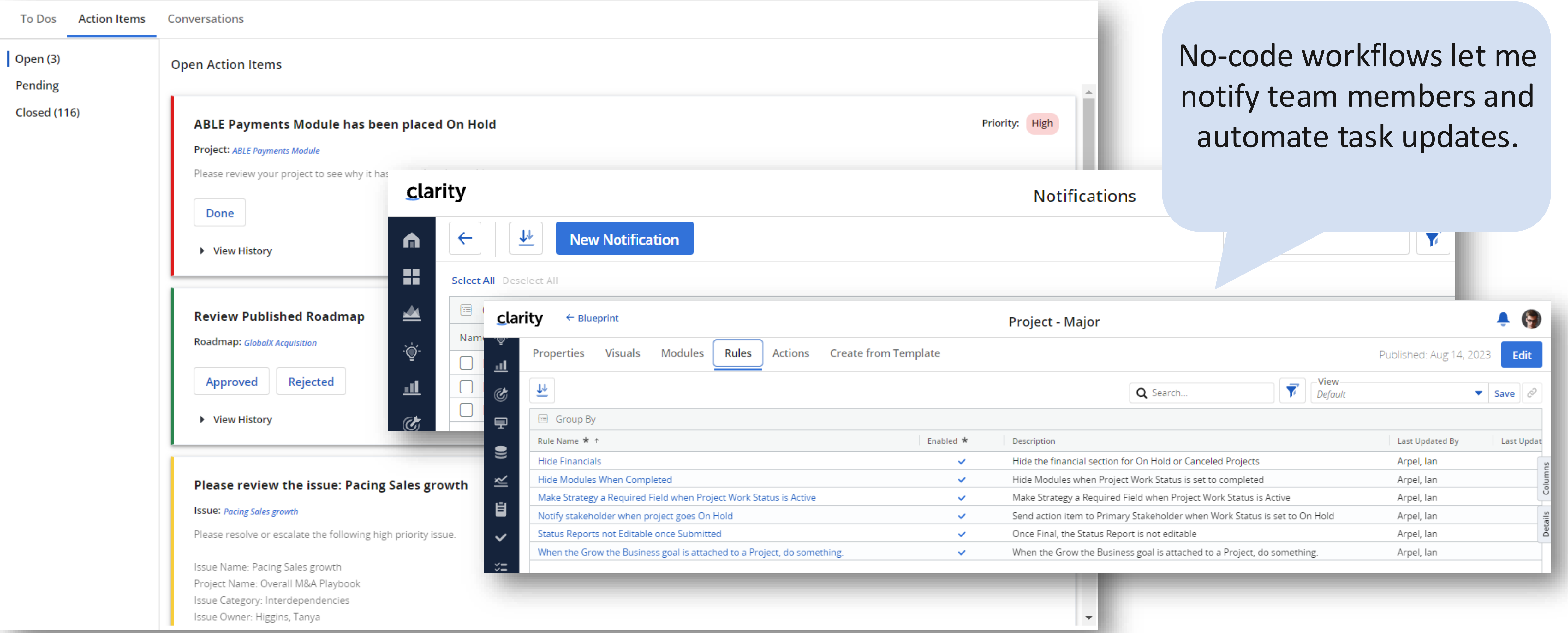



Mobile capabilities let me manage my work from anywhere.



# Workflow, Integration, and Automation

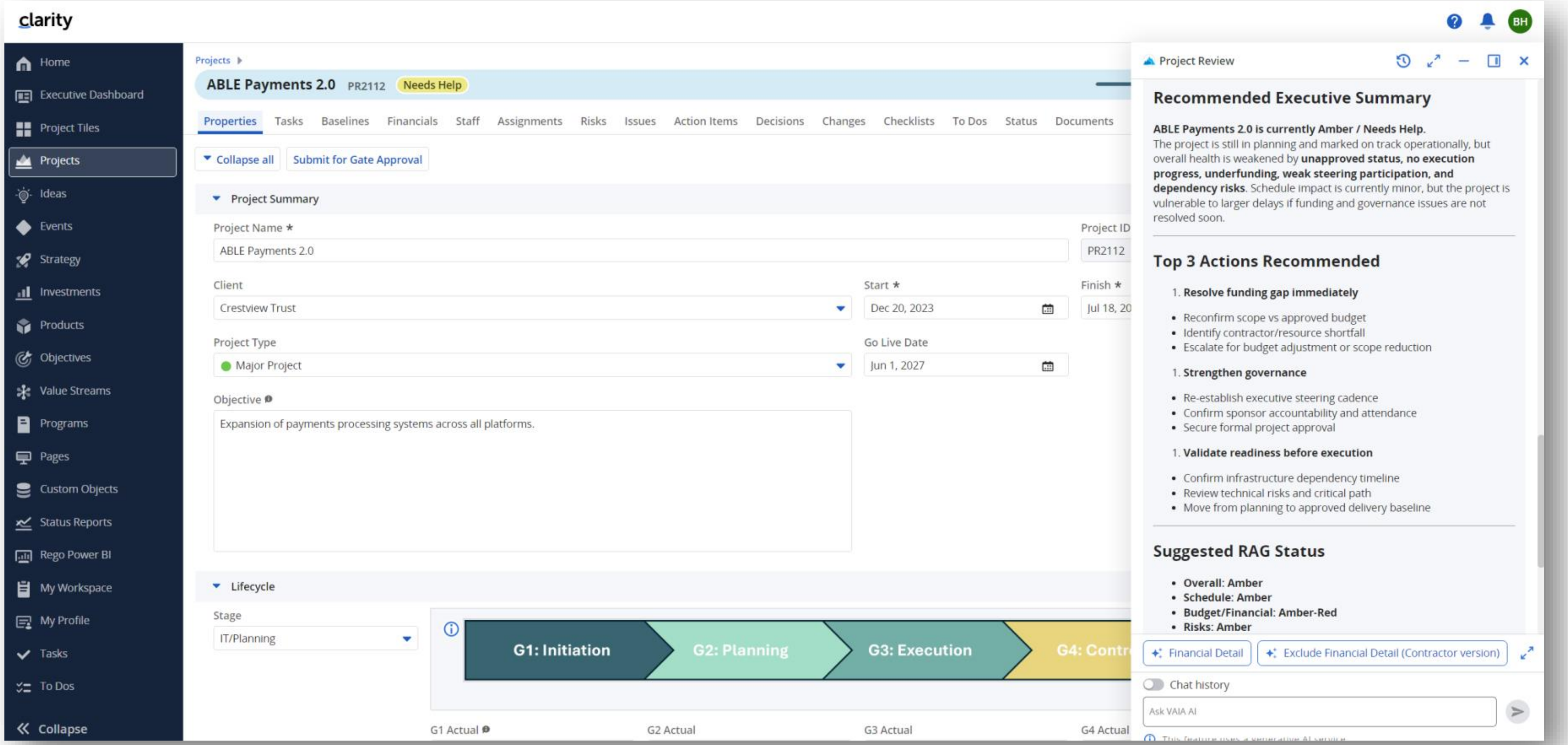



No-code workflows let me notify team members and automate task updates.

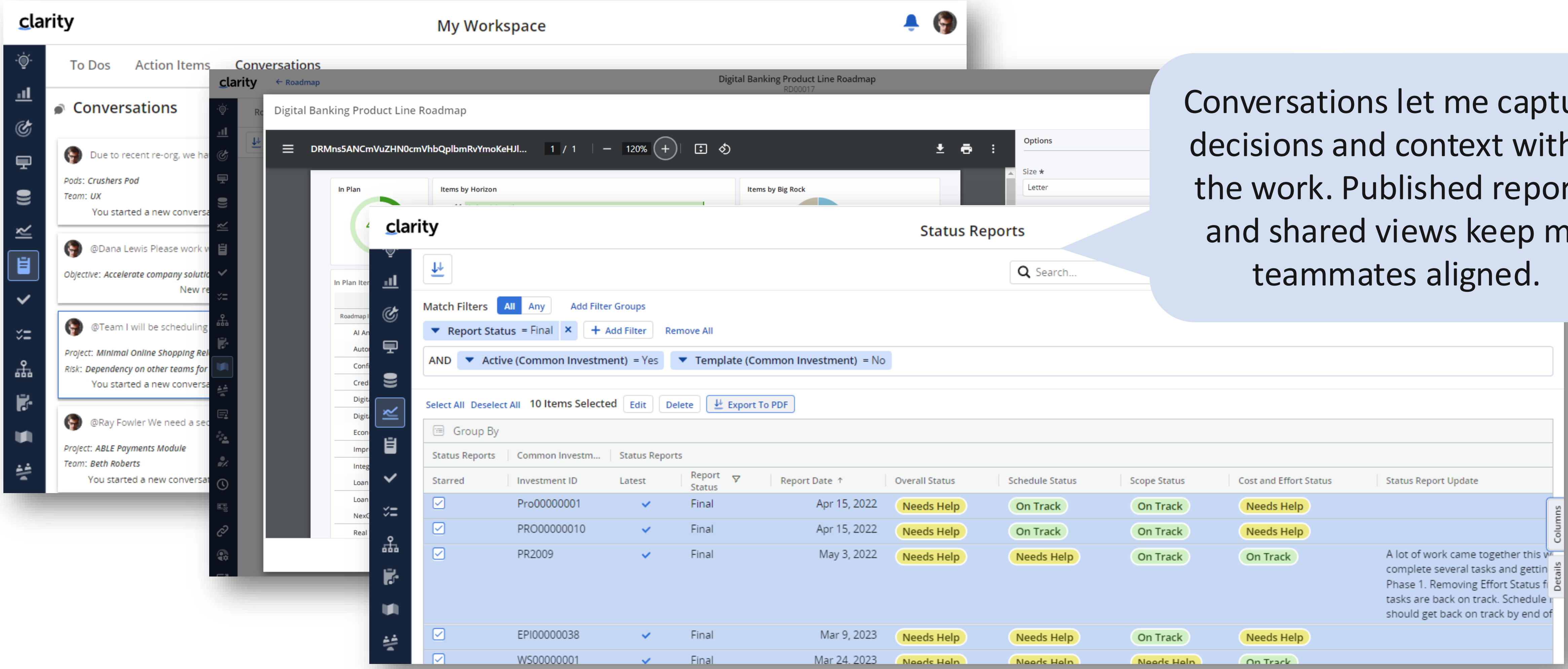
# Workflow, Integration, and Automation

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.

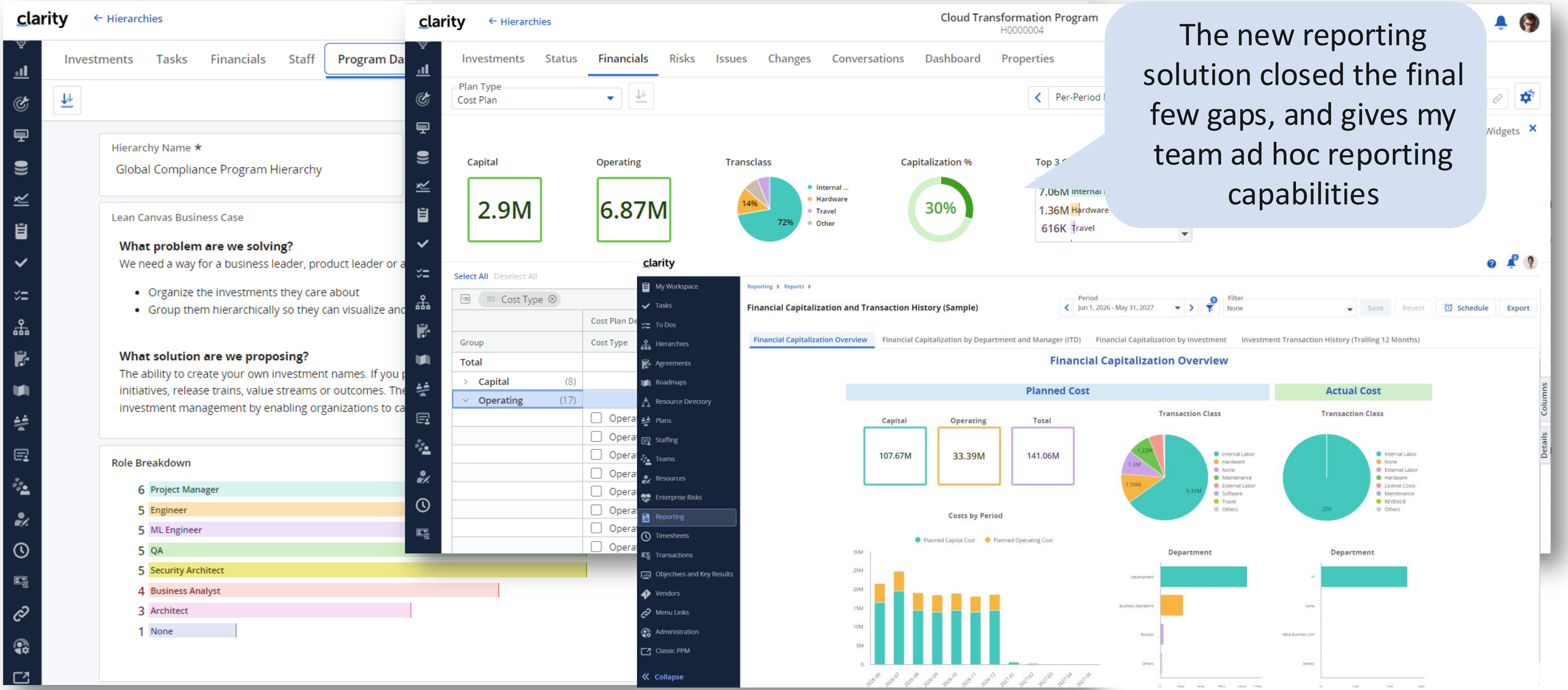


# Conversations and Content Publishing




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

# Reporting, Analytics, and Dashboards




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.

moventus

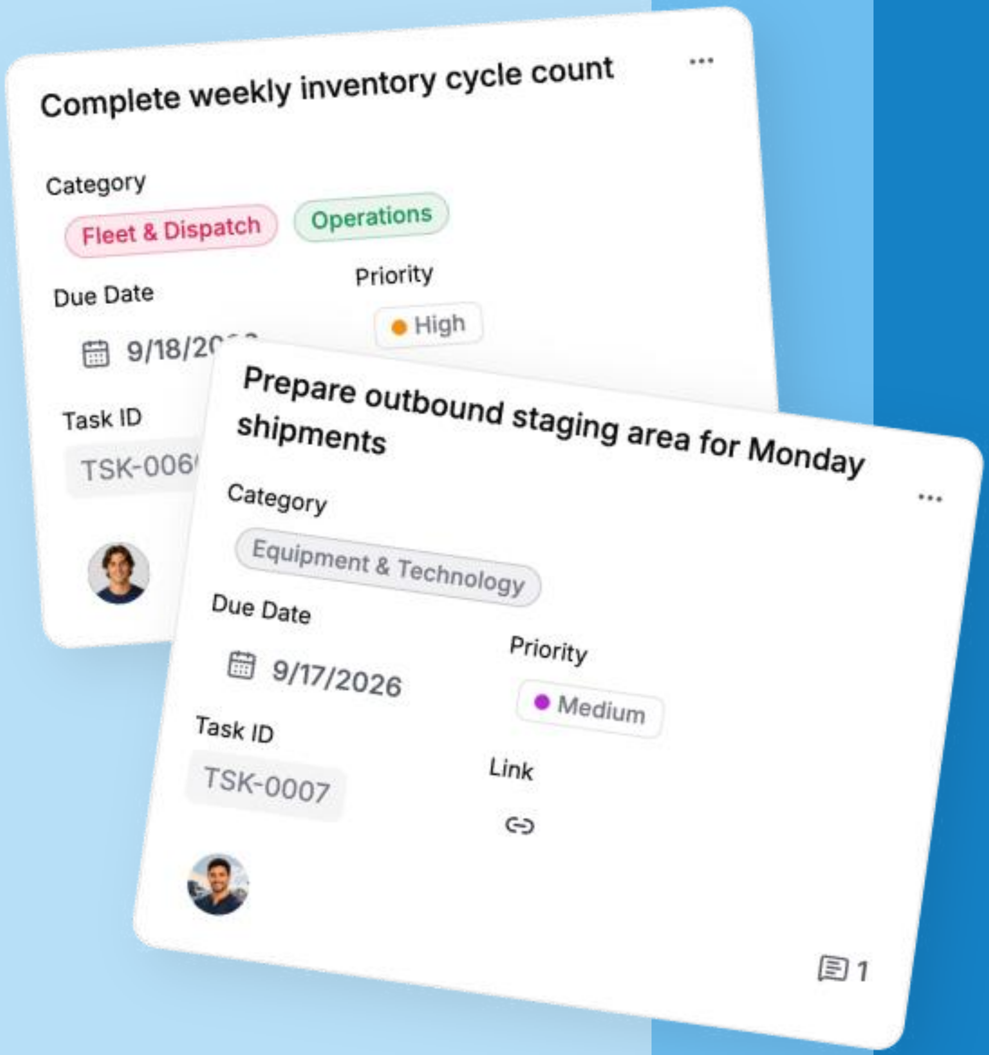
# What is Moventus?



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.

moventus

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.

# 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.

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**Email**
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**Website**
https://regouniversity.com/pmi-credits/

# Continue to Get Resources and Stay Connected

1. Use RegoXchange.com for instructions and how-to guides.
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