The Strategic Gatekeeper: Configuring Clarity for High-Impact Intake & Prioritization

Your Guides:
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Learning Objectives

By the end of this session, participants will:

Explain Demand Management in your own words and describe its out-of-the-box (OOTB) modules, objects, views, and functions.

Architect an Efficient Intake Workflow: Design a streamlined demand management process by configuring OOTB objects to minimize administrative overhead.

Design a Clarity Ideas configuration that ties requests to strategic goals, and develop a prioritized intake process using scoring criteria.

Agenda

- Brief introduction to Demand Management
- Overview of out-of-the-box objects / modules
- Discuss the foundation for Ideas
- High-level intake process design
- Best practices evaluating and prioritizing Ideas

Part I: Introduction

What Is Demand Management?

Demand Management in Clarity is the process of **capturing, evaluating, prioritizing, and approving** new business requests before committing resources and funding. It helps organizations ensure that proposed initiatives align with strategic objectives, available budgets, and resource capacity.

Typical Flow

- Business Request (Demand) → Ideas → Review and Approval → Convert to Program / Project or Product Execution

This process helps organizations maintain strategic alignment, optimize resource utilization, and improve investment decision-making across their portfolio.

Out-of-the-Box Modules

Properties
Primary canvas for an Idea, capturing foundational data such as the business case, alignment metrics, ownership, and target dates.

Staff
Forecast labor demand and costs before an investment is approved. Identifies staffing bottlenecks across the portfolio during early planning stages.

Financials
Builds cost and benefit plans to forecast early project valuations.

Risks & Issues
Assess Idea vulnerability. Log risks early, assign probability, track business impact, and map planned migration steps before execution.

Changes
Log and track potential modifications or change requests that arise during the initial intake phase.

Status
Leverage dynamic status canvas and standard KPIs (RAG) to update sponsors.

Recommendation: Utilize the minimum data needed in order to make a decision and move forward.

Out-of-the-Box Modules

Action Items
Routes review requests, sign-offs, and reminders directly to specific resources, roles, or group.

Agreements
Define and manage formal or informal arrangements between different investments, such as Projects, Ideas, and Custom Investments.

Audit
Tracks and logs all historical changes, insertions, and deletions made to specified object attributes over time.

To-Dos & Checklists
Manage flexible, lightweight checklist items and stage-gate operation items.

Links
Allows users to store and organize external URLs and web references relevant to the initiative.

Hierarchy
Map parent-child relationships between different types of investments, connecting the Idea to broader initiatives or portfolios.

Recommendation: Utilize the minimum data needed in order to make a decision and move forward.

Typical Attributes

Attribute	Description
Assignment Pool*	Controls assignable resources — Team Only or Resource Pool
Finish Date	Becomes the investment finish date upon conversion
Idea Priority	Risk priority: Low (default), Medium, or High
Manager	Owns the Idea; edits properties, links, and conversations
Originating Requestor*	Resource who submitted the Idea; defaults to current user
Progress*	Not Started, Started, or Completed
Start Date	Becomes the investment start date upon conversion
Status*	Position in the approval workflow
Subject*	Idea name; links to the converted investment
Target Manager	Manages the Idea after conversion; defaults to Idea Manager if left blank

- If preferred, labels can be changed, e.g., from “Subject” to “Name”
- Set defaults on required attributes if the organization does not plan to utilize them

Demand Management

Out-of-the-Box Status Options

Current Status	Available Status Options
Unapproved	Unapproved (no change) Submitted for Approval
Submitted for Approval	Approved Incomplete Rejected
Incomplete	Submitted for Approval Approved Rejected
Approved	Can now be converted to a project
[after Idea conversion]	Converted (read-only)

Tip: If organization-specific status values are preferred, a script is needed to map to and sync with the out-of-the-box values.

Part II:
Intake

Some Rego Thoughts …

What Is Success?

- ✓ Full view of the pipeline
- ✓ Accurate data
- ✓ Complete data
- ✓ Demands map to strategic objectives
- ✓ Objective scoring
- ✓ No other tools used to evaluate demand (e.g., Excel, SharePoint)

Stumbling Blocks

- ❑ Accurate financial and resource data in projects
- ❑ Goldilocks for demand – what is the right amount of data?
- ❑ Business users are not in Clarity
- ❑ Over-engineering demand process
- ❑ How do you decrement Idea demand once converted to a Project?

Intake

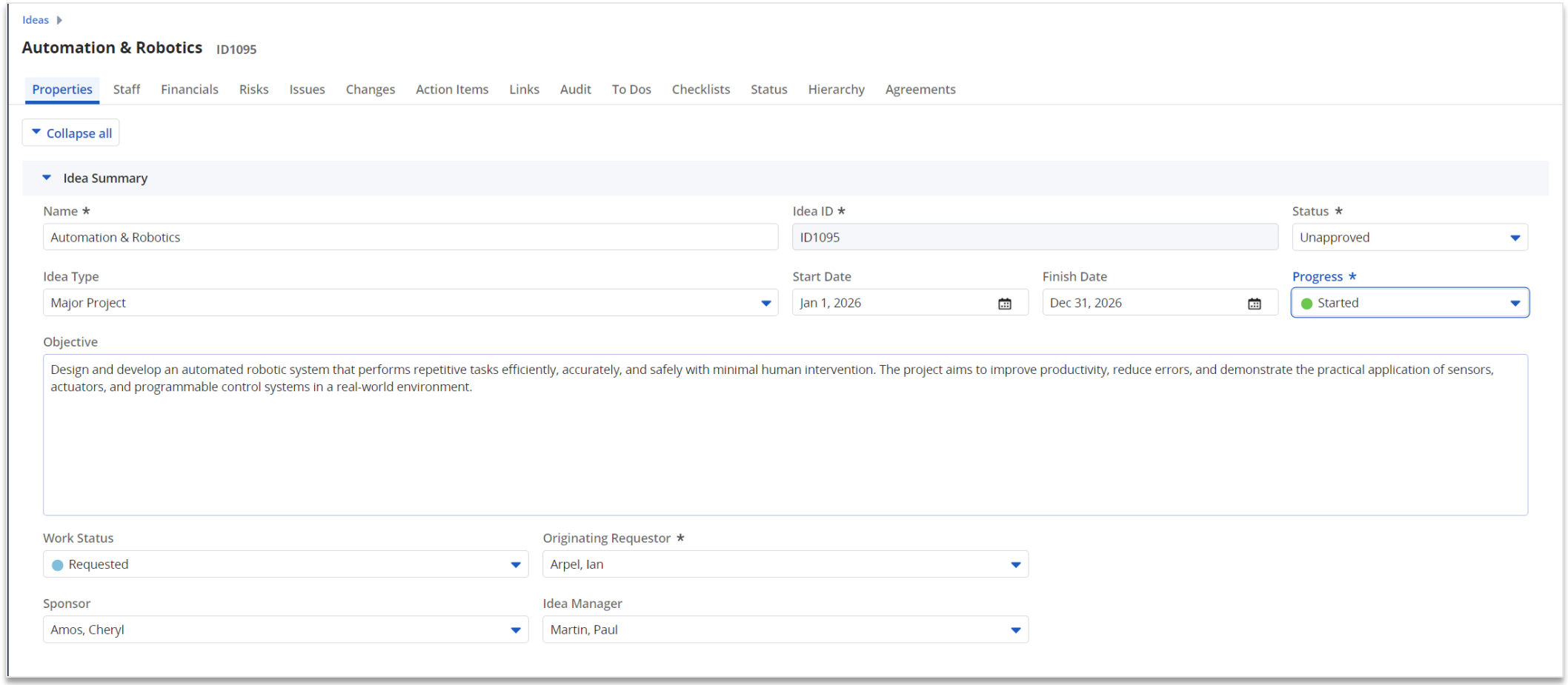
- **Common Practices When Using Clarity:**
  - Annual and quarterly intake (not constantly open)
  - Different forms / intake templates for different divisions and use cases (i.e., small requests fill out a different form than annual projects)

- **Additional Options:**
  - Integrate from ticketing / service management tool (sounds a lot like ITIL)
    - Do you send back round-trip information to the ticket creator?
  - Does anyone leave Clarity Ideas open year-round, accepting requests at any time?
  - Strategic Portfolio Management (SPM) reprioritization cadence – quarterly, if not more frequent

- Others?

Sample Ideas

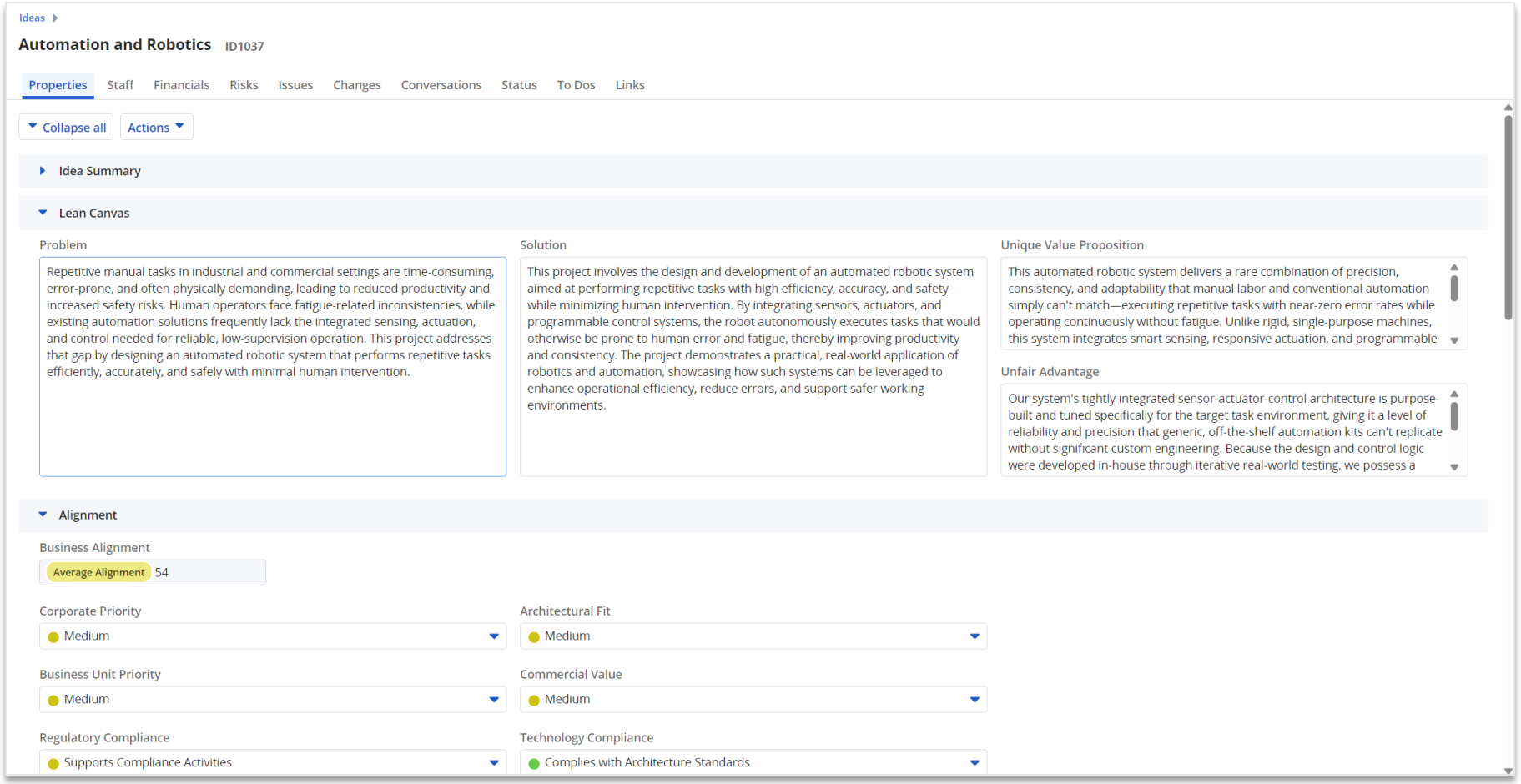
Out-of-the-box Ideas can be good, but can it be better? Yes!



Ideas Can Be Made Great

With a few attributes, the story can be told.
What problem are we trying to solve for? What solution are we proposing? And what's the value proposition?

Approvers need context to decide if this Idea is worth moving forward.



Intake Recommendation Details

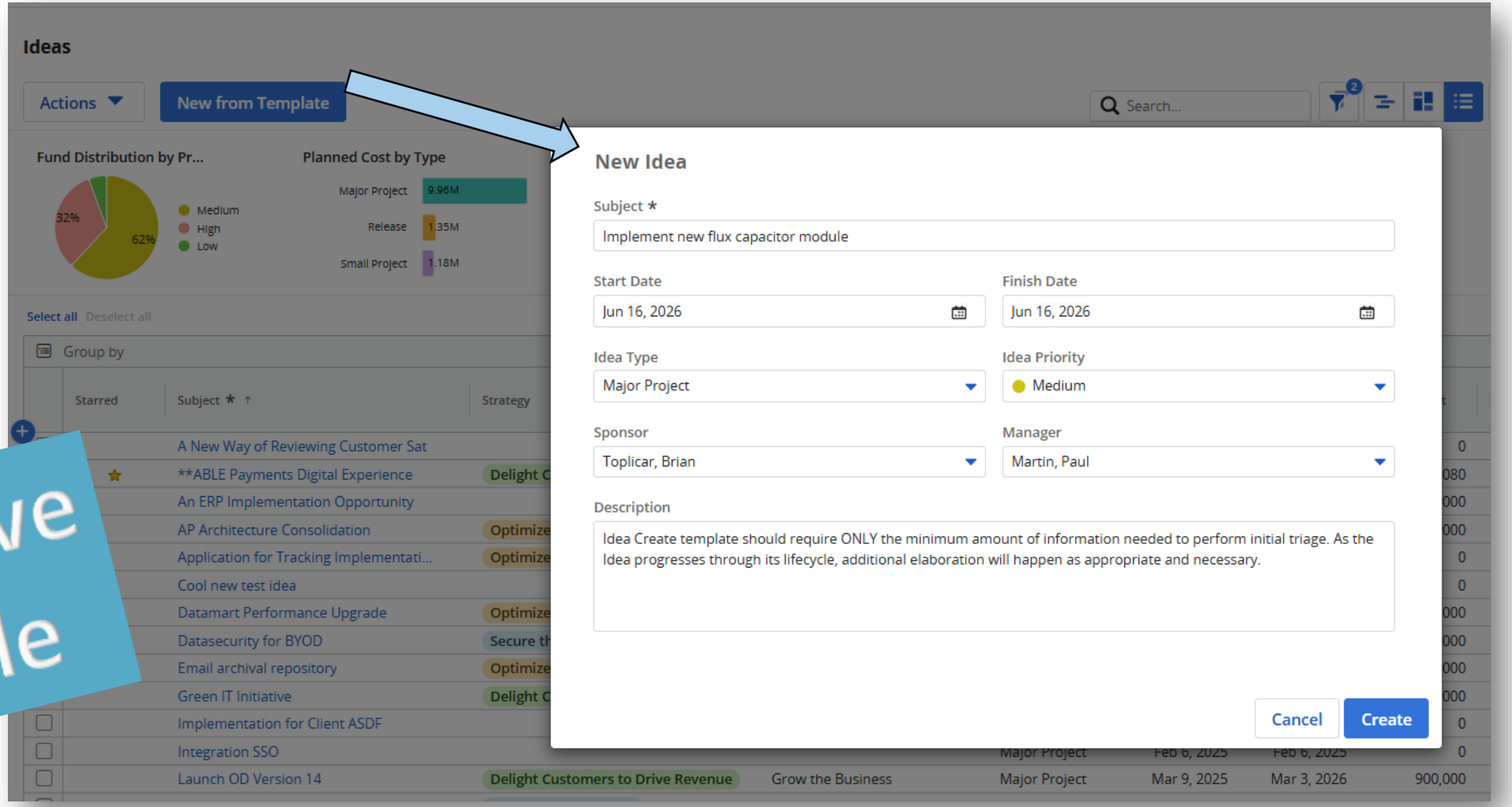
Overview	Key Challenges Addressed	Value and Key Results
➢Implement a standardized intake in Clarity Ideas, with a minimum standard of data to complete for entry ➢Implementing a prioritization model and intake review meeting drives consistent, transparent, and value-aligned decision-making ➢Use Checklists to create a standard set of steps to be completed for all intake. Blueprints for each unique intake type can meet tailored needs when required. Leverage in-UI dashboards to monitor progress and stage	• Inconsistent intake methods and prioritization • Lack of aligning capacity with strategic priorities • Limited visibility in planning horizons and insights on intake funnel	• Consistent and repeatable intake process • Easier prioritization through a strategy lens • Capacity planning enablement • Enhanced reporting and planning horizons

Intake Recommendation Details

Recommended Actions	Dependencies / Related Recommendations
• *Define and document a Level 0 / Level 1 intake process flow* • *Configure Clarity Ideas and Blueprints to accommodate all intake types* • *Develop prioritization metrics and data set, add to Idea configuration* • *Set up Checklists for intake process management and tracking* • *Enable Roadmaps to visualize and build scenarios for prioritization*	• *Modern user experience pilot* • *Enhanced resource optimization processes* • *Roadmaps proof of concept*

Consistency in Demand Management

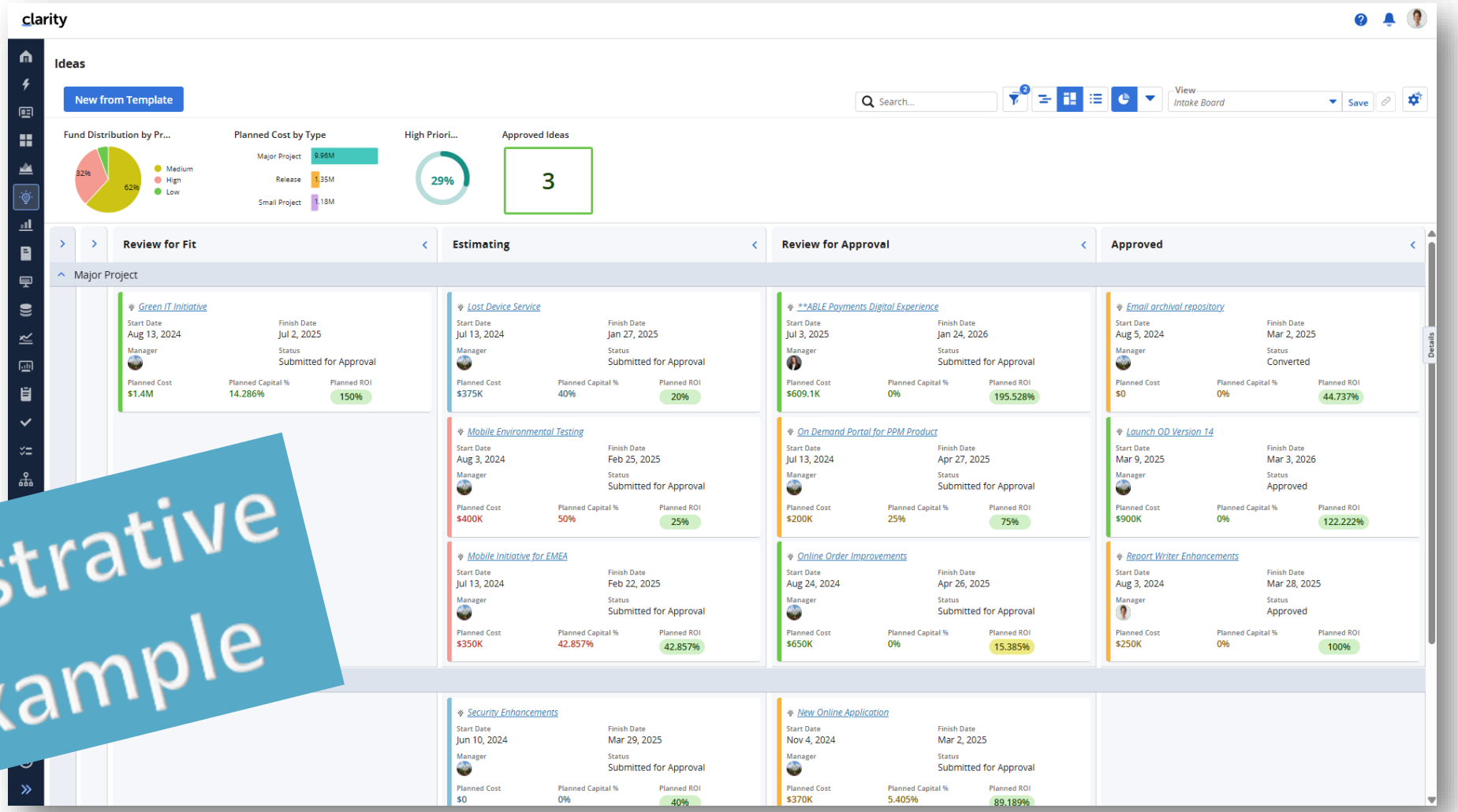
- Standardize the “Single Point of Entry” for review of new requests



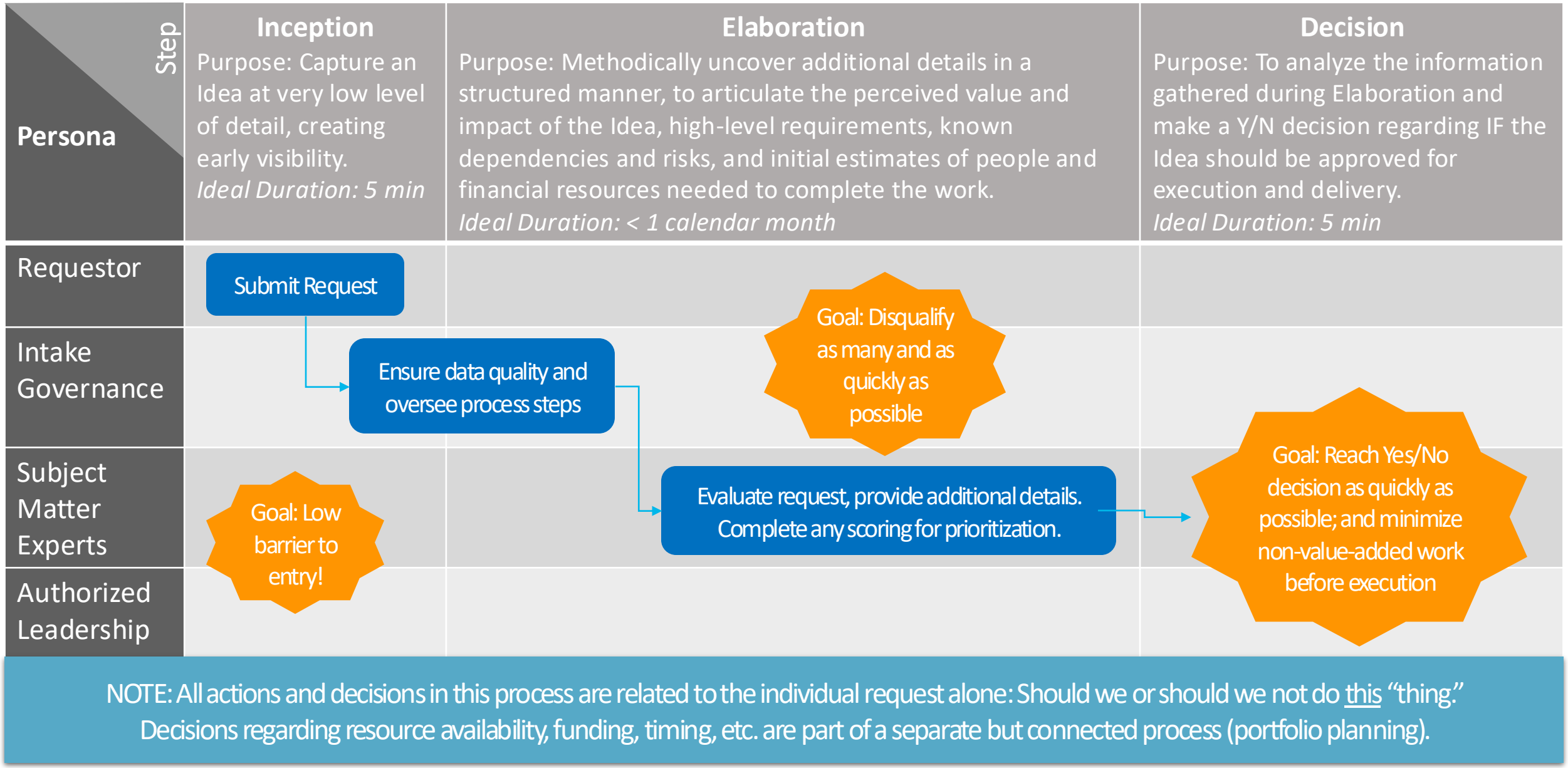
Illustrative Example

Consistency in Demand Management

- Standardize the “Single Point of Entry” for review of new requests



Best Practice – High-Level Intake Process (Level 0)



NOTE: All actions and decisions in this process are related to the individual request alone: Should we or should we not do this "thing." Decisions regarding resource availability, funding, timing, etc. are part of a separate but connected process (portfolio planning).

Best Practice – Overall End to End Lifecycle Picture

Intake

- "Inception"
- "Elaboration"
  - Initial estimates
  - Scoring
- "Decision"
  - "SHOULD we?" (Y/N)

Portfolio Planning

- Relative prioritization
- Constraint-based scenario planning
  - "Who?" "When?"

Execution and Delivery

- Execution methodology
- Task management
- KPI tracking
- Benefits realization

Part II: Prioritization

Why Have a Scoring Model?

- Importance of a Scoring Model

Forces explicit trade-offs

Ideas usually compete on different dimensions — cost, impact, effort, risk, strategic fit. A scoring model makes you name those criteria up front and weigh them consistently, instead of letting whoever pitches loudest or has the most seniority win.

Creates comparability across very different Ideas

A cheap quick-win and a big strategic bet aren't naturally comparable. Scoring translates both onto the same scale so leadership can rank them side by side.

Surfaces hidden assumptions

The act of scoring — estimating effort, impact, confidence — exposes gaps in knowledge early ("We don't actually know what this would cost") before resources are committed.

Reduces bias and politics

A transparent, criteria-based process is harder to game than an informal "who do you trust" decision, and it gives people a rational answer when their Idea doesn't move forward.

Documents the "Why"

When priorities are questioned later (by stakeholders, new leadership, or after a failure), a scored rationale is easy to revisit and defend, versus reconstructing an ad hoc decision from memory.

Scales

As the number of Ideas grows, informal prioritization breaks down. A scoring framework lets you triage dozens or hundreds of Ideas efficiently without a meeting for everyone.

Best Practice & Guiding Principles – Scoring & Prioritization

Score across 2 primary dimensions ("Business Value" / "Cost & Risk"); suggested "Overall Score" = 2(Business Value)/(Cost & Risk)

Optional: subdimensions can add granularity but avoid overcomplicating to keep adherence and UX manageable

Can supplement other frameworks (e.g., MoSCoW, D/V/F)

Use as few questions as necessary to get meaningful calculations

Use ONLY objective values; Avoid "High/Med/Low", "Fully/Somewhat/Not at all", etc.

Scoring should not be done by the requestor; should either be completed by or at a minimum vetted by a neutral party

Scoring should exclude detailed resource availability (handled separately); at most, factor in known resource conflicts/constraints

Mandatory (Audit/Legal/Regulatory/Customer) designations apply a 2-tier multiplier (e.g., 1.25x if Mandatory, 1.5x if Mandatory with time-sensitive penalties)

Build, test, and iterate in a spreadsheet first to validate calculations produce the desired outcomes

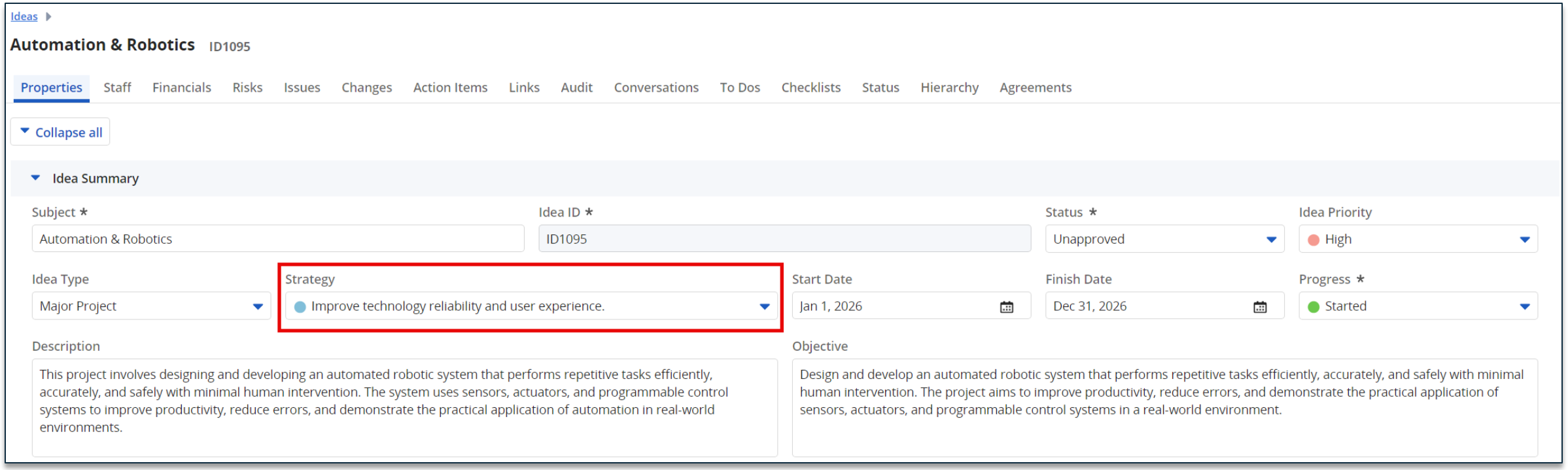
Prioritization Factors to Consider

- **Business value** – Soft and hard benefits / ROI
- **Urgency** – Is it mandatory for compliance or other factors?
- **Strategic alignment** – How does it align to goals, objectives, OKRs?
- **Impact** – On the teams, the customers, the organization
- **Bandwidth** – Do we have the people? Do we have the money?
- **ROI?**
- **Effort?**
- **Others?**

Align Ideas to Strategy

- Ensure Ideas contain a Strategy attribute to align the investment with the organization's enterprise strategies

- This strategy alignment can be exposed in a Roadmap and Hierarchy

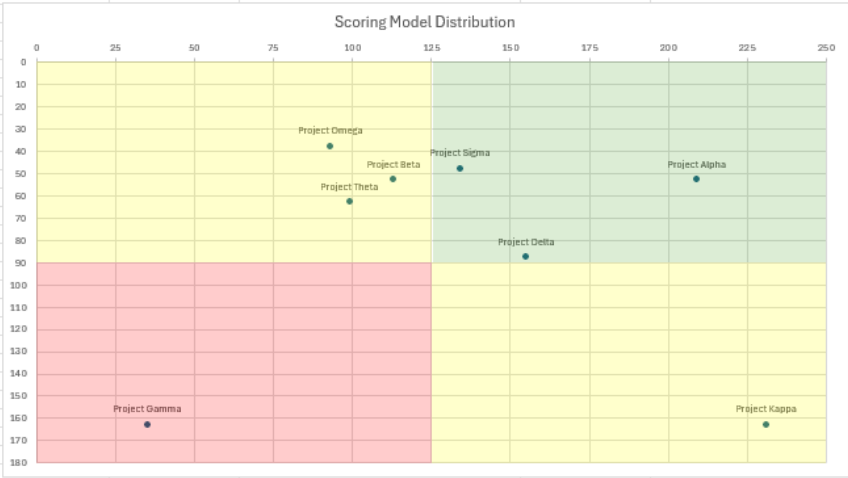


EXAMPLE – Scoring and Prioritization

Test and validate your scoring formula, criteria, and weighted values externally before configuring in Clarity

	Category Weights	Category Multipliers
Hierarchy Tier	30%	5
Improve	20%	2
Regulatory Urgency	20%	3
Financial Value (Tier 2–3)	20%	1.5
Impact of Delays	30%	1
Technical Risks	50%	1.5
Resource Risks	50%	1
	Note: Ensure H2:H5 and H7:H8 both sum to 100%.	*Default multipliers to 1.0 if not used.*

Project Name	Hierarchy Tier	Regulatory Urgency (Tier 1)	Financial Value (Tier 2–3)	Impact of Delays	VALUE Score	Technical Risks	Resource Risks	RISK Score
Project Alpha	Tier 1	Mandate w/ Penalties	None or N/A	5 choice b	209	New to org but compliant and stable	Dedicated Team or Resources Already Committed	52.5
Project Beta	Tier 3	None or N/A	Strong Financial Case (ROI)	5 choice c	113	New to org but compliant and stable	Dedicated Team or Resources Already Committed	52.5
Project Gamma	Tier 4	None or N/A	None or N/A	None Known	35	Custom, unproven, or non-standard technology	Known Resource Contention/Gaps	162.5
Project Delta	Tier 2	None or N/A	Quantified Cost Reduction/Avoidan	Has Critical Customer Deadlines/Commitment (e.g. Open Enrollment)	155	Standard, repeatable org technology	Known Resource Contention/Gaps	87.5
Project Theta	Tier 3	None or N/A	Strong Financial Case (ROI)	5 choice b	99	New to org but compliant and stable	Typical Level of Resource Risk	62.5
Project Kappa	Tier 1	Mandate w/ Penalties AND Customer Impact	None or N/A	Has Critical Customer Deadlines/Commitment (e.g. Open Enrollment)	231	Custom, unproven, or non-standard technology	Known Resource Contention/Gaps	162.5
Project Sigma	Tier 2	None or N/A	Soft Financial Benefits	None Known	134	Standard, repeatable org technology	Typical Level of Resource Risk	47.5
Project Omega	Tier 3	None or N/A	Quantified Cost Reduction/Avoidan	5 choice b	93	Standard, repeatable org technology	Dedicated Team or Resources Already Committed	37.5



GROUP EXERCISE!

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Exercise: Vending Machine Intake and Prioritization Challenge

Qualifying and Prioritizing Demand

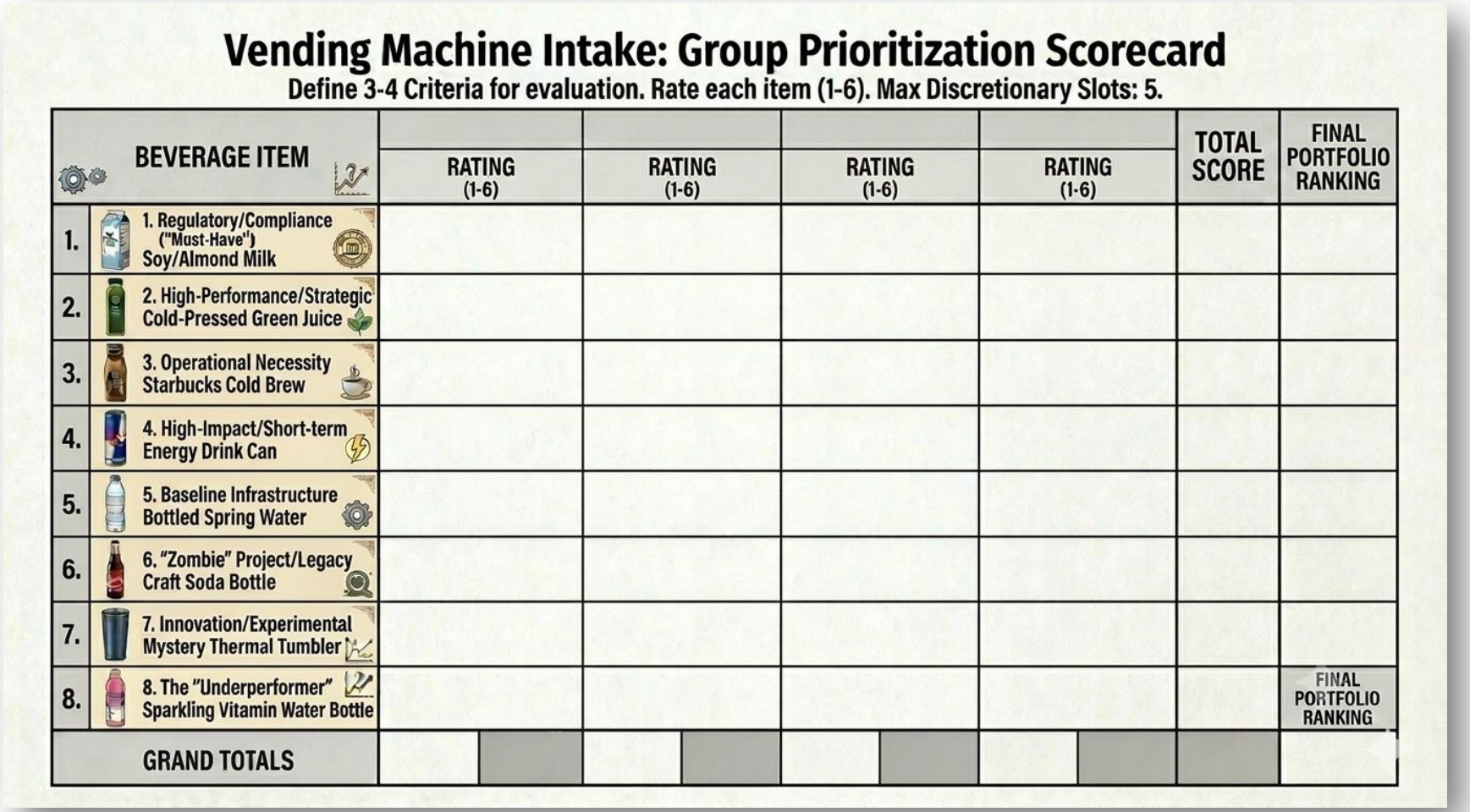
Context: Your office vending machine has **6 total slots**. To ensure organizational compliance, **1 slot is reserved and mandatory** for the "Regulatory/Compliance" beverage.

Your team must now "Intake" the remaining 7 beverage requests and decide which **5 items** will occupy the remaining slots.

Exercise: Vending Machine Intake and Prioritization Challenge

Instructions

- **Define Criteria (5 min):** As a group, define **3–4 objective metrics** you will use to evaluate each request (e.g., cost, strategic alignment, customer popularity, operational ease, ROI)
- **Qualify and Score (6 min):** Score each of the 8 items based on your metrics. Any item that fails to meet a "Minimum Qualification Score" is **rejected at the gate**
- **Prioritize (4 min):** From your qualified survivors, rank the items and select the **top 5** that provide the highest value to the organization
- **Debrief (5 min):** A spokesperson will present your selections, explain your rejection logic, and discuss any conflicts faced during the negotiation



Vending Machine Intake: Group Prioritization Scorecard

Define 3-4 Criteria for evaluation. Rate each item (1-6). Max Discretionary Slots: 5.

	BEVERAGE ITEM	RATING (1-6)	RATING (1-6)	RATING (1-6)	RATING (1-6)	TOTAL SCORE	FINAL PORTFOLIO RANKING
1.	1. Regulatory/Compliance ("Must-Have") Soy/Almond Milk						
2.	2. High-Performance/Strategic Cold-Pressed Green Juice						
3.	3. Operational Necessity Starbucks Cold Brew						
4.	4. High-Impact/Short-term Energy Drink Can						
5.	5. Baseline Infrastructure Bottled Spring Water						
6.	6. "Zombie" Project/Legacy Craft Soda Bottle						
7.	7. Innovation/Experimental Mystery Thermal Tumbler						
8.	8. The "Underperformer" Sparkling Vitamin Water Bottle						FINAL PORTFOLIO RANKING
	GRAND TOTALS						

Future-State Model (Illustrative)

In the future-state model, intake becomes a unified, transparent, and value-driven process spanning all impacted teams and resources.

Intake requests follow a standard lifecycle – from Idea to discovery, estimation, prioritization, and project creation – governed by clear roles, integrated tools (Clarity, Jira), and decision checkpoints.

With automation, traceability, and capacity-aligned approvals, the organization can reduce redundant work, eliminate manual triage, and increase confidence in Roadmapping, prioritization, estimation, and delivery readiness.

Future-State Model (Illustrative)

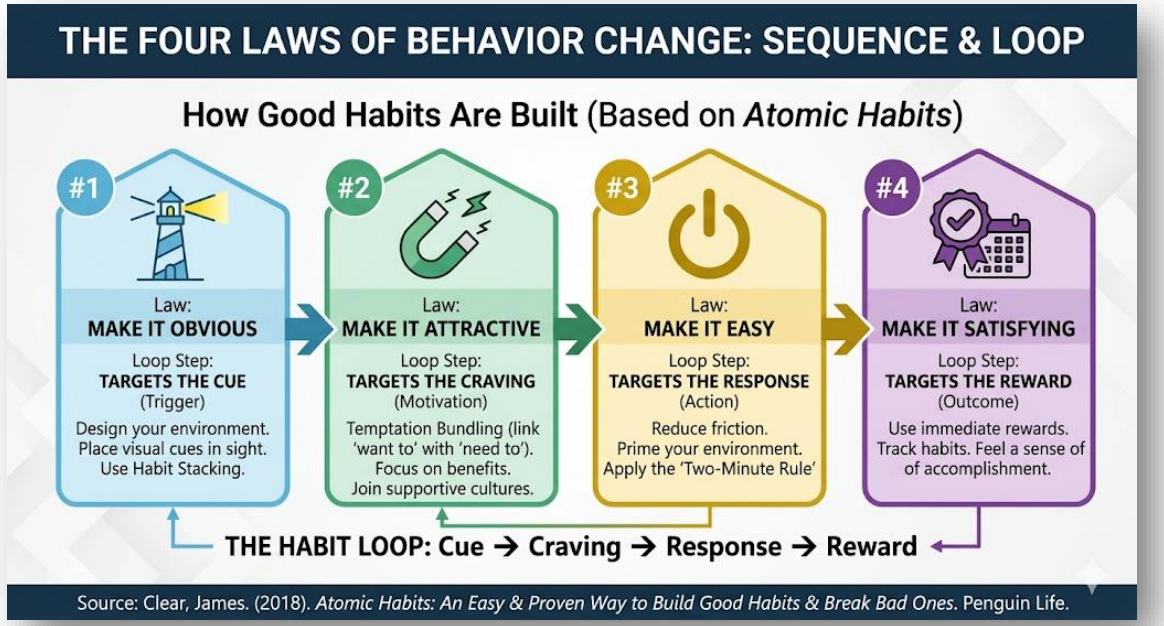
- **Standardized Intake Lifecycle**
  - Defined intake phases: Idea → Discovery → Estimation → Prioritization → Execution
  - Mapped roles and handoffs across all teams with ownership and accountability
- **Single Intake Entry Point**
  - Centralized intake funnel via Clarity CIT with tailored forms and blueprints for each intake type (strategic, regulatory, etc.)
- **Governed Estimation and Approval Process**
  - Architecture and delivery leads participate in collaborative estimation gates
  - ROM or story point estimates tied to capacity before work is approved
- **Integrated Tooling and Automation**
  - Jira and Clarity are linked to automate status transitions and reduce double entry
  - Dashboards surface intake progress, status, ownership, and aging items
- **Capacity-Aligned Prioritization**
  - Intake is gated based on real team capacity and velocity
  - Prioritization includes business value, urgency, cost of delay, and resource feasibility
- **Feedback and Continuous Improvement**
  - Closed-loop process captures outcomes (e.g., delivered value vs. estimate)
  - Retrospective inputs drive improvement in intake quality and throughput

Expected Outcomes of Streamlined Intake

Improved Intake and Prioritization
- Standardized intake phases and roles reduce confusion and rework
- Prioritization frameworks ensure strategic alignment
- Intake decisions are faster, clearer, and value-driven

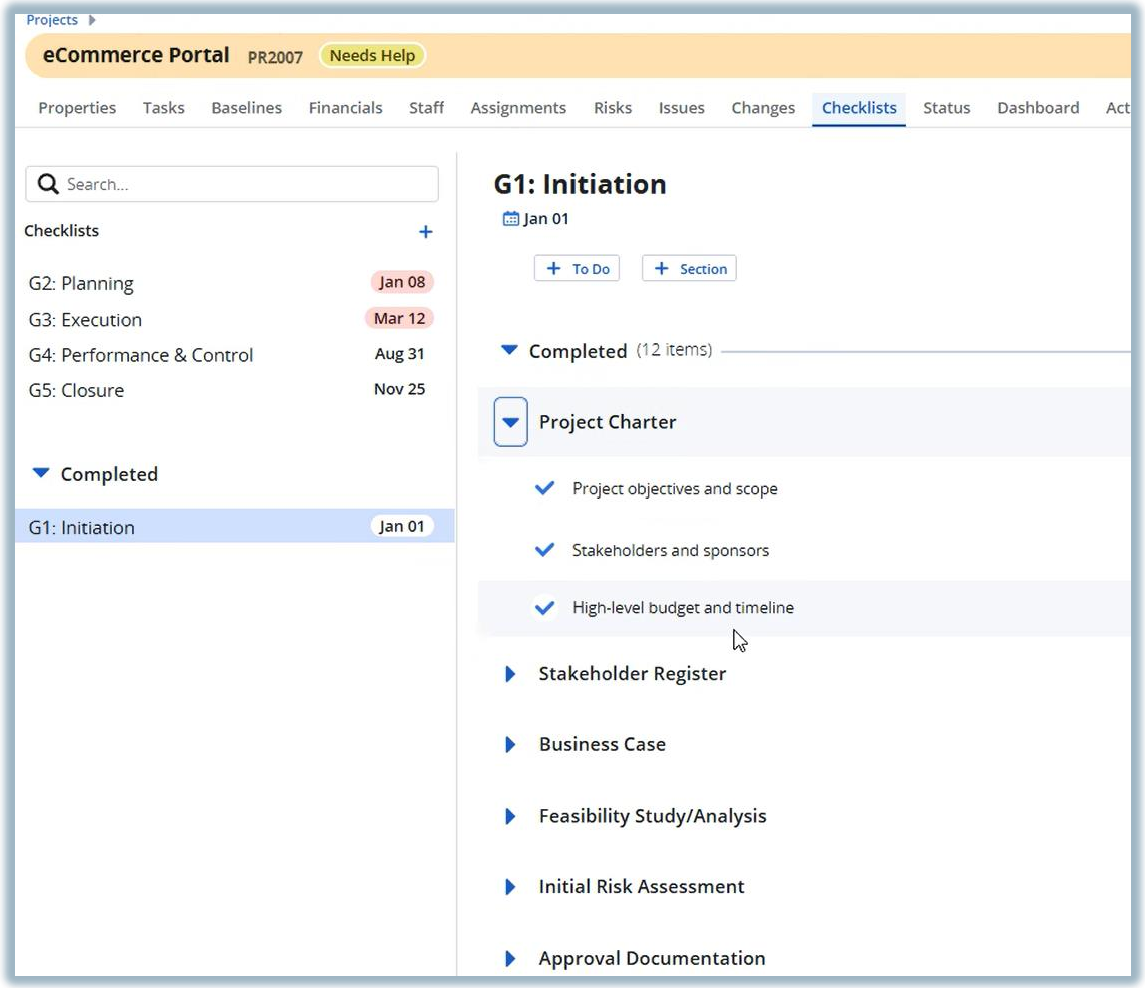
Capacity and Governance Alignment
- Intake is gated by available team capacity to prevent overload when Jira metrics are applied
- Cross-functional review and accountability
- Workflows and approvals are streamlined for consistent execution

Tool Integration and Visibility
- Jira and Clarity are connected for seamless traceability
- Dashboards provide real-time visibility into intake and backlog health
- Manual reporting and tool redundancy are reduced



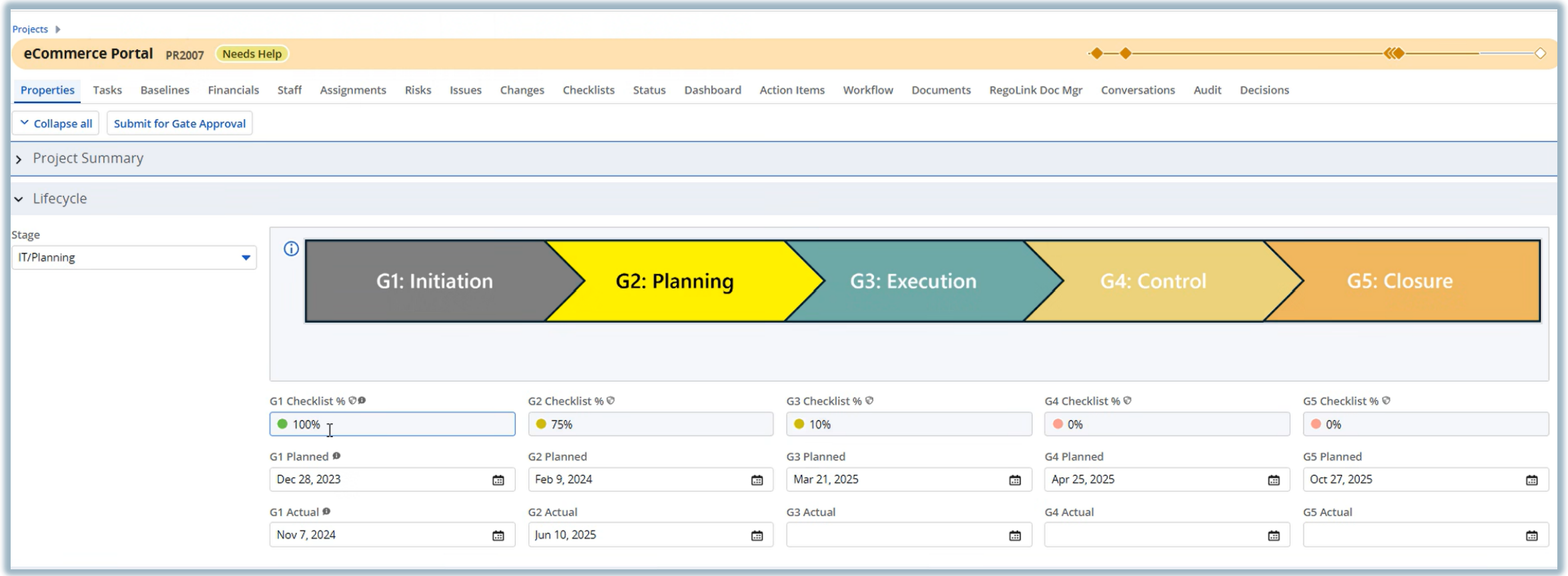
Example of Intake Config (Rego Configured)

Checklists and To-dos create standardization and consistency across all intake (Obvious, Attractive)



Example of Intake Config (Rego Configured)

% complete and progress of the checklist are automatically aggregated during the intake process (Easy, Rewarding)



Recommended Maturity Path (Illustrative)

An effective intake process isn't a gateway to approve every project, but a strategic filter designed to disqualify the wrong Ideas quickly so you can focus execution capacity on the right ones.

Pilot 1 - Foundational

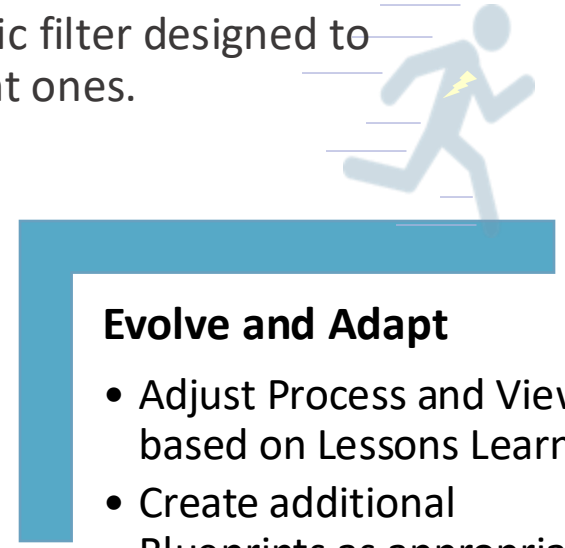
- Document L0/L1 Process
- Document RACI / Approval criteria, cadence
- Configure “Create” and “Edit” Blueprints for 2 most common work types
- Pilot through one “cycle”

Pilot 2 - Prioritization

- Design and test scoring model(s) eternally
- Update Blueprint(s) to include scoring
- Run in parallel with Roadmaps PoC
- Design and pilot intake dashboards / reports

Deploy

- Apply Lessons Learned from the Pilot
- Establish Ideas as centralized intake for all In-Scope work items, decommissioning other options
- Formalize intake review council / process
- Evaluate automations and Connectors



Evolve and Adapt

- Adjust Process and Views based on Lessons Learned
- Create additional Blueprints as appropriate
- Create automations, business rules, and other appropriate efficiencies
- Implement Connectors (if appropriate)

Questions?

Survey

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Your feedback is extremely important for future events.

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Appendix

Why Does Intake Fail?

Intake often fails because there are no **pre-scoring guardrails** to filter out low-value proposals before detailed review. This clogs the funnel with redundant or misaligned initiatives.

SPM best practice is to set clear **entry criteria** (e.g., must support at least one strategic objective, must have an accountable sponsor) and manage intake through a **portfolio Kanban** to control flow and apply work-in-progress (WIP) limits.

Source: Scaled Agile Framework – Portfolio Backlog (2025)

Idea Data Entry Best Practices

Keep data entry simple and focused

- Utilize simple “Create Screen”
- Keep the Blueprints uncluttered
- Define Blueprints by Idea Type (limit fields by type) and leverage Templates
- Focus on alignment: How does this support our broader goals?

Categorize Work to Differentiate Annual Planning from Standard Idea Intake

- This helps with metrics and reporting. For example: Utilize “Type” fields (Annual Planning, Project, Application, Service, Support Project)

Consider Project Conversion

- Create fields that will be leveraged on Projects in the Investment object

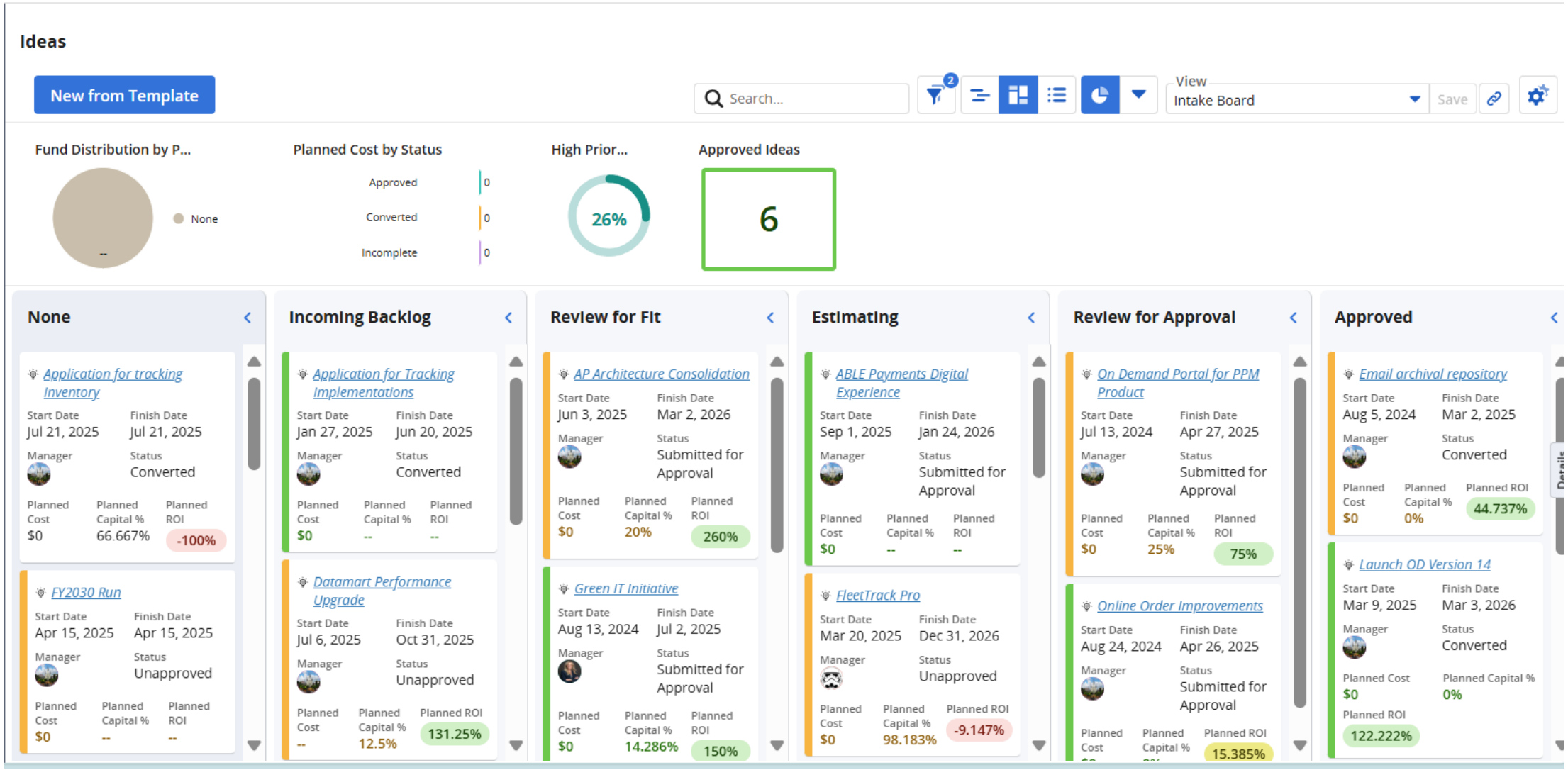
If using Roadmaps:

- Use the OOTB portfolio categorization fields, goal, strategy, and OBS
- Capture additional fields that would assist in portfolio planning (e.g., Target Start – Fiscal Year / Quarter)

Idea Financial Estimate Best Practices

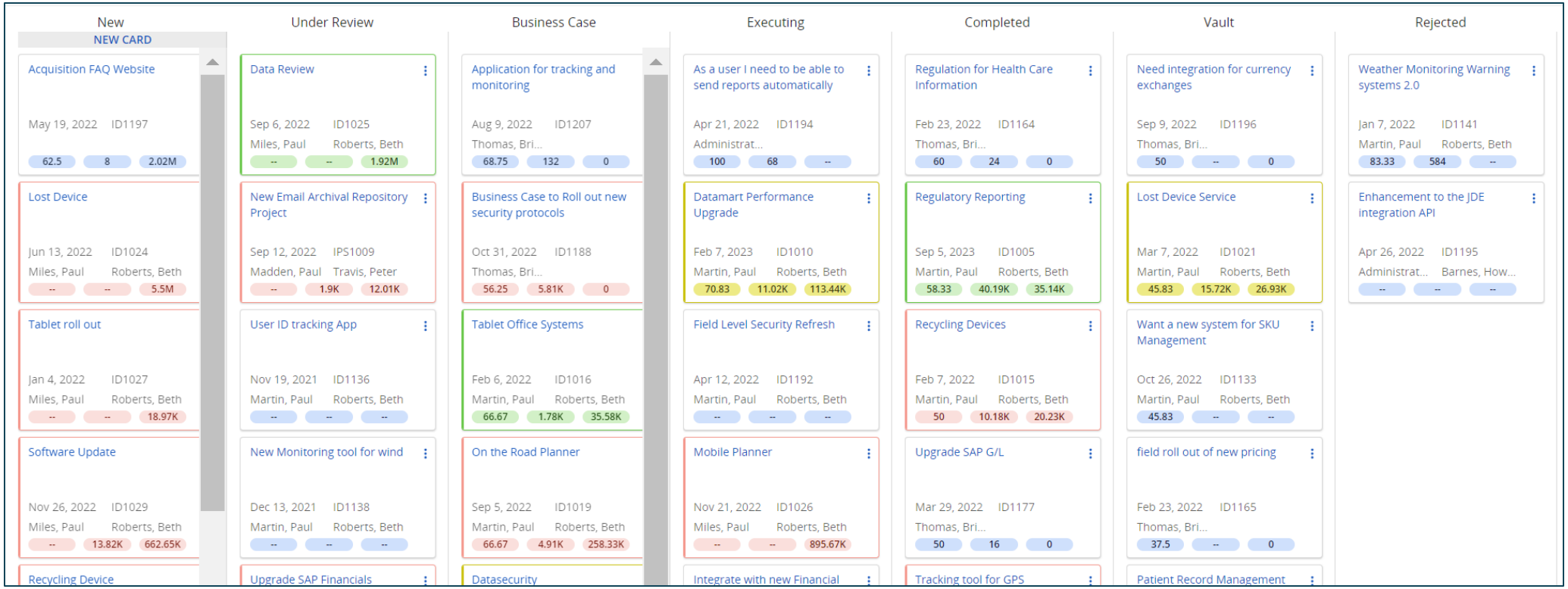
- Keep it light
  - You do not have enough information at this stage to have accurate costs
  - The estimate is typically ±100% at this stage
- Be consistent regarding the types of costs you plan to forecast (i.e., labor / non labor)
- Be consistent at the level you capture estimates
  - “T-shirt sizing” is commonly used at the Idea stage.
  - Gain agreement on standardized sizes and have them built into the system

Intake Dashboard



Idea Approval Best Practices

Leverage Board views to visualize how Ideas are moving through the process

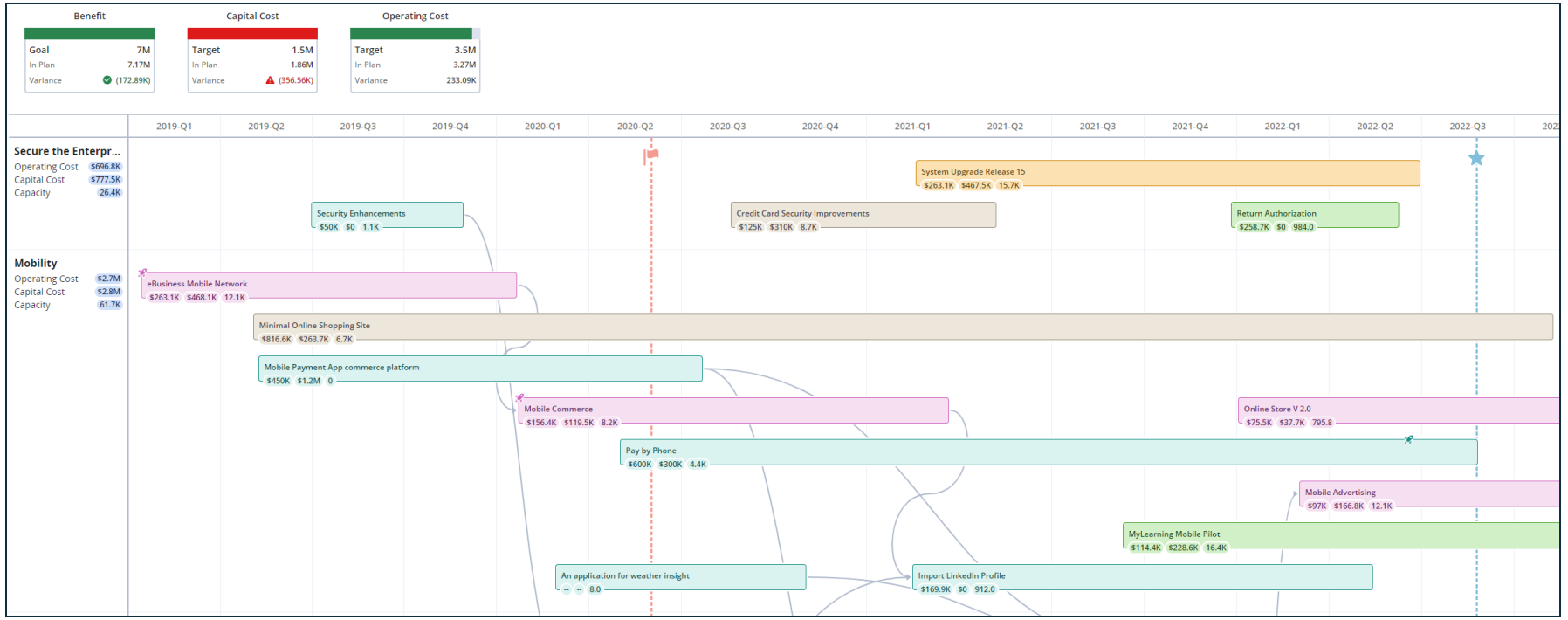


Rejection is Good!

Consider reporting on money or time not spent, or conflicts avoided

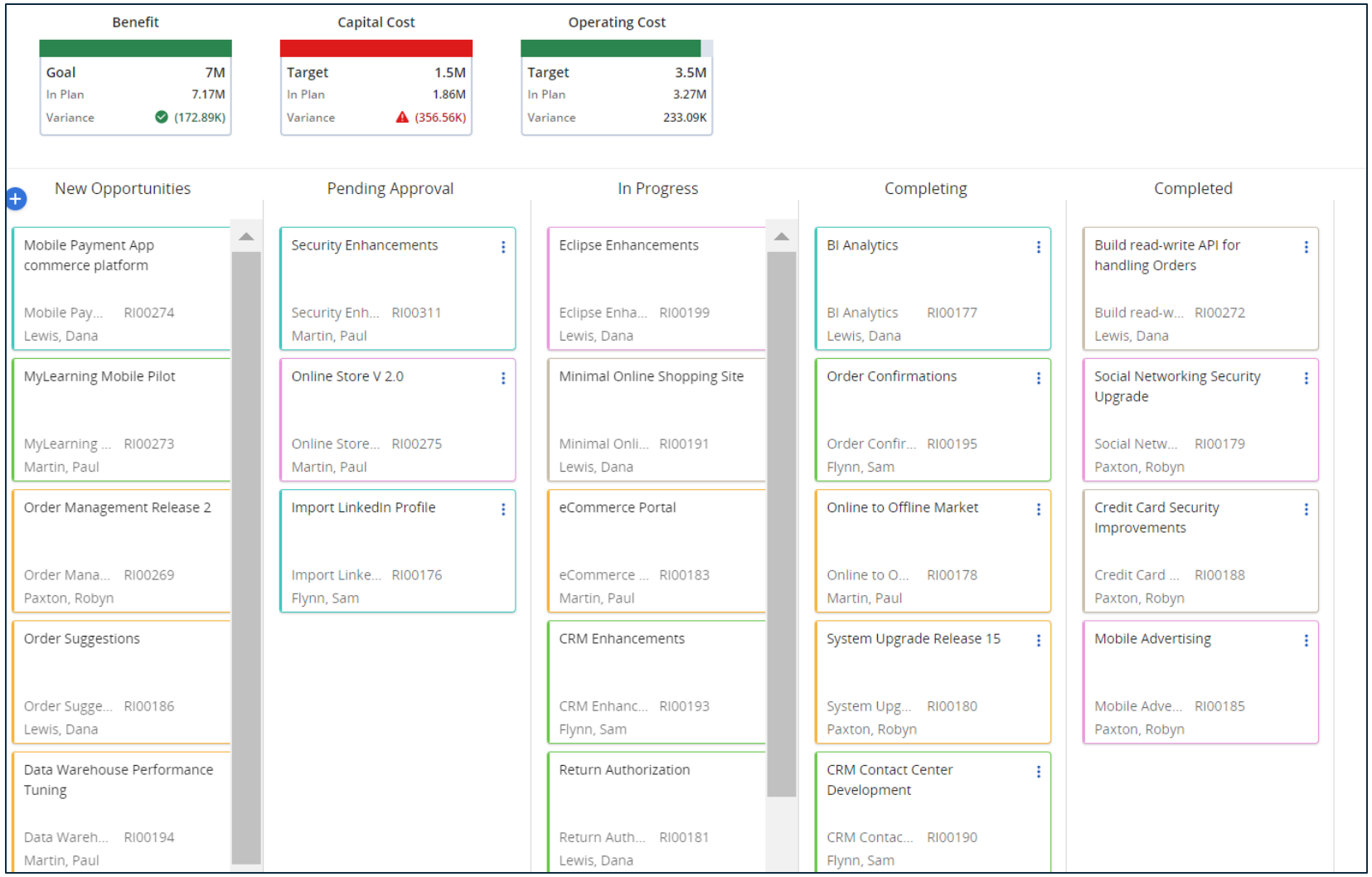
Use Roadmaps for Planning

- Ideas can be vetted against or planned with each other in the New UX Roadmap feature
- Item duration, start, and/or finish may be updated as well
- Include in-flight projects for complete planning



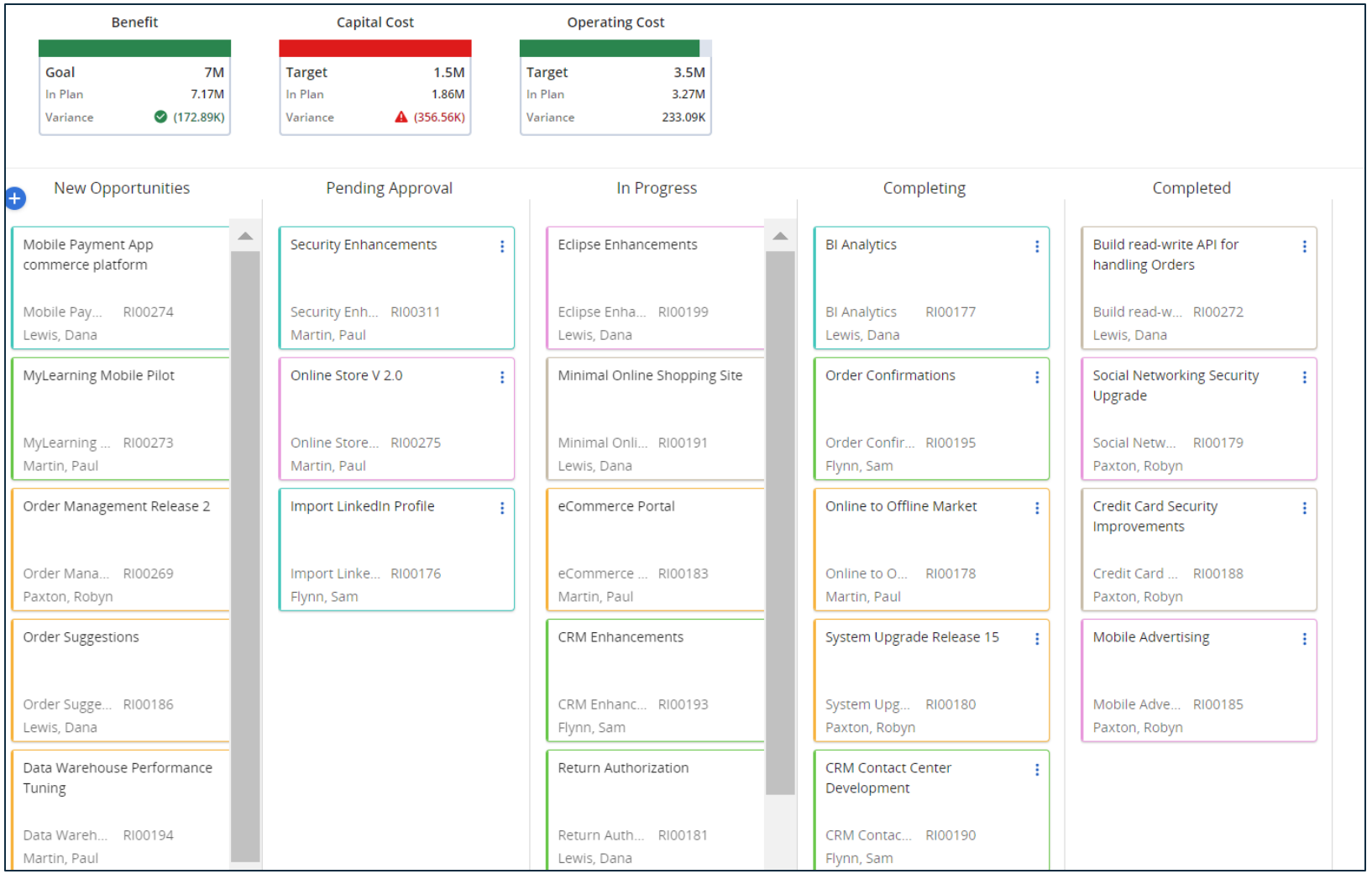
Use Roadmaps for Planning

- Utilize the Kanban board to organize and strategically plan work by dragging and dropping



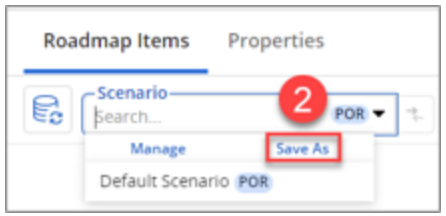
Use Roadmaps for Planning

- Use Grid View to manage work against targets
- Dynamically create and manage targets



Use Scenarios

- Allow for “What-if” analysis on roadmaps
- Scenarios will save roadmap-specific information at the item level. For example: adjusting the cost, capacity, or dates of a roadmap item. They will also save target information and what is/isn’t included in the plan.
- Unlimited number of scenarios may be created on a roadmap
- All users with access to the roadmap may view the scenarios
- Scenarios may be marked as Baseline and/or Plan of Record (POR)
- All roadmaps will be created with a Default scenario



Custom Investments

- Can be leveraged to capture different types of demand
- Name investments according to your organization's terminology
- Compatible with Roadmaps
- Same as other NPIOs (non-project investment objects)
- Includes *planned* simple budget financial fields on both the grid and the Details page