



The Support Blueprint for a Healthy Clarity Environment

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Introduction

Clarity Support Organization | Best Practices



Introduction



This class will discuss how other Clarity users support users, solve issues, discover solutions, and successfully use Clarity.



Understanding all aspects of Clarity support and implementing the proper support model is crucial to ensuring that your Clarity system continues to add great value to your company.



Volume, demand, number of users, company culture, structure, and PPM maturity all play a part in what support model works for you.



Effective Clarity Support is PEOPLE, PROCESS, and APPLICATION support

Agenda

- Key Components / Challenges
- Support Team Structure
- Support Process
- How Rego can Complement / Enrich Customer Support Offerings
- Next Steps
- Q&A

Key Components / Challenges

Common Sustainment Roles

Operating / Steering Committee

- Steer priority and sequencing of enhancements and new functionality
- Primary team for driving the vision of all solutions
- Communication with enterprise – releases, new functions, reporting
- Approval of release content

Change Forum

- Forum to provide “Voice of the Customer” input
- Identify pain point and topical new features of interest
- Act as an independent body to avoid perception internal politics around prioritization of roadmap
- Forum to socialize roadmap with representatives across the organization

Product Owner

- Works with leadership to define and update roadmap, enterprise reporting
- Resolves conflicts and owns prioritization
- Proposes new solutions and capabilities that benefit the org
- Communicates and champions change
- Skills / knowledge: functional product knowledge, business knowledge

Core Application Team

- End User Support
- Configuration / development - reporting
- Process support, mentoring & training
- Solution architecture & integrations
- Skills / Knowledge: functional product knowledge, administration training, technical knowledge, business knowledge

Power Users / Community of Practice

- Share knowledge and best practice
- Promote policy, process, and tool use
- Assist with User Testing
- Provide feedback on enhancements and new functionality

Common Sustainment Challenges



Lack of Staffing or Accountability to:

- Create and maintain a Strategic Vision
- Consistently own business process standards, data standards and data quality for all supported work and processes
- Communicate with stakeholders about new capabilities delivered internally or by Broadcom
- Create feedback loops and **collaborate** on a Tooling Backlog
- Train and mentor users
- **Triage and Deliver** leadership, business unit, and end user requests
- Architecture and technical skills to create **complex solutions** and system processes

Common Sustainment Challenges



Lack of Structure to:

- Collect, triage, agree upon, and deliver continuous improvements
- Have dedicated roles, rather than “everyone does a bit of everything”
- Communicate tooling opportunities with other leaders (different teams buying/creating similar functionality, new features that could support business challenges are unused)
- Align Process and Tool changes
- Maintain training, data dictionary, and other assets over time
- Ensure all users / organizations have access to improvements

Common Sustainment Challenges



Poor Prioritization:

- Failure to prioritize Voice of the Customer (VOC) requests
- Failure to balance multiple stakeholder requests
- Priority is given based on end of life or product events rather than value
- Failure to prioritize towards company objectives or key processes.

Support Team Structure

Support Model: Centralized (RECOMMENDED)



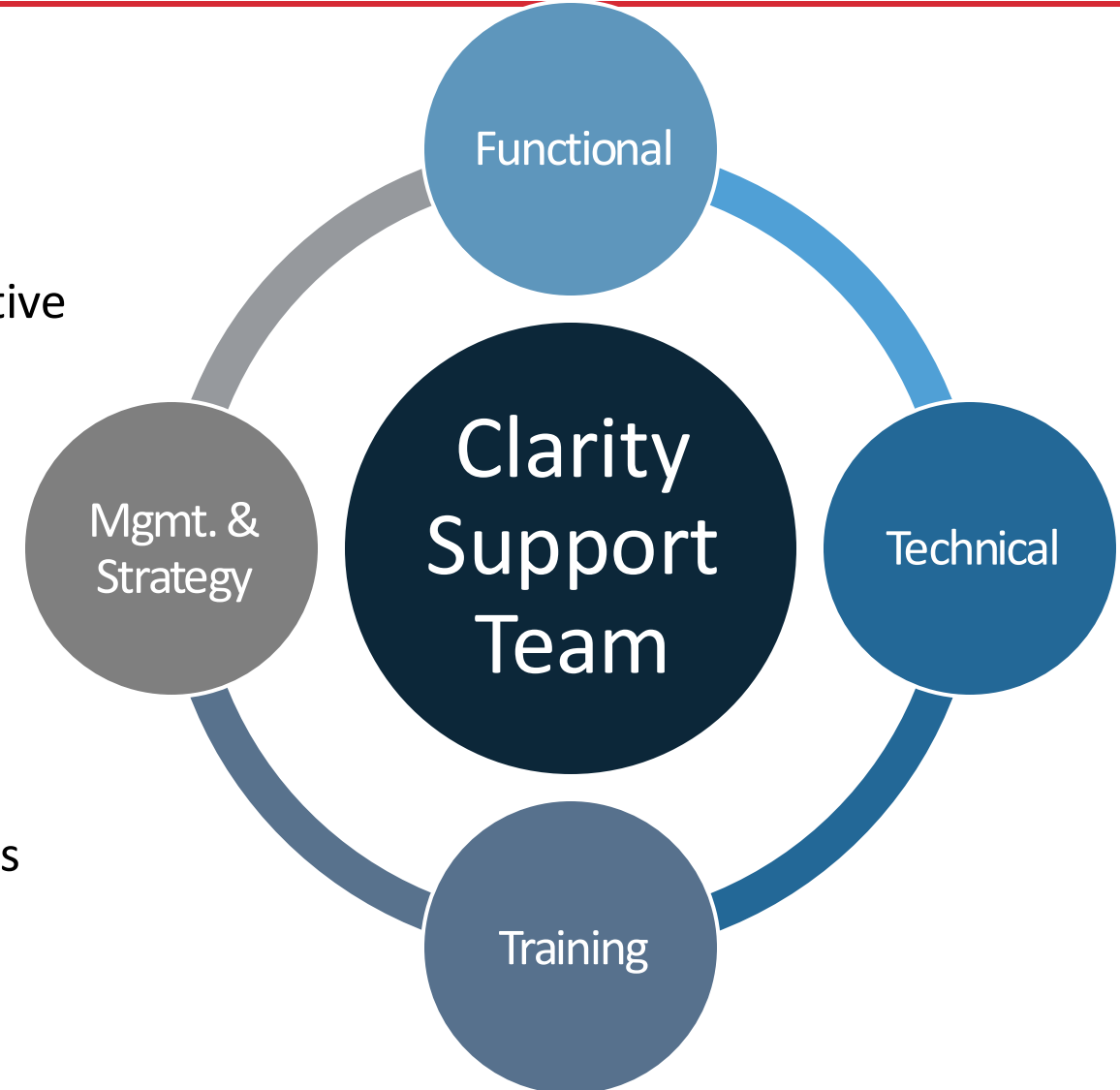
Advantages:

- “One vision” / higher oversight across the ecosystem
- More efficient collaboration and cost effective
- Cross training, multiple skills
- Accountability is more effective in direct reporting structure
- Continuous learning opportunity



Disadvantages:

- Must actively seek input from external areas
- Perceived as overhead / unpopular to use dedicated teams



Support Model: Distributed



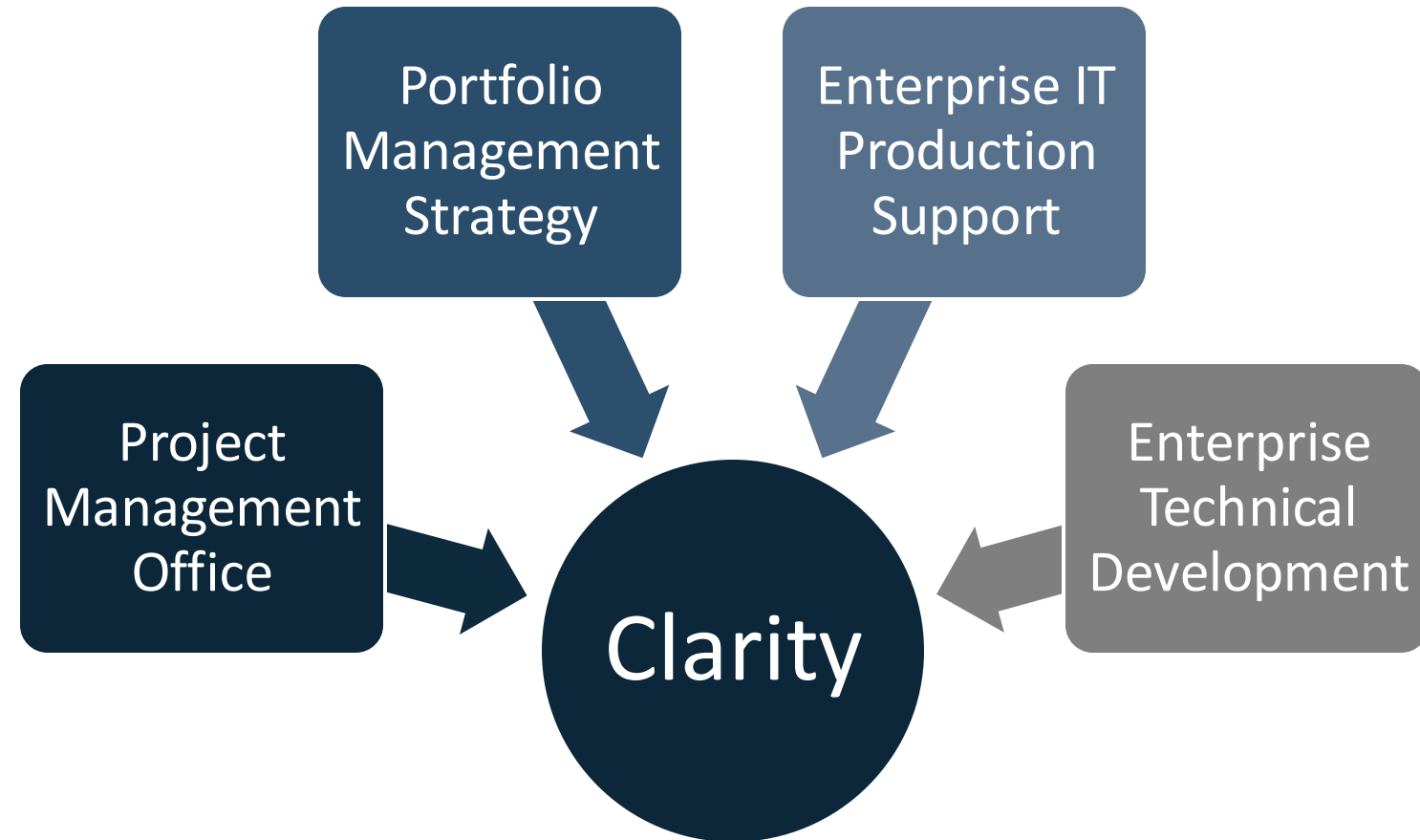
Advantages:

- Focused expertise
- Focused priorities
- Faster issue / response time
- Higher focus on targeted innovations



Disadvantages:

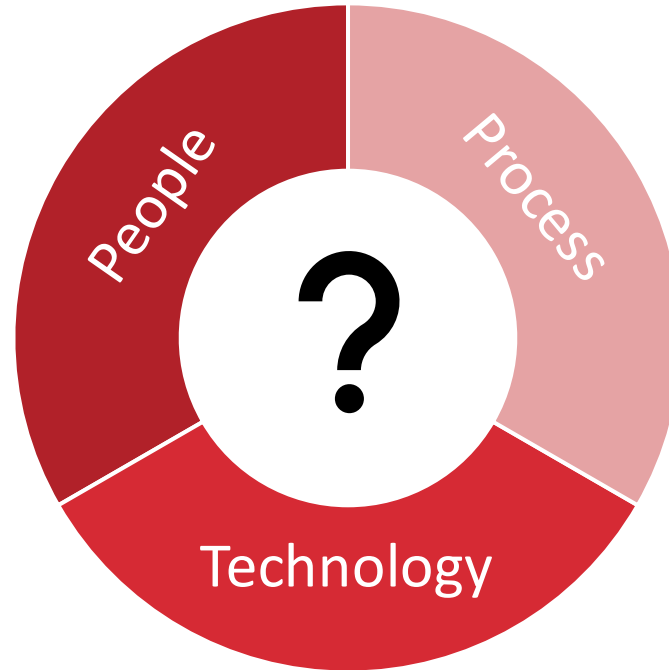
- Limited collaboration
- Risk of incorrect communication to end user
- Cross training challenges



Support Teams Need to Think Holistically

Ongoing Management

- Incidents
- User Questions
- Process Evolution
- Leadership Needs
- Routine Maintenance and User Onboarding
- Data / Report Requests
- Upgrade Management, and Feature Releases
- Environment Management (refreshes)
- Unmet business needs
- Voice of the Customer (end user improvement requests)



Organizational Change Management (OCM)

- Communications
- Coaching
- Rapid End User Support

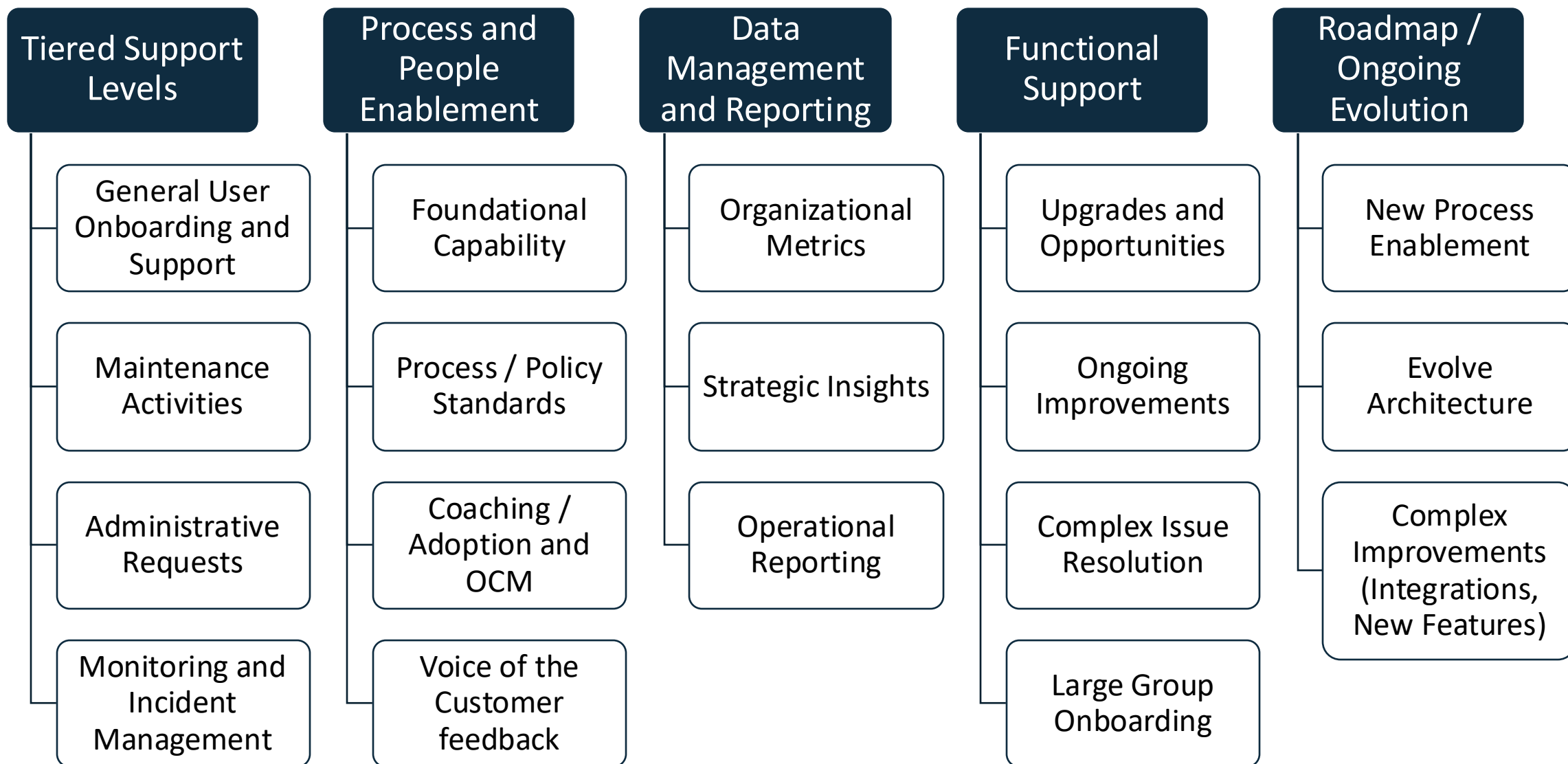
Sustained Assets

- Process Documents
- Training / Reference
- Data Quality Management
- Existing Reports
- Data Dictionary
- Communications

Functional Changes

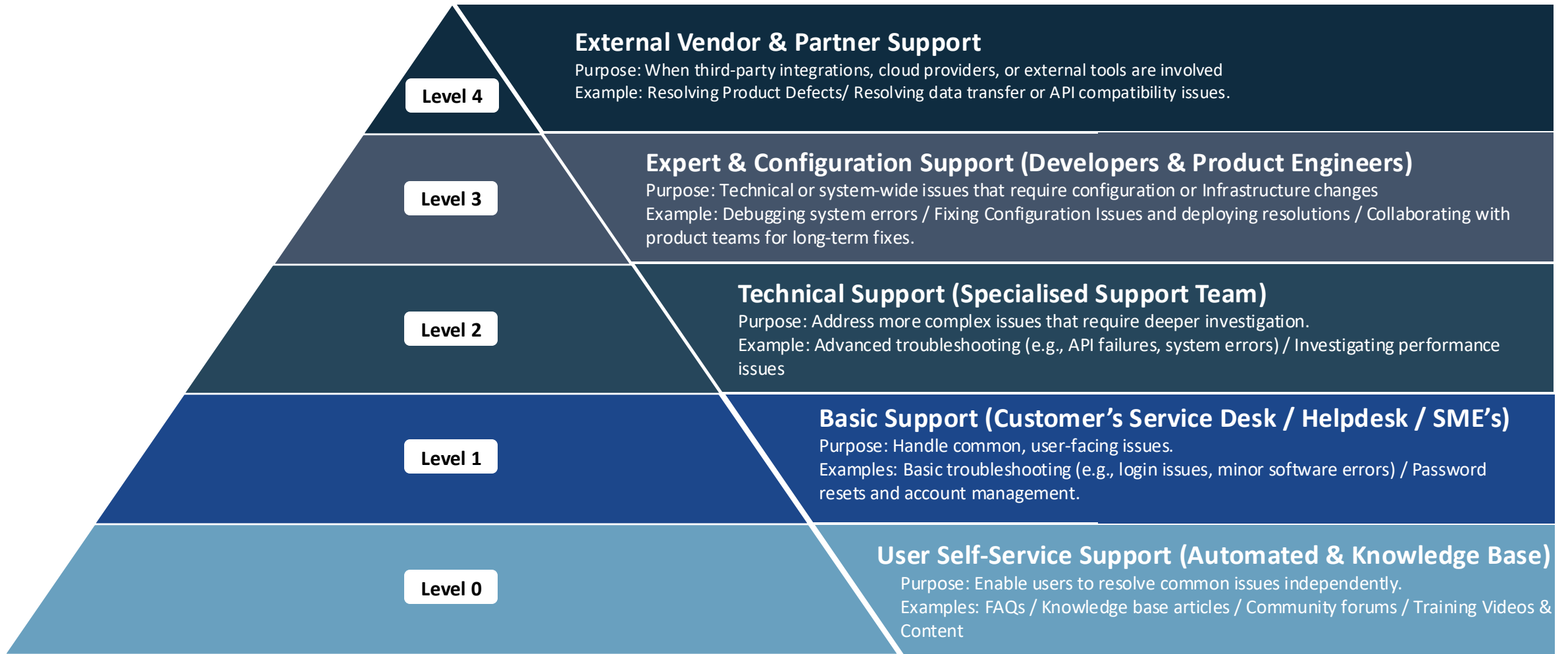
- Onboarding and Migration
- Enhancement Releases
- New Metrics and Reports
- Feature Releases

Key Components to ensure ongoing value



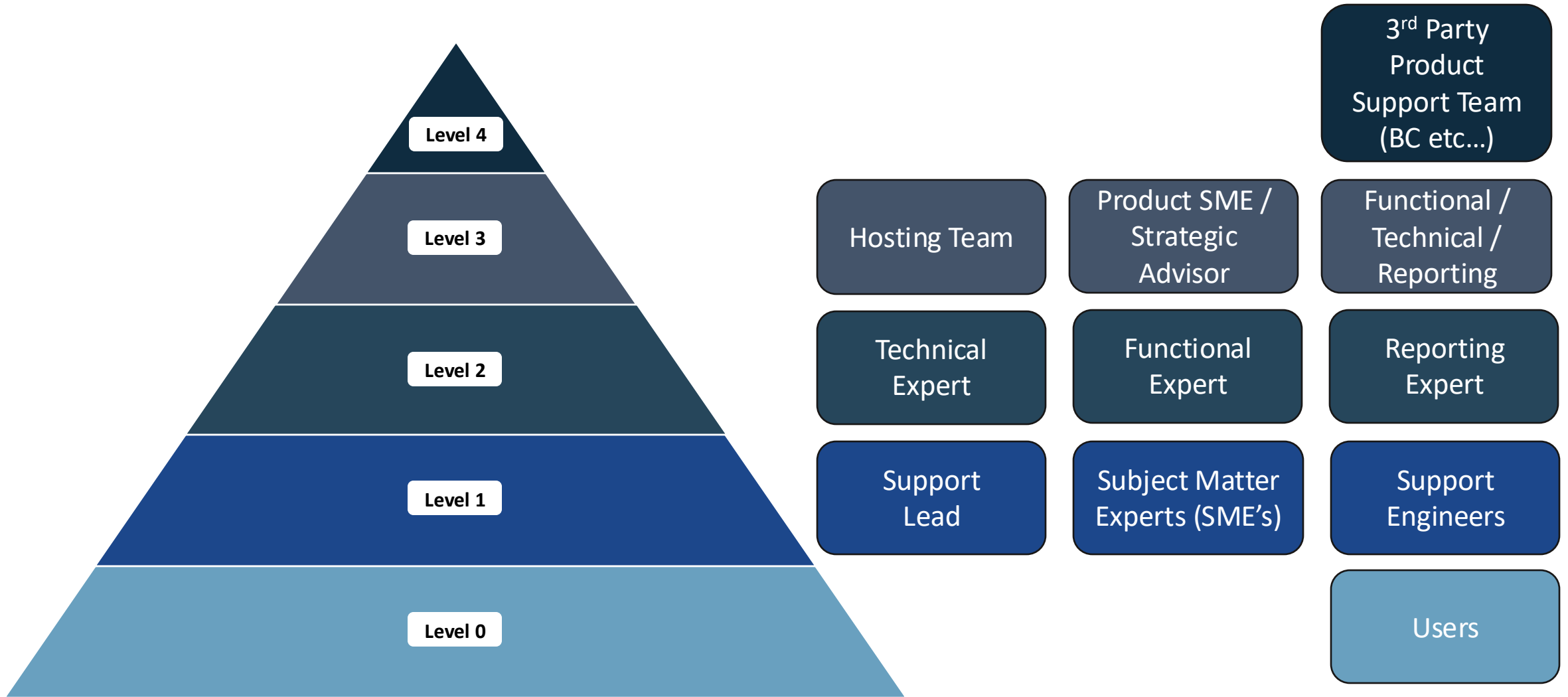
Using a Tiered Support Level Approach

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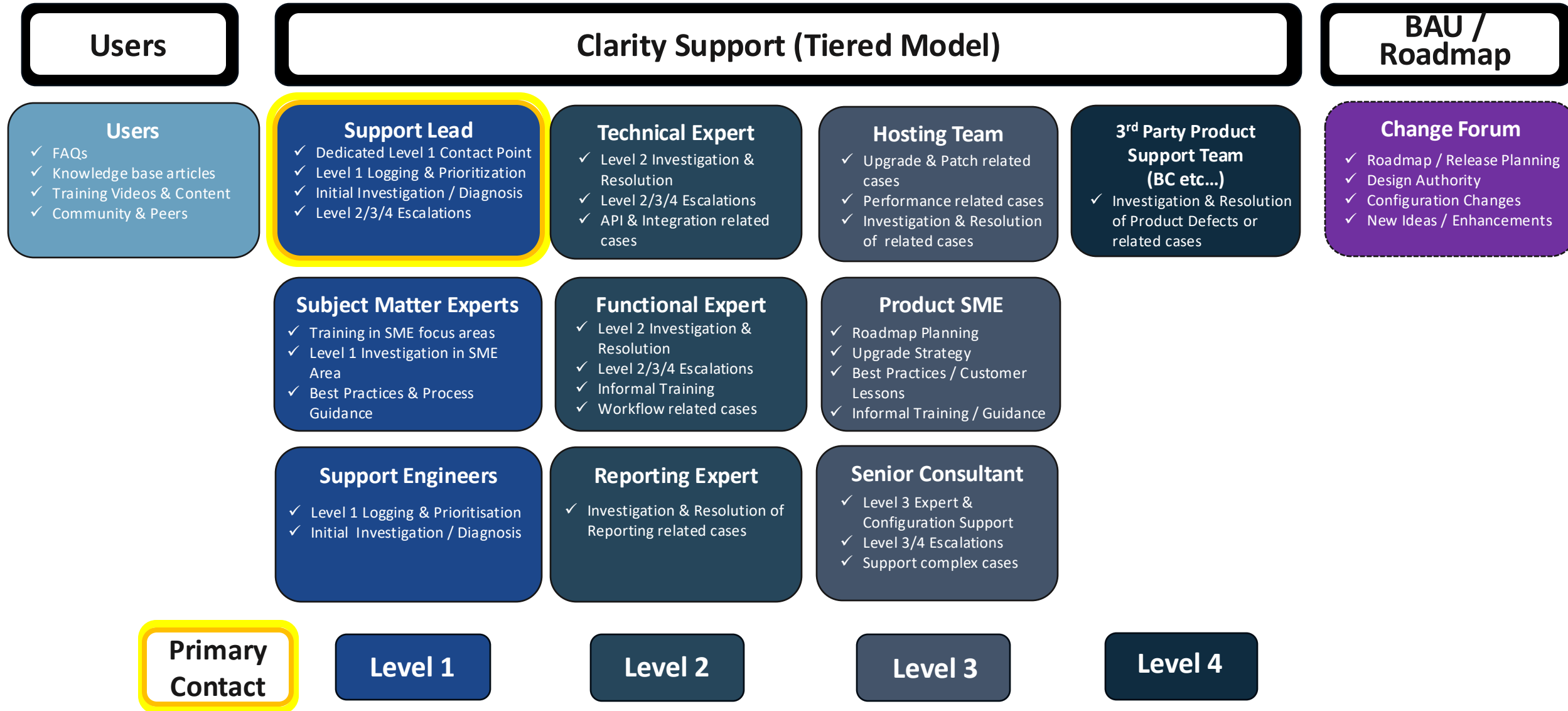


Mapping Support Roles to Support Tiers

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Clarity Support Role Definitions

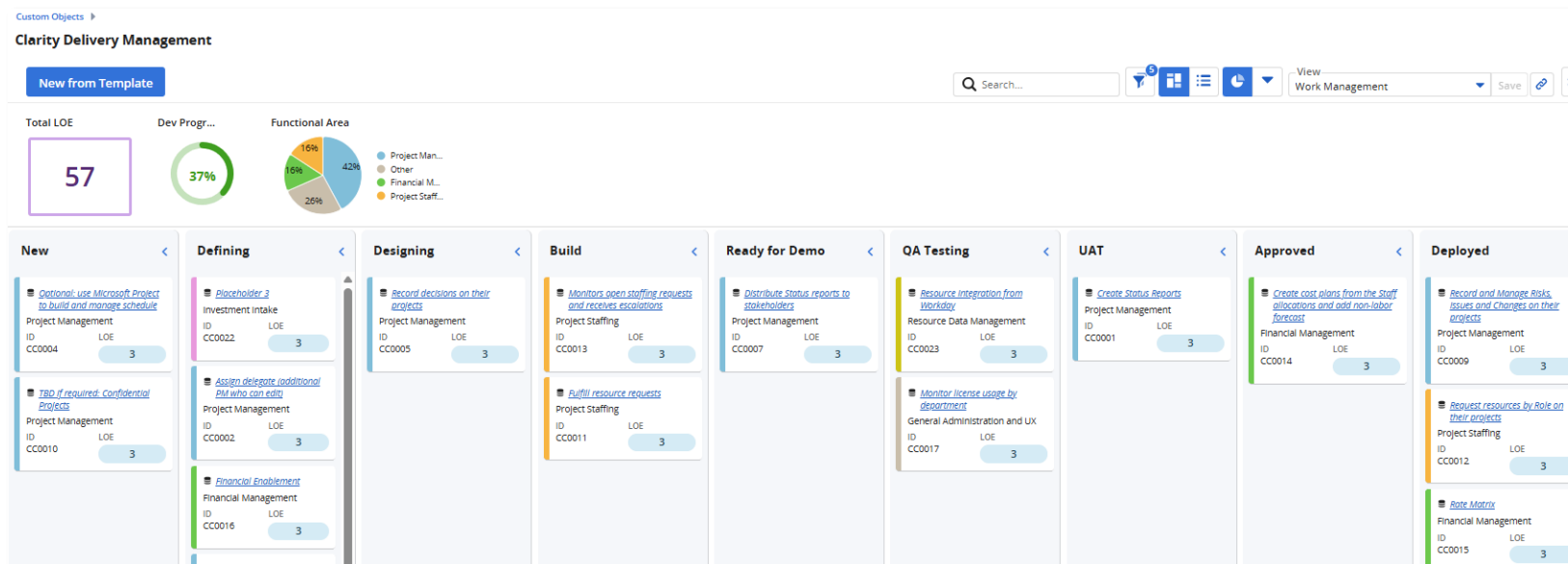


Tactics for Ongoing Management

Tactics: Manage Ongoing Delivery in Clarity

Demo: Clarity Delivery Management

xchange.regoconsulting.com/product/clarity-delivery-management

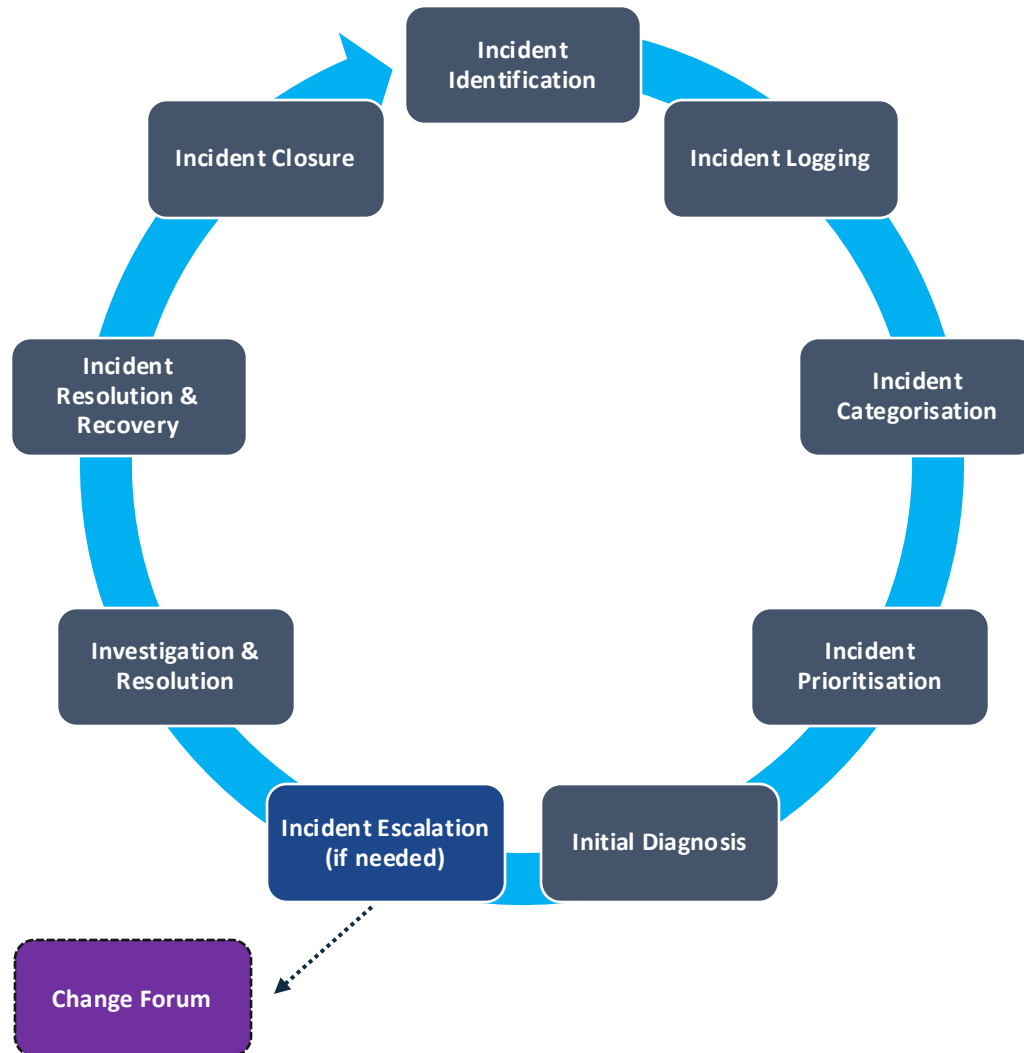


Key Points

- Log enhancements, features, upgrades, and other work in Clarity
- Use views to support the enhancement Process (Kanban, Sprint or other)
- Include your Definition of Done
- Make it Visible with Views
- Incorporate Release Notes
- Streamline Deployment Planning
- The list will serve as a configuration change log over time

Support Process

Sample Clarity Support Process (ITIL Based)



1. Incident Identification

- ☐ User reports an issue via service desk, email, phone, or self-service portal.

2. Incident Logging

- ☐ Record key details: incident category, priority, affected user/system, timestamps, and description.

3. Incident Categorisation

- ☐ Classify based on predefined categories (e.g., Network, Hardware, Module)

4. Incident Prioritisation

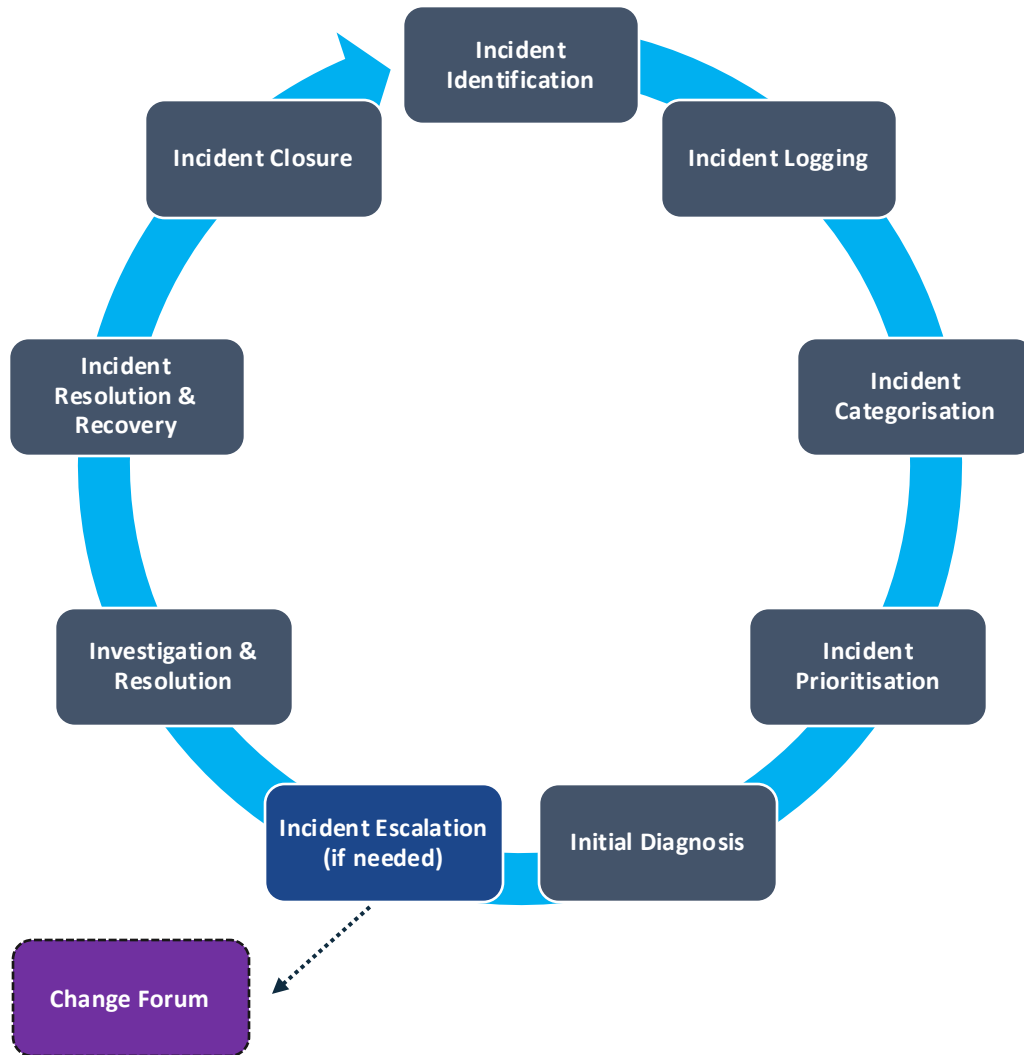
- ☐ Assign priority based on impact and urgency
(High: Business-critical service outage / Medium: Affects multiple users but has a workaround / Low: Minor impact, non-urgent)

5. Initial Diagnosis

- ☐ Service desk analyses the issue.
- ☐ Attempts first-line resolution using known solutions or workarounds.

Sample Clarity Support Process (ITIL Based)

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6. Incident Escalation (if needed)

- ☐ Functional Escalation: Sent to specialised teams if the service desk cannot resolve.
- ☐ Hierarchical Escalation: Escalated to higher management for urgent intervention.
- ☐ **Change Forum Escalation**: Escalate as an input to the change process/roadmap as requires new configuration.

7. Investigation & Resolution

- ☐ Technical teams diagnose and apply a resolution.
- ☐ If unresolved, it may be logged as a Product Defect.

8. Incident Resolution & Recovery

- ☐ Once resolved, the fix is verified.
- ☐ Users confirm the issue is resolved.

9. Incident Closure

- ☐ Incident is formally closed in the system.
- ☐ Root cause analysis (RCA) may be performed for major incidents.
- ☐ Knowledge base updated if necessary.

Sample Meetings and Reporting Cadence



Weekly Support Review

- Schedule weekly meetings to discuss all support work & open cases



Monthly Reporting & Retrospective

- Compile a comprehensive monthly report that includes:
 - *Ticket Volume by Category & Priority (ticket types, ticket patterns,)*
 - *Ticket Status by Level inc. duration open e.g. (% resolved with 1 business day)*
 - *Escalation Review of level 2 / 3 / 4 work and request status*
 - *SLA Analysis (Met vs Missed)*
 - *Trend Analysis vs Previous Month*
 - *Commentary & Insights on Prior month accomplishments, future focus items, opportunities for training and opportunities for enhancements*
 - *Release scheduling and communication planning*
 - *This may also include a weekly status report summarizing progress and any issues that require attention*
- **Schedule monthly retrospective to discuss the report findings and add any context / commentary prior to sharing with wider audience**
 - *Key to not just report SLA performance but to focus as much on where we didn't meet SLA, why, and how the process/training/system can be improved to stop it happening again or reduce ticket volume*



Knowledge Sharing Meetings

- Schedule regular best practice / knowledge transfer discussions within the team
- Topics include project management, resource management, financials, portfolios, and process optimisation

Sample SLA's Response/Resolution

Type of Request	Tracked Response SLA	Published Guidelines – But not Tracked SLA (Exceptions well communicated)	
	Acknowledge/Assign	Full Response / Action Plan	Target Resolution Guideline
Administration (Level 1) Password resets, creation of new users, assign security	3 Bus. Hours	N/A	1 Business Day Most Administration requests will be filled in FIFO (first in first out) order.
Information (Level 1/2) Requests for information on PPM functions, how to access specific data points.	3 Bus. Hours	1 Business Day Research the question they have and respond to the user with an answer to their question.	N/A
Best Practice (Level 2) Information for optimization of PPM processes.	3 Bus. Hours	1 Business Day Work with user to identify best use.	2-4 Business Days Rego will be available for a scheduled meeting for consultation / demonstration.
Product Defect (Level 2/3) Application functions that are not working as designed and need vendor intervention.	3 Bus. Hours	1 Business Day Work with the user to identify and document the issue, confirm it's a product defect, and log a vendor case.	N/A Vendor controls product defect resolution time
Config/Data/Process Defect (Level 2/3) Issues with existing configurations or data.	3 Bus. Hours	1 Business Day Work with the user to identify and document the issue, determine cause, then design a solution.	2-4 Business Days to Dev Implement the change within the Dev environment. Moving to production depends on release schedule.
Enhancement (Level 2/3) Improve current functionality or add new functionality to the system.	3 Bus. Hours	1 Business Day Work with the user to identify and document the enhancement, and then create an estimate	Scheduled Into Appropriate Release Delivery will be set once requirements are defined and accepted, and move to PROD will be scheduled.
System (Level 2/3) – Mainly OnPrem System performance, application, hardware, network and connectivity	3 Bus. Hours	1 Business Day Create an action plan by reviewing logs, infrastructure sizing, database diagnostics, etc.	Vary Based on Action Plan System issues may involve infrastructure teams or vendor. Resolution will depend on their availability.
Critical (Level 1/2/3) System down	1 Bus. Hour	4 Business Hours Coordinate with vendor or internal hosting team to arrange status calls and an action plan for resolution.	Vary Based on Issue Critical issues are often out of Rego's control, but we will coordinate and drive resolution as quickly as possible.

Business Hours are typically 8 am - 5 pm (client time zone), M-F excluding client holidays

Sample Staffing Data – Excluding SMEs

Users:	50-100	100-400	400-1000	1000-2000	2000-5000
Basic System Support	.25 - .5 Tech .25 - .5 Funct	.25 - .75 Tech .25 - .75 Funct	.5 - 1 Tech .5 - 1 Funct	1 - 1.5 Tech .75 - 1.5 Funct	2 - 3 Tech 1 - 2 Funct
ADD Time and Project / Resource Tracking					
ADD Project Mgmt: Scheduling, Status, IRC			.25 - .5 Funct	.5 - .75 Funct	.75 - 1 Funct
ADD Resource Mgmt		.1 - .25 Funct	.25 - .5 Funct	.5 - .75 Funct	.75 - 1.5 Funct
ADD Financial Mgmt: Cost Plans, Rates, Transactions	.1 - .25 Tech	.1 - .25 Tech	.25 - .75 Tech	.5 - 1 Tech	.5 - 1 Tech
ADD Demand and/or Roadmap Mgmt		.25 - .5 Funct	.25 - .5 Funct	.5 - .75 Funct	.75 - 1 Funct
Total FTE Ranges :	.6 – 1.25	.95 – 2.5	2 – 4.25	3.75 – 6.25	5.75 – 9.5

*NOTE: excludes Clarity Product owner that is likely needed FT in organizations with over 1,000 users

*NOTE: excludes SME/PowerUser resources that are typically outside of the Clarity team (similar # as the Clarity team)

*NOTE: Excludes major project work like major user expansions or major functionality deployments

*NOTE: Figures will vary based on organization maturity skill of resources

Sample Staffing Data – Including SMEs

Users:	50-100	100-400	400-1000	1000-2000	2000-5000
Basic System Support	.25 - .5 Tech .25 - .5 Funct .25 - .5 SME	.25 - .75 Tech .25 - .75 Funct .25 - .75 SME	.5 - 1 Tech .5 - 1 Funct .5 - 1 SME	1 - 1.5 Tech .75 - 1.5 Funct .75 - 1.5 SME	2 - 3 Tech 1 - 2 Funct 1 - 3 SME
ADD Time and Project / Resource Tracking					
ADD Project Mgmt: Scheduling, Status, IRC	0 - .25 SME	.25 - .75 SME	.25 - .5 Funct .5 - 1 SME	.5 - .75 Funct 1 - 2 SME	.75 - 1 Funct 2 - 3 SME
ADD Resource Mgmt	0 - .25 SME	.1 - .25 Funct .25 - .75 SME	.25 - .5 Funct .5 - 1 SME	.5 - .75 Funct 1 - 2 SME	.75 - 1.5 Funct 2 - 4 SME
ADD Financial Mgmt: Cost Plans, Rates, Transactions	.1 - .25 Tech	.1 - .25 Tech	.25 - .75 Tech	.5 - 1 Tech	.5 - 1 Tech
ADD Demand and/or Roadmap Mgmt		.25 - .5 Funct .25 - .5 SME	.25 - .5 Funct .25 - .5 SME	.5 - .75 Funct .75 - 1 SME	.75 - 1 Funct 1 - 1.5 SME
Total Clarity Team Ranges :	.6 - 1.25	.95 - 2.5	2 - 4.25	3.75 - 6.25	5.75 - 9.5
Total SME/PowerUser Ranges :	.25 - 1	1 - 2.75	1.75 - 3.5	3.5 - 6.5	6 - 11.5

*NOTE: excludes Clarity Product owner that is likely needed FT in organizations with over 1,000 users

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How Rego can Complement / Enrich Customer Support Offerings



Support Highlights

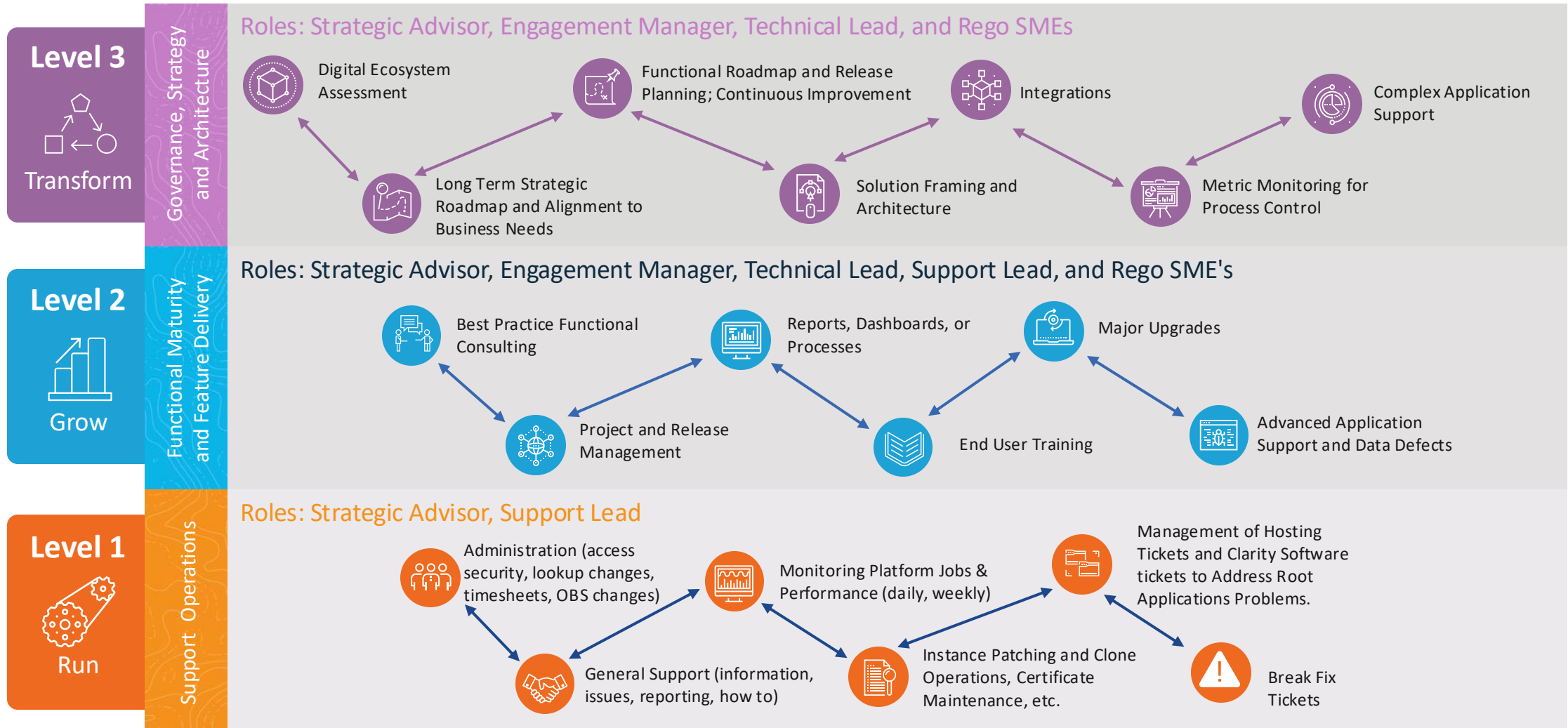
- We specialize in delivering world-class, responsive managed support for Clarity PPM, leveraging the proactive Managed Support Model that has been in place and perfected for over 8 years.
- Rego currently provides fully outsourced Managed Support (including admin support) for over 20 clients. In addition, Rego provides Clarity Support for over 80 other clients.
- No matter the size of your company, you'll find the level of support you need with assigned support staff you'll know by name.
- Many clients that already have a Clarity PPM Admin team choose to add Rego Level 2/3 Support to handle advanced issues, make system enhancements and handle ongoing training and mentoring.

How Rego can Help

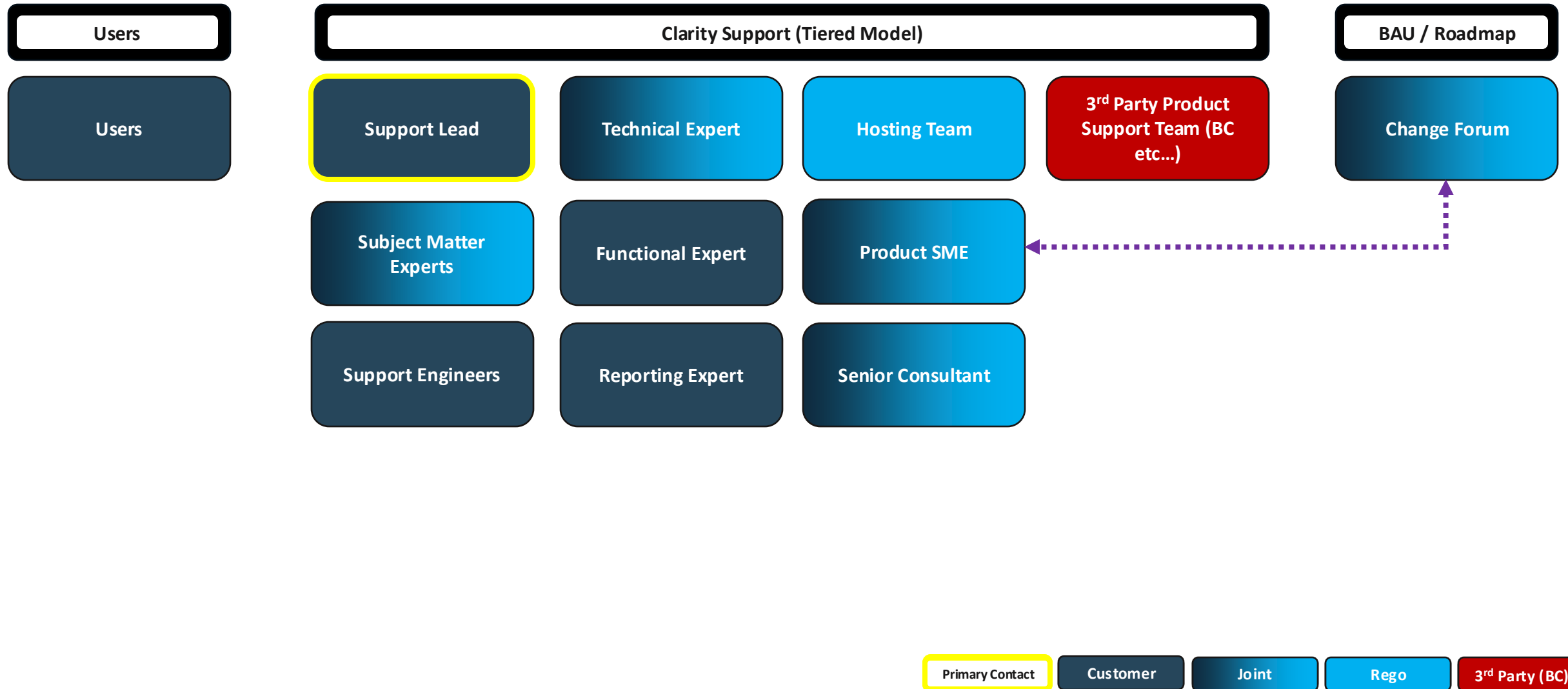
- Rego support has named resources assigned to each account – you will know your support team vs. using a “pool”
- Rego support responsiveness is unmatched
 - ❑ *Managed Support - Critical response within 1 hour, level 1 requests resolved within 1 day, level 2/3 request estimate & plan within 1 day (when using a ticketing system)*
 - ❑ *Support Plus+ - Dedicated named Support resource aligned with your working hours*
 - ❑ *Tailored Support Levels – We will work with you to find the best way we can complement / enrich your current capabilities*
- All Rego resources are experienced Clarity PPM users with excellent communication skills
- Rego support resources have access to the vast experience of Rego Consulting
 - ❑ *Hundreds of successful Clarity PPM implementations with over 150 Clarity PPM SMEs*

Complement / Enrich Customer Capabilities

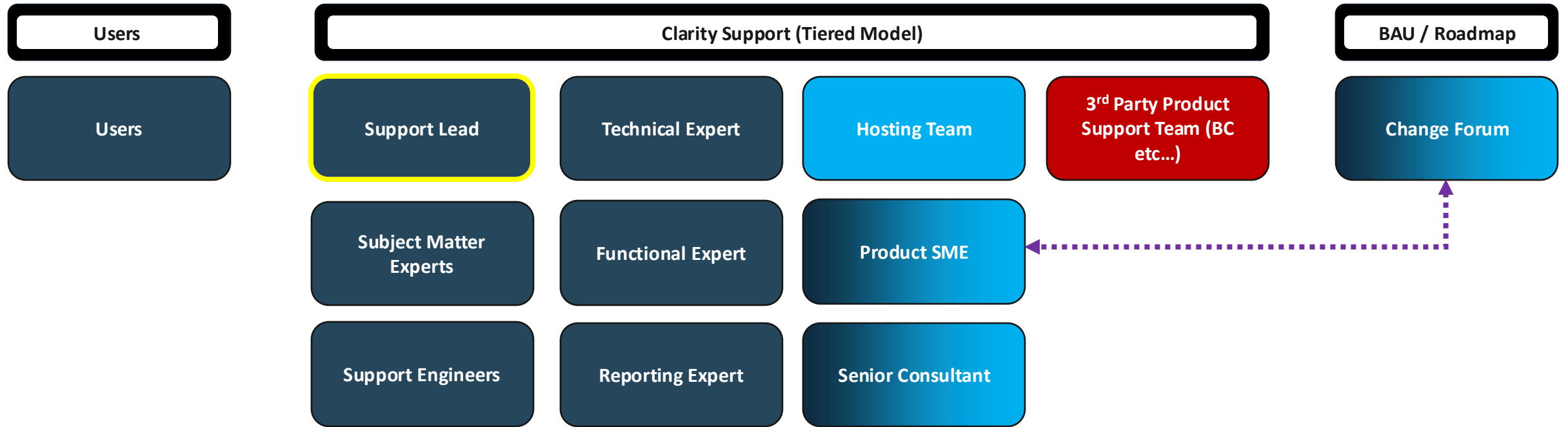
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Sample "Day 1" Customer/Rego Role Allocation



Sample “Future State” Role Allocation



Next Steps

Potential Next Steps – Support Structure /Process

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Identify & Assign Roles within the Support Team vs Best Practice Model

- ☐ Clarify roles & responsibilities (as supposed to everyone performing multiple roles)
- ☐ Identify Potential Role / Skill gaps, Possibility to leverage Rego expertise to fill short/medium term gaps.
- ☐ Identify Training & Knowledge Transfer Opportunities



Document/Develop the Support and Escalation Process

- ☐ Review Current Processes vs Best Practice advice to develop, document and socialise an appropriate Process (inc SLA, Escalation process and Meetings/Reporting cadence)
- ☐ Confirm Intake process for Users and ensure this is well communicated and adhered too
- ☐ Confirm tooling use as part of Support Process, Ensure appropriate training and access levels



Document and Publish Change Management/Enhancement Process

- ☐ Establish or Ensure Change Forum is in place, part of the standardised process and regular meetings are well attended/documentated
- ☐ Review Current Processes vs Best Practice advice to develop, document and socialise an appropriate Change Management/Enhancement Process

Potential Next Steps – Clarity Specific



Consider Product SME / Strategic Advisor Role (if not in place)

- ☐ Spends most of time in the Change arena but has key inputs into Support Team in retrospectives etc...
- ☐ Ensures learning and support gained through Support are considered and contribute into the change roadmap
- ☐ Provides a different perspective, knowledge transfer and experience to support team discussions



Review, Update and Create supporting Documentation

- ☐ Document “build lists” configuration logs, change logs – use them as a mechanism to communicate and visualise change
- ☐ Ensure operational runbooks and post activity runbooks are in place and regularly reviewed/updated
- ☐ Document housekeeping, monitoring and recurring “run” activities – they should be on your roadmap alongside change



Review Upgrade Procedure based on best practice suggestion below – do you have similar in place?

- ☐ Review Broadcom Release Notes
- ☐ Complete a Change Impact Analysis
- ☐ Execute Test Scripts for the most critical functionality > Evaluate Testing Results
- ☐ Communicate Upgrade Impact and Timings to the Users



Document/Develop Release Management Process

- ☐ Create a standard cadence for changes - Incorporate time for testing / Coordinate user communications
- ☐ Enhancement Definition of Done - includes work to maintain assets over time, Identify Data Quality Owners.
- ☐ Consider separate Upgrade, Maintenance and Capability Releases

Summary – Keys to Success



Have a Vision and Align work to that Strategy

- Plan & Communicate how the tooling will evolve to support your objectives – with realistic timescales and expectations
- Stay current on new features and capabilities being released that would add value to your direction of travel
- It is not a “one and done solution” - No initial implementation is perfect. Have a plan in place to manage improvements, including a method to collect and prioritize incremental change, and resources to implement them.



Dedicate Capacity to both Run and Change

- People are always the most important element
- With the right process and structure, you can move forward on a shoestring budget. But you can't neglect the housekeeping or let it consume all your capacity.
- Outsourcing (Rego / External Market) may make sense especially if you are concerned about turnover or short-term skill gaps.



Walk in your “Users” shoes (Perception)

- How does this look to them, what is their perspective, pain points
- Be responsive. If users believe their enhancements, defects, etc. take too long or do not meet their needs, they will look elsewhere to get their data or implement their process.



Produce Insights not just Reports

- Provide detailed reporting with trend analysis and category heatmaps to be able to take a higher-level view of the incident data and draw meaningful insights
- USE THOSE INSIGHTS to drive change – whether it is to the configuration, to the process, to onboarding/training – learn the lessons to move forward.



Communicate and Collaborate – BRING EVERYONE ON THE JOURNEY

Questions?



Survey



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Let us know how we can improve!
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