



Unifying Product and Project Management in Clarity

Your Guides:
Ben Raper & Jacob Cancelliere

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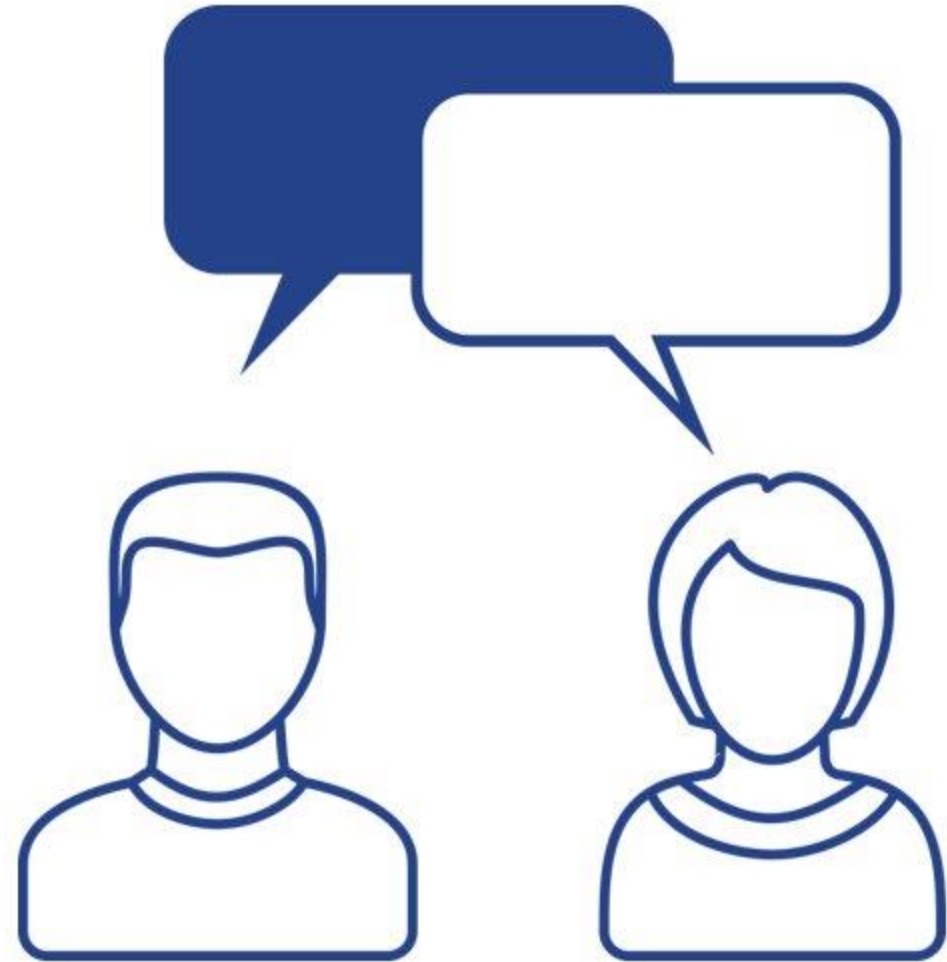
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Introduction

Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself



Your Journey?

- ❓ How many of you are All Waterfall, All Agile, or would describe your model as Hybrid?
- ❓ Are you considering a moving towards a Product Based Model instead of project based?
- ❓ If so, is that move considered a tooling change or a business transformation?



Rethinking How We Define, Fund, and Deliver Work

In recent years, technology organizations have increasingly shifted from managing work through projects to **delivering value through products**. This evolution offers significant advantages — but only if we fundamentally change how we define, fund, and execute development.



First, we must move from prescribing specific solutions to **articulating the outcomes** we seek to achieve. This shift empowers teams to solve for impact, not just output.



Second, we must rethink funding. Rather than allocating budgets to a fixed scope of work, we should **invest in the ongoing capacity to evolve and improve products over time**.

This session will explore how these changes can be embedded within Clarity to align strategy, funding, and delivery — enabling your organization to unlock the full potential of a product-led approach.

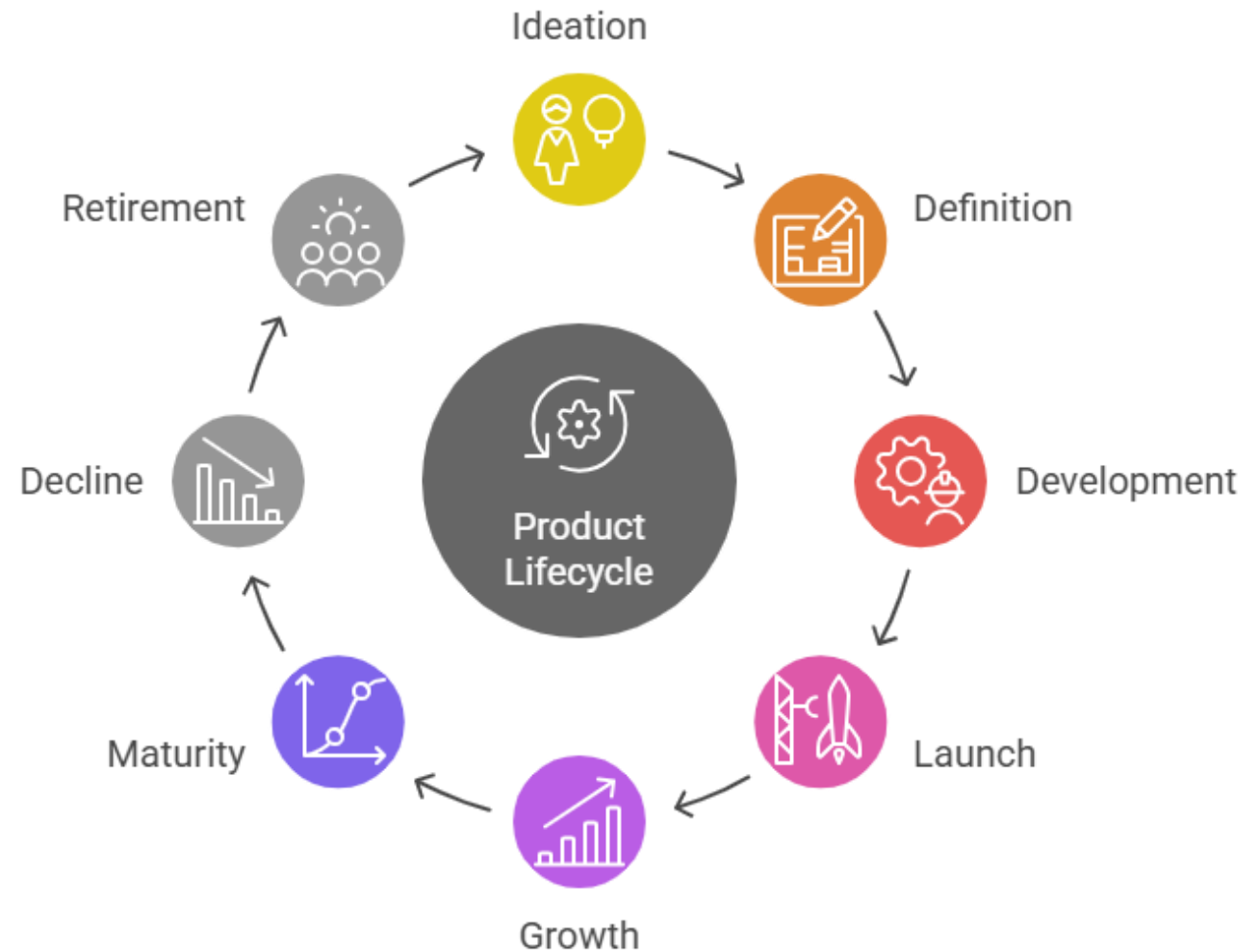
What Is a Product?

Product Defined and Product Lifecycle

- What is a **Product**?

A **product** is anything that delivers value to a defined customer segment and can be offered to a market to satisfy a need or want.

- What is a **Product-Led Organization**?
A **product-led organization** places the product experience at the center of its growth, customer acquisition, and retention strategy.



Made with  Napkin

Changing the Focus

Project Mgmt. Focuses on:

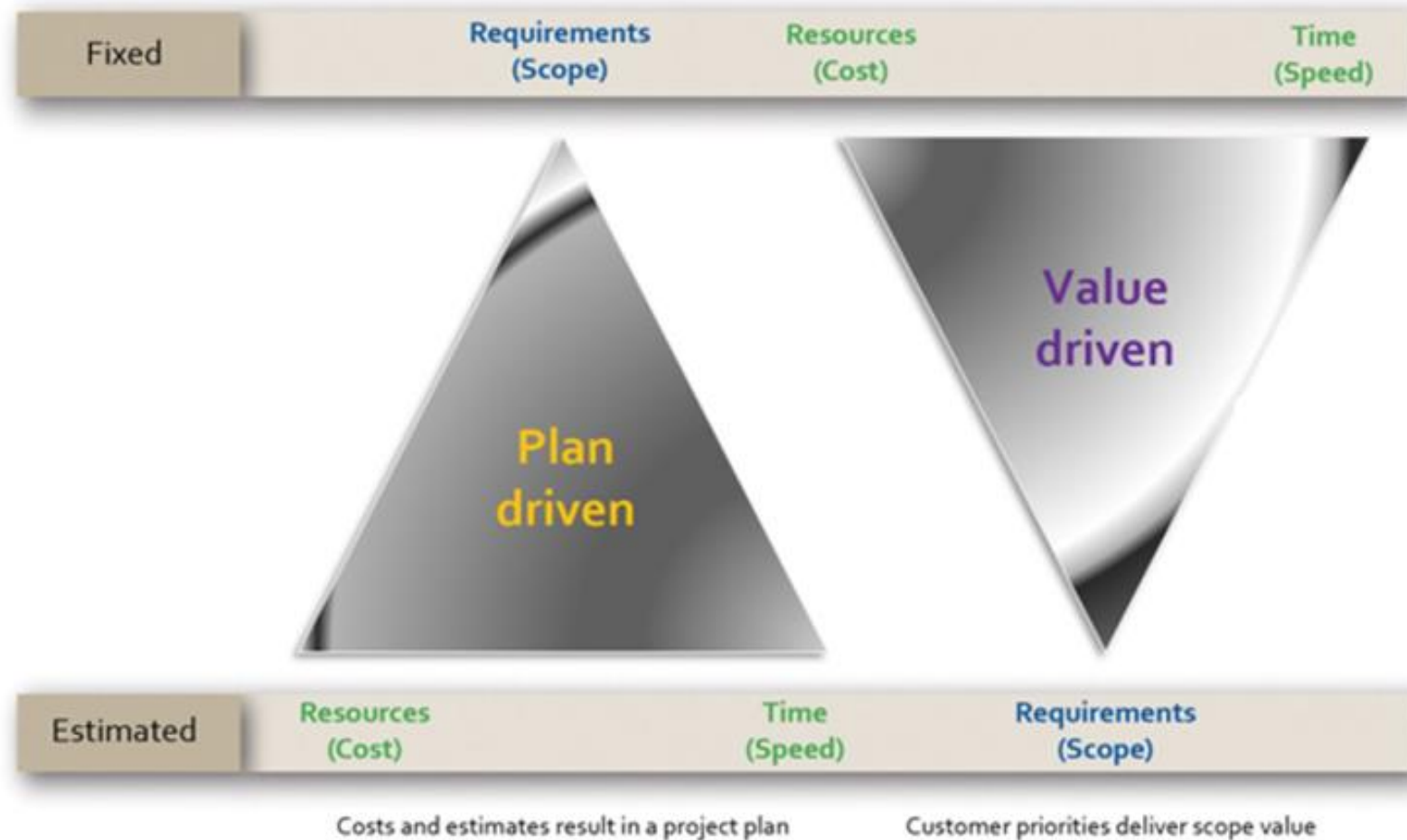
- **Development**
 - *Project Requirements*
 - *Investments that deliver fixed scope*
- **Plan**
 - *Predictive Up-front Planning*
- **Resource Oriented**
 - *Short Lived Project Teams*
- **Technical Knowledge**
 - *Start and End Date*
 - *One off Delivery*
- **Budget**
 - *Isolated costs*
- **Completion**
 - *Focus on Delivery*

Product Mgmt. Focuses on:

- **Strategy**
 - *Evolving Customer Needs*
 - *Investments that deliver Value*
- **Vision**
 - *Adaptive Iterative Planning*
- **Business Oriented**
 - *Long Lived Cross Functional Team*
- **Industry Knowledge**
 - *Permanent*
 - *Continual Improvements*
- **TCO**
 - *Product Level P&L*
- **Growth**
 - *Focus on Outcomes*

Why Shift from Project to Product?

Paradigm Shift



Key Variables

Project Based Approach

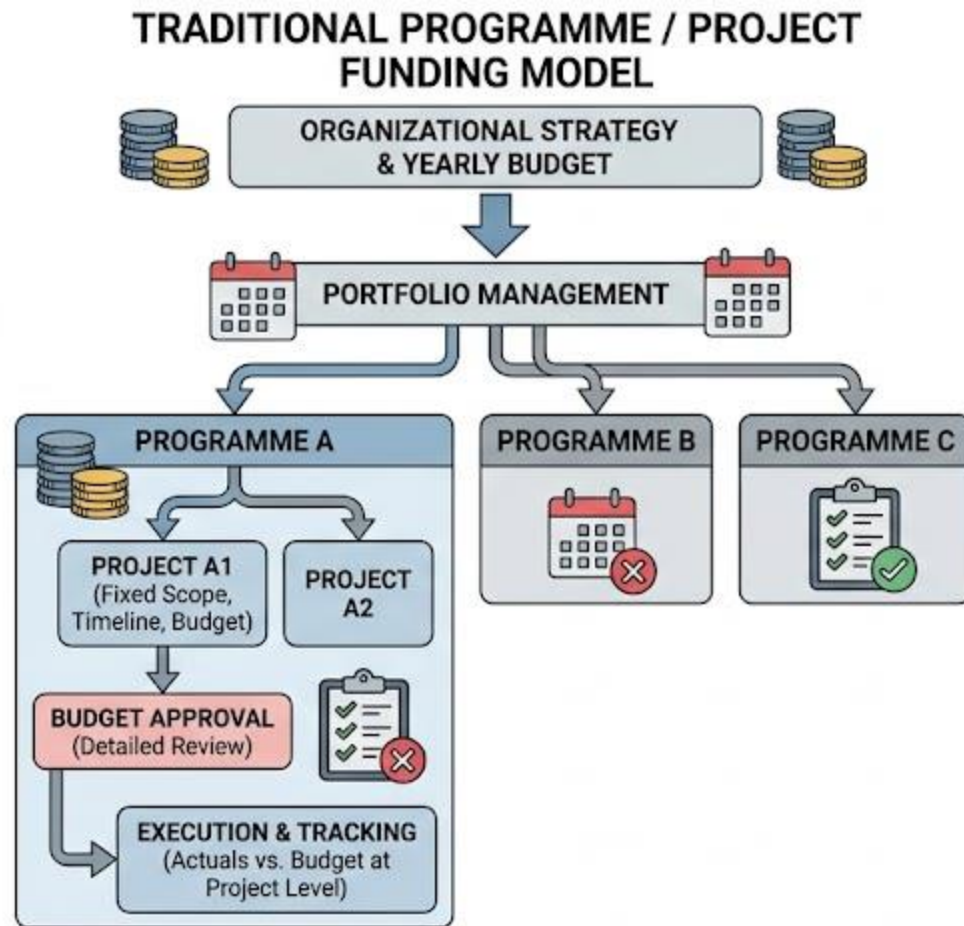
- Projects are time-boxed. There is an assumed start and stop date. This results in creating many Projects in many different processes and tools.
- Teams and resources are staffed on Projects, often resulting in resources being “peanut-buttered” across multiple Projects at the same time.
- Annual planning activities take months and force teams to estimate time-to-market and costs based only on very high-level requirements.
- Principles align to typical Waterfall processes.

Product Centric Approach

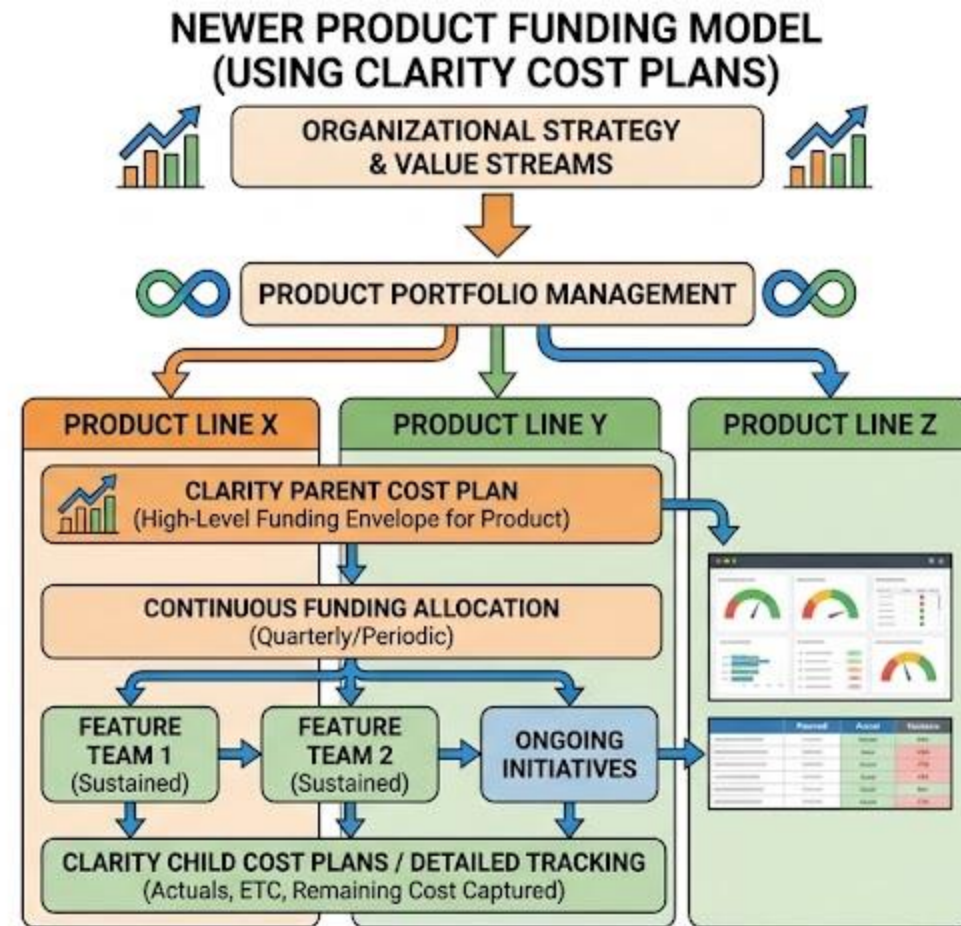
- Products are NOT timeboxed. Products exist if they are profitable and provide customer value.
- A physical, software, or service Product can only exist if it meets customer needs and provides value.
- Teams and resources are static and support a single Product or Product Group. Work is brought to these static teams, simplifying budgeting and planning.
- Annual planning is reduced to weeks, since static teams establish budgets and costs.
- Product backlogs are prioritized and ranked.
- Teams move to high-margin Products.
- Principles align to typical Agile methodologies and frameworks.

Evolving the Funding Model (Essential)

11



Funding tied to specific, time-bound projects.
Detailed budgets approved upfront.
Focus on project delivery and variance analysis.



Funding allocated to long-lived products/teams via high-level Clarity plans. No detailed budget approval at team level.
Focus on value delivery and continuous flow.
Costs tracked against high-level envelope.

Open Mic



Any examples of new funding models in the group?

Key Advantages of Product-led Organizations

Customer-Centric

Increased Agility

Cross-Functional
Collaboration

Faster Time-to-
Market

Sustainable
Growth

Data-Driven
Decision Making

Total Cost of
Ownership



The shift to a product-driven culture is a strategic decision that involves changes in processes, mindset, and sometimes organizational structure.

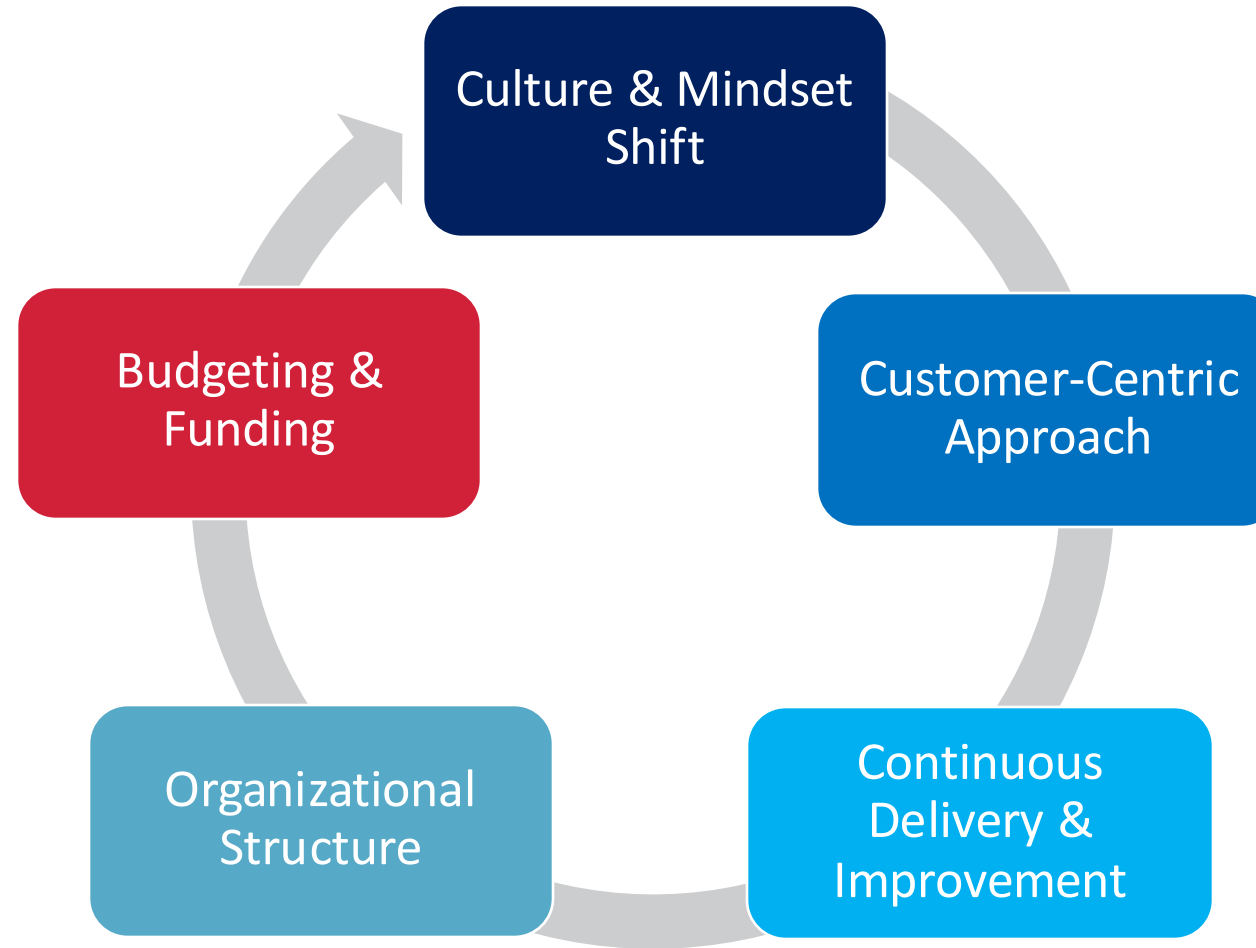
It's not just about developing products but about **building a culture that values customer satisfaction, collaboration, and continuous learning.**

How To Build Product-led Organizations



Moving from Project to Product – A Mindset Shift

15



Are We Ready to Be a Product Organization?

If the answer is not “Crystal Clear” to any of the following, further alignment is necessary for the adoption of a product organization model that maximizes the benefit of both traditional and agile methods.



Strategic—Do our products align with the overall business objectives, vision, and Strategy?



Cultural—Does our culture prioritize long-term customer value and continuous improvement?



Process—Does our development process accommodate continuous feedback loops, iterative development, and cross-functional team collaboration?



Technical/Tooling—Does our technical infrastructure and tooling support Product, DevOps, continuous integration/continuous deployment, and both waterfall and agile project management?



Governance—Are our governance structures setup to support rapid decision-making, reduced administration, and increased autonomy at the team level?



Financial—Does our financial planning and budgeting processes accommodate the dynamic nature of product delivery?



Stakeholders—Are we engaging all relevant stakeholders in our development lifecycle, including our customers?



Training and Skills—Do we have the right skills to support customer-centric design thinking, data analytics, and agile methods necessary for product development and management?

Anti-Patterns of Product Implementations

Due to **misconceptions** about Product-Focused Development, organizations often treat Products and Projects interchangeably and **undermine** their efforts to realize the value of Product-Focused Funding and Development.

Common anti-patterns of Product



Rename the “Projects”
to “Products”



Internal components
are Products



Capabilities labeled
as Products



Services that are
provided within the
business

So What Is a Product?

Electric Vehicle	Industrial Robot	Processor Chip
Battery	Manufacturing Assembly Line	Mobile App
Streaming Service	Insurance Policy	Smartphone
Database	Payroll Service	Reporting Engine
Website	Login Screen	CRM Software
Insurance Underwriting	Consulting Service	Payment Processing Engine
AI Assistant	API Gateway	Data Platform
Online Banking	Onboarding Workflow	

What Is a Product? Examples!

Rule of Thumb: If customers would recognize it, buy it, subscribe to it, or measure value from it, you're probably looking at a product. If it exists mainly to support something else, it's probably a capability or component.

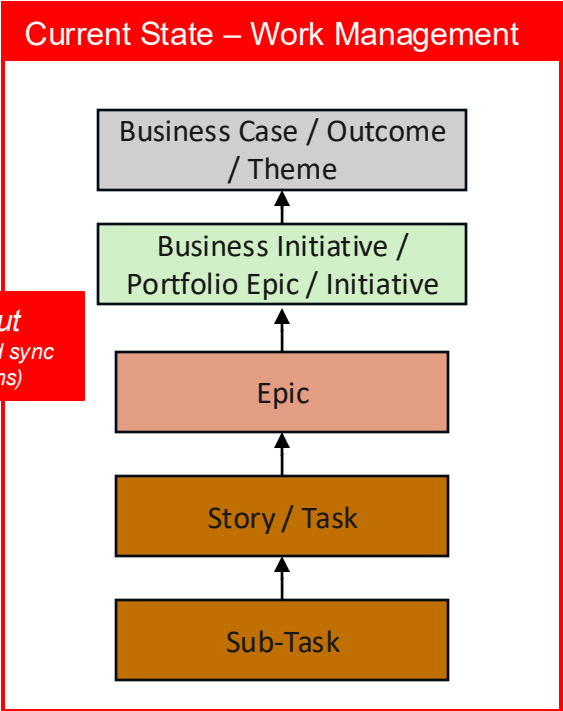
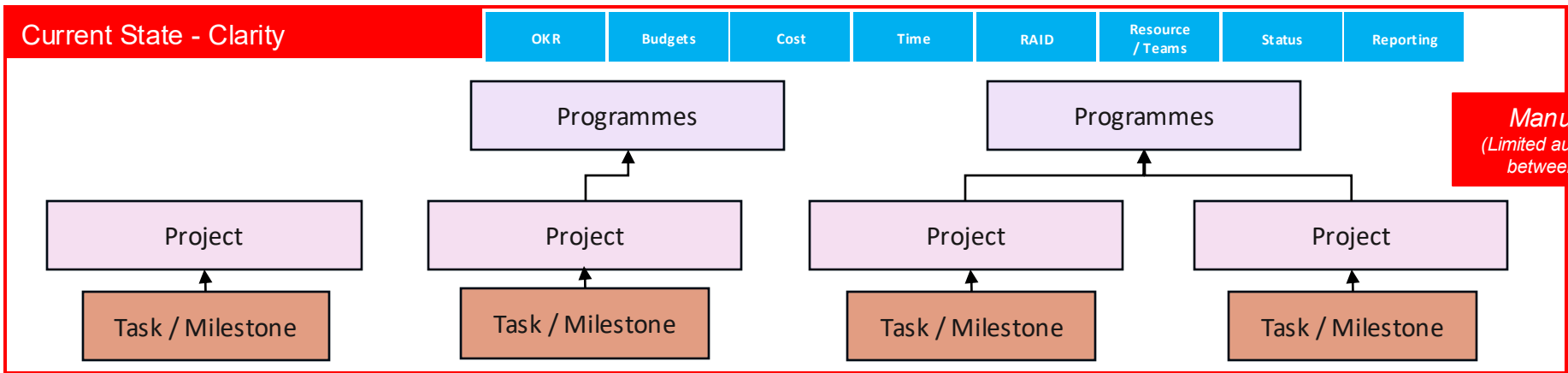
Products	Maybe	NOT Products
Electric Vehicle	Website	Battery
Streaming Service	AI Assistant	Database
Industrial Robot	API Gateway	Insurance Underwriting
Insurance Policy	Mobile App	Manufacturing Assembly Line
Payroll Service	Data Platform	Login Screen
Consulting Service		Onboarding Workflow
Smartphone		Processor Chip
CRM Software		Reporting Engine
Online Banking		Payment Processing Engine

A Clarity Journey from Projects to Products



Product Led - Current State with Capabilities

- ✓ Current state is focussed on Programmes & Projects
- ✓ All Clarity data captured at (and reported from) Programme / Project / Task Level
- ✓ Product Hierarchy and concept of “Product Led” does not exist across current processes or tooling and even where work may be product aligned it is not consistent.
- ✓ Limited/no integration with Clarity and Agile Tooling (if used for Work Management)
- ✓ Work hierarchy is project-led, focused on outputs (i.e. tasks and milestones)



Product Led – Basic Concept

Division / Portfolio – “Grouping” Largely Aligned to value Streams

Product Family – Grouping of Dependent Products

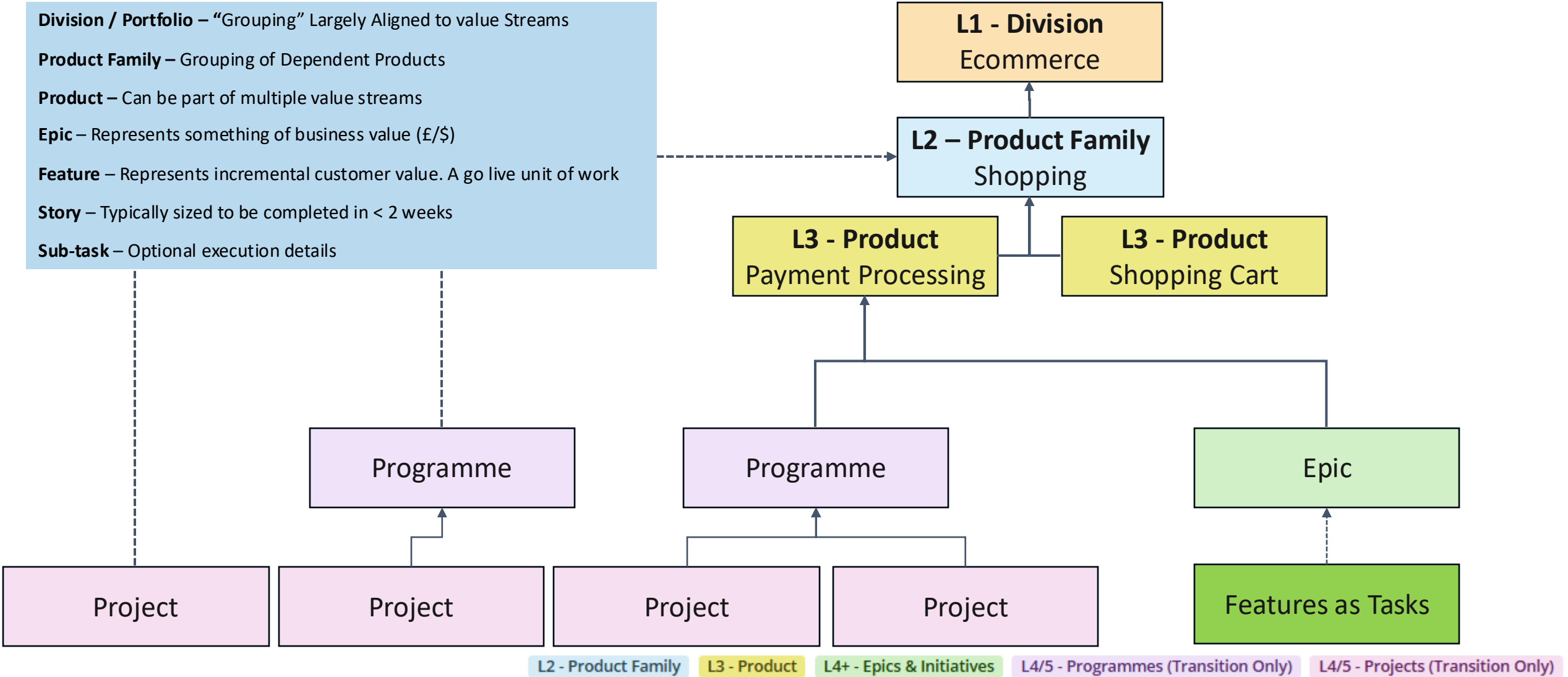
Product – Can be part of multiple value streams

Epic – Represents something of business value (£/\$)

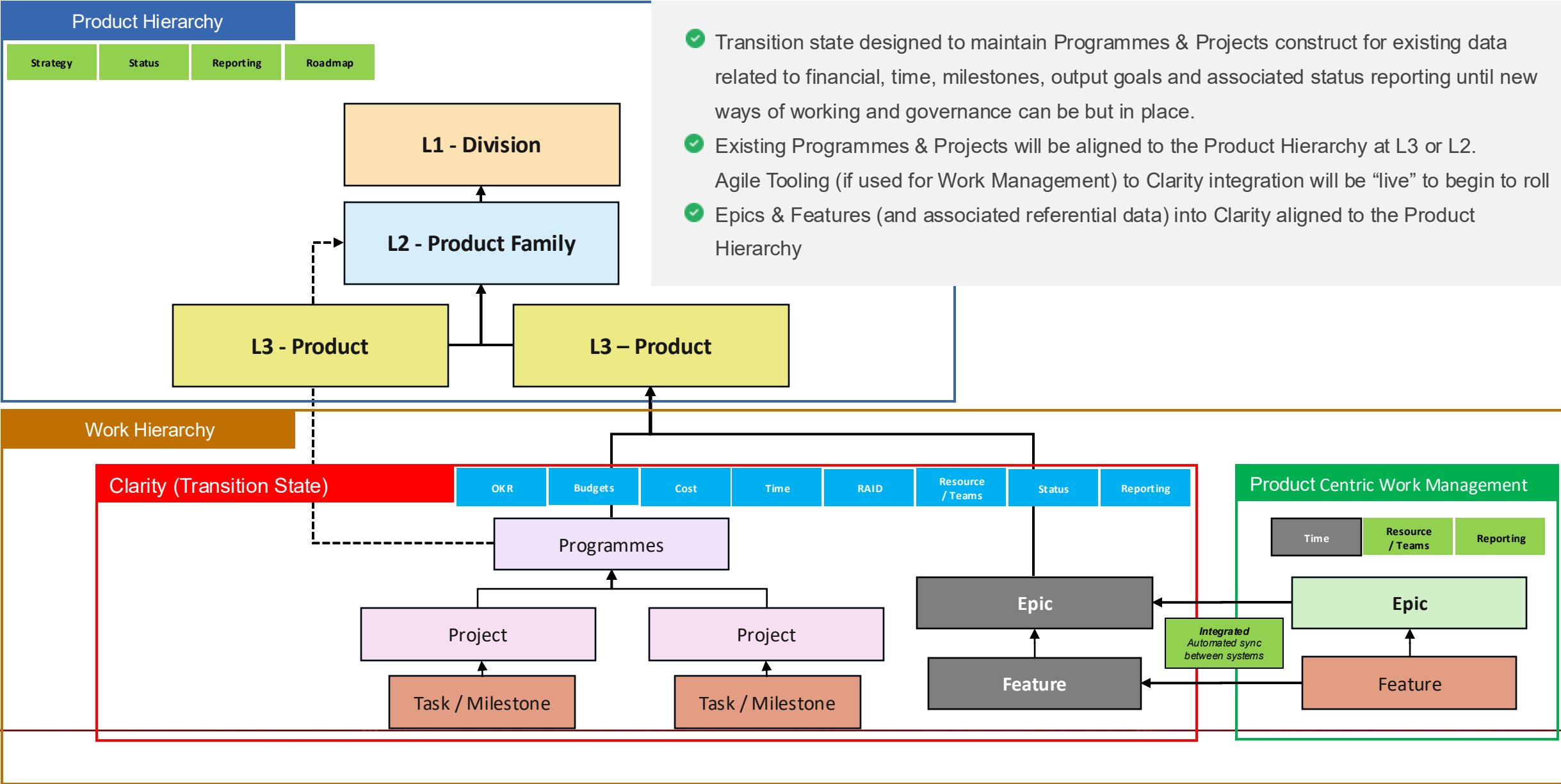
Feature – Represents incremental customer value. A go live unit of work

Story – Typically sized to be completed in < 2 weeks

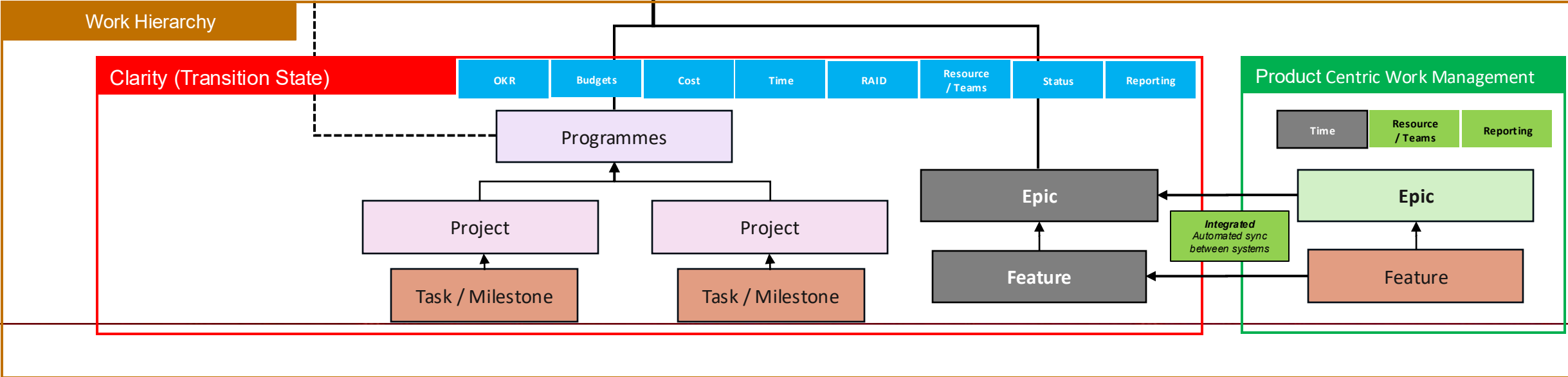
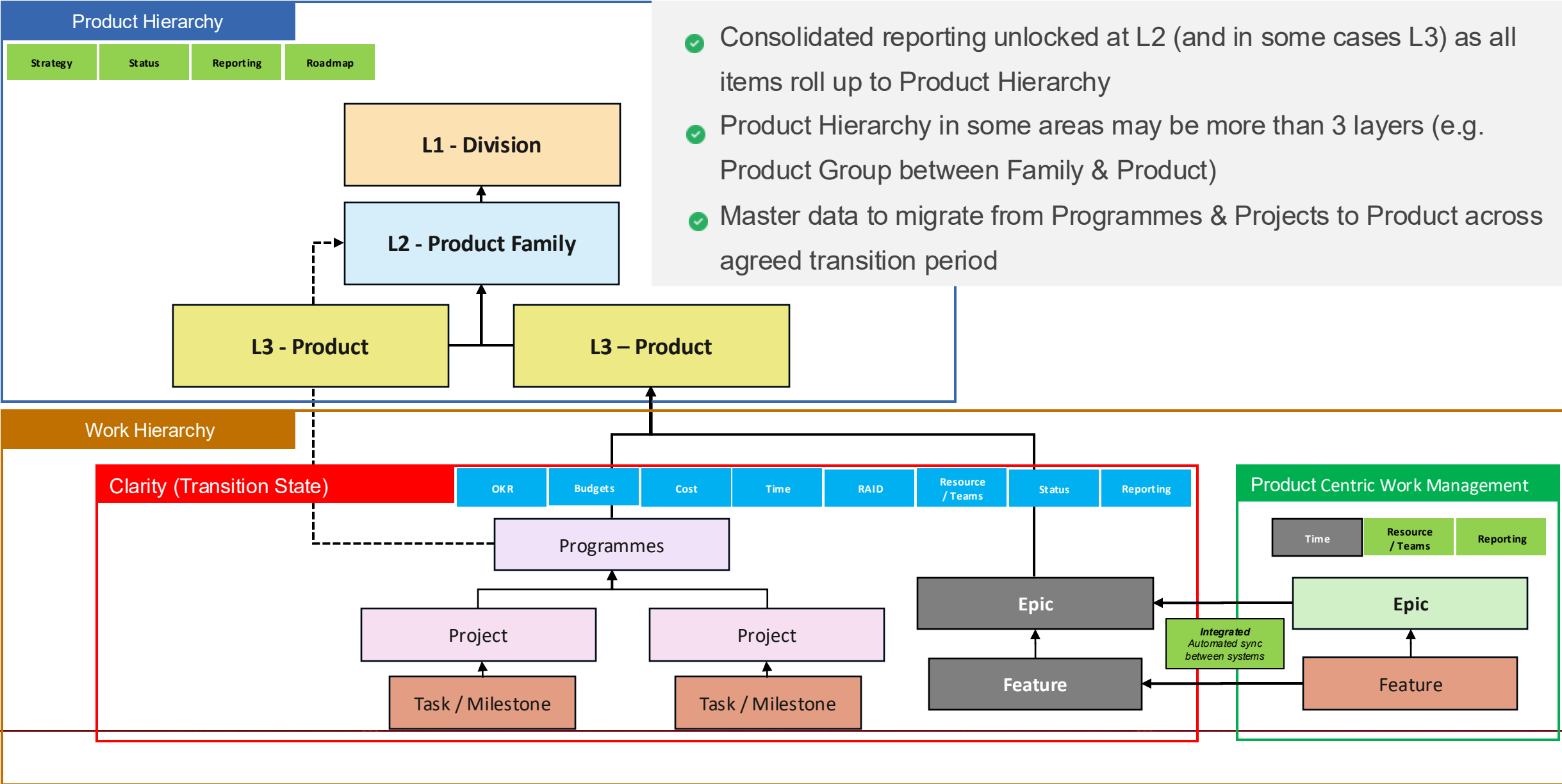
Sub-task – Optional execution details



Product Led - Transition State with Capabilities



Product Led - Transition State with Capabilities

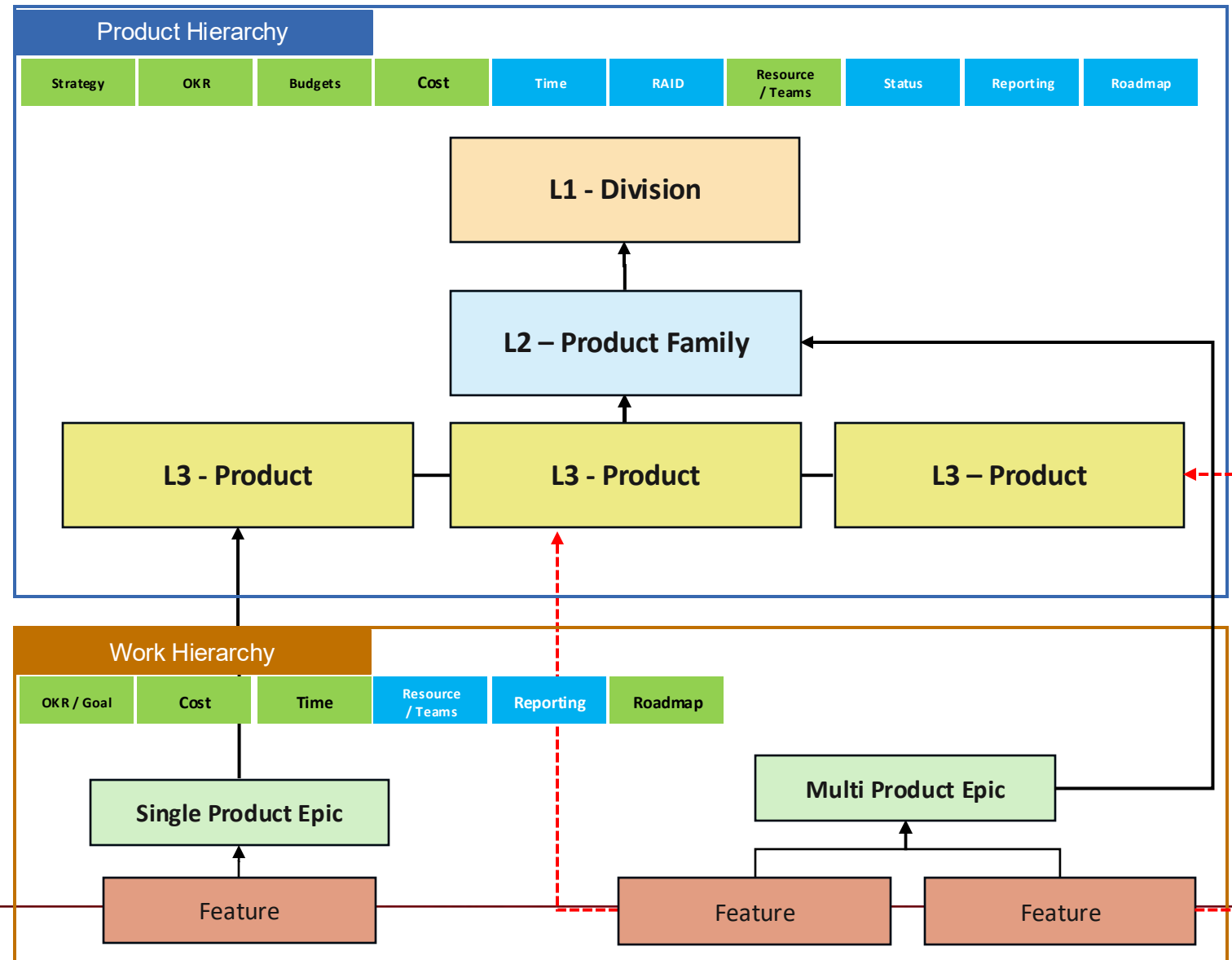


Product Led – End State with Capabilities

Existing
Capabilities

Product Led
Capabilities

- ✓ Focused on Product delivery and all work in the Work Hierarchy aligned to Product Hierarchy (L1-2-3) in Clarity.
- ✓ Existing Programmes/Projects/Task constructs migrated to Product / Epic / Feature. *Possibility if there is no cross-functional team and need temporary team to deliver some elements may remain -> project/programme.
- ✓ Agile Tool (if used for work management) to Clarity integration used to drive data from Epics & Features which is used as the primary data for status of work aligned to each product – Features are aligned to single Product.

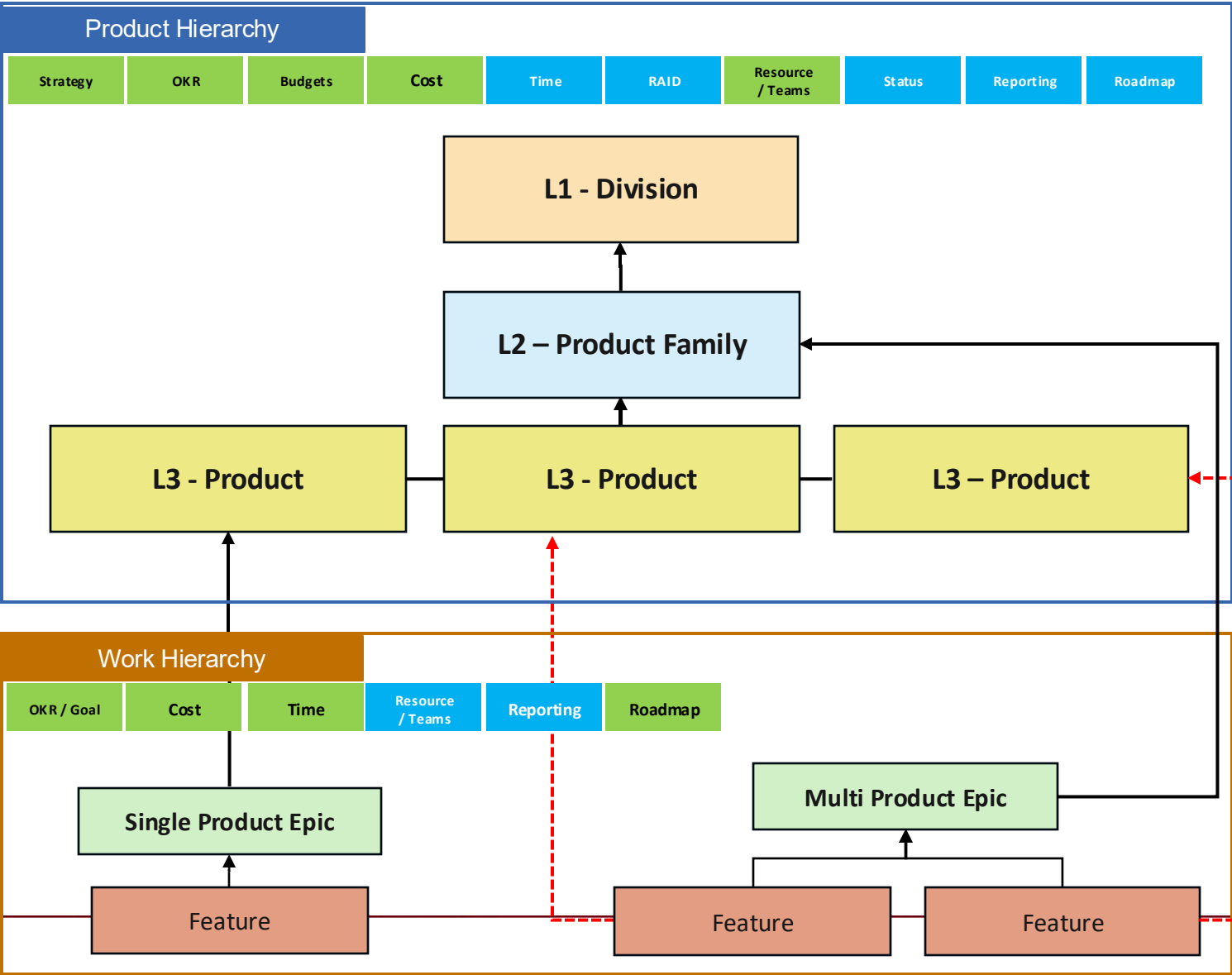


Product Led – End State with Capabilities

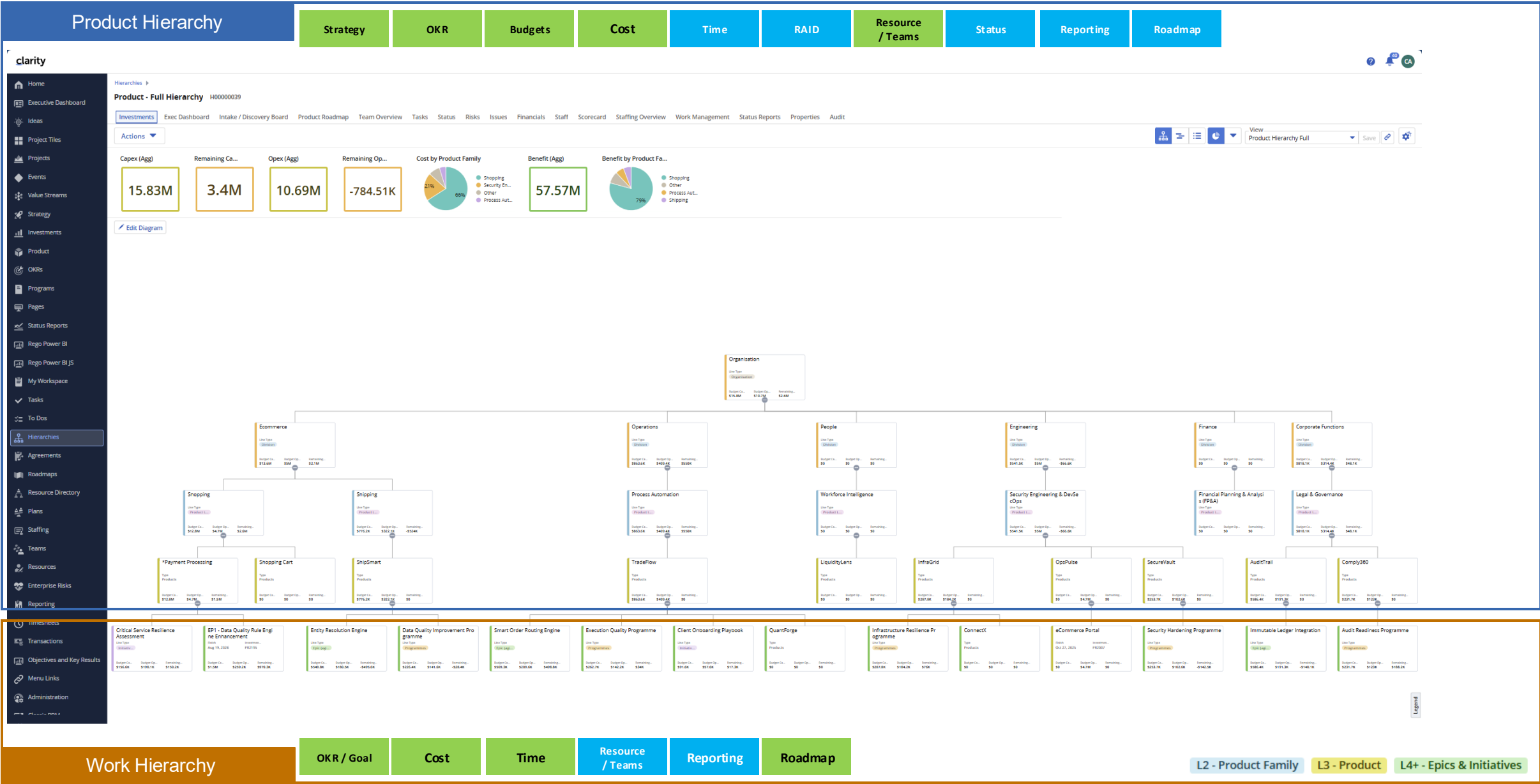
Existing Capabilities

Product Led Capabilities

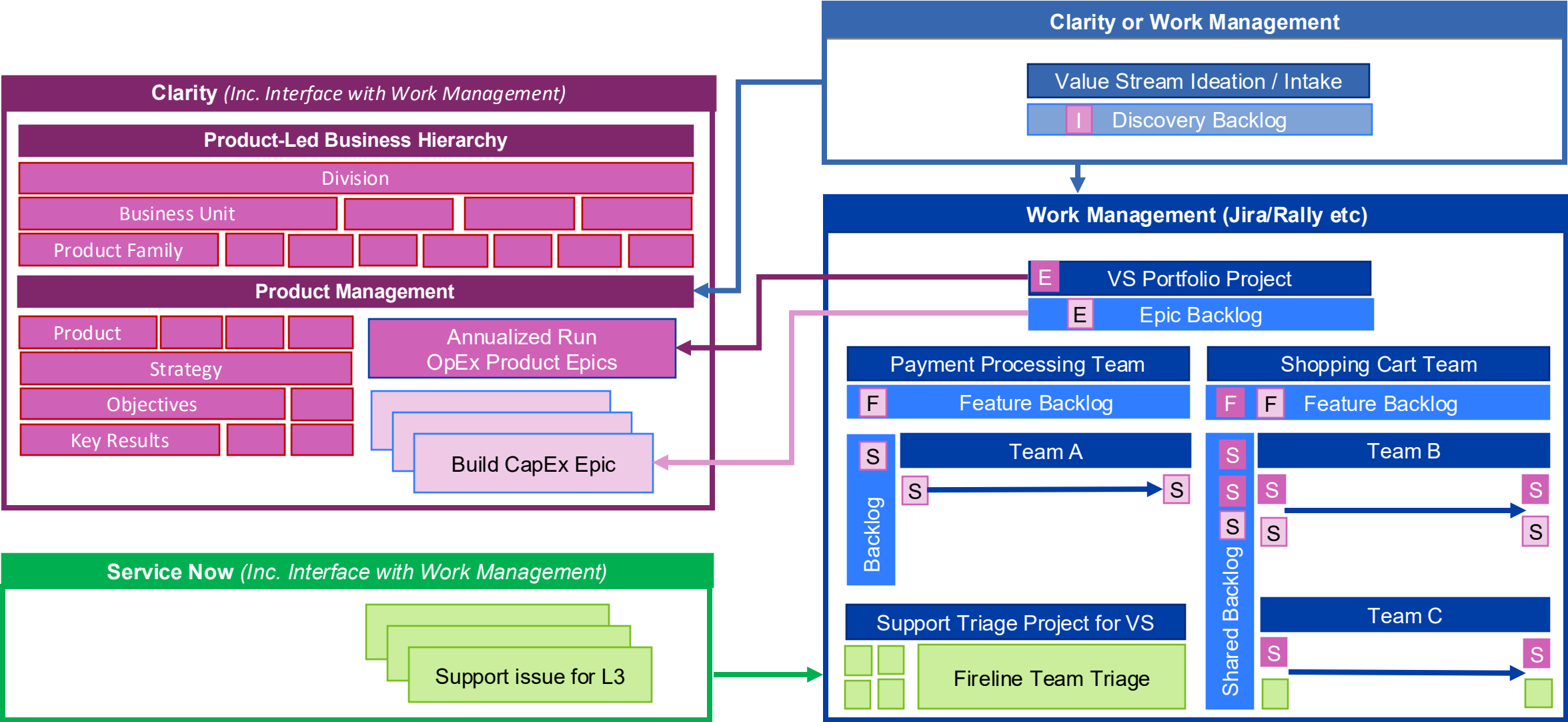
- ✔ Time tracking against Tasks in Clarity replaced with automated time spent on each Feature which can then be monetised in Clarity at agreed levels of capitalisation (requires Finance & Governance alignment)
- ✔ Consolidated reporting and traceability unlocked at ALL levels of the Product Hierarchy
- ✔ There will still be an element of programme and projects, however for simplicity they have not been represented on the diagram



Product Led – Full Product Example



Product Led – Full Ecosystem Journey



Product Mgmt. in Clarity - Screenshots

Clarity Demonstration

Let's bring this to Life

- ☐ Product Hierarchy CIT Structure
- ☐ Product As an Investment
- ☐ Hierarchies
- ☐ Roadmap
- ☐ Reporting



Product as an Investment

Using Custom Investments in Clarity – data can be captured and all the core modules (OKR, RAID, Status Reporting) can be enabled at any level – allowing users to capture all strategy, funding, RAID and associated data against each Product to demonstrate the value it aims to deliver.

clarity

Hierarchies > Product - Full Hierarchy >

*Payment Processing PRO00000011 Needs Help

Dashboard

Properties

Staff

Tasks

Financials

Objectives & Key Results

Risks

Experience Data

Product Health

Status

Product Hierarchy

< Collapse

Product Header

1 - Customer Problem & Market Opportu...

2 - Target Customer & Segmentation

3 - Value Proposition & Differentiation

4 - Product Strategy & Roadmap

5 - Commercial Model & Go-to-Market

6 - Risk, Legal & Compliance Consideratio...

7 - Operational Considerations

8 - Financial Projections & Investment Ca...

9 - Success Factors & Dependencies

10 - Team & Resource Requirements

11 - Document Control & Approvers

Metrics & Reporting

Admin & Settings

> Collapse all

Product Header

Name *

*Payment Processing

Investment ID *

PRO00000011

Manager

Administrator, PPM

Investment Class

Invest

Product Category

Strategic

Review Date:

Dec 15, 2025

Division

D&A > Data & Analytics Real Time

Last Updated Date

Mar 16, 2026

Executive Summary

Executive Summary

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Paragraph

Link

Table

Image

Text

GoldenSource is designed to be the cornerstone of enterprise data management for large financial institutions, delivering a unified platform that streamlines the ingestion, validation, and distribution of critical reference and market data across the organization. Targeting data-intensive functions such as risk, compliance, trading, and reporting, GoldenSource empowers institutions to achieve data consistency, reduce operational risk, and accelerate decision-making. Its key value proposition lies in its ability to centralize and standardize data from disparate sources, ensuring accuracy and transparency while supporting regulatory compliance. By enabling a single source of truth for financial data, GoldenSource drives operational efficiency, enhances client trust, and unlocks scalable growth opportunities across business lines.

AI Actions

Product Overview

Product Vision

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Paragraph

Link

Table

Image

Text

To empower financial institutions with a single, trusted source of truth for all enterprise data, enabling faster, smarter, and more compliant decision-making.

Strategic Imperative

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Paragraph

Link

Table

Image

Text

GoldenSource directly supports our strategic objectives by enhancing data integrity, operational resilience, and regulatory compliance across the financial ecosystem. It aligns with our commitment to delivering scalable, data-driven infrastructure that underpins global financial markets.

Investment Ask

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Paragraph

Link

Table

Image

Text

£12M-£15M total investment over the next 12-18 months, covering platform enhancements, cloud migration, integration capabilities, and go-to-market execution.

Success Metrics

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11

Paragraph

Link

Table

Image

Text

1. Data Accuracy Rate ≥ 99.5% across all integrated systems.

2. Reduction in Operational Data Incidents by 40% within 12 months of deployment.

3. Client Adoption Rate ≥ 75% across Tier 1 financial institutions within 18 months.

Key Risks

A

AI

B

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A

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11

Paragraph

Link

Table

Image

Text

1. Integration Complexity:

Legacy systems may pose challenges; mitigate with phased rollout and dedicated integration support teams.

2. Regulatory Changes:

Evolving compliance requirements could impact roadmap; mitigate with agile development and regulatory advisory partnerships.

3. Client Adoption Lag:

Resistance to change from existing systems; mitigate with strong onboarding, training, and demonstrable ROI.

regoUniversity2026

Product as an Investment

Using Custom Investments in Clarity – data can be captured and all the core modules (Staffing, OKR, RAID, Status Reporting) can be enabled at any level – allowing users to capture all strategy, funding, RAID and associated data against each Product to demonstrate the value it aims to deliver.

clarity

Products

*Payment Processing

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Needs Help

Dashboard

Properties

Staff

Tasks

Financials

Objectives & Key Results

Risks

Experience Data

Product Health

Status

Product Hierarchy

Cost Plans

High Level Product Funding Plan

Plan of Record

Compare to: --Select--

Match Filters

All

Any

Add filter groups

+ Add filter

Remove all

Select all

Deselect all

Group By

	Cost Type	Transaction Class	Description	2025	2026	2027	Totals
				Cost	Cost	Cost	Cost
Total				8,400,000	7,000,000	0	15,400,000
Capital	Software			3,700,000	2,800,000	0	6,500,000
Capital	Software	Regulatory Module Development		1,200,000	1,000,000	0	2,200,000
Capital	Software	Platform Engineering Tools		2,500,000	1,800,000	0	4,300,000
Capital	Internal Labor			700,000	600,000	0	1,300,000
Capital	Internal Labor	Testing & QA		300,000	250,000	0	550,000
Capital	Internal Labor	Product Management & UX		400,000	350,000	0	750,000
Capital	Hardware			800,000	600,000	0	1,400,000
Capital	Hardware	Cloud Infrastructure Setup		800,000	600,000	0	1,400,000
Capital	External Labor			1,100,000	900,000	0	2,000,000
Capital	External Labor	Security & Compliance Setup		500,000	400,000	0	900,000
Capital	External Labor	Integration & API Development		600,000	500,000	0	1,100,000
Operating	Software			600,000	600,000	0	1,200,000
Operating	Software	Technology Infrastructure		600,000	600,000	0	1,200,000
Operating	Maintenance			500,000	500,000	0	1,000,000
Operating	Internal Labor			700,000	700,000	0	1,400,000
Operating	Internal Labor	Sales & Marketing		700,000	700,000	0	1,400,000
Operating	External Labor			300,000	300,000	0	600,000
Operating	External Labor	Compliance & Risk		300,000	300,000	0	600,000

1-18 of 18

<<<>>>

clarity

Products

*Payment Processing

PRO00000011

Needs Help

Dashboard

Properties

Staff

Tasks

Financials

Objectives & Key Results

Risks

Experience Data

Product Health

Status

Product Hierarchy

New from Template

By Strategic Imperative

By Goal

Watch List

Owner

Low Confidence

High Fulfillment

Select all

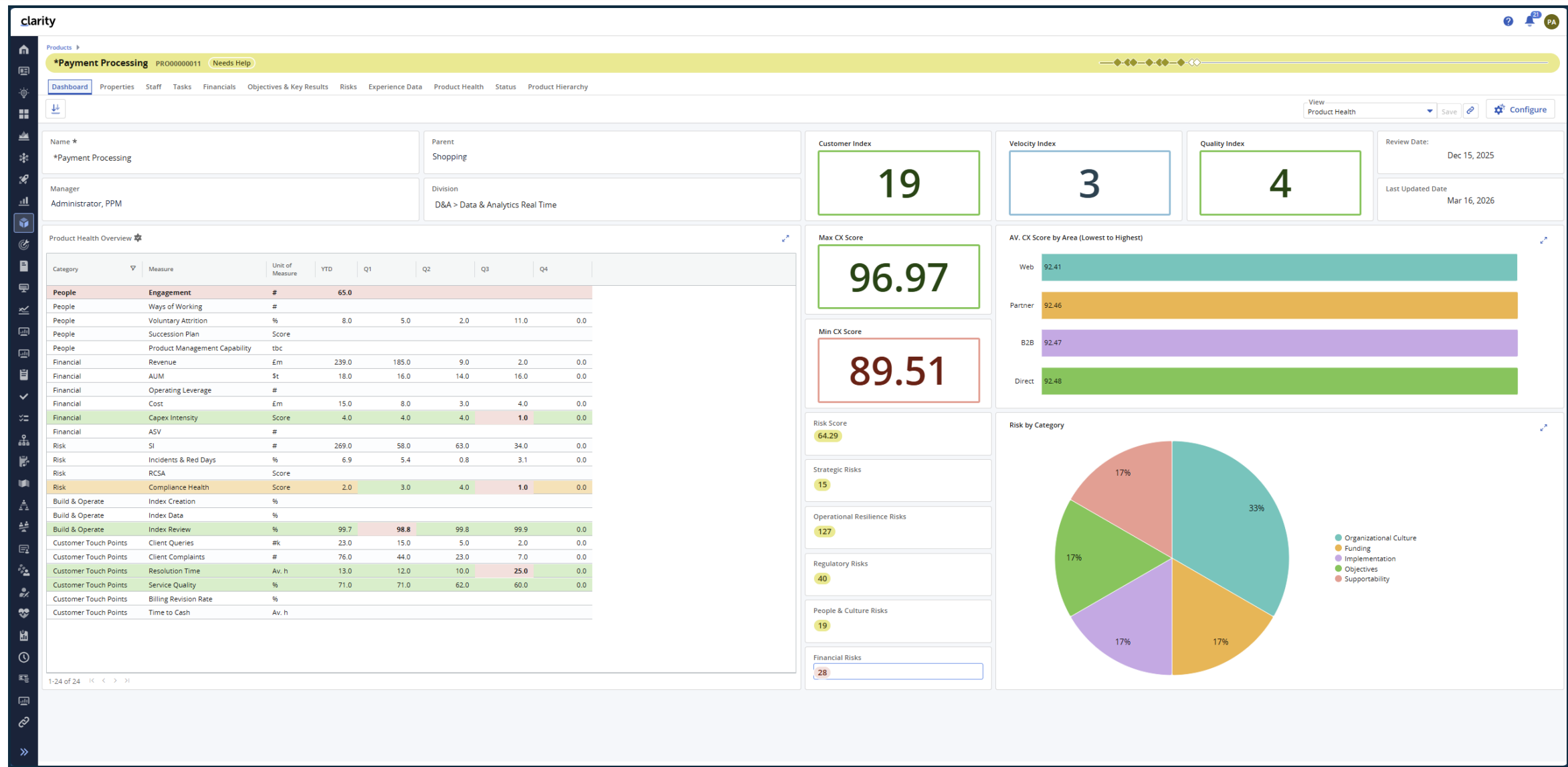
Deselect all

Objective: Name	Strategic Imperative	Owner	Target	Start	Confidence Score
Accelerate Product Innovation to Meet Market Demands	Drive Innovation and Product Leadership	Andersson, Peter	Jan 28, 2025	Jul 1, 2023	
Key Result: Name	Owner	Unit of Measure	Progress	Start Value	Target Value
Launch 5 new product features or services in key verticals (e.g., AI, cloud, cybersecurity...)	Andersson, Peter	New Products Lau...	80%	0	5
Reduce product development time by 20% through the implementation of agile metho...	Amos, Cheryl	% Decrease	40%	0	20
File 10 new patents for cutting-edge technologies in AI and machine learning by the en...	Carmen, Ed	New Patents	70%	0	10
Achieve a customer satisfaction (CSAT) score of 90% for newly launched products.	Carmen, Ed	Increased percent...	38%	10	90
Collaborate with 5 new research institutions to co-develop technologies by the end of t...	Carmen, Ed	New Institutions	60%	0	5
Enhance Research and Development (R&D) Capabilities	Drive Innovation and Product Leadership	Andersson, Peter	Jan 28, 2025	Jul 1, 2023	
Key Result: Name	Owner	Unit of Measure	Progress	Start Value	Target Value
Increase R&D investment by 25% to \$50 million annually to focus on AI and next-gen h...	Andersson, Peter	Revenue Increase %	67%	0	15
Optimize global operations to improve productivity, reduce costs, and ...	Enhance Operational Efficiency and Scalability	Amos, Cheryl	Jan 28, 2025	Jul 1, 2023	
Key Result: Name	Owner	Unit of Measure	Progress	Start Value	Target Value
Achieve a 25% reduction in lead times through supplier diversification and logistics opt...	Amos, Cheryl	% Increase	40%	0	30
Reduce supply chain costs by 15% by implementing predictive analytics and AI-driven f...	Amos, Cheryl	Percent completion	70%	0	100
Increase supply chain transparency by integrating blockchain technology across 50% o...	Amos, Cheryl	% Reduction	80%	0	10
Expand into High-Growth Markets (e.g., Asia-Pacific, Latin America, Middle...	Expand Global Market Reach	Barry, Debra	Jan 28, 2025	Jul 1, 2023	
Strengthen Brand Presence and Customer Loyalty Globally	Expand Global Market Reach	Andersson, Peter	Jan 28, 2025	Jul 1, 2023	
Achieve Industry-Leading Security Standards	Strengthen Cybersecurity and Data Protection	Amos, Cheryl	Jan 28, 2025	Jul 1, 2023	
Enhance Data Privacy Compliance and Governance	Strengthen Cybersecurity and Data Protection	Bauer, Joyce	Jan 28, 2025	Jul 1, 2023	

Row Count: 7

Product Reporting (Health)

By surfacing “Products” in Clarity and connecting Clarity to the wider ecosystem for other reporting metrics, organisations can centralise strategy, funding, and performance metrics at the Product level—from a variety of sources to provide a comprehensive dashboard that visualises the real-time value and health of every product.”



Product Reporting (Strategy)

Replace static offline data and documents with dynamic, one-click exports such as Product Strategy summaries for quarterly review, ensuring executive-ready reports are always product quickly and driven directly from live source data for total accuracy.

clarity

Products

Dashboard

Name *

Total Bud

Division

Investment

Executive S

Product Vis

To emp

Investment

£12M-£

*Payment Processing

1 of 1

Search

Options

Name *

*Payment Processing

Parent

Shopping

Last Updated Date

Mar 16, 2025

Review Date:

Dec 15, 2025

Total Budget

15.4M

Total Planned

15.4M

Total Benefit

49.33M

FTE Headcount

7.93K

Division

D&A > Data & Analytics Real Time

Manager

Administrator, PPM

Investment ID *

PRO00000011

Investment Class

Invest

Product Category

Strategic

Work Status

Active

Status Indicator

At Risk

Executive Summary

GoldenSource is designed to be the cornerstone of enterprise data management for large financial institutions, delivering a unified platform that streamlines the ingestion, validation, and distribution of critical reference and market data across the organization. Targeting data-intensive functions such as risk, compliance, trading, and reporting, GoldenSource empowers institutions to achieve data consistency, reduce operational risk, and accelerate decision-making. Its key value proposition lies in its ability to centralize and standardize data from disparate sources, ensuring accuracy and transparency while supporting regulatory compliance. By enabling a single source of truth for financial data, GoldenSource drives operational efficiency, enhances client trust, and unlocks scalable growth opportunities across business lines.

Product Vision

To empower financial institutions with a single, trusted source of truth for all enterprise data, enabling faster, smarter, and more compliant decision-making.

Investment Ask

£12M-£15M total investment over the next 12-18 months, covering platform enhancements, cloud migration, integration capabilities, and go-to-market execution.

Strategic Imperative

GoldenSource directly supports our strategic objectives by enhancing data integrity, operational resilience, and regulatory compliance across the financial ecosystem. It aligns with our commitment to delivering scalable, data-driven infrastructure that underpins global financial markets.

Key Risks

1. **Integration Complexity:** Legacy systems may pose challenges; mitigate with phased rollout and dedicated integration support teams.

2. **Regulatory Changes:** Evolving compliance requirements could impact roadmap; mitigate with agile development and regulatory advisory partnerships.

3. **Client Adoption Lag:** Resistance to change from existing systems; mitigate with strong onboarding, training, and demonstrable ROI.

Success Metrics

1. **Data Accuracy Rate** ≥ 99.5% across all integrated systems.

2. **Reduction in Operational Data Incidents** by 40% within 12 months of deployment.

3. **Client Adoption Rate** ≥ 75% across Tier 1 financial institutions within 18 months.

Primary Problem

Financial institutions struggle with fragmented, inconsistent, and siloed data across systems, leading to operational inefficiencies, regulatory risk, and poor decision-making.

Problem Validation

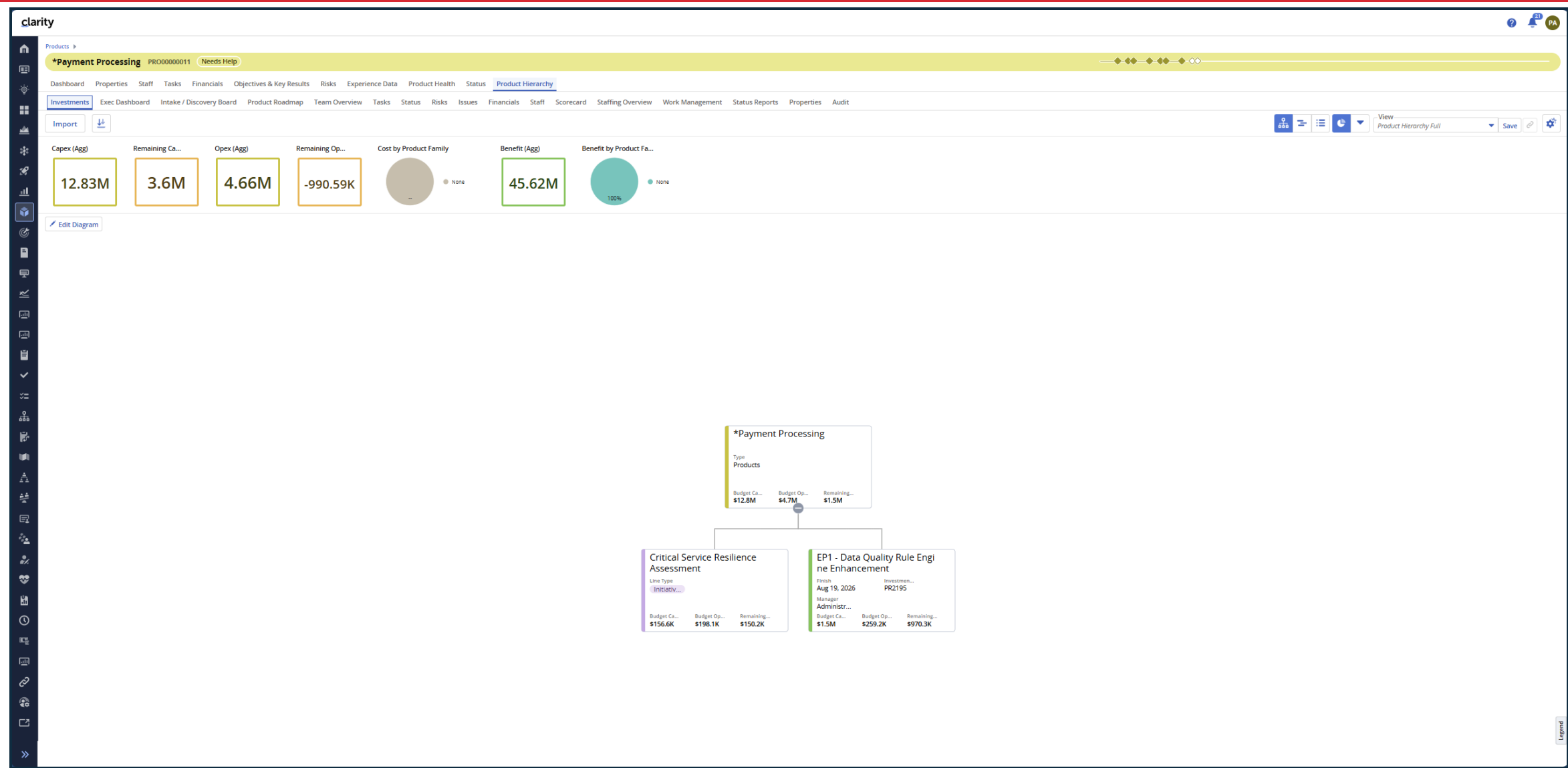
Insights from over 10 customer interviews with data governance leads, risk officers, and IT architects across Tier 1 and Tier 2 institutions revealed a consistent pain point: the lack of a centralized, reliable data source. Customers

Cancel

Download

Align the Work to a Product

Even when the “Work” is happening in Rally/JIRA or other Agile tooling – it can and should be integrated to provide some read only visualisation and reporting at Product level in Clarity. Allowing users to drill down into a Product and see the status and key metrics of the underlying work.



Align the Work to a Product

Epics > Features (and even User Stories where appropriate) can be created as Investments with underlying “Tasks” in Clarity to leverage OOTB functionality to view the progress, status and key metrics of the underlying work being performed by the Product Teams without needing to leave Clarity.

clarity

Hierarchies > Product - Full Hierarchy >

EP1 - Data Quality Rule Engine EnhancementPR2195Needs Help

Agile PerformanceTasksPropertiesBi-directional Agile SyncStaffFinancialsRisksIssuesStatus

Actions

Match FiltersAllAnyAdd filter groups

+ Add filterRemove all

Select allDeselect all

Type	Name	Task Narrative	Feature	Development Lifecycle	Accepted Story Points	Estimated Story Points
Epic	EP1 - Data Quality Rule Engine Enhancement					
Feature	F1 - Custom Rule Authoring	Allow users to define and manage custom data quality rules via a UI.				
User Story	US 1 - As a data steward, I want to create custom data quality rules using a user-friendly interface, so that I can enforce business-specific data standards.		F1 - Custom Rule Authoring	In Progress		
User Story	US 2 - As a business analyst, I want to use pre-built rule templates, so that I can quickly deploy common data quality checks.		F1 - Custom Rule Authoring	Backlog		
User Story	US 3 - As a data quality manager, I want failed rule checks to trigger exception workflows, so that issues are tracked and resolved efficiently.		F1 - Custom Rule Authoring	Ready for Testing		
Feature	F2 - Rule Versioning & Audit Trail	Track changes to rules, including who made them and when.				
User Story	US 4 - As a compliance officer, I want to view an audit trail of all rule changes, so that I can ensure regulatory compliance and accountability.		F2 - Rule Versioning & Audit Trail	Code Review		
User Story	US 5 - As a system admin, I want to control who can create, edit, or delete rules, so that sensitive rules are protected from unauthorized changes.		F2 - Rule Versioning & Audit Trail	Blocked		
Feature	F3 - Real-Time Rule Execution	Apply data quality rules in real time as data is ingested.				
User Story	US 6 - As a data engineer, I want rules to be executed in real time during data ingestion, so that only high-quality data enters downstream systems.		F3 - Real-Time Rule Execution	Ready for Release		
User Story	US 7 - As a product owner, I want to monitor the performance of all active rules, so that I can identify bottlenecks and optimize processing.		F3 - Real-Time Rule Execution	Backlog		

NoneBacklogSelected for DevelopmentIn ProgressCode ReviewReady for TestingIn TestingReady for ReleaseBlocked

None

F1 - Custom Rule Authoring

US 2 - As a business analyst, I want to use pre-built rule templates, so that I can quickly deploy common data quality checks.

TypeUser Story

Estimated Story PointsAccepted Story Points

US 1 - As a data steward, I want to create custom data quality rules using a user-friendly interface, so that I can enforce business-specific data standards.

TypeUser Story

Estimated Story PointsAccepted Story Points

US 3 - As a data quality manager, I want failed rule checks to trigger exception workflows, so that issues are tracked and resolved efficiently.

TypeUser Story

Estimated Story PointsAccepted Story Points

F2 - Rule Versioning & Audit Trail

US 4 - As a compliance officer, I want to view an audit trail of all rule changes, so that I can ensure regulatory compliance and accountability.

TypeUser Story

Estimated Story PointsAccepted Story Points

US 5 - As a system admin, I want to control who can create, edit, or delete rules, so that sensitive rules are protected from unauthorized changes.

TypeUser Story

Estimated Story PointsAccepted Story Points

F3 - Real-Time Rule Execution

US 7 - As a product owner, I want to monitor the performance of all active rules, so that I can identify bottlenecks and optimize processing.

TypeUser Story

Estimated Story PointsAccepted Story Points

US 6 - As a data engineer, I want rules to be executed in real time during data ingestion, so that only high-quality data enters downstream systems.

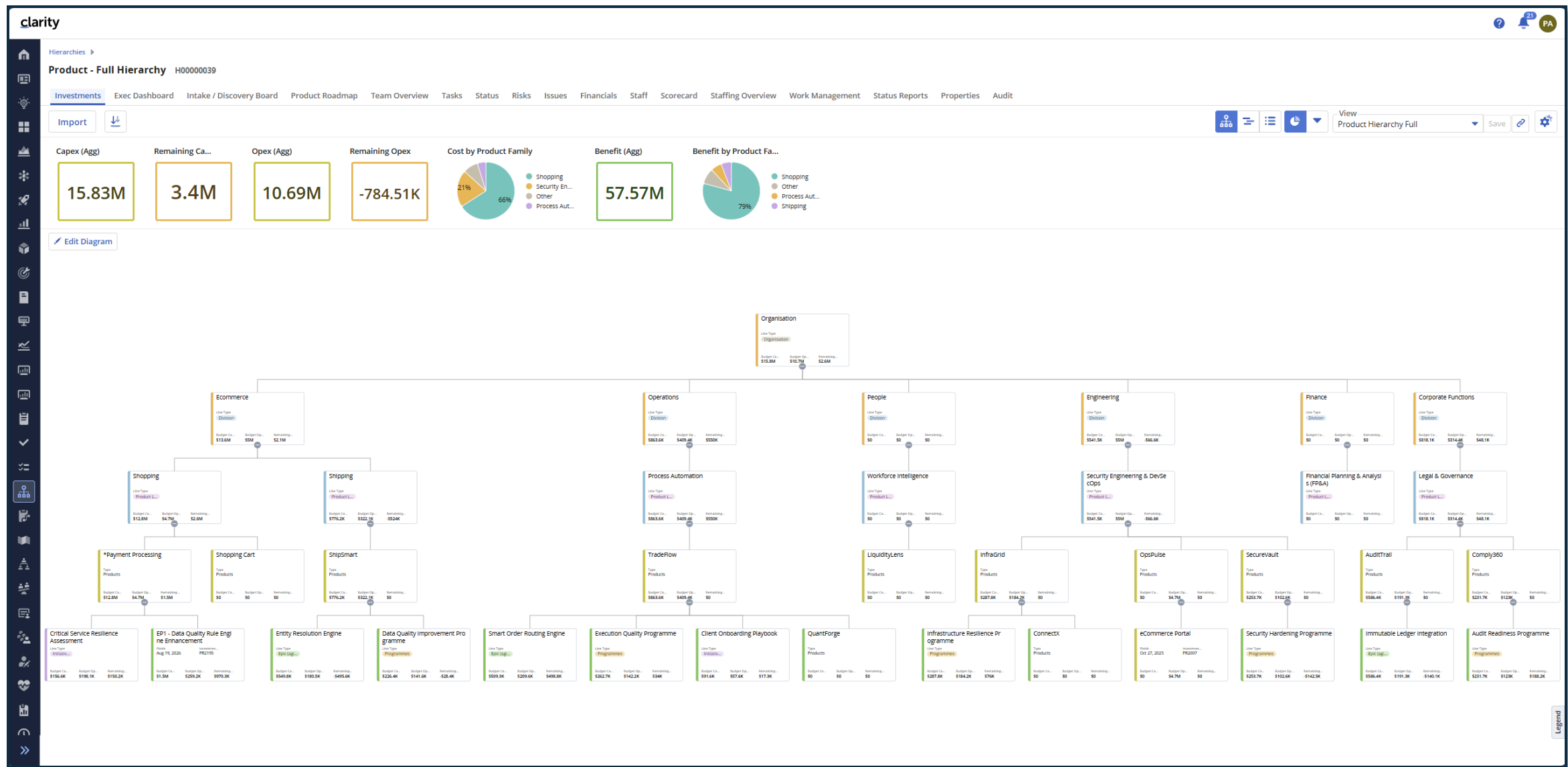
TypeUser Story

Estimated Story PointsAccepted Story Points

F4 - Rule Impact Analysis

Product Hierarchy

Model and View the whole hierarchy form Organisation through Division > Product Family > Product– and then associate the work as Projects/Programmes/Epics to the Product Hierarchy.



Product Hierarchy - “Top Down” & “Bottom Up” Aggregation

Summarise data from the top down or aggregate from the bottom up – using the hierarchy to show how Product funding is being allocated and utilised

clarity

Hierarchies

Product - Full Hierarchy H00000039

Investments

Exec Dashboard

Intake / Discovery Board

Product Roadmap

Team Overview

Tasks

Status

Risks

Issues

Financials

Staff

Scorecard

Staffing Overview

Work Management

Status Reports

Properties

Audit

Import

Download

Search...

Filter

Columns

Layout

Refresh

View

Product Hierarchy Full

Save

Share

Settings

Capex (Agg)

15.83M

Remaining Ca...

3.4M

Opex (Agg)

10.69M

Remaining Opex

-784.51K

Cost by Product Family

21%

66%

Shopping

Security En...

Other

Process Aut...

Benefit (Agg)

57.57M

Benefit by Product Fa...

79%

Shopping

Other

Process Aut...

Shipping

Select all

Deselect all

Group By

	Hierarchical	Investment	Hierarchical	Investment	Hierarchical	Investment	Hierarchical	Investment	Hierarchical	Investment
	Level ↑	Name *	Budget Cost (Agg) (Max)	Remaining Budget	Remaining Capex (agg) (Max)	Actual Capex	Remaining Opex (Agg) (Max)	Actual Opex	Budget Capex (Agg) (Max)	Budget Opex (Agg) (Max)
Total			26,520,078	2,615,845	3,598,900	14,060,264	233,280	7,231,826	15,830,024	10,690,054
☐	1	Organisation	26,520,078	0	3,400,355	0	(784,509)	0	15,830,024	10,690,054
☐	2	Ecommerce	18,586,178	0	3,162,313	0	(1,077,994)	0	13,606,782	4,979,396
☐	2	Operations	1,273,067	0	436,155	0	113,849	0	863,624	409,443
☐	2	People	0	0	0	0	0	0	0	0
☐	2	Engineering	5,528,398	0	(43,918)	0	(22,634)	0	541,536	4,986,862
☐	2	Finance	0	0	0	0	0	0	0	0
☐	2	Corporate Functions	1,132,435	0	(154,195)	0	202,270	0	818,082	314,353
☐	3	Shopping	17,487,879	0	3,598,900	0	(990,587)	0	12,830,596	4,657,283
☐	3	Shipping	1,098,299	0	(436,588)	0	(87,407)	0	776,186	322,113
☐	3	Security Engineeri...	5,528,398	0	(43,918)	0	(22,634)	0	541,536	4,986,862
☐	3	Legal & Governance	1,132,435	0	(154,195)	0	202,270	0	818,082	314,353
☐	3	Process Automation	1,273,067	0	436,155	0	113,849	0	863,624	409,443
☐	3	Workforce Intellige...	0	0	0	0	0	0	0	0
☐	3	Financial Planning ...	0	0	0	0	0	0	0	0
☐	4	*Payment Proces...	17,487,879	1,487,879	3,598,900	10,000,000	(990,587)	6,000,000	12,830,596	4,657,283
☐	4	AuditTrail	777,727	0	(293,202)	0	153,058	0	586,404	191,323
☐	4	ShipSmart	1,098,299	0	(436,588)	0	(87,407)	0	776,186	322,113
☐	4	Shopping Cart	0	0	0	0	0	0	0	0
☐	4	LiquidityLens	0	0	0	0	0	0	0	0
☐	4	Comply360	354,708	0	139,007	0	49,212	0	231,678	123,030
☐	4	InfraGrid	472,032	0	57,565	0	18,421	0	287,827	184,205
☐	4	OpsPulse	4,700,020	0	0	0	0	0	0	4,700,020
☐	4	SecureVault	356,346	0	(101,484)	0	(41,055)	0	253,709	102,637
☐	4	TradeFlow	1,273,067	0	436,155	0	113,849	0	863,624	409,443
☐	5	eCommerce Portal	4,700,020	0	0	0	0	0	0	4,700,020
☐	5	Critical Service Res...	354,726	150,178	31,329	125,314	118,850	79,233	156,643	198,083
☐	5	Security Hardeni...	356,346	(142,538)	(101,484)	355,193	(41,055)	143,692	253,709	102,637
☐	5	Infrastructure Resi...	472,032	75,986	57,565	230,262	18,421	165,785	287,827	184,205

1-38 of 38

Columns

Details

Product Hierarchy – Team Utilisation

Hierarchies provide a consolidated view of a Product or Group of Products (Product Family/Division/Organisational) allowing Product & Portfolio Managers as well as Senior Leadership to quickly spot bottlenecks and get a live picture of the “Value” being delivered across the portfolio.

clarity

Hierarchies

Product - Full Hierarchy H00000039

InvestmentsExec DashboardIntake / Discovery BoardProduct RoadmapTeam OverviewTasksStatusRisksIssuesFinancialsStaffScorecardStaffing OverviewWork ManagementStatus ReportsPropertiesAudit

Allocations by InvestmentAllocations by ResourceAssignments by InvestmentAssignments by ResourceStaffInvestments

Per-Period Metrics - 12 Periods

ViewProduct Team OverviewSave

Resource Summary Mode

Group	Staffing	Investment	Totals	2026-04	2026-05	2026-06	2026-07	2026-08	2026-09	2026-10	2026-11	2026-12	2027-01	2027-02	2027-03
Resource *	Name	Manager	Allocation	Allocation	Allocation	Allocation	Allocation	Allocation	Allocation	Allocation	Allocation	Allocation	Allocation	Allocation	Allocation
AI Team	(3)		995 / 1,827	77 / 154	74 / 147	91 / 154	97 / 161	88 / 147	92 / 154	92 / 154	88 / 147	97 / 161	88 / 147	84 / 140	25 / 161
Blackhawks Team	(3)		603 / 1,370	64 / 116	61 / 110	74 / 116	78 / 121	72 / 110	47 / 116	40 / 116	39 / 110	42 / 121	39 / 110	37 / 105	12 / 121
Crushers Team	(3)		2,627 / 2,175	238 / 183	227 / 175	255 / 183	268 / 192	245 / 175	232 / 183	202 / 183	192 / 175	211 / 192	192 / 175	183 / 167	200 / 192
Digital Team	(5)		2,253 / 1,784	233 / 150	222 / 144	235 / 150	220 / 157	201 / 144	174 / 150	165 / 150	158 / 144	173 / 157	158 / 144	150 / 137	164 / 157
Global Delivery	(2)		266 / 2,219	94 / 187	0 / 179	17 / 187	20 / 196	18 / 179	19 / 187	19 / 187	18 / 179	20 / 196	18 / 179	17 / 170	9 / 196
Integration Team	(2)		0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -
Jaguars Team	(1)		106 / 1,357	0 / 114	0 / 109	10 / 114	12 / 120	11 / 109	11 / 114	11 / 114	11 / 109	12 / 120	11 / 109	10 / 104	5 / 120
Jira Team	(2)		16 / 131	0 / 11	0 / 11	1 / 11	1 / 12	1 / 11	1 / 11	1 / 11	1 / 11	1 / 12	1 / 11	1 / 10	1 / 12
Legal	(3)		0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -
M&A Team	(2)		0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -
Mobile Team	(3)		481 / 1,827	85 / 154	81 / 147	86 / 154	64 / 161	59 / 147	24 / 154	15 / 154	15 / 147	16 / 161	15 / 147	14 / 140	7 / 161
Nighthawks Team	(2)		133 / 870	18 / 73	18 / 70	25 / 73	19 / 77	7 / 70	7 / 73	7 / 73	7 / 70	8 / 77	7 / 70	7 / 67	3 / 77
Operations	(3)		0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -	0 / -
Security Team	(7)		2,069 / 1,566	238 / 132	227 / 126	229 / 132	193 / 138	176 / 126	152 / 132	145 / 132	139 / 126	152 / 138	139 / 126	132 / 120	144 / 138
vendor team 1	(1)		11 / 261	11 / 22	0 / 21	0 / 22	0 / 23	0 / 21	0 / 22	0 / 22	0 / 21	0 / 23	0 / 21	0 / 20	0 / 23
vendor team 2	(1)		17 / 793	17 / 66	0 / 63	0 / 66	0 / 69	0 / 63	0 / 66	0 / 66	0 / 63	0 / 69	0 / 63	0 / 60	0 / 69
Vendor team 3	(1)		972 / 522	88 / 44	84 / 42	88 / 44	92 / 46	84 / 42	88 / 44	88 / 44	84 / 42	92 / 46	84 / 42	80 / 40	20 / 46

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Product Hierarchy – Release Roadmap

Hierarchies provide a consolidated view of a Product or Group of Products (Product Family/Division/Organisational) allowing Product & Portfolio Managers as well as Senior Leadership to quickly spot bottlenecks and get a live picture of the “Value” being delivered across the portfolio.

clarity

Hierarchies

Product - Full Hierarchy H00000039

InvestmentsExec DashboardIntake / Discovery BoardProduct RoadmapTeam OverviewTasksStatusRisksIssuesFinancialsStaffScorecardStaffing OverviewWork ManagementStatus ReportsPropertiesAudit

Q Search...ViewCalendar ViewSave

Match FiltersAllAnyAdd filter groupsAdd filterRemove all

November 2025

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
26	27 Closing Phase Closing Phase Gate Complete	28	29 Risk Response and Mitigation Plan	30	31	1
2 User Interface Development	3	4	5	6	7	8
9	10	11	12	13	14 US 3 - As a data quality manager, I want failed rule checks to tr US 5 - As a system admin, I want to control who can create, ed F5 - Role-Based Access Control for Rules US 4 - As a compliance officer, I want to view an audit trail of a US 6 - As a data engineer, I want rules to be executed in real ti More	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30 Begin Tier 2 market penetration	1	2	3 Functional and Technical Design Complete Project Plan	4 Planning Phase Gate Complete	5	6

Product Hierarchy – Financial Overview

Hierarchies provide a consolidated view of a Product or Group of Products (Product Family/Division/Organisational) allowing Product & Portfolio Managers as well as Senior Leadership to quickly spot bottlenecks and get a live picture of the “Value” being delivered across the portfolio.

clarity

Hierarchies

Product - Full Hierarchy H00000039

InvestmentsExec DashboardIntake / Discovery BoardProduct RoadmapTeam OverviewTasksStatusRisksIssuesFinancialsStaffScorecardStaffing OverviewWork ManagementStatus ReportsPropertiesAudit

Plan TypeCost Plan

Match FiltersAllAnyAdd filter groups

Plan of Record (Cost Plan) = Yes

AND Plan of Record (Cost Plan) = Yes

Cost by Project

By Trans Class

Select allDeselect all

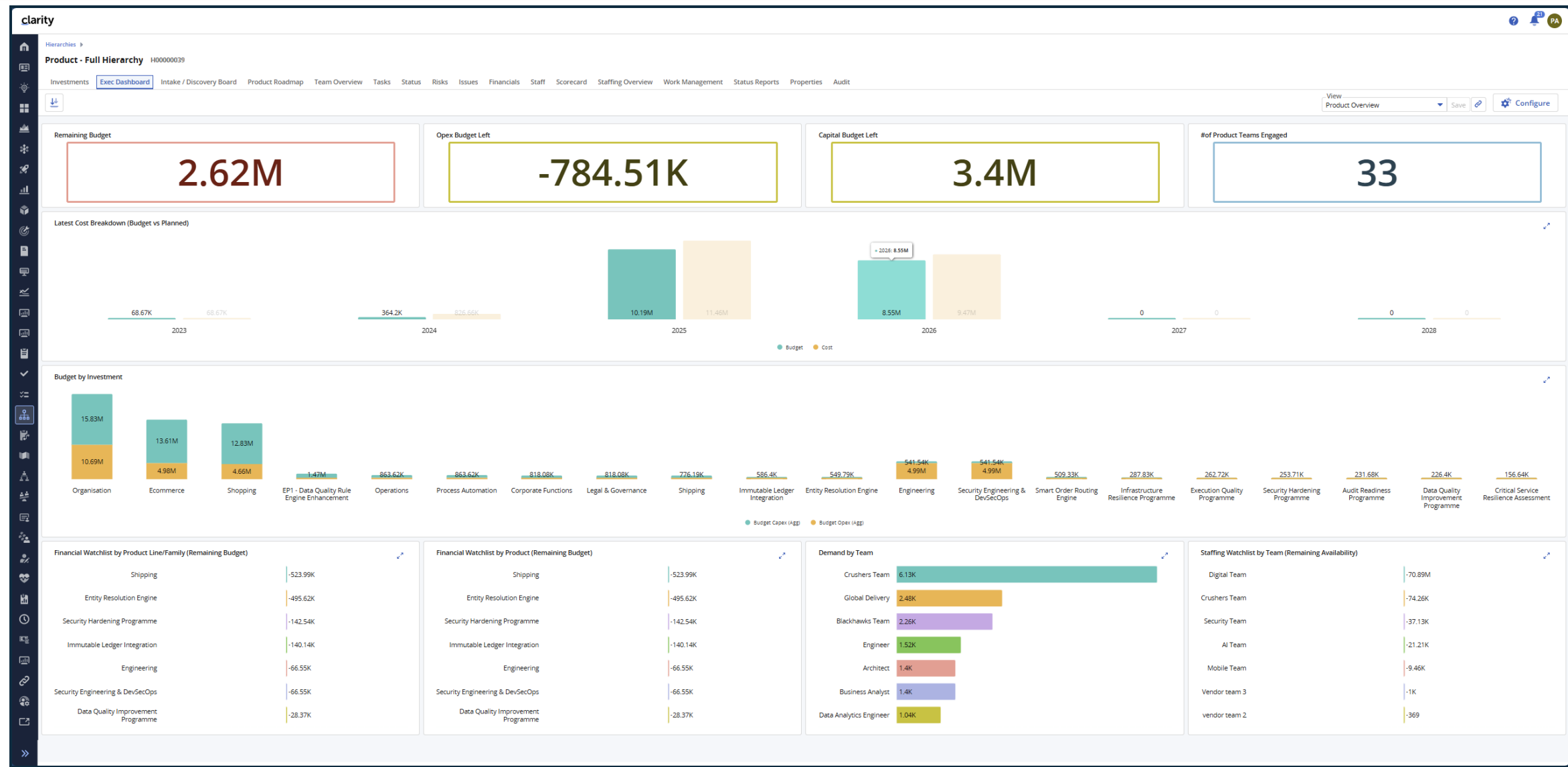
Cost TypeTransaction ClassName

Group	Cost Plan Details	Investment	Cost Plan Details	Totals	2026-01	2026-02	2026-03	2026-04	2026-05	2026-06	2026-07	2026-08	2026-09	2026-10	2026-11	2026-12
	Cost Type	Name	Description	Transaction Class	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost	Cost
Capital	(10)				4,900,000	416,164	375,890	416,164	402,740	416,164	402,740	416,164	416,164	402,740	416,164	402,740
> External Labor	(1)				900,000	76,438	69,041	76,438	73,973	76,438	73,973	76,438	76,438	73,973	76,438	73,973
> Hardware	(1)				600,000	50,959	46,027	50,959	49,315	50,959	49,315	50,959	50,959	49,315	50,959	49,315
> Internal Labor	(7)				600,000	50,959	46,027	50,959	49,315	50,959	49,315	50,959	50,959	49,315	50,959	49,315
> eCommerce Portal	(5)				0	0	0	0	0	0	0	0	0	0	0	0
> EP1 - Data Quality Rule Engine Enhancement	(1)				0	0	0	0	0	0	0	0	0	0	0	0
> *Payment Processing	(1)				600,000	50,959	46,027	50,959	49,315	50,959	49,315	50,959	50,959	49,315	50,959	49,315
> Capital		*Payment Processing		Internal Labor	600,000	50,959	46,027	50,959	49,315	50,959	49,315	50,959	50,959	49,315	50,959	49,315
> Capital		*Payment Processing	Testing & QA	Internal Labor	250,000	21,233	19,178	21,233	20,548	21,233	20,548	21,233	20,548	21,233	20,548	21,233
> Capital		*Payment Processing	Product Management & UX	Internal Labor	350,000	29,726	26,849	29,726	28,767	29,726	28,767	29,726	29,726	28,767	29,726	29,726
> Software	(1)				2,800,000	237,808	214,795	237,808	230,137	237,808	230,137	237,808	237,808	230,137	237,808	230,137
> Operating	(18)				4,573,352	446,404	404,776	446,404	440,651	434,220	440,651	458,588	434,220	440,651	275,828	172,603
> External Labor	(3)				706,000	69,479	63,014	69,479	68,658	67,479	68,658	71,479	67,479	68,658	41,479	24,658
> Internal Labor	(12)				2,767,352	283,500	257,379	283,500	281,582	273,316	281,582	293,684	273,316	281,582	140,924	57,534
> Maintenance	(1)				500,000	42,466	38,356	42,466	41,096	42,466	41,096	42,466	42,466	41,096	42,466	41,096
> Software	(2)				600,000	50,959	46,027	50,959	49,315	50,959	49,315	50,959	50,959	49,315	50,959	49,315
> EP1 - Data Quality Rule Engine Enhancement	(1)				0	0	0	0	0	0	0	0	0	0	0	0
> *Payment Processing	(1)				600,000	50,959	46,027	50,959	49,315	50,959	49,315	50,959	50,959	49,315	50,959	49,315
> Operating		*Payment Processing		Software	600,000	50,959	46,027	50,959	49,315	50,959	49,315	50,959	50,959	49,315	50,959	49,315
> Operating		*Payment Processing	Technology Infrastructure	Software	600,000	50,959	46,027	50,959	49,315	50,959	49,315	50,959	50,959	49,315	50,959	49,315

1 - 20 of 20

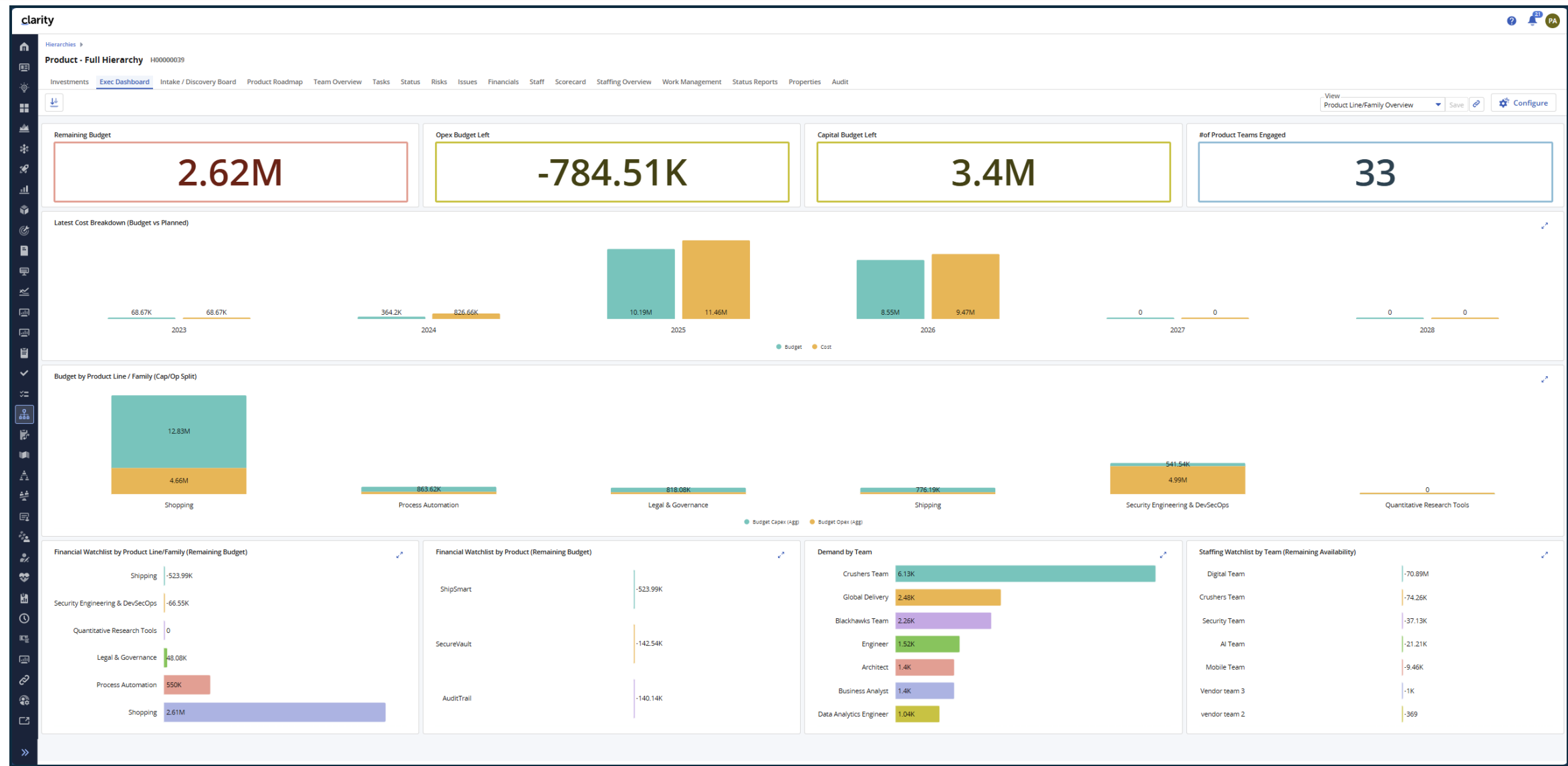
Product Hierarchy – Executive Snapshot By Product

Hierarchies provide a consolidated view of a Product or Group of Products (Product Family/Division/Organisational) allowing Product & Portfolio Managers as well as Senior Leadership to quickly spot bottlenecks and get a live picture of the “Value” being delivered across the portfolio.



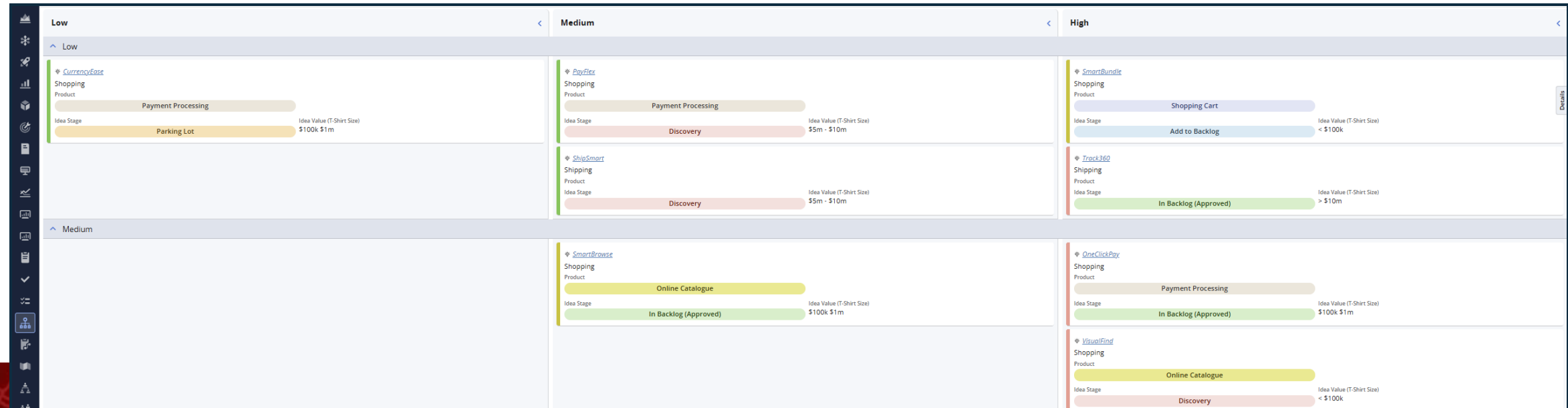
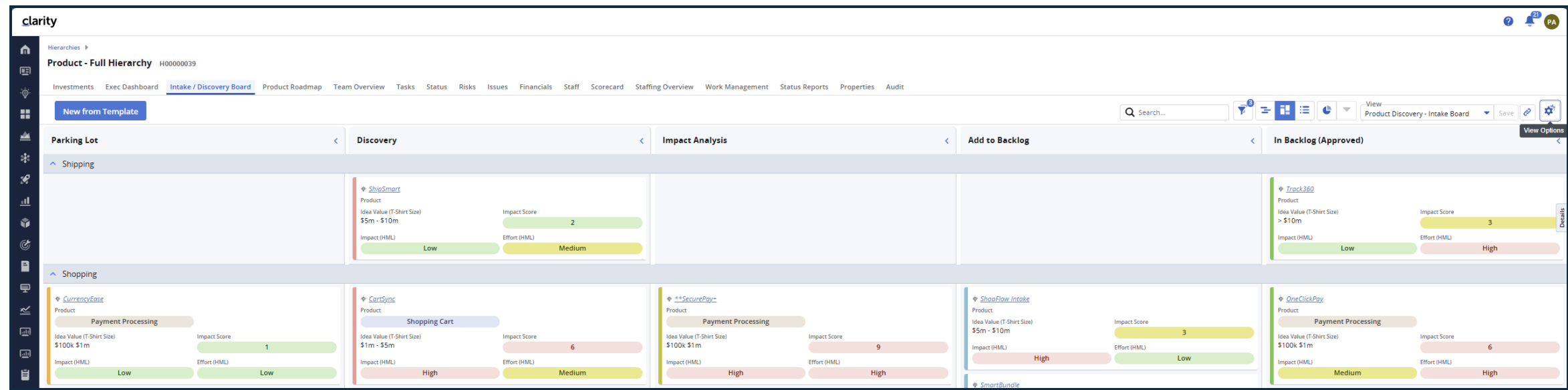
Product Hierarchy – Executive Snapshot By Product Family

Hierarchies provide a consolidated view of a Product or Group of Products (Product Family/Division/Organisational) allowing Product & Portfolio Managers as well as Senior Leadership to quickly spot bottlenecks and get a live picture of the “Value” being delivered across the portfolio.



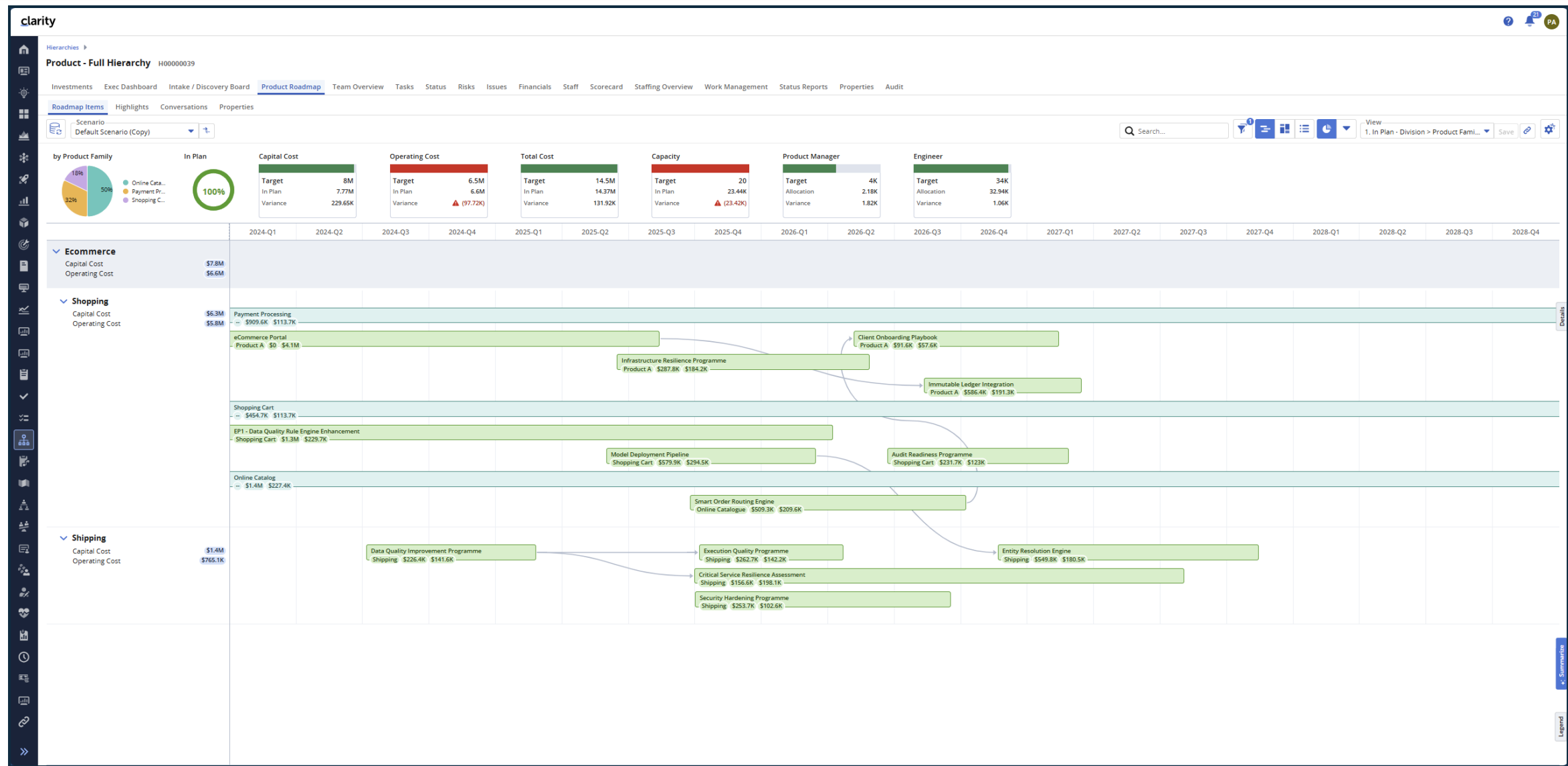
Product Hierarchy – Product Discovery

Utilise the Idea module (or a custom investment) in Clarity for Product Discovery so users can visualise not just the work in progress but the backlog of Epics being priorities and impact assessed to pull into the workstack. Roadmapping in Clarity can be used for OOTB “What if” scenario planning to underpin the prioritisation and approval of Backlog items alongside the existing portfolio.



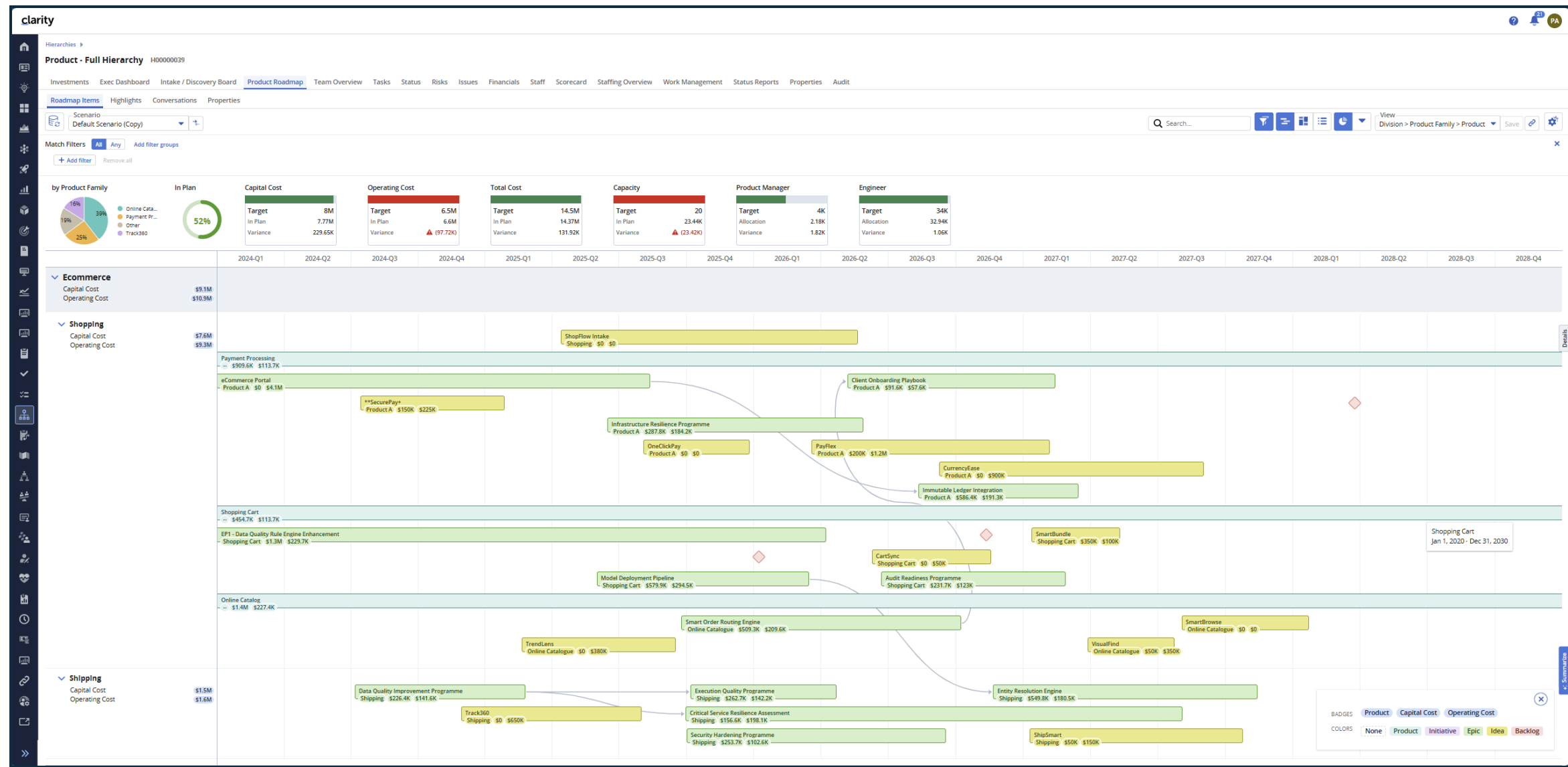
Product Hierarchy – Executive Snapshot By Product Family

Hierarchies provide a consolidated view of a Product or Group of Products (Product Family/Division/Organisational) allowing Product & Portfolio Managers as well as Senior Leadership to quickly spot bottlenecks and get a live picture of the “Value” being delivered across the portfolio.



Product Hierarchy – Product Roadmap

Native Clarity Roadmapping functionality provides elegant visuals as well as prioritisation and scenario planning support for Product Discovery and Quarterly Planning. Similar to hierarchies a roadmap can be created at ANY level in the hierarchy from a single product to a entire division depending on the business need.



Conclusion

Key Takeaways



A Shift in Terminology Does Not Change the Way We Work: Moving from projects to products requires more than new labels. Organizations must change how they define work, govern investments, allocate funding, and measure success.



Not Everything Should Be Managed as a Product: Products should represent enduring value streams with clear customers, outcomes, ownership, and investment strategies. The execution layer remains critical, and that layer may continue to include projects and programmes.



Products Need Continuous Investment: Unlike projects, products do not end. They evolve, adapt, improve, and generate value throughout their lifecycle.



Measure customer and business value, not just delivery success: Success is not On time / On budget / In scope. Success is Customer adoption / Business outcomes / Strategic alignment / Realized Value

Key Takeaways



Teams and Funding Must Follow the Product: As organizations mature, funding, planning, and teams become aligned to products and value streams rather than being repeatedly created and disbanded around temporary initiatives.



Start Small and Evolve: You do not need to reorganize overnight.

Identify Products → Assign Ownership → Define Outcomes → Align Investments → Grow Maturity



Products and Projects Work Better Together: The goal is not to replace Project Management with Product Management. The goal is to connect strategy, products, projects, teams, and investments into a single model focused on delivering business value.



Clarity Supports Both: Clarity enables organizations to manage both Product and Project investments. Product CITs, hierarchies, and roadmaps provide visibility across product portfolios while maintaining the governance and execution capabilities required for execution.

Questions?



Survey



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

Your feedback is extremely important for future events.





Jacob Cancelliere, PMP

VP of Account Enablement

Rego Consulting



Let's Connect on LinkedIn



Ben Raper

Principal Consultant – Clarity



Let's Connect on LinkedIn

Thank you!

Let's continue the conversation! Connect with us on LinkedIn!



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- Click on **Course or Training**
- Class Provider = **Rego Consulting**
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- Course **Description**
- Date Started = **Today's Date**
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