



Clarity AI: Because "Just Bumping This" Isn't a Strategy

Your Guide:
Vib Mehrotra

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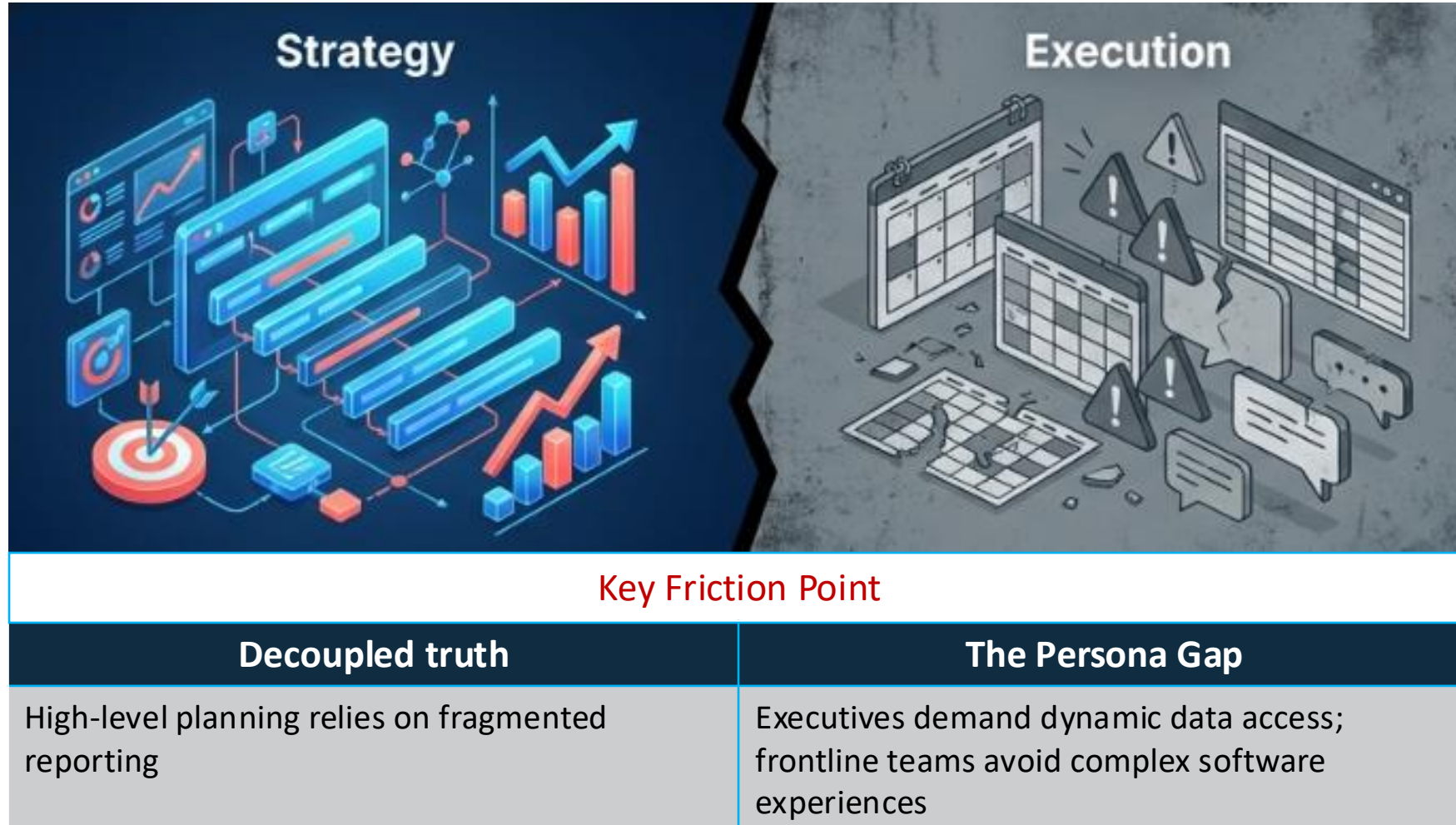
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We fund multimillion-dollar strategies, yet we validate their progress with guesswork and late timesheets



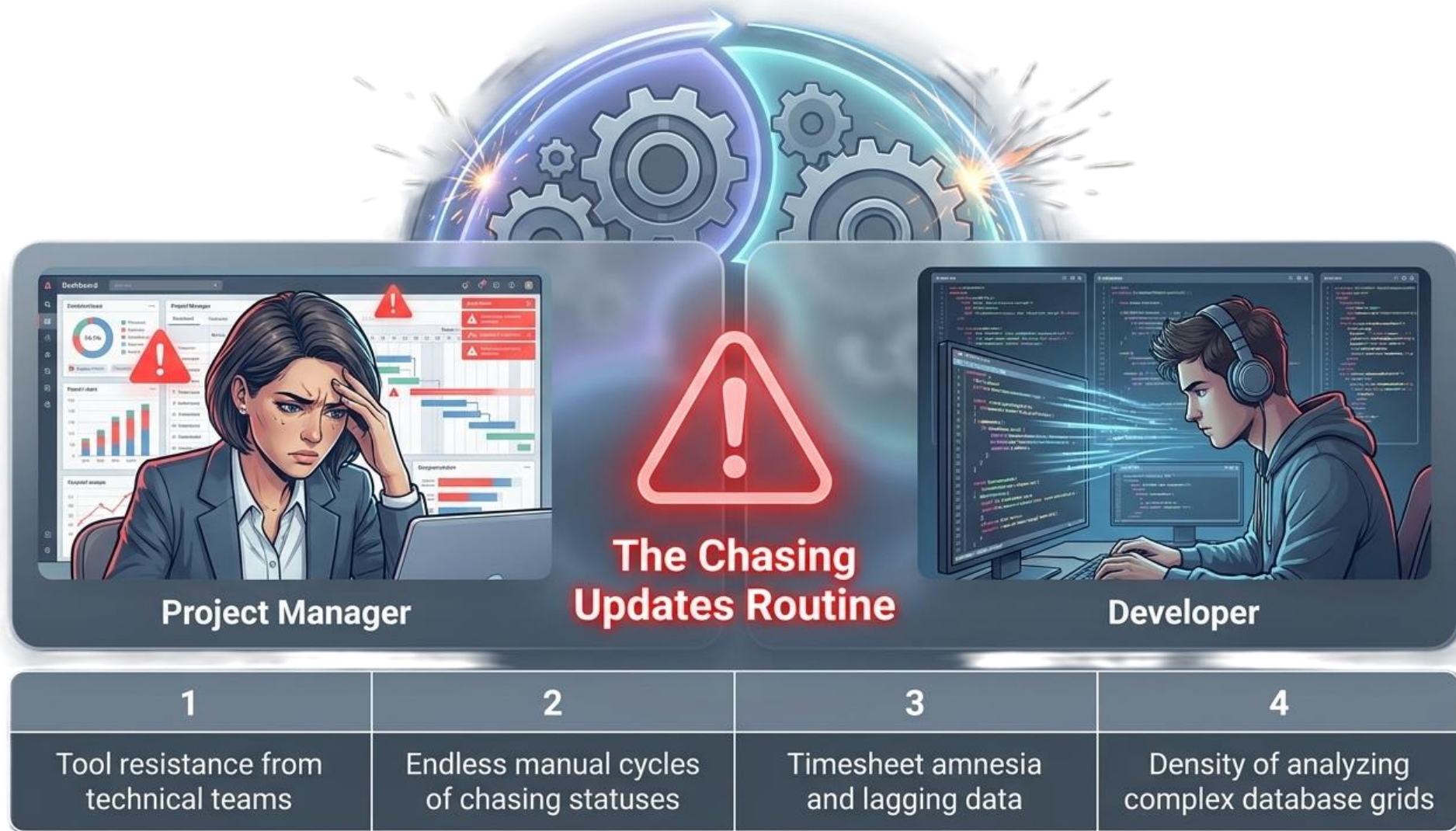
Whiteboard Dream of Strategic Portfolio Management



Connecting strategy to execution is supposed to be a continuous machine.

Fact vs Reality

5



Meet the key persona's of SPM Cycle



Mike

Team Member

Lives in his development environment. Hates context switching just to enter time.



Nicole

Project Manager

Responsible for managing investments including financials, staffing, risks, and deliverables.



Derrick

Resource Manager

Balances resource capacity and allocations. Fights lagging data.



Sid

Portfolio Manager

Demands dynamic insights for strategic pivots without wading through grids.

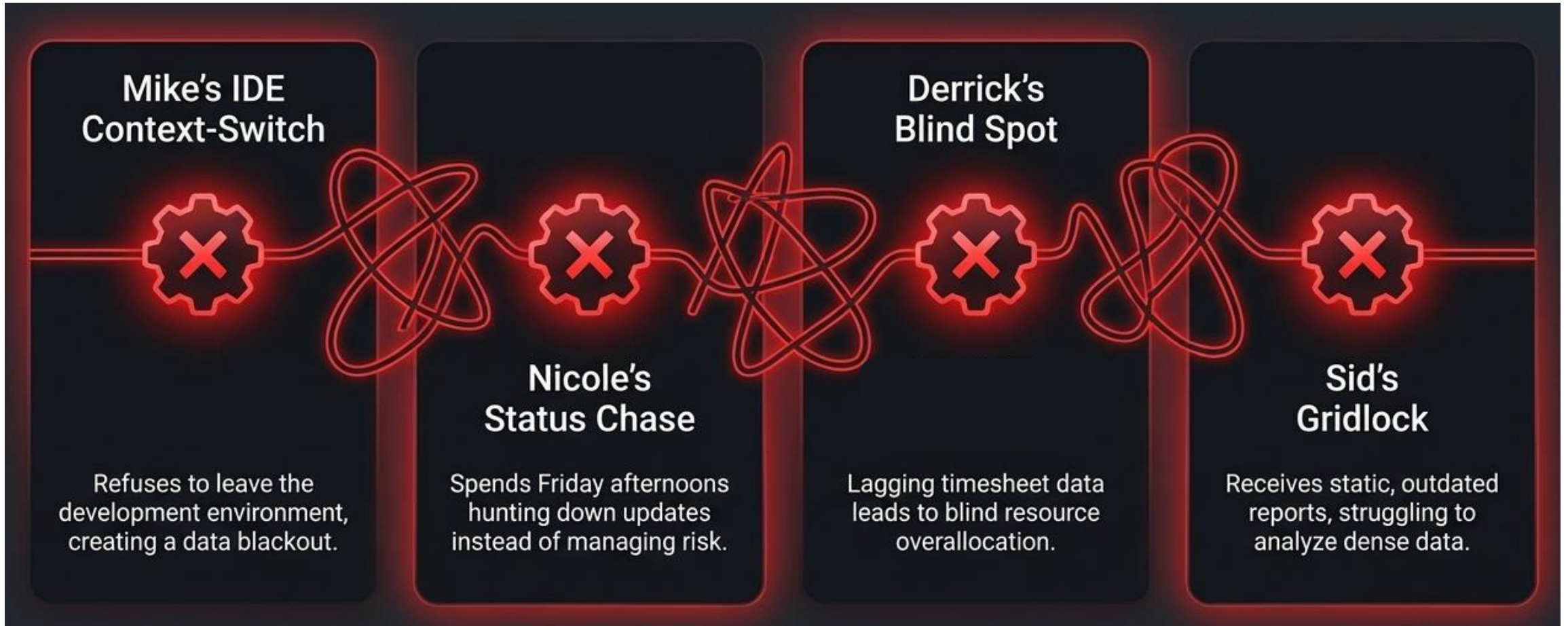
The lifecycle coordinate map

7



Each role is perfectly positioned in theory. But theory does not account for daily **human friction.**

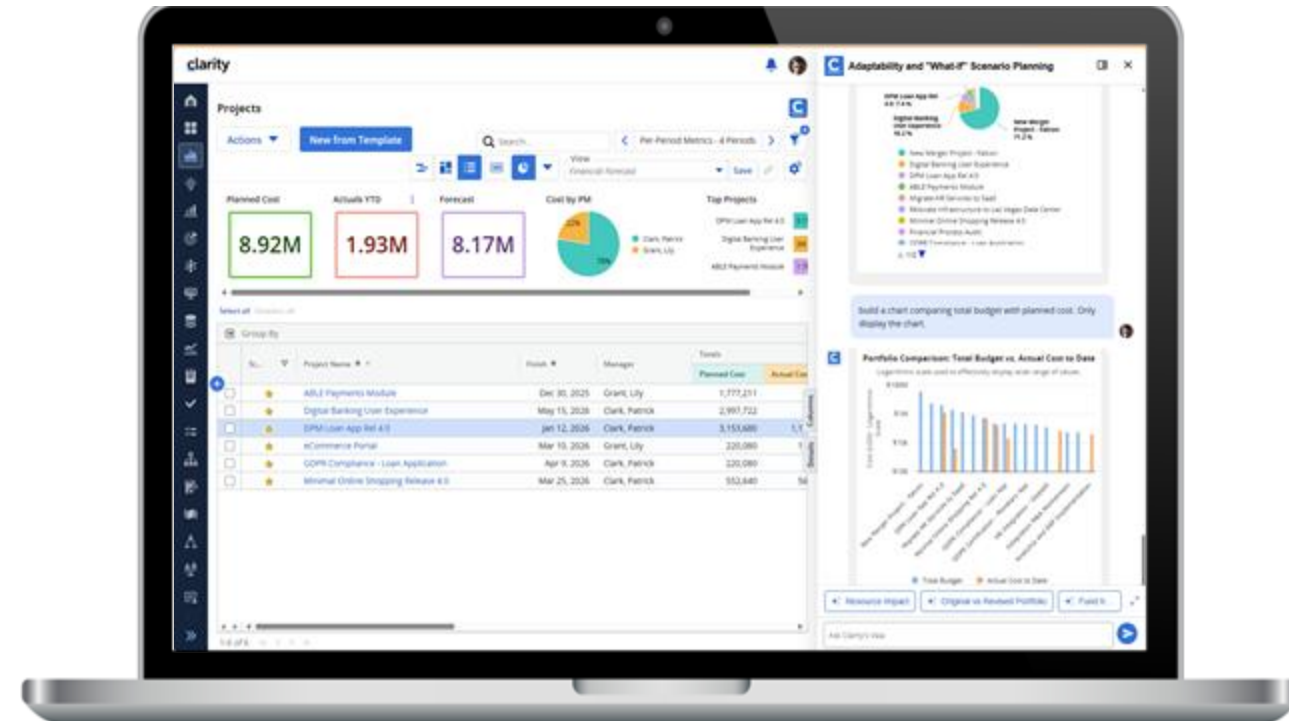
Where it breaks down



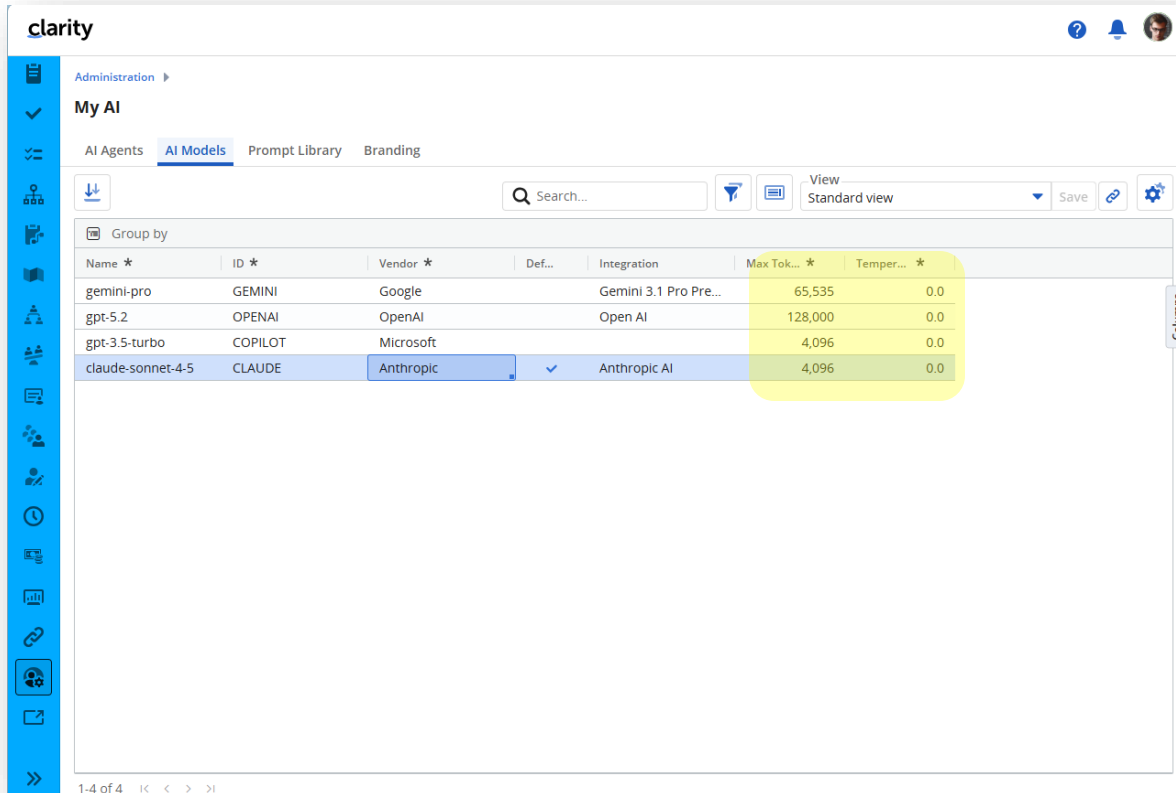
Introducing Clarity AI

9

Introducing Clarity AI,
industry's first Governed
Intelligence Engine -
transforming raw LLMs into
secured, contextualized, and
cost-controlled corporate
assets.



Enterprise Governance and LLM Controls



clarity

Administration ▸

My AI

AI Agents AI Models Prompt Library Branding

Search...

View Standard view Save

Group by

Name *	ID *	Vendor *	Def...	Integration	Max Tok... *	Temper... *
gemini-pro	GEMINI	Google		Gemini 3.1 Pro Pre...	65,535	0.0
gpt-5.2	OPENAI	OpenAI		Open AI	128,000	0.0
gpt-3.5-turbo	COPILOT	Microsoft			4,096	0.0
claude-sonnet-4-5	CLAUDE	Anthropic	✓	Anthropic AI	4,096	0.0

Columns

1-4 of 4

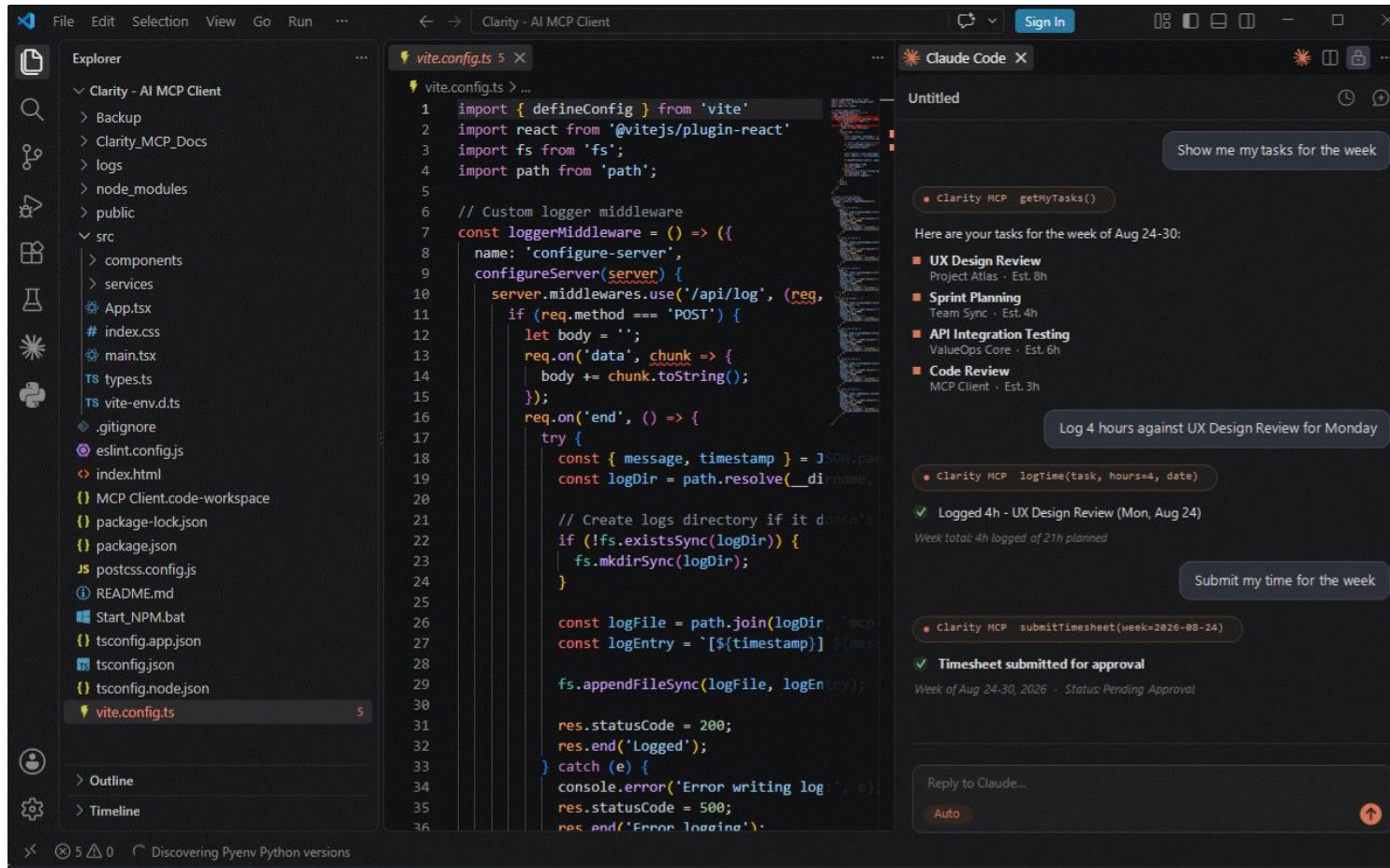
- **Granular Model Management:** Admins can configure Max Tokens and Temperature settings individually for every LLM in the "AI Model" grid.
 - **Response Length Control:** Define the Max Tokens to cap the length of AI responses (subject to specific model limits).
 - **Accuracy vs. Creativity:** Adjust Temperature on a scale of 0 to 1 to dictate how deterministic (factual) or creative (varied) the output should be.
 - **Mandatory Configuration:** Token and temperature fields are required to ensure every model is optimized for its specific purpose.

A connected journey: A day in the life



Following a single thread of data as it moves from the trenches to the boardroom, unblocked by Clarity AI at every step.

Mike's no more context switching

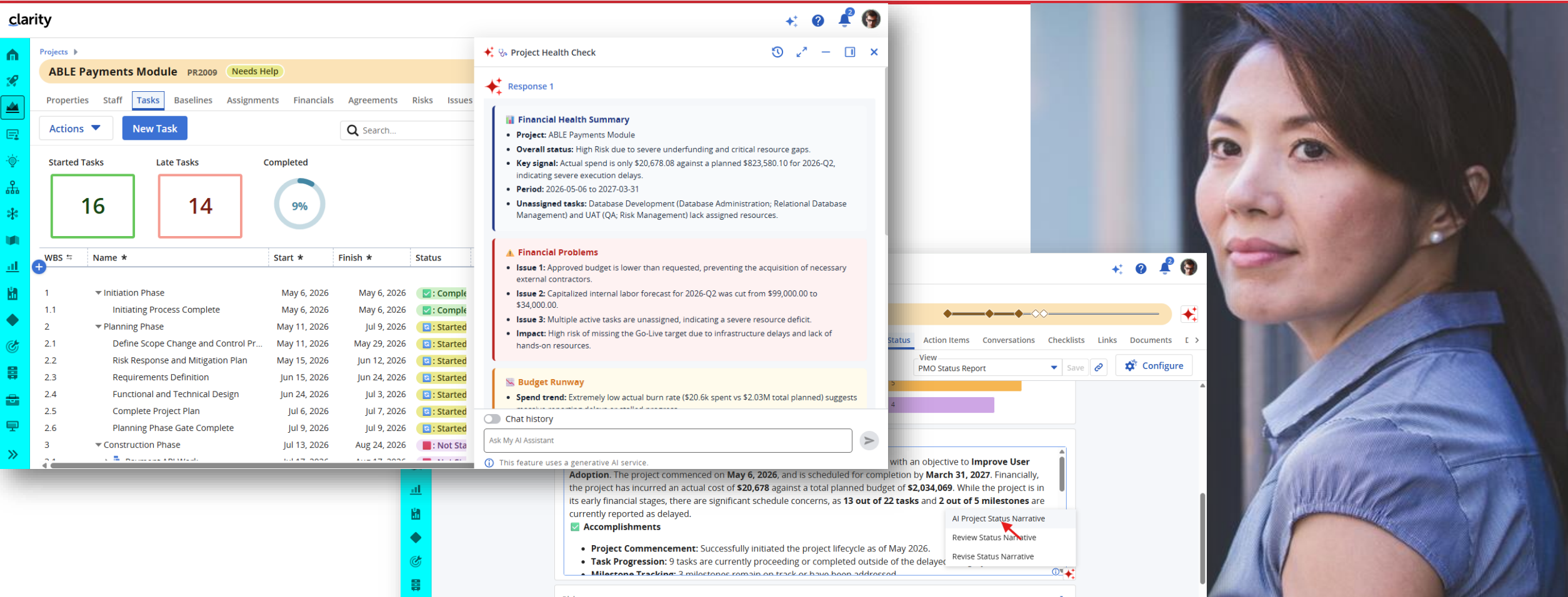


The Cure for Timesheet Procrastination: Mike updates his task status and submits timesheets directly inside VS Code, keeping his developer momentum in high-value flow

Mike's **Value:** Frictionless time entry



Nicole's Status Monitoring



The image displays a screenshot of the Clarity project management software interface, overlaid on a background image of a woman (Nicole) looking at a screen. The interface shows a project health check for the 'ABLE Payments Module' (PR2009) with a 'Needs Help' status. The main dashboard includes a 'Project Health Check' section with a 'Response 1' card. This card contains a 'Financial Health Summary' and a 'Financial Problems' section. The 'Financial Health Summary' lists the project name, overall status (High Risk), key signal, period, and unassigned tasks. The 'Financial Problems' section lists three issues: Issue 1 (Approved budget is lower than requested), Issue 2 (Capitalized internal labor forecast for 2026-Q2 was cut from \$99,000.00 to \$34,000.00), and Issue 3 (Multiple active tasks are unassigned, indicating a severe resource deficit). The 'Budget Runway' section shows a spend trend: Extremely low actual burn rate (\$20.6k spent vs \$2.03M total planned) suggests a significant budget deficit. The interface also displays a table of tasks with columns for WBS, Name, Start, Finish, and Status. The tasks are categorized into Initiation Phase, Planning Phase, and Construction Phase. The 'Initiation Phase' includes 'Initiating Process Complete' (Completed). The 'Planning Phase' includes 'Define Scope Change and Control Plan' (Started), 'Risk Response and Mitigation Plan' (Started), 'Requirements Definition' (Started), 'Functional and Technical Design' (Started), 'Complete Project Plan' (Started), and 'Planning Phase Gate Complete' (Started). The 'Construction Phase' includes 'Construction Phase' (Not Started). A chat history section is visible at the bottom of the interface, showing a conversation with an AI agent. The chat history includes a message from the AI agent: 'Adoption. The project commenced on May 6, 2026, and is scheduled for completion by March 31, 2027. Financially, the project has incurred an actual cost of \$20,678 against a total planned budget of \$2,034,069. While the project is in its early financial stages, there are significant schedule concerns, as 13 out of 22 tasks and 2 out of 5 milestones are currently reported as delayed.' The chat history also includes a message from the user: 'Accomplishments'. The user's message lists two accomplishments: 'Project Commencement: Successfully initiated the project lifecycle as of May 2026.' and 'Task Progression: 9 tasks are currently proceeding or completed outside of the delay.' The chat history also includes a message from the AI agent: 'Milestone Tracking: 3 milestones remain on track or have been addressed.'

Project Health Check

Response 1

Financial Health Summary

- **Project:** ABLE Payments Module
- **Overall status:** High Risk due to severe underfunding and critical resource gaps.
- **Key signal:** Actual spend is only \$20,678.08 against a planned \$823,580.10 for 2026-Q2, indicating severe execution delays.
- **Period:** 2026-05-06 to 2027-03-31
- **Unassigned tasks:** Database Development (Database Administration; Relational Database Management) and UAT (QA; Risk Management) lack assigned resources.

Financial Problems

- **Issue 1:** Approved budget is lower than requested, preventing the acquisition of necessary external contractors.
- **Issue 2:** Capitalized internal labor forecast for 2026-Q2 was cut from \$99,000.00 to \$34,000.00.
- **Issue 3:** Multiple active tasks are unassigned, indicating a severe resource deficit.
- **Impact:** High risk of missing the Go-Live target due to infrastructure delays and lack of hands-on resources.

Budget Runway

- **Spend trend:** Extremely low actual burn rate (\$20.6k spent vs \$2.03M total planned) suggests a significant budget deficit.

Chat history

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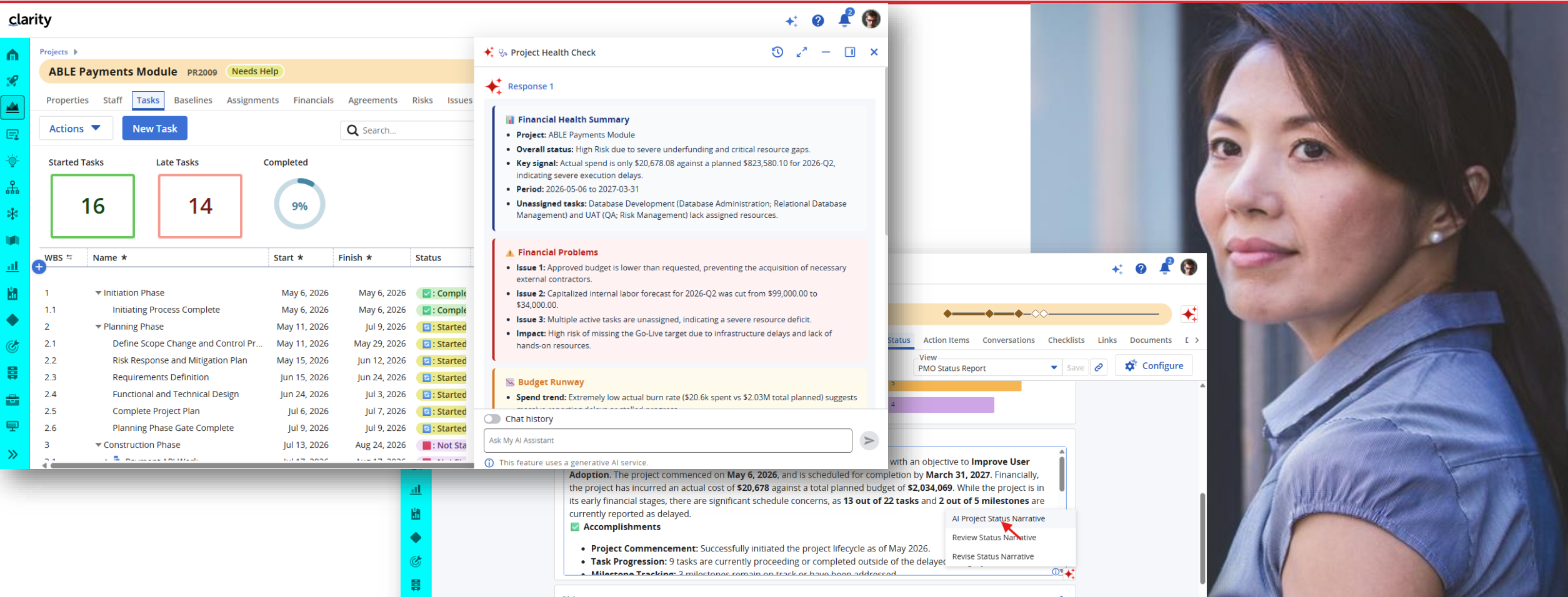
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Let Rego be your guide.

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AI Project Status Narrative

- Review Status Narrative
- Revise Status Narrative

Tasks

WBS	Name	Start	Finish	Status
1	Initiation Phase	May 6, 2026	May 6, 2026	Complete
1.1	Initiating Process Complete	May 6, 2026	May 6, 2026	Complete
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2.1	Define Scope Change and Control Pr...	May 11, 2026	May 29, 2026	Started
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Summary

Started Tasks: 16

Late Tasks: 14

Completed: 9%

Summary

With an objective to **Improve User**

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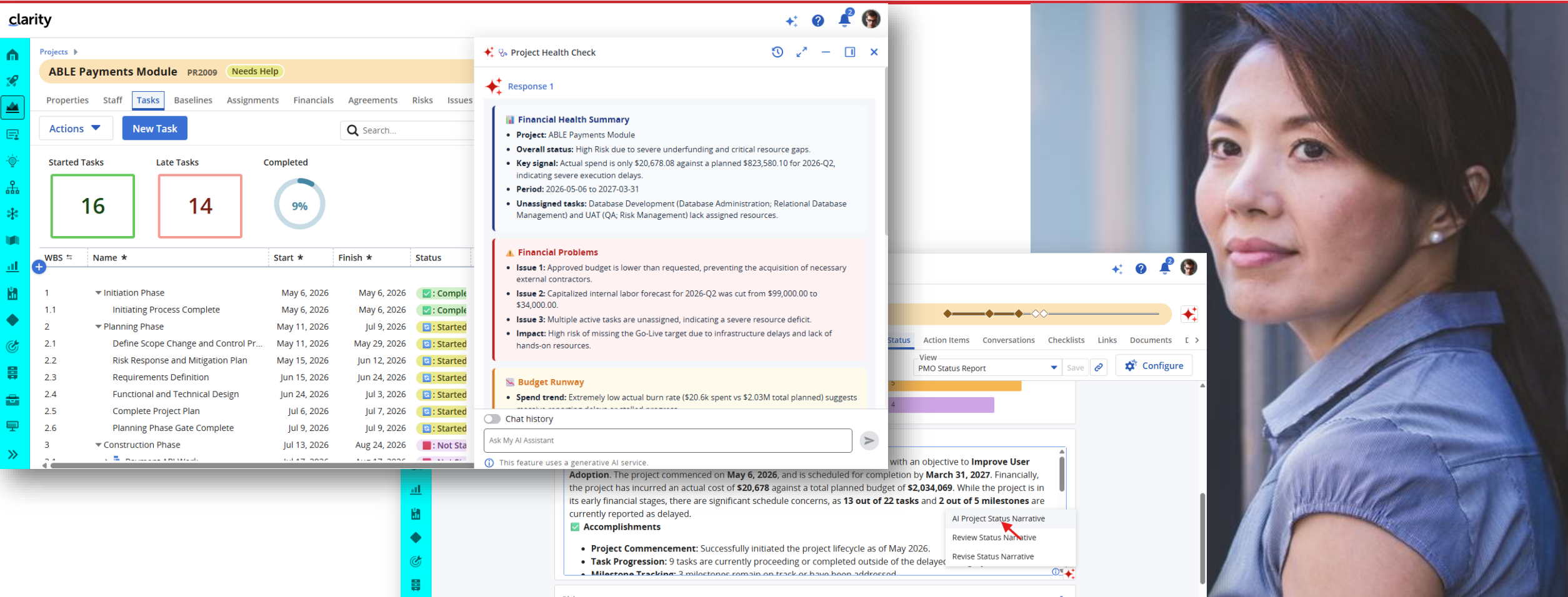
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Project Health Check - Response 1

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Background Interface:

Projects

ABLE Payments Module PR2009 Needs Help

Properties Staff **Tasks** Baselines Assignments Financials Agreements Risks Issues

Actions New Task Search...

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Ditching the Status Chase: Clarity AI Agent scans active project data to surface hidden cost anomalies, log critical risks, and generate accurate status updates keeping Nicole ahead of surprises.

Let Rego be your guide.

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Nicole's **Value**: Proactively find and neutralize bottlenecks before they impact anything



Derrick's Capacity Audit

The screenshot displays the Clarity Staffing tool interface. On the left, a sidebar contains various icons for navigation. The main area is titled 'Staffing' and shows a table of resource allocations. A modal window titled 'Staff Allocation Analysis - G' is open, displaying a 'Response 1' section with a warning icon and the title 'Over-Utilized Resources (Project Allocations Only)'. This section lists three resources: Paul Tanner (Product Owner), Ed Carmen (QA Engineer), and Alex Garcia (ML / AI Systems Engineer), each with their 2026-Q2 and 2026-Q3 utilization percentages and available hours. Below this, a section titled 'Underutilized Resources & Bench Capacity' is visible. At the bottom of the modal, there is a 'Chat history' toggle and a text input field for 'Ask My AI Assistant'.

Resource *	Role	Name
☐	Lefevre, Christophe	Product M...
☐	Reed, Henry	Corporate...
☐	Donegal, Amy	Analyst Re...
☐	Lang, Suzie	ABM Mark...
☐	Quinn, Randy	Business ...
☐	Berry, Jason	Engineer
☐	Stoneburg, Sam	QA Engine...
☐	Roberts, Beth	Security A...
☐	Granger, Paula	Project M...
☐	Bhatt, Rakesh	Engineer
☐	Hill, Wayne	Business ...
☐	Ives, Blair	Engineer
☐	Garcia, Alex	ML Engine...

Over-Utilized Resources (Project Allocations Only)

Tanner, Paul — Product Owner

- **2026-Q2: 164.6%** (856.0h allocated vs. 520.0h available)
- **2026-Q3: 198.5%** (1048.0h allocated vs. 528.0h available)
- Conflict: Concurrent full-time assignments on *Digital Banking User Experience* and *CloudShift: Enterprise Infrastructure Migration*.

Carmen, Ed — QA Engineer

- **2026-Q2: 164.6%** (856.0h allocated vs. 520.0h available)
- **2026-Q3: 151.5%** (800.0h allocated vs. 528.0h available)
- Conflict: Overlap between *eCommerce Portal* and *CloudShift: Enterprise Infrastructure Migration*.

Garcia, Alex — ML / AI Systems Engineer

- **2026-Q3: 109.1%** (576.0h allocated vs. 528.0h available)
- Conflict: Double-booked on *eCommerce Portal* and *CloudShift: Enterprise Infrastructure Migration*.

Krishna, Sai — QA Engineer

- **2026-Q1: 101.6%** (520.0h allocated vs. 512.0h available)
- Conflict: Minor over-allocation due to 8h on *Analytics* and *ERP Implementation* alongside full allocation on *eCommerce Portal*.

Underutilized Resources & Bench Capacity

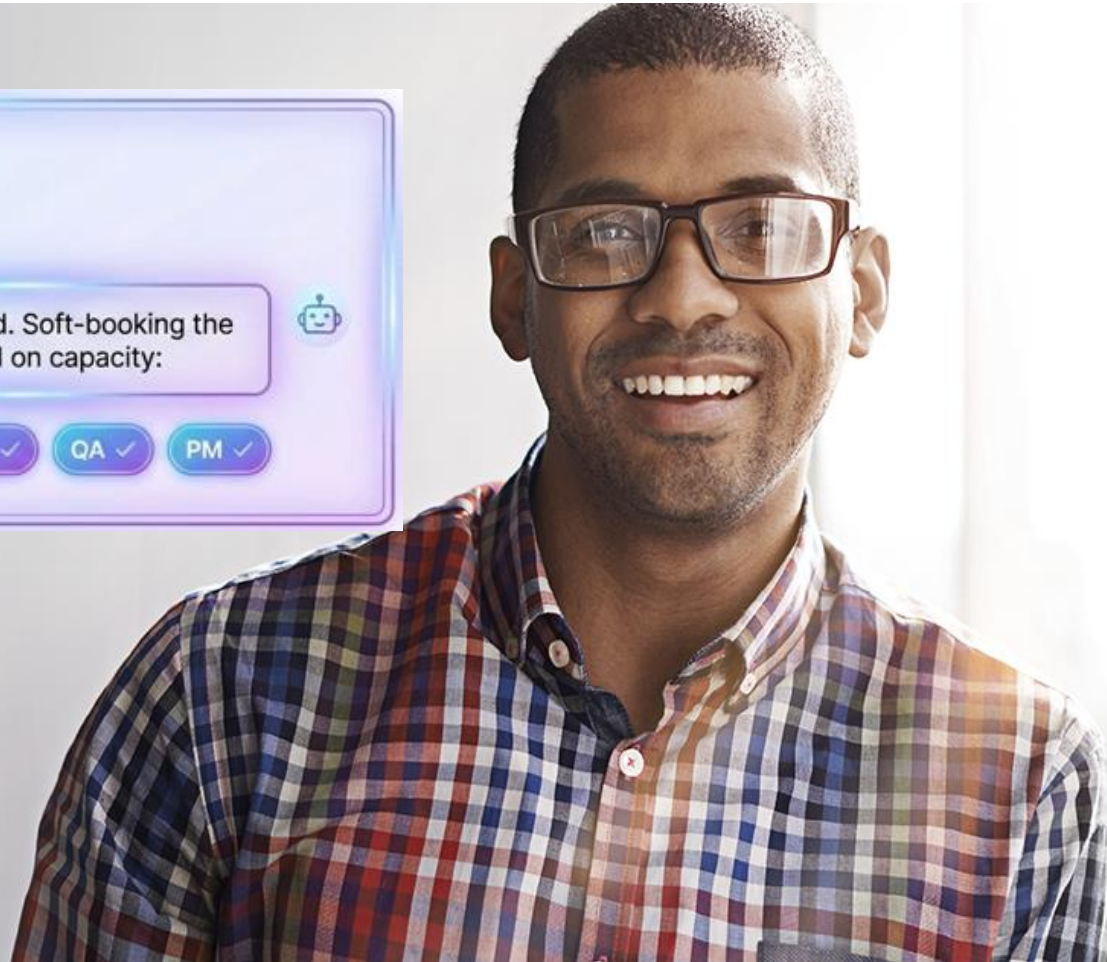
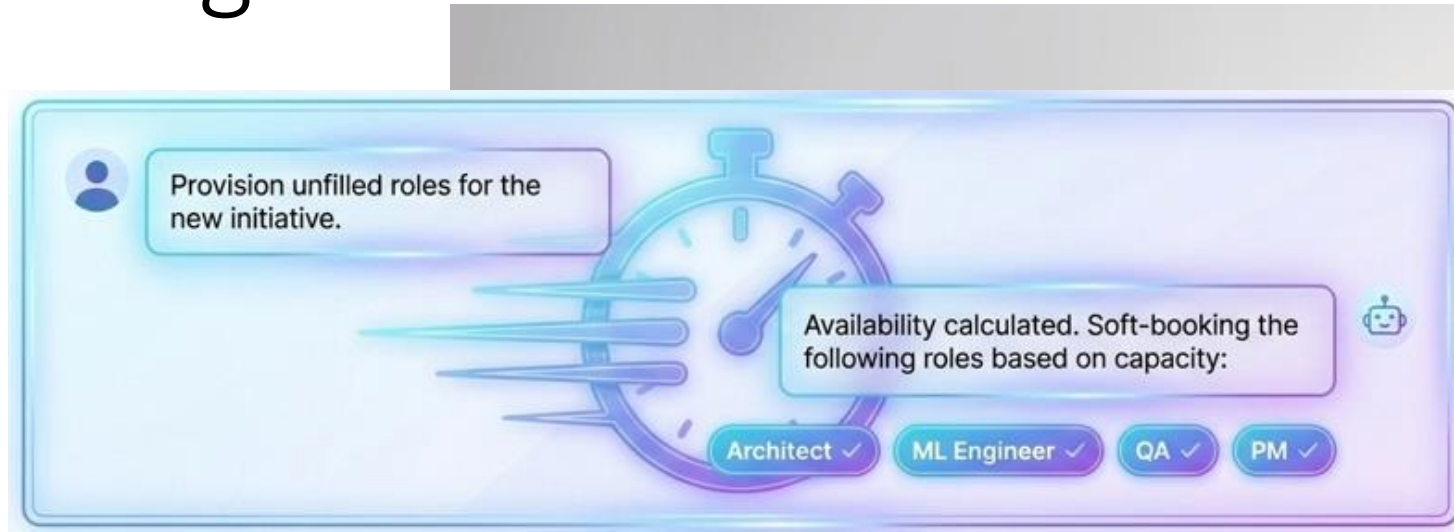
Chat history

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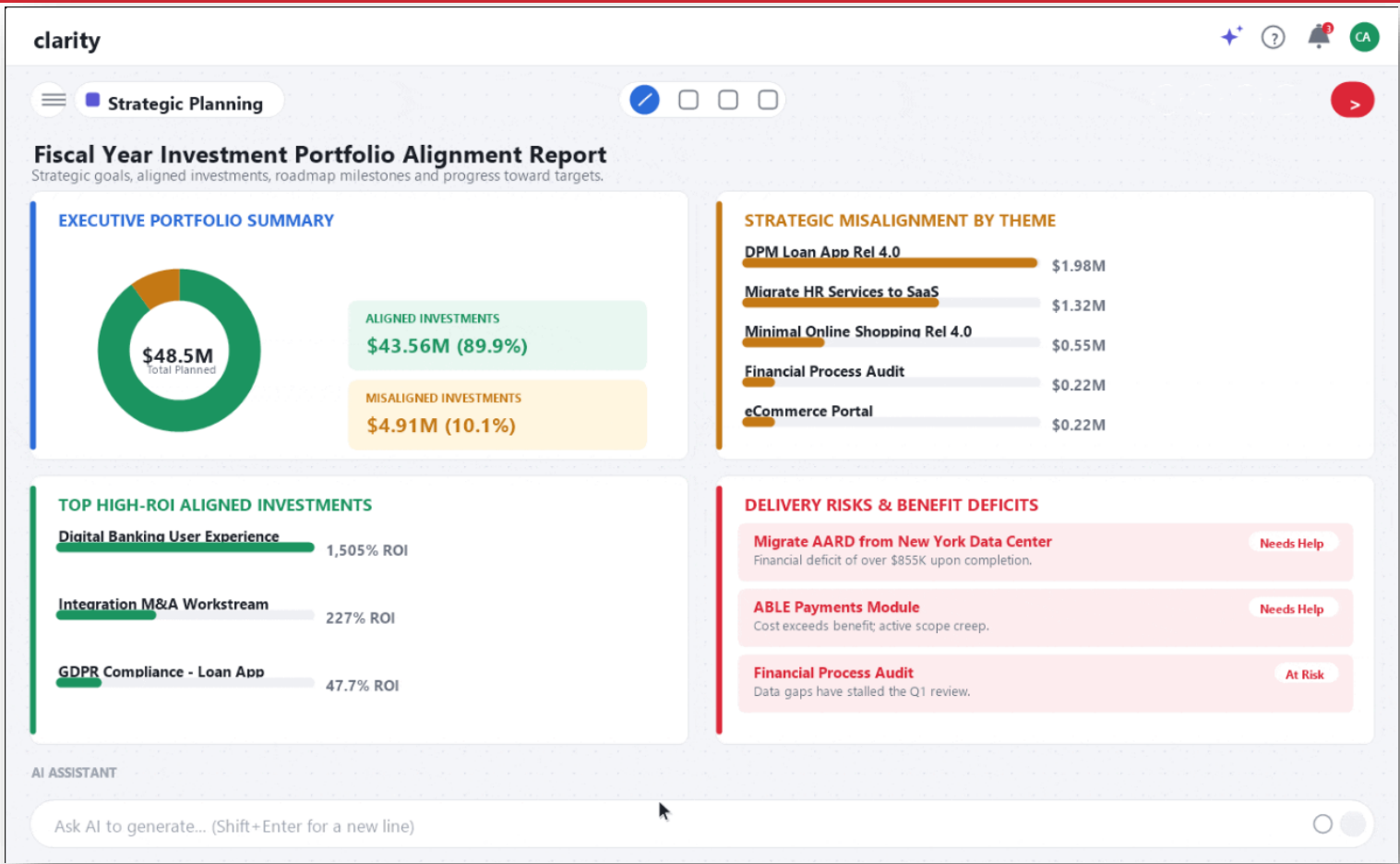
This feature uses a generative AI service.

Human Tetris Mastered: Derrick replaces lagging spreadsheet forecasts with conversational AI to spot over-allocations and align team capacity before bottlenecked projects stall

Derrick's **Value:** Complex resource management problems solved in seconds, eliminating manual grid assignments



Sid Context Aware Multi-Step Planning



Bypassing the Weekend Fire Drill: Sid leverages context-aware, multi-turn AI to query roadmaps and model strategic shifts without getting bogged down in granular spreadsheet rows

Sid's Value



Information finds
the executive
dynamically.
Bypassing **rigid**
grids entirely.

Executives don't
want rows and
columns; they
want answers.



From Administrative Friction to Breakthrough Flow



Mike
Team Member

Constant context switching just to log time and update status

Uses MCP Server to perform updates without context switching



Nicole
Project Manager

Endless chasing status updates and hunting for invisible budget leaks

Leverage AI as a proactive guard to flag anomalies and neutralize bottlenecks before impact



Derrick
Resource Manager

Manual capacity allocation without full insights into demand.

Instantly spots overutilization, and make necessary adjustment in anticipation of demand

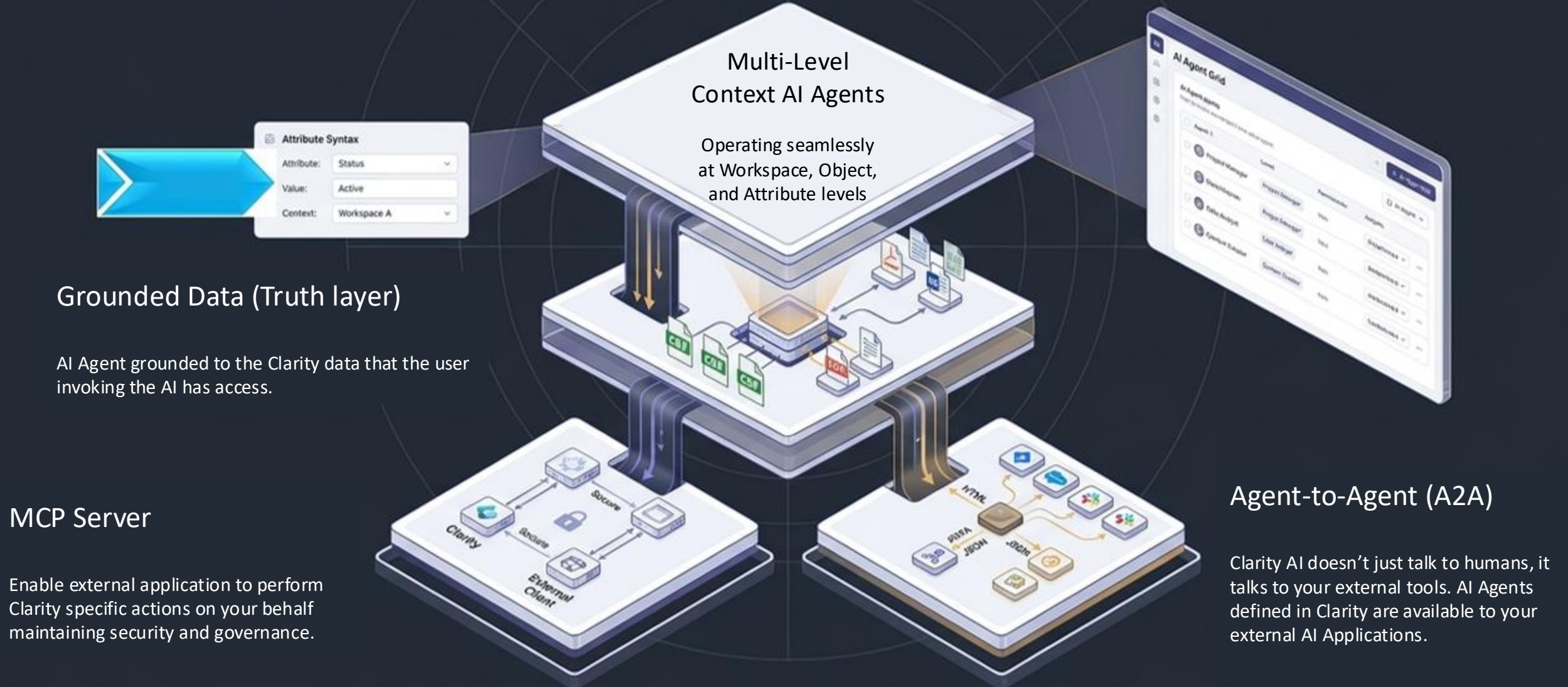


Sid
Portfolio Manager

Manually analyzing large complex data to make strategic decisions

Move from static view to an interactive data drive decision

Clarity AI: Built for the enterprise engine room



To AI and beyond...

Active Digital Teammates

- MCP Server to manage Timesheet entry and approval (Timesheet Persona AI Agent)
- AI Agents to access object specific documents
- Ability to save AI Agent interactions for future reference.

<Future> Strategic Partner

- Strategic Planner Persona MCP Servers (Roadmaps and Hierarchies)
- Support for BYO custom LLM
- Multiple users to collaborate on an AI Agent
- Dynamic UI
- OAuth support for MCP Server

SPM AI Command Center

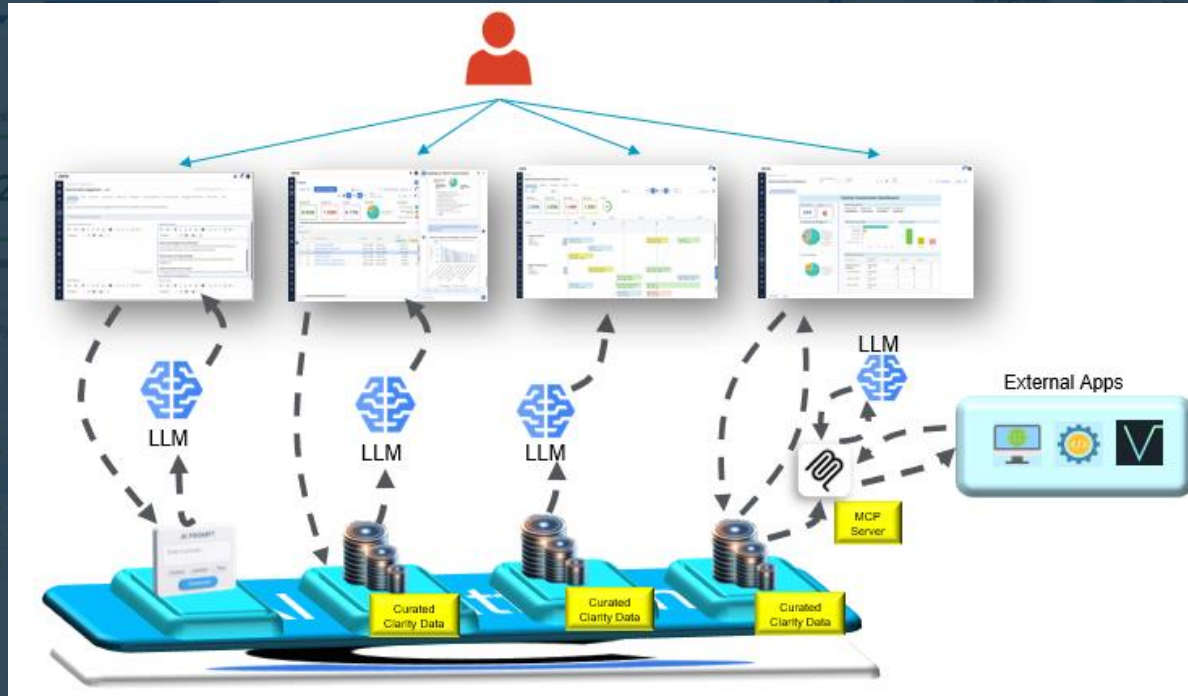
- Introduced AI Agent in Clarity.
- Ability to perform data analysis and visualization based on curated context specific data
- Grounded to user provided documents
- AI Agents can generate or review content

Collaborative Partners

- Describe based MCP Server
- Agentic AI for Clarity configuration management.
- Ability to use AI Agents to get non-contextual data within Clarity.
- AI Agents within Staffing and Pages.
- Provide User contextual information to AI Agent

Escape the Grind

Because 'Just bumping this' isn't a strategy



Clarity AI frees your team to do what they do best....deliver strategic value

You RegoU Clarity AI Roadmap

Clarity AI: Because "Just Bumping This" Isn't a Strategy

9:00 am  ★ You are here

Mon Sept 14th

Tue Sept 15th

Wed Sept 16th

Thu Sept 17th

AI workshop



1:00 pm

The AI Nervous System (ConnectALL)



10:10 am

Clarity's VAIA AI Capabilities



2:40 pm

Stop Hunting for Data



2:40 pm

AI Progression



10:10 am

Tokenomics



2:40 pm

Vaia in the Wild



11:20 am

Can You Reallocate \$10M in 10 Minutes?



4:00 pm

Velocity Over Volume



9:00 am

Questions?



Survey



Please take a few moments to fill out the class survey.
Your feedback is extremely important for future events.





Thank You

Let Rego be your guide.

Thank You For Attending Rego University

Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Provider = **Rego Consulting**
- Class Name = **regoUniversity**
- Course **Description**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**



Let us know how we can improve!
Don't forget to fill out the class survey.



Phone

888.813.0444



Email

info@regoconsulting.com



Website

www.regouniversity.com