



Stop Hunting for Data: Building a 'Self-Service' Executive Culture in Clarity

Your Guides:
Stephanie Harris
Mike Richman

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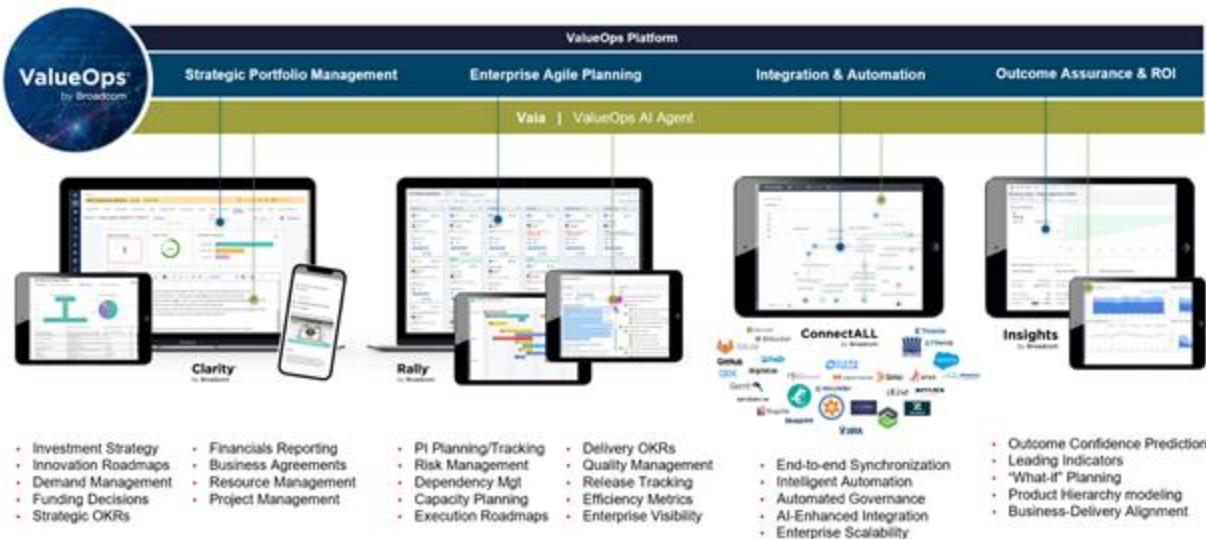
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Speaker Introductions & Welcome

Your Presenters

Stephanie Harris & Mike Richman
 Agile Operations Division, Broadcom
 Supporting ValueOps



What to Expect

Interactive & Practical Session

This is designed to be an engaging learning experience, not just a passive lecture. Please feel free to participate and ask questions.

Actionable Best Practices

Leave today's session with concrete, real-world strategies and portfolio techniques that you can immediately apply to your organization's value stream.

Agenda

Key Points:

- The Reality
 - Execs ~~want~~ NEED easy access to reporting with analytical insights
- The Challenge
 - Each Exec wants different ways to access and different levels of detail
- The Solution
 - Today we are going to suggest 4 of at least 10 Clarity³ reporting/analytic solutions
- Key Takeaways & Q&A

Empowering every leader to “Self Service” reporting & analysis

The CIO / CTO

Capability: Executive Roadmap Planning Dashboard

Outcome: A holistic view of your strategic plans and visualize the evolution of your investments over time to enable you to prioritize initiatives, communicate strategic direction, and align related efforts across all investment types.

IT Finance / CFO

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Outcome: A comprehensive view of your investment’s financial capitalization status and all associated transaction history of detailed insights necessary for accurate investment classification, financial compliance, and transparent cost management.

VP of Infrastructure

Capability: Fiscal Year Infrastructure Analysis

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Business Unit (P&L) Leaders

Capability: Capacity vs Demand by Resource

Outcome: Critical insights into your resource utilization by comparing available capacity with current and projected demand across your organization to identify over-allocations, potential bottlenecks, and opportunities for better resource planning.

Executives are drowning in fragmented data but starving for strategic signal.

Examples



Portfolio Modernization and AI initiatives are disconnected to cost drivers and execution metrics.



Organizations rely on the "**peanut butter spread**" of vague IT accounting, draining budgets without tying costs to digital products.



Poor data costs the average company almost **\$13 million a year** (Gartner).

The Reporting Breakdown

Fragmented Silos

Data trapped across tables, attributes, disconnected systems, and tribal knowledge.

Misaligned Decision-Makers

Conflicting interests and distinct metrics lead to discord. Objective analytics are replaced by subjective instincts.

The Execution Gap

A complete disconnect between high-level strategic planning and lower-level tactical delivery.

The era of manual report building is over.

“Where’s the business analytics?! Not vanity metrics.”

Data Hunting (Legacy)

Data Gatherer & Spreadsheet Maintainer.

Subjective instincts and incomplete tribal knowledge.

“Peanut butter spread” of IT allocations.

Static, disconnected Jaspersoft domains requiring custom SQL.

Role of SPM Practitioner

Decision Basis

Financial Tracking

Reporting Output

Strategic Advising (Future)

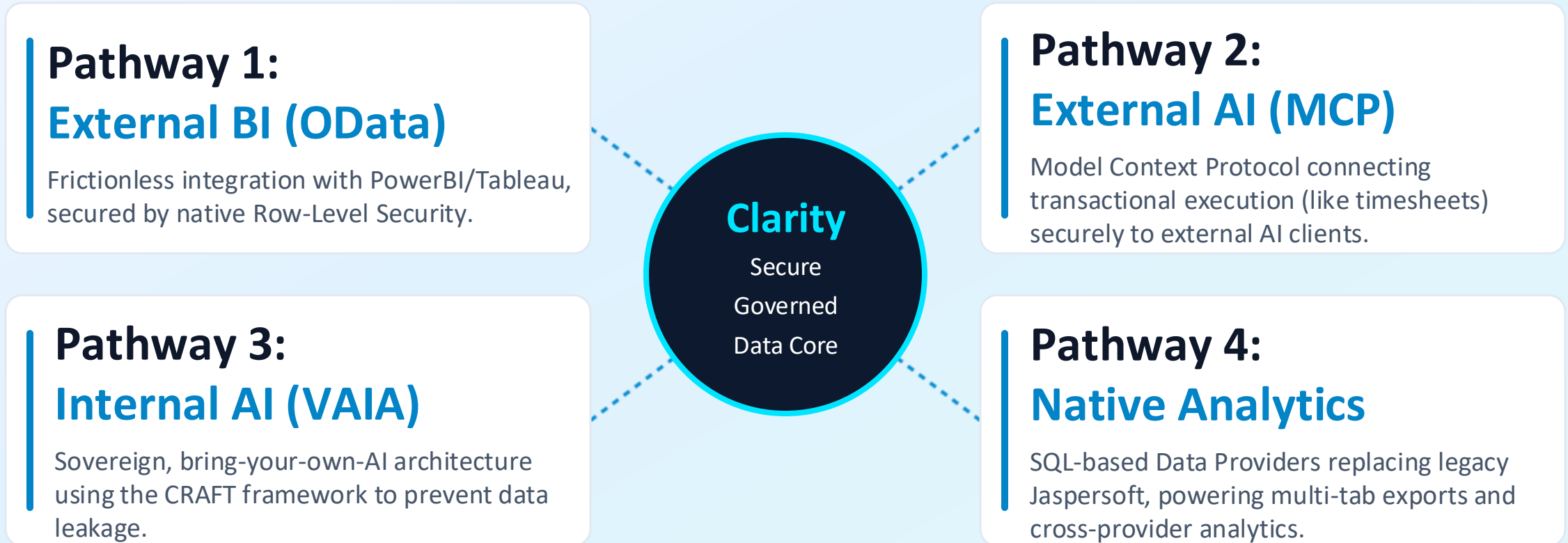
High-Value Strategic Advisor.

Objective analytics and governed digital modeling as it directly drive business outcomes.

Granular Strategic Portfolio Management and bottom-up TCO per business unit.

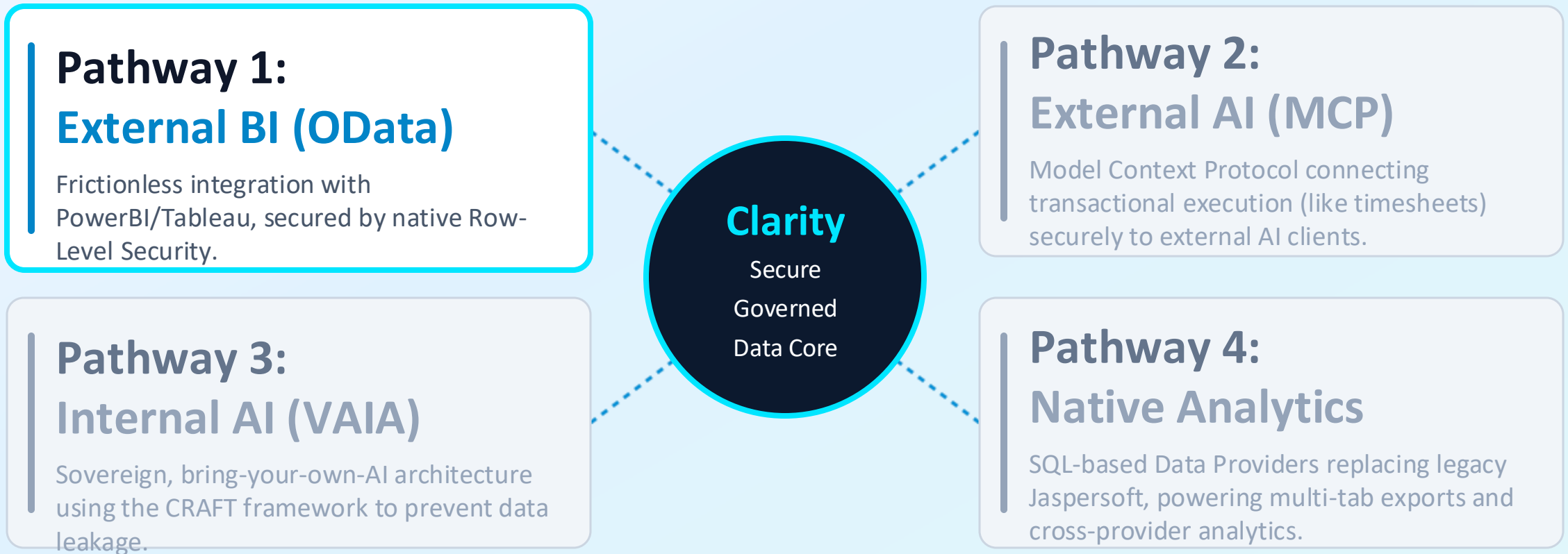
Self-service, automated AI narratives and cross-provider intelligence.

The Engine of the Self-Service Executive Culture





The Engine of the Self-Service Executive Culture



Pillar 1 : Liberating data without compromising security nor governance

The RLS Security Funnel

The Old Way

Report designers had to manually join security tables to protect data.

The OData Way

Row-Level Security (RLS) is built directly into the REST endpoints.

How it Works

Access to the data without compromising governance. Security filtering occurs at the database query level. Users only extract the exact records they are authorized to view, bypassing the need for complex, manual governance in the BI tool.

Active View: `DWH_INV_SECURITY_V`



DEMO

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TOPIC AT HAND:
[AI Innovation in Urban Systems]

VALUEOPS POWER:
INSIGHTS, EFFICIENCY, RESULTS!

Mike

Stephanie

UNLEASH THE POWER! SEE HOW **VALUEOPS** TRANSFORM THE TOPIC AT HAND INTO EXCITEMENT & ACTIONABLE INSIGHTS!

PRESENTATION DEMO

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Pathway 1: External BI (OData) Benefits



ODATA ENGINE

Frictionless integration connecting your governed database core directly to premium BI tools like PowerBI and Tableau.

Frictionless PowerBI & Tableau Integration

Direct connection bypasses legacy intermediate files, enabling real-time executive dashboarding with zero manual export friction.

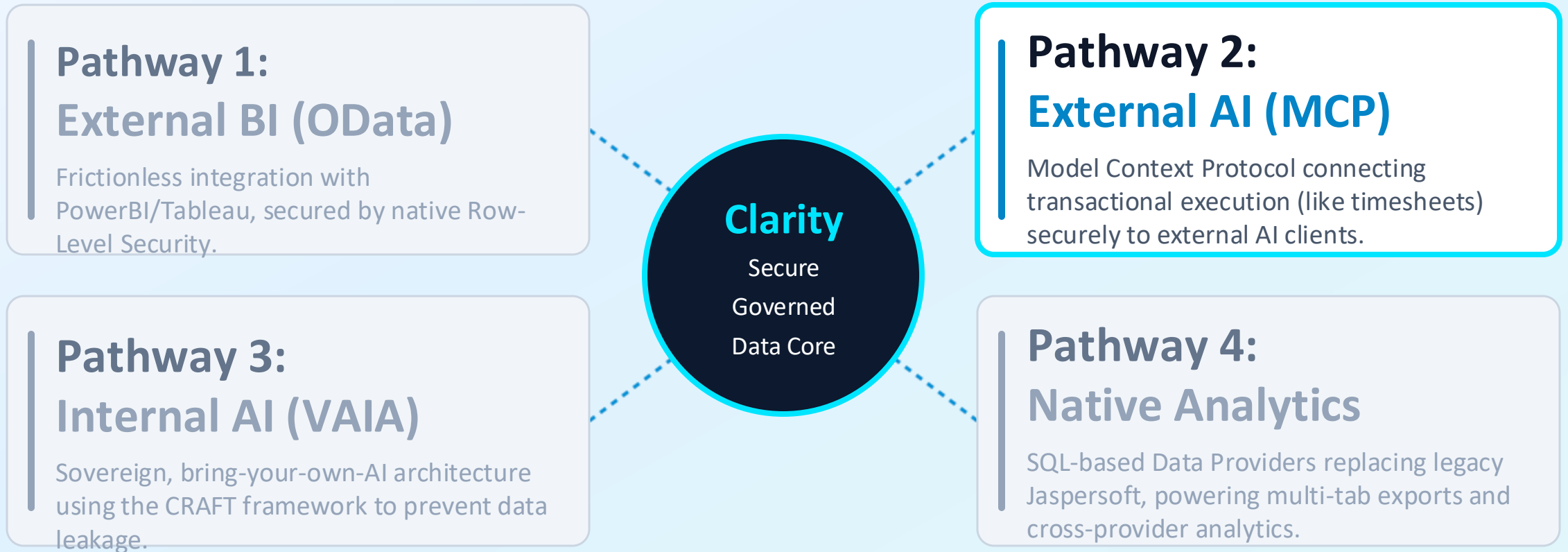
Native Row-Level Security (RLS)

Security is enforced at database level so users only extract data they are authorized to view, eliminating complex manual governance in BI tools.

Sovereign & Governed Data Core

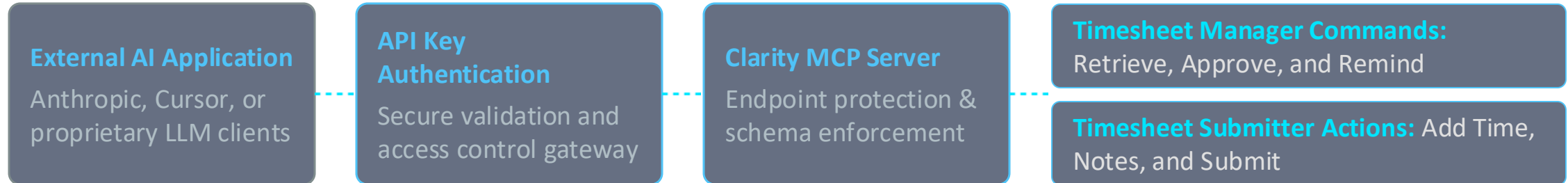
Ensures a single source of truth directly from Clarity's secure database views (such as DWH_INV_SECURITY_V) without risking data leakage.

The Engine of the Self-Service Executive Culture



Pillar 2: Bridging external AI clients with secure, transactional execution.

Command Flow



MCP Capabilities

Timesheet Managers

Timesheet Managers can automatically Retrieve, Approve, and Send Reminders via natural language prompts, simplifying team administrative workflows.

Timesheet Submitters

Timesheet Submitters can automatically Add Time, Add Notes, and Submit hours via conversational AI interfaces without opening the full UI.

Why Do We Need ValueOps?

Evaluating why standalone AI agents cannot replace a purpose-built strategic execution platform

ValueOps is purpose-built to align strategy, work planning, execution, and continuous reporting.

Your team members' time, the company's money, and your good standing with government compliance regulations are at stake.



SPM Governance

An automated, objective operational model that aligns enterprise capital, technology, and human capacity with strategic business outcomes.

Establishes real-time decision guardrails and eliminates manual bias.



Data Context

Organizations suffer from extreme data fragmentation across thousands of legacy systems and operational silos.

How will AI reliably make sense of 2,600+ different status values without built-in context?



Complex Finance

AI lack time-state awareness and ignore costing parameters. Binary floating-point math introduces ledger drift.

Corrupts rate calculation formulas and compromises strict audit precision.



Data-Level Security

Generative LLMs consistently fail to construct reliable row-level access boundaries autonomously.

Directly introduces high risks of enterprise data exposure and compliance leaks.

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MCP Server in action

Developer Persona: Viewing user

clarity

Tasks

Task Status

50%

50%

Not Started

Started

Late Tasks

1

Select all Deselect all

Group by

Tasks	Investment
C...	Name ↑
☐	ABLE Payments Module
☐	Relocate Infrastructure to Las Vegas Data C...
☐	Relocate Infrastructure to Las Vegas Data C...
☐	Relocate Infrastructure to Las Vegas Data C...
☐	Relocate Infrastructure to Las Vegas Data C...
☐	Relocate Infrastructure to Las Vegas Data C...

Tasks	Assigned Resources
Name *	
Database Development	Arpel, Ian; Berry, Jason; S...
Risk Response and Mitigation Plan	Arpel, Ian
Complete Project Plan	Arpel, Ian; Perez, Carlos
Database Development	Arpel, Ian; Preston, Sarah
Usability and User Acceptance Testing	Arpel, Ian; Krishna, Arun
Lessons Learned	Arpel, Ian; Perez, Carlos

File Edit Selection View Go Run Terminal Help

MCP_Testing

Clarity capabilities list

show me the tasks assigned to me for the current week

Fetching Weekly Tasks 5s

Ran Timesheet Submitter in Clarity

Retrieving Assigned Tasks 3s

Ran Timesheet Submitter in Clarity

Use Allowlist

Listing Weekly Tasks 1s

Here are the tasks assigned to you for the current week:

1. Database Development

2. Risk Response and Mitigation Plan

3. Complete Project Plan

4. Database Development (Note: You have two separate tasks named "Database Development", likely across different projects)

5. Usability and User Acceptance Testing

6. Lessons Learned

These tasks are all currently open for time entry. Let me know if you'd like to add time to any of them!

MCP Server in action

Developer Persona: Add tasks to timesheet

File Edit Selection View Go Run Terminal Help

MCP_Testing

Clarity capabilities list

add my assigned taks to my timesheet for the current week

Submitting tasks for timesheet 4s

Ran Timesheet Submitter in Clarity

Use Allowlist

I have successfully added your assigned tasks to your timesheet for the current week. your timesheet with 0 hours, ready for you to enter your time.

Search Agents...

New Agent

Agents

Clarity capabilities list

Read timesheet_submitter.json, ti...

Older

Assigned tasks for current week

Read timesheet_approver.json, tim...

clarity

Timesheets

My Timesheet Review & Approve Timesheets

Time Period

Apr 20 2026 - Apr 26 2026

Status

Open

HOURS

0.00/40.00

PROJECT TIME

0%

Select Resource

Submit

Notes

Collapse all

Add Tasks

Remove Tasks

Name	Team	Entry Method	Mon. 20	Tue. 21	Wed. 22	Thu. 23
ABLE Payments Module (PR2009)						
Database Development (LM.003.010)		Manual				
Construction Phase						
Relocate Infrastructure to Las Vegas Data Center (PR2011)						
Complete Project Plan (LM.001.050)		Manual				
Planning Phase						
Risk Response and Mitigation Plan (LM.001.030)		Manual				
Planning Phase						

MCP Server in action

Developer Persona: Add time to timesheet

File Edit Selection View Go Run Terminal Help MCP_Testing

Search Agents...

New Agent

Agents

Clarity capabilities list Now

Read timesheet_submitter.json, tl...

Order

Assigned tasks for current week 33d

Read timesheet_approver.json, tim...

Clarity capabilities list

Add 8 hours for monday, tuesday, and wednesday to "Database Development" task , and 8 hours to "Complete Project Plan" for the remainder of the week.

Ran Timesheet Submitter in Clarity

Ran Timesheet Submitter in Clarity

Ran Timesheet Submitter in Clarity

Ran Timesheet Submitter in Clarity

Ran Timesheet Submitter in Clarity

Ran Timesheet Submitter in Clarity

Ran Timesheet Submitter in Clarity

Ran Timesheet Submitter in Clarity

Use Allowlist

I have successfully updated your timesheet with the requested hours:

Database Development: Added 8 hours for Monday, Tuesday, and Wednesday.

Complete Project Plan: Added 8 hours for Thursday and Friday (the remainder of the standard work week).

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Timesheets

My Timesheet Review & Approve Timesheets

Time Period Apr 20 2026 - Apr 26 2026 Status Open

HOURS 40.00/40.00 PROJECT TIME 100%

Select Resource Sub

Collapse all Add Tasks Remove Tasks

Name	Team	Entry Method	Mon. 20	Tue. 21	Wed. 22	Thu. 23	Fri. 24
ABLE Payments Module (PR2009)							
Database Development (LM.003.010) Construction Phase		Manual	8.00	8.00	8.00		
Relocate Infrastructure to Las Vegas Data Center (PR2011)							
Complete Project Plan (LM.001.050) Planning Phase		Manual				8.00	8.00
Risk Response and Mitigation Plan (LM.001.030) Planning Phase		Manual					

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MCP Server in action

Developer Persona: Timesheets Pending Approval

File Edit Selection View Go Run Terminal Help MCP_Testing

Search Agents...

New Agent

Agents

- Clarity capabilities list Now
 - Read timesheet_submitter.json, ti...
- Assigned tasks for current week 33d
 - Read timesheet_approver.json, tim...

Clarity capabilities list

show me all the timesheet submitted for approval for the current week. list who submitted the timesheet and how many hours per timesheet

Retrieving Timesheet Data 2s

Ran Timesheet Approver in Clarity

Use Allowlist

Here are the timesheets submitted for approval for the current week:

- 1. Blair Ives: 40 hours
- 2. Ian Arpel: 40 hours
- 3. Paul Lewis: 40 hours
- 4. Tom Morris: 40 hours

clarity

Timesheets

My Timesheet Review & Approve Timesheets

Time Period

Apr 20 2026 - Apr 26 2026 Open

Search or Filter...

RESOURCE	136	OPEN	4	SUBMITTED	2	APPROVED
Blair Ives Engineer HRS 40.00/40.00				👍 👎		
Ian Arpel Business Analyst HRS 40.00/40.00				👍 👎		
PL Paul Lewis Product Owner HRS 40.00/40.00				👍 👎		
Tom Morris Architect HRS 40.00/40.00				👍 👎		

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MCP Server in action

Developer Persona: Timesheet Approval

File Edit Selection View Go Run Terminal Help MCP_Testing

Search Agents...

New Agent

Agents

- Clarity capabilities list 2m
 - Read timesheet_submitter.json, tim...
- Assigned tasks for current week 33d
 - Read timesheet_approver.json, tim...

Older

Clarity capabilities list

approve Paul Lewis timesheet for the current month

Ran Timesheet Approver in Clarity

Ran Timesheet Approver in Clarity

Ran Timesheet Approver in Clarity

Ran Timesheet Approver in Clarity

Ran Timesheet Approver in Clarity

Ran Timesheet Approver in Clarity

Use Allowlist

I have successfully approved all of Paul Lewis's pending timesheets for the current month of April 2026. This included 4 timesheets corresponding to the weeks ending on April 12th, April 19th, and April 26th.

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Timesheets

My Timesheet Review & Approve Timesheets

Download

Filter 5

Calendar

Chart

Dropdown

View Default View

Match filters All Any Add filter groups

- Employment Type = Employee
- Status = Approved
- Resource Name = Lewis, Paul

+ Add filter

AND

- Time Period Is Open = Yes
- Time Period = 06-APR-26 - 12-APR-26; 13-APR-26 - 19-APR-26; 20-APR-26 - 26-APR-26

Select all Deselect all

Group by

	Notes	Resource Name	Time Period Start Date	Status	Total	Posted Time
☐		Lewis, Paul	Apr 6, 2026	Approved	40	
☐		Lewis, Paul	Apr 13, 2026	Approved	40	
☐		Lewis, Paul	Apr 20, 2026	Approved	40	

Pillar 2: External AI (MCP) Benefits

01

Secure Protocol Gates

Enforces strict API Key authentication and endpoint schemas. It provides robust validation and an access control gateway between external AI clients and core systems.

02

One Sample Use Case: Manager Automation

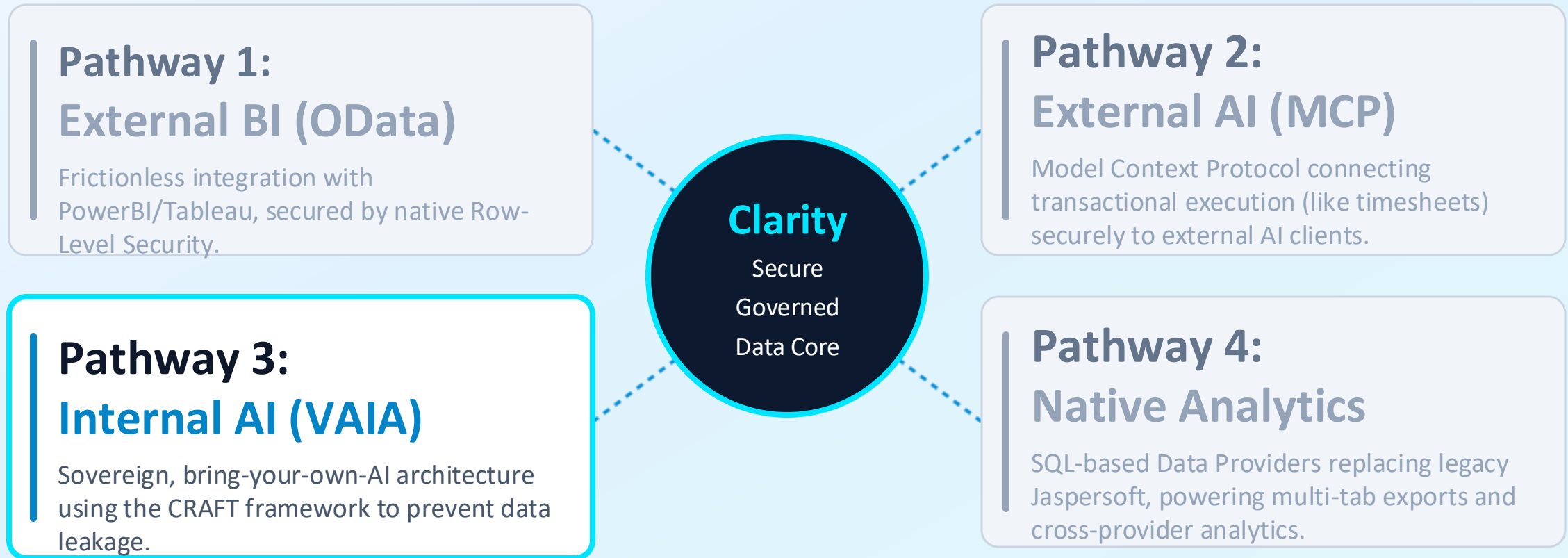
Allows Timesheet Managers to automatically retrieve, approve, and send submission reminders using conversational natural language prompts, bypassing complex UI forms.

03

One Sample Use Case: Submitter Simplification

Enables team members to directly add time, write descriptive notes, and submit timesheets via secure, conversational AI interfaces on their preferred chat clients.

The Engine of the Self-Service Executive Culture



Pillar 3: Deploying sovereign AI that interprets data instead of just displaying it.

Bring-Your-Own-AI

Seamlessly integrate Google Gemini, OpenAI, or Microsoft Azure Copilot, Anthropic to leverage your preferred LLM provider.

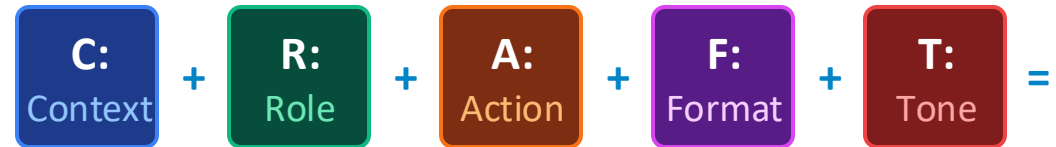
AI Governance & AI Cost Control

Granular tracking of Max Tokens and Temperature limits to optimize query costs directly linked to business units.

Max Tokens: **200 - 100** | Temperature: **0 - 50**

Sovereignty

Grounded solely in explicit Clarity data; zero training of public models on proprietary customer IP.



Governed AI Insight

The CRAFT framework guarantees alignment and security.

Empowers administrators to build highly specific, restricted AI Agents rather than unpredictable open-ended chatbots.

Translating raw telemetry into executive-ready narratives.

Input (Raw Data)

Schedule Status

Needs Help

High Priority Risks

1

Open To-Dos

67%



The Engine

AI Status Narrative Generator

(Gemini, Copilot, etc.)

Output (Executive Summary)

Instead of manually typing variances, the AI drafts a professional narrative of health, accomplishments, and roadblocks.

Generated Draft

"There are some scope and schedule concerns, specifically regarding the database migration timeline, which may impact upcoming milestones. However, financial health remains strong with recent accomplishments..."

Bonus Capability: AI Roadmap Summarization instantly extracts key metrics, approaching deadlines, and dependency conflicts directly from visual timeline data.

DEMO

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Stephanie

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PRESENTATION DEMO



Pillar 3: Sovereign AI Key Benefits

01

Bring-Your-Own-AI

Seamlessly integrate your preferred LLM provider, including Google Gemini, OpenAI, Microsoft Azure Copilot, or Anthropic, to leverage custom corporate architectures.

02

Security, Control & Governance

Build, manage and use VAIA in a way that works for your executive culture. Access data without sacrificing governance.

03

Guaranteed Sovereignty

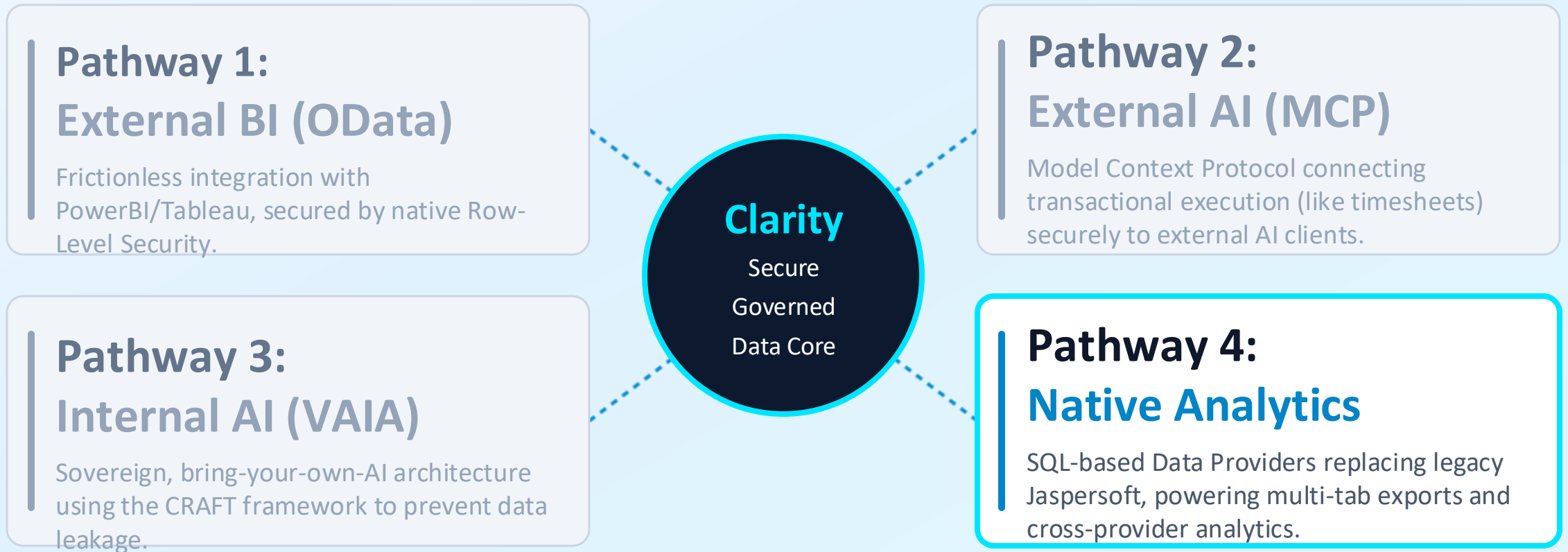
Ensure absolute data privacy. Ground your AI operations solely in explicit Clarity data, with zero training of public models on your proprietary customer IP.

Pro tips

Use Vaia to Improve Data Quality - to improve, govern data quality, consider using Vaia to identify data quality anomalies.

Prompt Effectively – Consider the CRAFT framework to ensure quality outputs (Context, Role, Audience, Format, Task/Tone)

The Engine of the Self-Service Executive Culture



Pillar 4: Eliminating reporting silos with limitless, native Data Providers. *Results: Faster to generate, Automated, Accurate*

Legacy State

Jaspersoft Domains

- Rigid, required desktop Report Studio
- Limited by single data sources
- Heavy custom SQL requirements

Modern State

Data Providers

- **Browser-based:** Object-driven building blocks directly querying the Clarity Data Warehouse.
- **Limitless Integration:** No limitation on the number of Data Providers used in a single report.
- **Cross-Provider Intelligence:** Automatically generates filters across multiple providers (e.g., merging Project, Risk, and Financial data).
- **Output:** Exportable multi-tab formatted Excel and PDFs directly from the UI.

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PRESENTATION DEMO

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Pillar 4: Limitless Native Reporting Benefits

Get more out of Clarity reporting with less effort

01

Browser-Based Authoring

Eliminate the rigid desktop Report Studio requirement. Author reports directly in the browser using object-driven building blocks connected straight to the Clarity Data Warehouse.

02

Limitless Integration

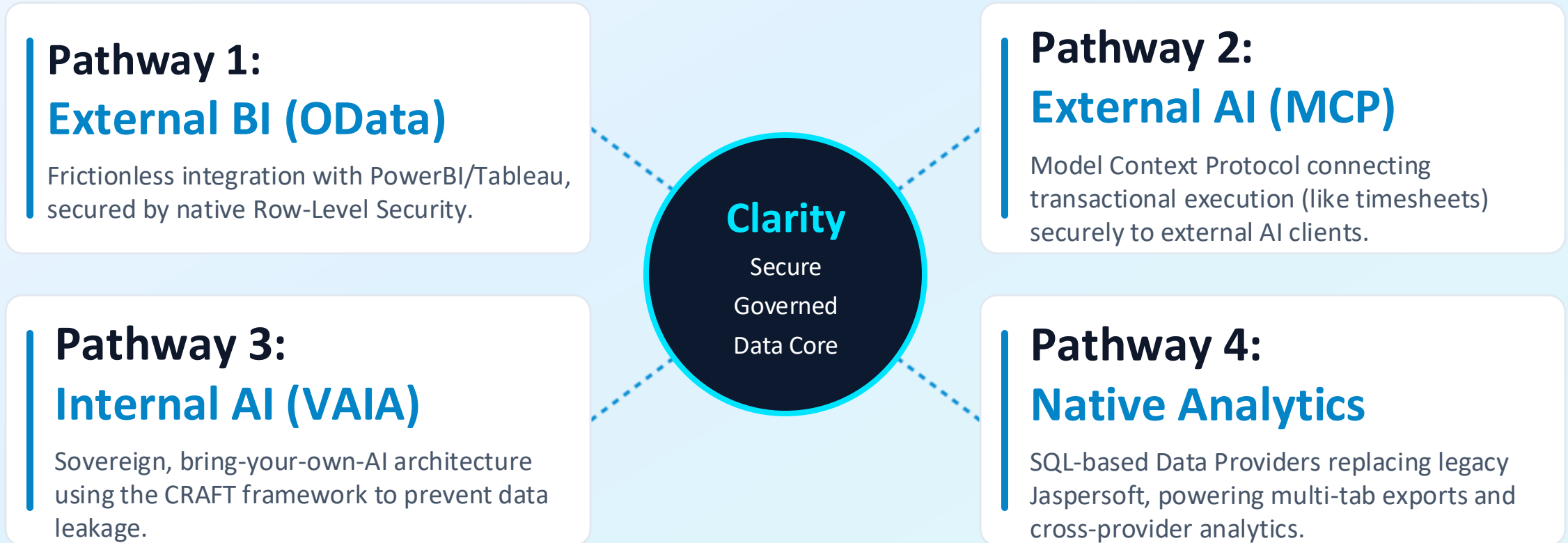
Consolidate data easily by querying limitless native Data Providers. Combine and filter complex project, risk, and financial data automatically into a single, unified view. Easy drill down functionality.

03

Automated High-Value Output

Generate instant, accurate exports with no manual custom SQL required. Export rich, multi-tab formatted Excel workbooks and PDFs natively directly from the user interface.

The Engine of the Self-Service Executive Culture



Empowering every leader to “Self Service” reporting & analysis

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REVEALING THE NUANCE: BEYOND REPORTING TO INTELLIGENCE

Strategic Portfolio Management:
Reporting vs. Vaia-Driven Analysis & Recommendations

Mike:
Capturing
the Data



Mike



Stephanie:
Interpreting
the Data &
Finding Actions



Stephanie

**VALUEOPS TRANSFORMS SPM: UNLOCKING HIDDEN NUANCE,
ACTIONABLE INSIGHTS, AND SUPERIOR STRATEGIC OUTCOMES WITH AI!**

Intelligent Portfolio

 ValueOps

Questions & Answers



Audience Q&A

The floor is open for your questions.

We invite you to share your thoughts, ask about scenario planning, or discuss organizational challenges.

Presenter Contacts:

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Stephanie Harris

stephanie.harris@broadcom.com



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We are hosting one-on-one deep dives, custom platform walkthroughs, and technical live demonstrations.

Questions?



Survey



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Certifications

Build recognized Clarity expertise.
Complete 10 eligible learning units
within a certification track.



**Best Practice
Clarity Administrator**



**Best Practice
Clarity Lead**

Professional Specializations

Deepen your skills in focused topic areas.
Complete 4 eligible learning units within a selected
specialization, with the option to earn multiple
specializations.



**Artificial
Intelligence (AI)**



**Reporting &
Analytics**



Technical



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- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Provider = **Rego Consulting**
- Class Name = **Rego University**
- Course **Description**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**



Let us know how we can improve! Remember to fill out the class survey.



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