



Vaia in the Wild: How AI is Actually Transforming Portfolio Decisions Today

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**The traditional approach to SPM is broken
because it relies on human cognitive limits.
We currently ask humans to build, evaluate,
and compare complex resource scenarios
with limited bandwidth.**



THE CORE PROBLEM



21st-Century Market Complexity Cannot Run on 20th-Century Tools

COGNITIVE CONSTRAINTS

HUMAN COGNITIVE LIMITS

The traditional approach to Strategic Portfolio Management (SPM) is fundamentally broken because it relies heavily on human cognitive limits. We currently ask humans to build, evaluate, and compare complex, multi-variable resource scenarios with limited bandwidth, consolidating operational disconnects.

THE DISCONNECT

OUTDATED “SPREADSHEETS”

We are trying to navigate 21st-century market complexity using 20th-century portfolio management tools. Leadership sets ambitious goals but lacks visibility into ground-level progress because strategic planning relies on fragmented, lagging, and static manual reporting.



"High-level strategic vision fails to translate into daily frontline execution, creating a massive disconnect between strategy and daily operations."



Does this look familiar?



Manual Processes and Siloed Data

Despite the ideal vision, real-world Strategic Portfolio Management often breaks down due to systemic operational friction. Manual Processes and Siloed Data Cause SPM to Fail in Daily Operations



Siloed Data

Critical data remains siloed across disconnected spreadsheets and legacy tools.



Manual Reporting

Teams spend hours on manual status reporting rather than delivering value.



Approval Bottlenecks

Approval bottlenecks stall progress across key strategic initiatives.



Lack of Visibility

A lack of real-time visibility prevents decision-making.

Operational Reality: The reality is a fragmented ecosystem.

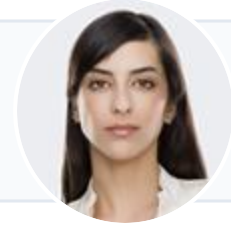
Human Cognitive Limits Sabotage Strategic Execution

Executive Lens

Sarah | EPMO Director
Strategic Alignment & Governance



Grace | Finance Leader
Financial Health & Integrity



The Daily Operations of SPM



Mike

Team Member

Executes daily tasks in his code editor.
Faces high context-switching friction
just to report timesheets.



Nicole

Project Manager

Drives project delivery and alignment.
Responsible for managing financials,
staffing, and deliverables.



Derrick

Resource Manager

Optimizes staffing and allocations.
Balances capacity across teams while
fighting outdated data.



Sid

Portfolio Manager

Vets ideas via email requests and
manages the operating model leading
to opaque prioritization and unverified
ROI without dynamic insights.

Human Friction Disrupts SPM Coordination



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

Vaia

The **ValueOps AI Agent**, the intelligent partner for ValueOps.

Built to empower a smarter journey from inspiration to realization, optimizing every step for speed and quality.



The Future of Clarity Vaia

Evolving beyond today's Clarity capabilities to redefine portfolio decision-making.

01

Present State

Clarity Today

The robust foundation of Vaia capabilities currently operational within Clarity, driving baseline automation and intelligence.

Vib's Session on Tuesday:
Clarity AI: Because
"Just Bumping
This" Isn't a
Strategy

02

In Development

Building Now

Active engineering of advanced AI modules to deepen context awareness and user empowerment across daily workflows.

03

Visionary Horizon

Where We're Headed

The strategic roadmap focusing on generative foresight and seamless ecosystem integrations to scale performance.

04

The Paradigm Shift

Transformation

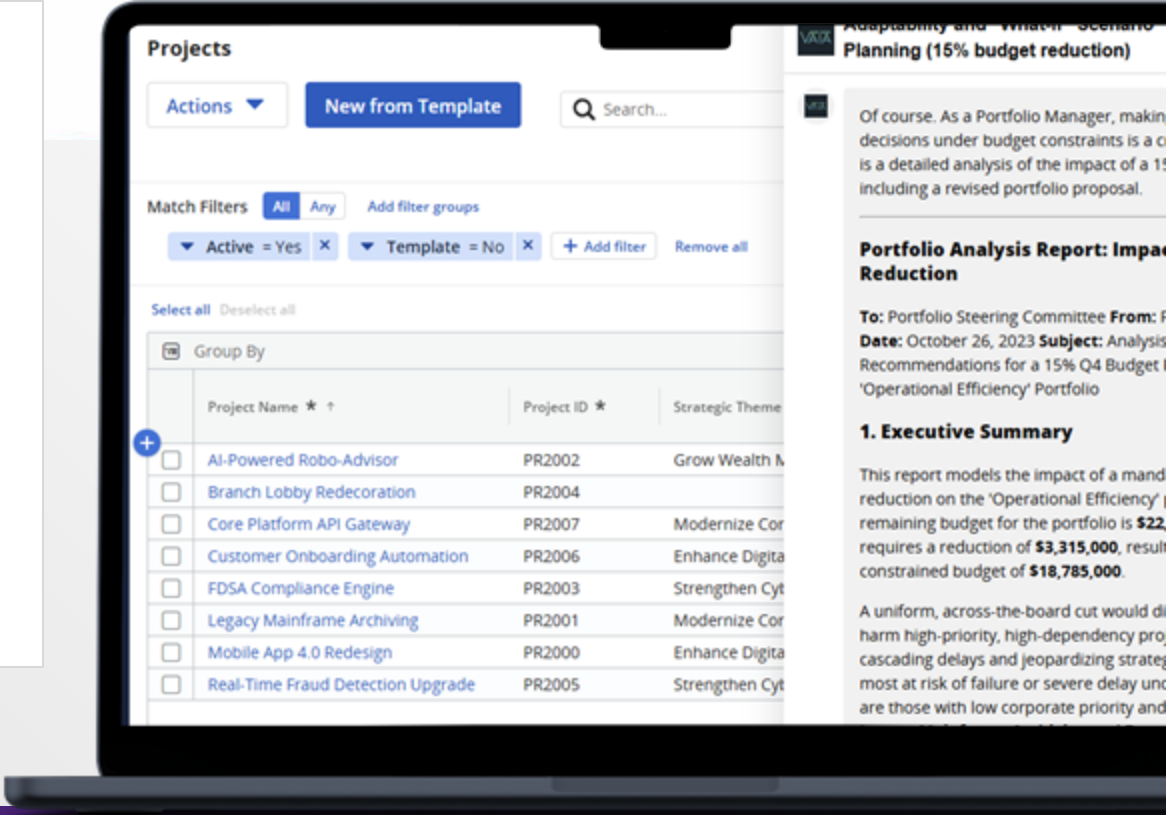
How these combined breakthroughs will radically reconstruct and optimize corporate portfolio decisions as we know them.

Today's Session

AI: North Star

Vision

Power the **next evolution** of **value creation** where **trusted AI** and human intelligence **unite to innovate** at the speed of imagination



Guiding Principles



Secure & Trustworthy

Specialized knowledge base of Domain knowledge and Customer knowledge.



Built-in Governance

Governance is built into all actions and activities done in our platform.



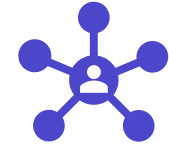
People First

Experiences built for all users of our platform to ensure seamless adoption.



SPM / VSM

Streamlining Inspiration to Realization aka our core Domain.

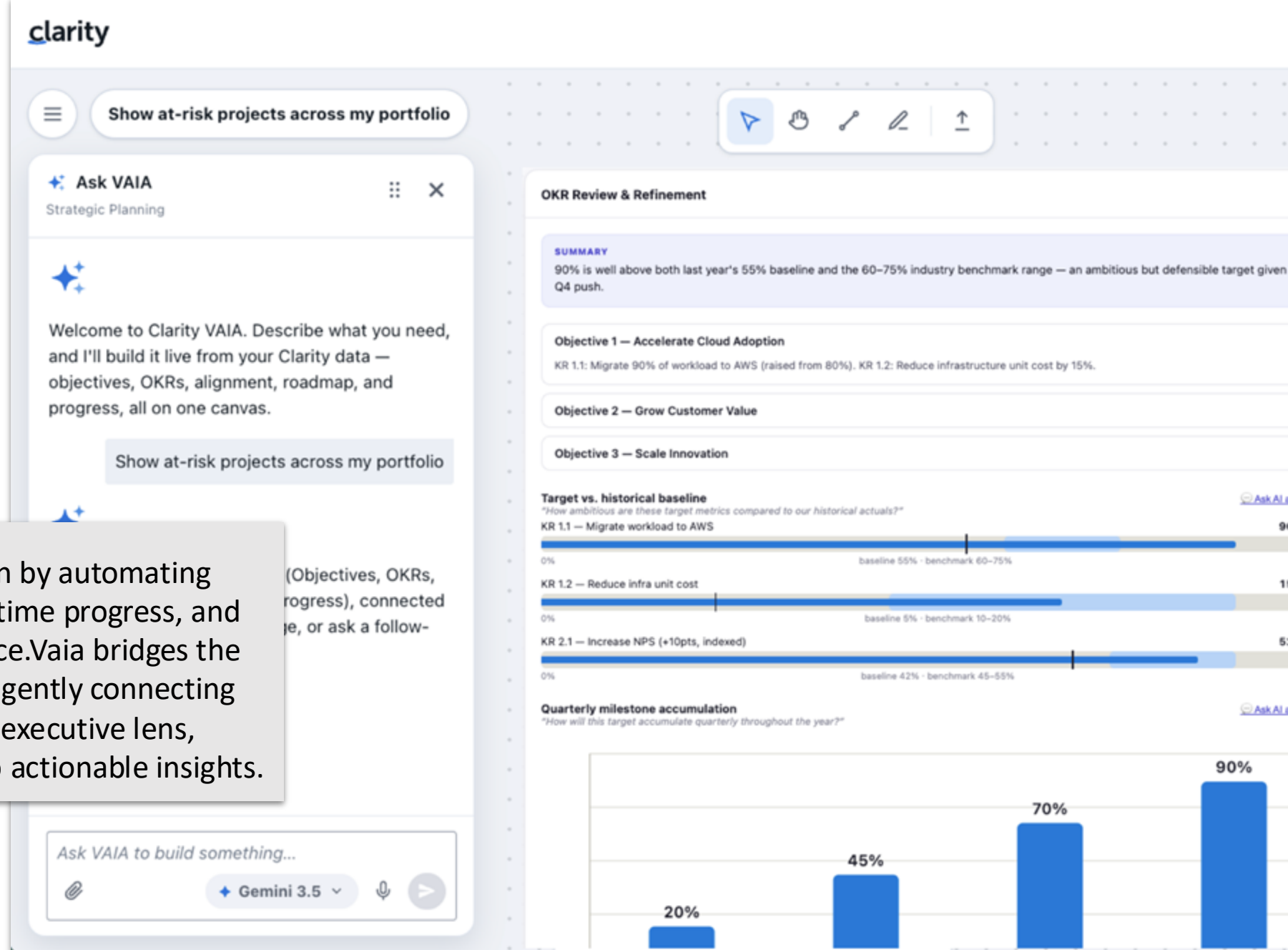


AI Ecosystem

Built to participate actively in the rapidly emerging AI ecosystem.

Clarity Vaia is the Industry's First Governed AI Engine for SPM

It directly addresses human friction by automating manual workflows, capturing real-time progress, and enforcing organizational governance. Vaia bridges the strategy-to-execution gap by intelligently connecting the operational personas with the executive lens, transforming fragmented data into actionable insights.



What Clarity VAIA Actually Is



Lives Inside Clarity

An AI teammate that lives inside Clarity, not a separate tool to learn or a chatbot bolted onto the side.



Plain English

You ask in plain English. It reads your real Clarity data and responds with a page built for your question, not a canned report.



You Control

It drafts, but never decides. Every single write to Clarity happens only after you review and click confirm.



Smarter Locally

It learns and gets smarter about your specific organization over time, not just smarter about general AI.

Built Around the Person Doing the Work



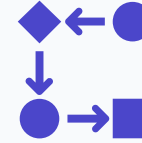
Portfolio Manager

Get a defensible, explainable ranking, and a real answer to 'why is this above that.'



Head of PMO

Turn any raw ask into a vetted idea and a placement decision in minutes, not weeks.



Chief Strategy Officer

See what you're actually funding, and keep every OKR, new or old, honest and measurable.



Resource Manager

Model capacity trade-offs before committing to new work, not after burnout sets in.



Business Analyst

Submit an idea by describing it in plain language, no rigid form required.

Strategic Planning: Accelerating Alignment

Sarah, Director of Portfolio Strategy

THE STRATEGIST

! Sarah's PAINS

Sarah battles with **static planning tools** and disjointed corporate goals.

Hours are wasted in **manual data aggregation** just to build outdated roadmap sequences.

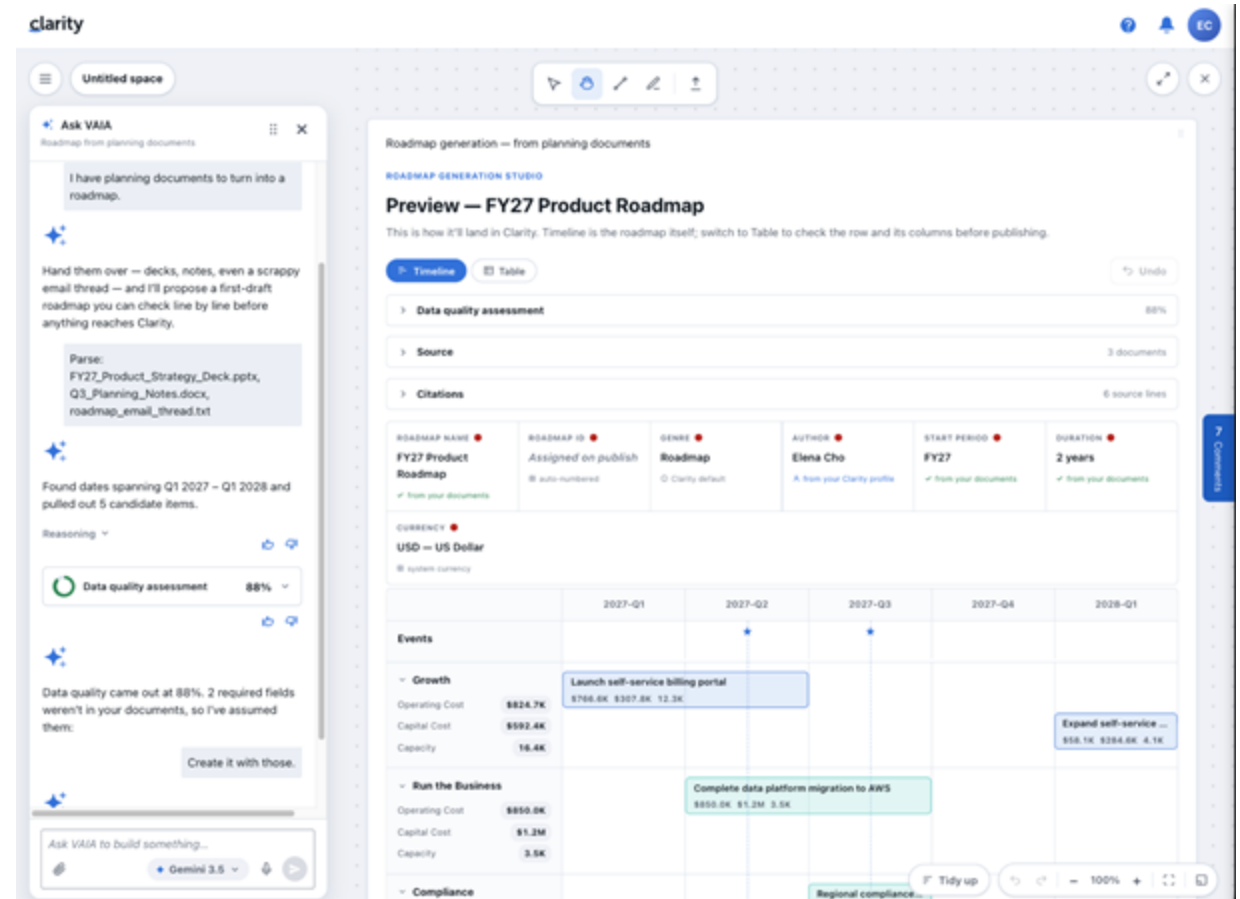
Clarity Vaia delivers **AI-driven goal extraction** directly from native executive strategy decks.

It automates **investment alignment** and translates static milestones into actionable plans (ex: Roadmaps).

The result is **accelerated alignment** and rapid enterprise-wide onboarding.

"Vaia finally aligns our executive vision with daily investment execution, cutting manual planning cycles to zero."

- Sarah, Director of Portfolio Strategy



JOB TO BE DONE (JTBD)

Transforming static C-suite decks into active, tracked investment portfolios.

AI Drives Intelligent Idea Vetting and OKRs for Portfolio Managers

| Sid, Portfolio Manager

| Objectives and Key Results

OUTCOME-BASED FUNDING

! THE CHALLENGE

Sid, the Portfolio Manager, faces **informal email intake** and **artificial project re-chartering**.

+ VAIA RESOLUTION

It also enables a true Product Operating Model by providing **continuous, outcome-based funding** for standing product teams and **auditing backlogs** for remediation.

| Idea Intake & Vetting

SHARED-SERVICE VISIBILITY

! THE CHALLENGE

Sid, the Portfolio Manager, faces **informal email intake** and **artificial project re-chartering**.

+ VAIA RESOLUTION

Clarity Vaia transforms Idea Intake by **automatically capturing, screening, and flagging** incoming proposals for strategic fit and shared-service impact.

Evaluating Multi-Year Portfolio Trade-Offs Before Committing Capital

Side-by-Side Scenarios

MULTI-YEAR MODELING

! THE CHALLENGE

Organizations face **tactical disruptions** and **arbitrary project cuts**, making it difficult to safeguard long-term strategic objectives.

+ VAIA RESOLUTION

Clarity Vaia leverages AI to model complex, **multi-year strategic scenarios**. Portfolio managers can model 'What-If' delivery variants and trade-offs side-by-side to guide budgets while **protecting critical funding floors**.

Impact & Commit

REAL-TIME EXECUTION

! THE CHALLENGE

Traditional plans suffer from a **disconnect from reality**, where static PowerPoint decks fail to reflect actual spending in execution systems.

+ VAIA RESOLUTION

Clarity Vaia provides **Instant Impact Calculation** live for OKRs and timelines, and always show previews **prior** to write approved scenarios back to Clarity so strategy and spend tell the same story.

The Executive Lens Empowers AI Governance, OKR Alignment, and Prioritization

01

Strategic OKR Alignment

Drafts OKRs: Automatically extracts draft metrics directly from strategic executive documents.

Quality-Checks: Validates structural consistency and direct alignment to high-level goals.

Tracks Progress: Monitors execution milestones continuously without manual bottlenecks.

02

Dynamic Prioritization

Reverse-Engineers Logic: Automatically decodes corporate priority rules to clear complexity.

Capital Allocation: Seamlessly guides annual portfolio budgets and dynamic planning.

Protects Floors: Safeguards critical funding floors from arbitrary project cuts.

03

Sentiment & AI Fencing

Sentiment Analysis: Detects artificial positivity bias in project status reports.

AI Fencing Controls: Establishes strict security guardrails around corporate data.

R&D Protection: Fully safeguards proprietary and highly confidential strategic work.

C-Suite Strategy to Secured Execution: The EPMO Director leverages Clarity Vaia to transition static executive vision into dynamic, tracked corporate assets.

Financial Management: Proving ROI and Business Cases

| CFOs, Portfolio Financial Managers

TARGET PERSONAS

! FINANCIAL PAINS

Financial managers grapple with **rigid budgets** and error-prone **manual financial tracking**.

This leads to completely **unproven ROI post-delivery**, hiding whether actual value was ever achieved.

✦ VAIA VALUE CREATION

Enable fluid governance with **dynamic capital shifts** that adjust to evolving priorities.

Achieve real-time accuracy via **automated cost tracking** directly linked to delivery.

Confirm strategic success with a **proven ROI** loop tied back to original business cases.

"Every business case promises a 300% ROI. But once the project delivers... nobody ever goes back six months later to check if we actually saved a single dollar."

- CFO / Portfolio Financial Manager

KEY CAPABILITIES

- **Cost & Benefit Planning:** Forecast spend and track actual benefits.
- **Actuals Posting & Reconciliation:** Reconcile actuals against planned costs automatically.
- **Capital Commitment & Burdening:** Apply overhead and depreciation rules.
- **Subscription Chargeback:** Tie SaaS/cloud spend to actual usage metrics.

☰ Show at-risk projects across my portfolio

✦ Ask VAIA
Strategic Planning

Welcome to Clarity VAIA. Describe what you need, and I'll build it live from your Clarity data — objectives, OKRs, alignment, roadmap, and progress, all on one canvas.

Show at-risk projects across my portfolio

✦ Done — 5 widgets generated (Objectives, OKRs, Investment Flow, Roadmap, Progress), connected in sequence. Drag to rearrange, or ask a follow-up.

Ask VAIA to build something...

✦ Gemini 3.5

OKR Review & Refinement

SUMMARY
90% is well above both last year's 55% baseline and the 60-75% industry benchmark range — an ambitious but defensible target given your Q4 push.

Objective 1 — Accelerate Cloud Adoption
KR 1.1: Migrate 90% of workload to AWS (raised from 80%). KR 1.2: Reduce infrastructure unit cost by 15%.

Objective 2 — Grow Customer Value

Objective 3 — Scale Innovation

Target vs. historical baseline
How ambitious are these target metrics compared to our historical actuals?*

KR 1.1 — Migrate workload to AWS
0% 100%
baseline 55% benchmark 60-75%
90% target

KR 1.2 — Reduce infra unit cost
0% 100%
baseline 5% benchmark 10-20%
15% target

KR 2.1 — Increase NPS (x10pts, indexed)
0% 100%
baseline 42% benchmark 45-50%
52% target

Quarterly milestone accumulation
How will this target accumulate quarterly throughout the year?*

20% 45% 70% 90%

☰ Hybrid Project, Program & Cloud/Contract Management

✦ Ask VAIA
Hybrid Project, Program & Cloud/Contract Man...

Before you lock this — I checked Resource Management data and R. Chen is already committed full-time on 2 other active projects (Customer Portal Revamp, Data Platform Modernization) during weeks 3-6, the exact window Data Migration & Validation needs them. Want me to suggest an alternate assignee before you lock the baseline?

Suggest an alternate assignee

M. Osei has open capacity during weeks 3-6 and has run 2 prior data-migration efforts — reassigning Data Migration & Validation to M. Osei.

↶ Revert this change

Lock this as the Schedule Baseline

Ask VAIA to build something...

✦ Gemini 3.5

Cloud Migration Phase 2 — Schedule (Draft)

6 tasks · dependencies mapped · not yet baselined

Columns 5/5 or drag a column header off the table to remove it

TASK	DEPENDS ON	DURATION	START	ASSIGNEE
Infrastructure Provisioning	—	2 wks	Wk 1	J. Alvarez
Data Migration & Validation	Infrastructure Provisioning	3 wks	Wk 3	M. Osei
Application Cutover Planning	Infrastructure Provisioning	2 wks	Wk 3	R. Chen
Integration Testing	Data Migration, Cutover Planning	2 wks	Wk 6	M. Osei
Stakeholder UAT	Integration Testing	1 wk	Wk 8	J. Alvarez
Go-Live Cutover	Stakeholder UAT	1 wk	Wk 9	R. Chen

Timeline

Infrastructure Provi...
Data Migration & Va...
Application Cutover...
Integration Testing
Stakeholder UAT
Go-Live Cutover

Tidy up

100%

Everything Easier — Starting With Day One



No New Tool

Clarity VAIA lives inside the Clarity you already use. There is absolutely nothing new to install or learn.



Easy Setup

Setup happens in conversation, not a manual. Define your prioritization scheme instead of starting with a blank page.



Zero Change

Value shows up the first time someone pastes in a raw ask instead of filling out a complicated form.



Instant Training

Training is simple. Just ask it a question instead of attending a multi-day workshop.

Complete Governance: Ask. Draft. Human-Confirm

Clarity Vaia operates on a strict trust model built around the person doing the work, ensuring that it **drafts, but never decides**.



STEP 1: YOU ASK

You Ask

Input natural language prompts, raw meeting notes, or strategic documents. You can hand it a raw request in whatever form it arrives—an email, a meeting note, or a one-line message.



STEP 2: VAIA DRAFTS

Vaia Drafts

Vaia reads your real data, drafts an answer, a record, or a recommendation, and shows its reasoning. You can always see what it inferred versus what it's still guessing at.



STEP 3: YOU CONFIRM

You Confirm

Nothing writes to Clarity until you review it and click confirm—every single time. No write operation ever touches Clarity without explicit human approval.

Built on Trust, Not Just Automation



Human Confirm

Every write to Clarity requires an explicit human confirm — nothing saves silently, ever.



Full Visibility

You can always see what it inferred versus what it's still guessing at.



Data Sovereignty

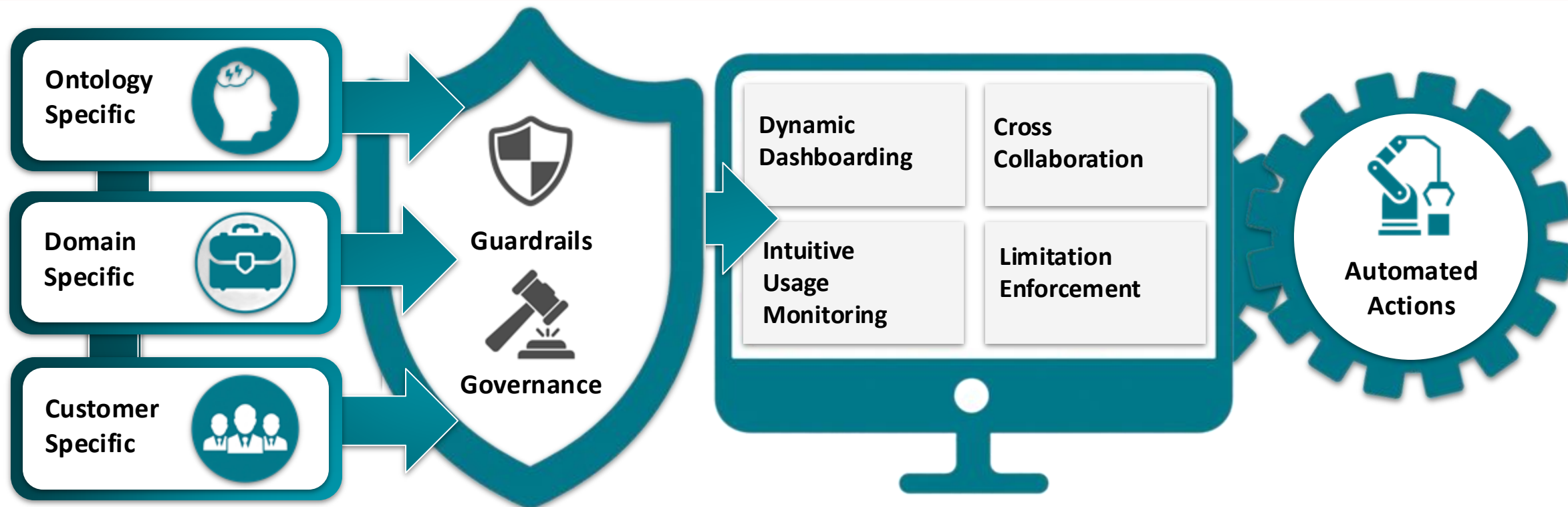
Your data stays yours, scoped to your tenant, with the same access boundaries you already have in Clarity today.



Calibrated by You

It's designed to be calibrated by you, not to override your judgment.

What makes us different?



Domain/Custom Guardrails and specific business ontologies **provide control** by ensuring the AI operates reliably within your rules.

Builds trust by providing **Auditable AI recommendations** tracing to your specific data sources with associated reasoning

Your data remains secure and isolated by design (**no external model training**)

Structured Workstreams ensure **Humans always retain final decision-making authority and accountability**

Delivers instant, data-backed answers to context/domain specific business questions

Automated Actions uniquely close the loop from insight to update by **allowing users to push AI-generated and human-approved content directly** into connected enterprise systems

THE SHORT VERSION

Today vs. With Clarity Vaia

This is not your average Vaia

TODAY (examples but not limited to)

- Ideas sit in an inbox until someone re-types them
- Prioritization logic nobody can fully explain
- Strategy deck and real spend tell different stories
- OKRs checked once, then forgotten
- Capacity is a guess until it's a crisis
- Status stitched together by hand, every cycle

WITH CLARITY VAIA (examples but not limited to)

- ✓ Any raw ask becomes a structured, vetted idea in minutes
- ✓ A prioritization model you've personally calibrated and can explain
- ✓ A plain-language answer to 'what are we really prioritizing'
- ✓ OKR quality checked continuously, not just at draft time
- ✓ Capacity trade-offs modeled before you commit, not after
- ✓ One page, correlated automatically, always current

Design Partnership: Co-Authoring the Future of AI-Driven Planning

STRATEGIC PLANNING

- **Roadmapping (Q4)**
Co-design automated roadmap creation directly from raw executive presentations and unstructured strategy docs.
- **OKRs from Data (Q4 Tentative)**
Generate and auto-audit objective structures and key results aligned directly to strategic files.
- **Ideation & Demand Intake**
Build smart intake forms that screen, structure, and categorize plain-text ideas into qualified backlogs.

CAPACITY PLANNING

- **Team Sequencing**
Model complex resource allocations and team priority sequencing past traditional human cognitive limits.
- **Scenario Comparison**
Draft and contrast visual "what-if" capacity trade-offs dynamically based on real-time execution changes.

HYBRID DELIVERY

- **Automatic Status Reports**
Eliminate manual compilation cycles with continuous, automated progress summaries pulled from native tools.
- **Risk & Issue Mitigation**
Intelligently predict bottlenecks, flag execution outliers, and auto-suggest corrective mitigation steps.

DESIGN PARTNERSHIP

Looking for Active Design Partners

We are seeking innovative portfolio leaders to co-develop, test, and calibrate these capabilities during this Program Increment (PI). Work directly with our product team to tailor the AI models to your real-world strategy workflows.

Design Partnership - What's Next

WHAT YOU DO

Discover: Participate in discovery research to help us learn about your goals, aspirations and frustrations

Validate: Provide feedback on a wide array of experience designs including storyboards, sketches, prototypes and working code

Test: Usability test prototypes and working code

WHAT'S IN IT FOR YOU

Steer: Directly shape the future of VAIA NextGen

Co-create: Exclusive collaboration with Product Designers on features and user interface design

Be in the know: When released, features will more likely fit with how you want to work

Questions?



Survey



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



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Rego is excited to continue our **certification programs**, designed to enhance your expertise in Clarity administration, leadership, and technical skills. These certifications provide hands-on experience and knowledge to excel in your career.



Certification Requirements:

✓ **Completion:** 12 units per certification track

✓ **Eligibility:** Open to all Rego University attendees



Important Reminder:

To have your certification **credits tracked**, ensure you **complete the class surveys in the app** after each session. This step is critical for certification progress.

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- 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**
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- Class Name = **regoUniversity**
- Course **Description**
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- Date Completed = **Today's Date**
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