Presenter: Lisamarie Manso, Lead Clarity Global Capabilities Team

September 17, 2020

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Agenda

- Why the new UX
- What resources are available so I can get up to speed?
- How do I begin?
- Demo
- Q&A

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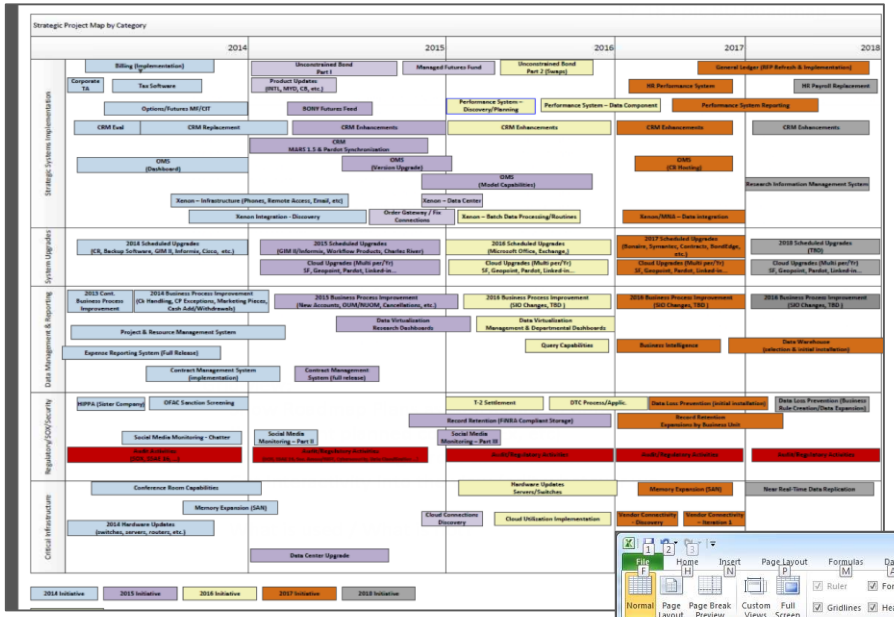
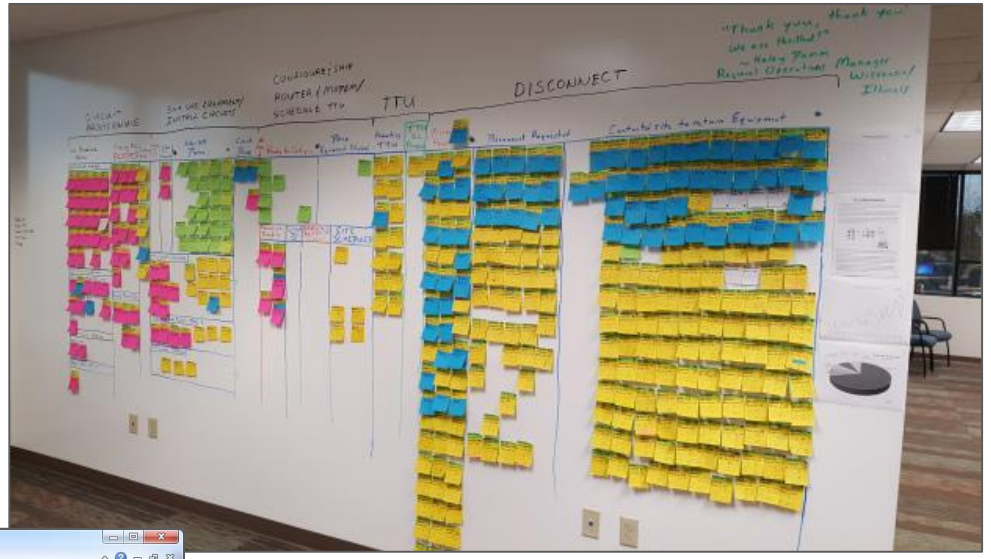
How you work today

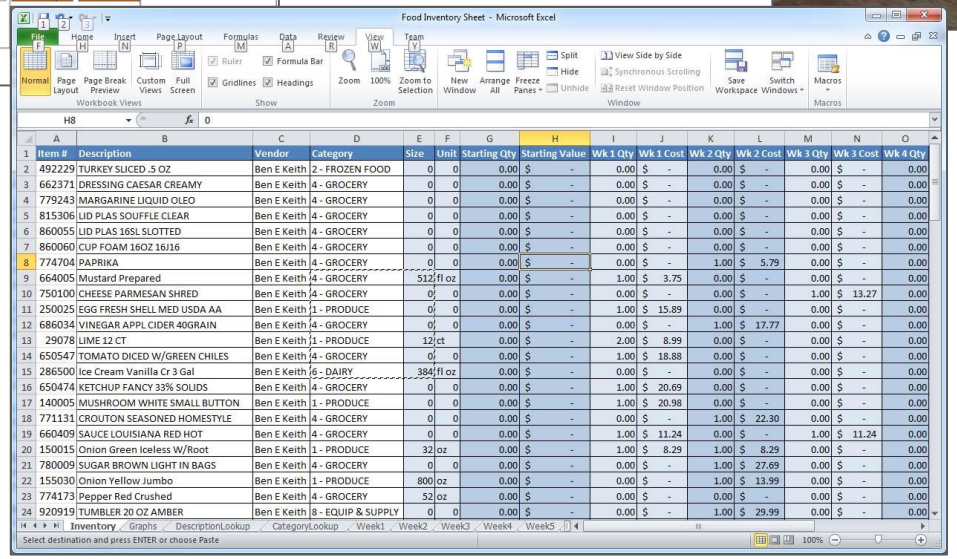
Common tools repeatedly cited by customers



Communicate



Manage the lifecycle



	Item #	Description	Vendor	Category	Size	Unit	Starting Qty	Starting Value	Wk 1 Qty	Wk 1 Cost	Wk 2 Qty	Wk 2 Cost	Wk 3 Qty	Wk 3 Cost	Wk 4 Qty
2	492229	TURKEY SLICED .5 OZ	Ben E Keith	2 - FROZEN FOOD	0	0	0.00	$ -	0.00	$ -	0.00	$ -	0.00	$ -	0.00
3	662371	DRESSING CAESAR CREAMY	Ben E Keith	4 - GROCERY	0	0	0.00	$ -	0.00	$ -	0.00	$ -	0.00	$ -	0.00
4	779243	MARGARINE LIQUID OLEO	Ben E Keith	4 - GROCERY	0	0	0.00	$ -	0.00	$ -	0.00	$ -	0.00	$ -	0.00
5	815306	LID PLAS SOUFFLE CLEAR	Ben E Keith	4 - GROCERY	0	0	0.00	$ -	0.00	$ -	0.00	$ -	0.00	$ -	0.00
6	860055	LID PLAS 16SL SLOTTED	Ben E Keith	4 - GROCERY	0	0	0.00	$ -	0.00	$ -	0.00	$ -	0.00	$ -	0.00
7	860060	CUP FOAM 16OZ 16J16	Ben E Keith	4 - GROCERY	0	0	0.00	$ -	0.00	$ -	0.00	$ -	0.00	$ -	0.00
8	774704	PAPRIKA	Ben E Keith	4 - GROCERY	0	0	0.00	$ -	0.00	$ -	1.00	$ 5.79	0.00	$ -	0.00
9	664005	Mustard Prepared	Ben E Keith	4 - GROCERY	512	fl oz	0.00	$ -	1.00	$ 3.75	0.00	$ -	0.00	$ -	0.00
10	750100	CHEESE PARMESAN SHRED	Ben E Keith	4 - GROCERY	0	0	0.00	$ -	0.00	$ -	0.00	$ -	1.00	$ 13.27	0.00
11	250025	EGG FRESH SHELL MED USDA AA	Ben E Keith	1 - PRODUCE	0	0	0.00	$ -	1.00	$ 15.89	0.00	$ -	0.00	$ -	0.00
12	686034	VINEGAR APPL CIDER 40GRAIN	Ben E Keith	4 - GROCERY	0	0	0.00	$ -	0.00	$ -	1.00	$ 17.77	0.00	$ -	0.00
13	29078	LIME 12 CT	Ben E Keith	1 - PRODUCE	12	ct	0.00	$ -	2.00	$ 8.99	0.00	$ -	0.00	$ -	0.00
14	650547	TOMATO DICED W/GREEN CHILES	Ben E Keith	4 - GROCERY	0	0	0.00	$ -	1.00	$ 18.88	0.00	$ -	0.00	$ -	0.00
15	286500	Ice Cream Vanilla Cr 3 Gal	Ben E Keith	6 - DAIRY	384	fl oz	0.00	$ -	0.00	$ -	0.00	$ -	0.00	$ -	0.00
16	650474	KETCHUP FANCY 33% SOLIDS	Ben E Keith	4 - GROCERY	0	0	0.00	$ -	1.00	$ 20.69	0.00	$ -	0.00	$ -	0.00
17	140005	MUSHROOM WHITE SMALL BUTTON	Ben E Keith	1 - PRODUCE	0	0	0.00	$ -	1.00	$ 20.98	0.00	$ -	0.00	$ -	0.00
18	771131	CROUTON SEASONED HOMESTYLE	Ben E Keith	4 - GROCERY	0	0	0.00	$ -	0.00	$ -	1.00	$ 22.30	0.00	$ -	0.00
19	660409	SAUCE LOUISIANA RED HOT	Ben E Keith	4 - GROCERY	0	0	0.00	$ -	1.00	$ 11.24	0.00	$ -	1.00	$ 11.24	0.00
20	150015	Onion Green Iceless W/Root	Ben E Keith	1 - PRODUCE	32	oz	0.00	$ -	1.00	$ 8.29	1.00	$ 8.29	0.00	$ -	0.00
21	780009	SUGAR BROWN LIGHT IN BAGS	Ben E Keith	4 - GROCERY	0	0	0.00	$ -	0.00	$ -	1.00	$ 27.69	0.00	$ -	0.00
22	155030	Onion Yellow Jumbo	Ben E Keith	1 - PRODUCE	800	oz	0.00	$ -	0.00	$ -	1.00	$ 13.99	0.00	$ -	0.00
23	774173	Pepper Red Crushed	Ben E Keith	4 - GROCERY	52	oz	0.00	$ -	0.00	$ -	0.00	$ -	0.00	$ -	0.00
24	920919	TUMBLER 20 OZ AMBER	Ben E Keith	8 - EQUIP & SUPPLY	0	0	0.00	$ -	0.00	$ -	1.00	$ 29.99	0.00	$ -	0.00

Get at the Numbers

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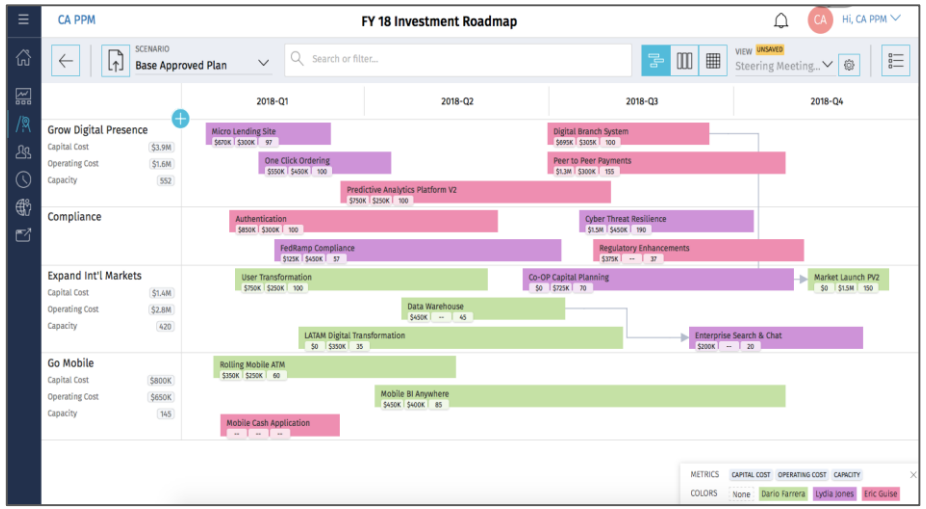
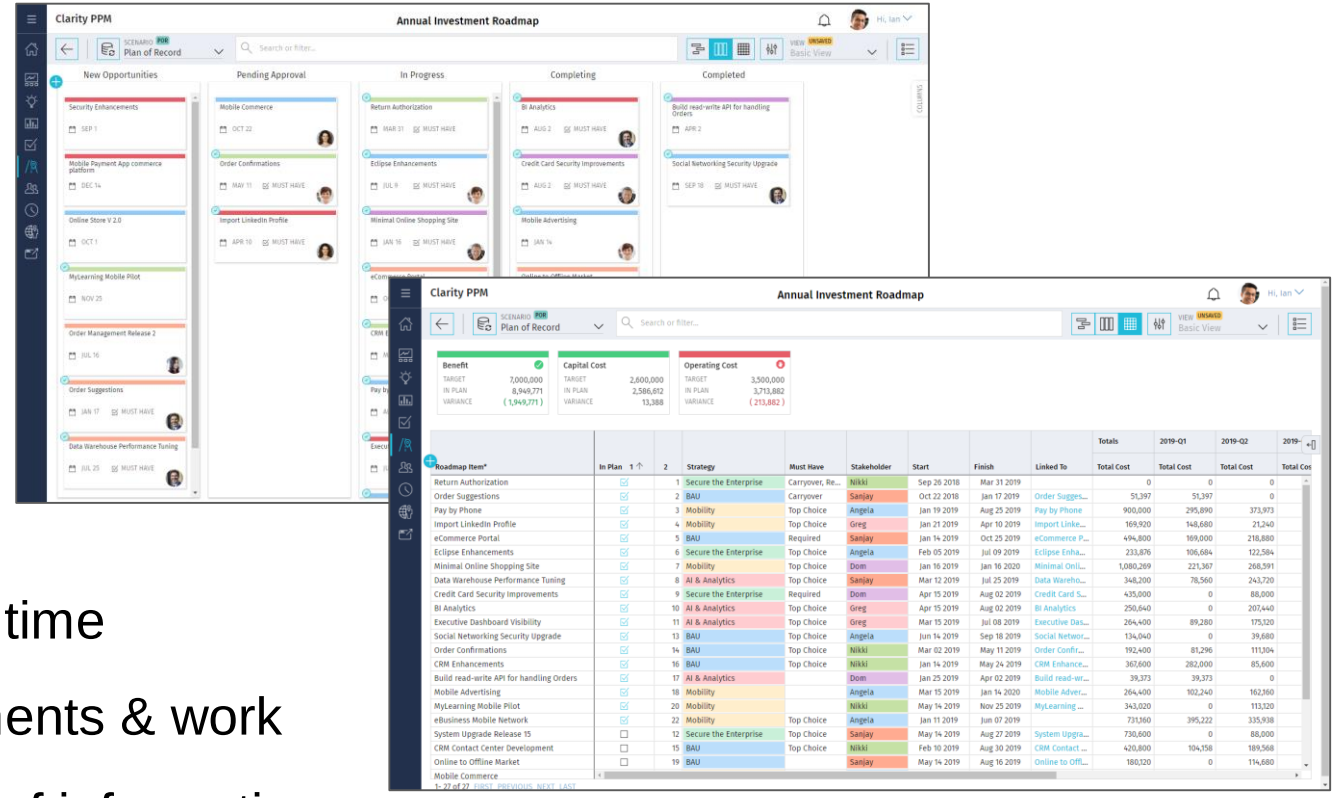
Tie them all together and you have something

PowerPoint® Slide, Excel® Sheet, and Trello® Board all reading the same data





- ☑ Timelines: Visualize and model work over time
- ☑ Boards: Manage the lifecycle of investments & work
- ☑ Grids: Simple data updates and entry of information

How People Work

Provide tools that work the way people do and you'll get adoption and acceptance. Don't focus on dashboards.
What do people use to manage their lives?

Clarity

The fastest way to innovate

SIMPLE

Get work done with one solution built for every role.

USABLE

Accelerate planning with strategic roadmaps.

POWERFUL

Make smarter decisions based on real-time data.

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Getting More Value from Clarity

- **Product Management Office Hours**
  - **Weekly** opportunity to consult with Product Management to ask questions and provide feedback
  - Every Wednesday at 11:15am ET for 90 minutes duration
  - Drop in & depart as you need; early preference will be given to EMEA customers
  - To be added to the Office Hours distribution, please provide your name, organization, and e-mail address to clarity@broadcom.com with the subject “Clarity Office Hours”

- **Customer Release Previews**
  - **Quarterly** presentation of new features & enhancements prior to General Availability (GA)
  - Keep up-to-date on the value being delivered as part of your investment in Clarity
  - To be added to the distribution list for Release Preview invitations, please send your name, organization and e-mail address to clarity@broadcom.com with the subject “Clarity Release Previews”

- **Ask the Experts**
  - **Biweekly** opportunity to consult with knowledgeable Clarity Global Capabilities system engineers
  - Every other Thursday at 11:00am ET for 60 minutes duration
  - Ideally, you bring your particular business problem to the call and have our consultants work with you to figure out the best solution given what you currently have available
  - To be added to the ‘Ask the Clarity Experts’ distribution, please provide your name, organization, and e-mail address to clarity@broadcom.com with the subject “Ask the Clarity Experts”

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BrightTALK Channel

- Recorded:
  - Panel Discussions with Brian Nathanson, Product Management
  - August 11th -- TDS Telecom (Joan Moen and Theresa Klindt) & AbbVie (Jennifer Hughs) “See Why Customers Love the New Clarity Experience”
  - August 27th – MSU (Jon Seeger), ConsorsBank (Andreas Renz) and Government of British Columbia (Will Lloyd) “Learn How Clarity Customers Embrace and Adopt the New UX”

- Upcoming:
  - Clarity Modern UX Adoption Practices
  - **Clarity New UX Administration Key Features**
  - What’s new in Clarity 15.9
  - Monthly Product Management End to End Demo

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How have others begun? What are the best practices?

- Guidance
  - Find a new opportunity to onboard new groups
  - Projects that have limited fields and modules are good place to start for the casual project manager
  - Consider implementing ideas and roadmaps during your annual planning process; identify the next “event” to help you have a target and gain momentum
  - Always engage a key stakeholder/user in the process – gain real world feedback, and make them a champion in the process
  - Make sure there is “something for everyone”…. Turn on Views right away so people can see the data they have been contributing
  - Reach new groups with Roadmaps bringing them out of classic ui and eliminate spreadsheets
  - Create your Tableau (or) executive dashboard to roll up executive level information
  - Stay connected with Broadcom – product management office hours and ask the experts – for continued weekly support
  - Perform a gap analysis – where do you want “to be”?
  - Look for quick wins – Phoenix ui, timesheets, roadmaps and blueprints

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Personas

Head of EPMO

WHAT KEEPS ME UP AT NIGHT?	• Bottom-up planning process, which is always too granular and slow • Lack of stakeholder engagement and shared understanding of the work • Not enough hours in the day
WHAT DO I OWN?	• Funding and headcount alignment in the portfolio • Provides insights for strategic pivots • Deliver superior outcomes based on business decisions
WHAT DO I WANT?	Prioritize investments based on value before beginning detailed panning. Enabling innovation and communication amongst a broad team. Provide clear picture of investments and visualize investments dependencies.

CIO/Executive/Innovation Chief

WHAT KEEPS ME UP AT NIGHT?	• How we can respond to change more quickly • Enterprise innovation • Visibility that investment are aligned to strategy • Too many things happening at once
WHAT DO I OWN?	• Business performance today and future • Business partners • Planning and delivering of business strategy
WHAT DO I WANT?	A top-down, integrated roadmap connecting capabilities being developed today with anticipated needs of the future. A complete picture of investments across multiple time horizon. A method of visualizing and communicating a proposed set of objectives.

Digital Product Manager

WHAT KEEPS ME UP AT NIGHT?	• Communicating product direction across multiple teams and geographies. • Constant updates of on-going and planned work • Provide relevant metrics to stakeholders
WHAT DO I OWN?	• Product budgeting, customer insights, product features, team management • Product planning and maximize return on investment • Application owner
WHAT DO I WANT?	Simple visual transparency to planned evolution of the product. Team collaboration and transparency of the product roadmap and vision. Not having to rebuild roadmaps in PowerPoint and Excel.

Ensure business goals are met through every project delivery.

- A PPM app that starts with the investment budget and plans down with a focus on business performance
- A PPM solution that enables clear focus on innovation, business goals and the enterprise roadmap, facilitating a common vision
- A PPM app that provides all stakeholders with all information in real time, presented in the way each individuals wants

Execute strategy to achieve all business goals every time.

- A PPM platform that directly connects decision with actions focused on achieving business goals. Adaptive planning tied directly to work adjustments
- A PPM app that provides real-time visibility into the entire portfolio in a context that is relevant to the audience
- A PPM app focused on investment management and value delivery, not a glorified project management tool focused on process and templates

Deliver innovative solutions that delight customers with every release.

- A PPM app that integrates product and project portfolios
- A PPM app that prioritizes top-down planning, anticipates change, and allows teams to pivot quickly
- A PPM app that supports the evolution from project management to product management

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Personas

Project Manager

WHAT KEEPS ME UP AT NIGHT?	• Keeping everyone informed • Tracking people down • Removing obstacles and roadblocks
WHAT DO I OWN?	• Initiation, planning, and design of projects • Execution, monitoring, controlling, and closure of a project
WHAT DO I WANT?	A common set of tools and a consistent approach. While reducing the amount of administrative overhead and increase visibility into her projects. Also, greater responsiveness, and improved ability to change.

Deliver projects on time and on budget with the limited resources.

- A single PPM app that lets you start with project, resource, and financial management, before adding new modules as needed
- A PPM app for team collaboration
- A PPM app with all essential, and fully automated, project reports and dashboards

Resource Manager

WHAT KEEPS ME UP AT NIGHT?	• Forecast changes in headcount • Poor visibility into staffing conflicts • Unplanned activities
WHAT DO I OWN?	• Getting the right people with the right skills • Managing resource demand with planning • Future outlook to develop capabilities and capacity
WHAT DO I WANT?	The ability to balance demand and capacity on the fly. Make better project selections with accurate team performance metrics. For the company to optimize its resource investments.

Optimize the company's best resources – Its people.

- A PPM app with real-time views of resource utilization
- A PPM app to manage time entered in any system
- A PPM app to identify needs based on resource skills, locations and availability

Financial Manager

WHAT KEEPS ME UP AT NIGHT?	• Having access to accurate, real-time data • Working with non-intuitive data systems • Creating her own tools
WHAT DO I OWN?	• Budgeting, projecting cash flows, and determining how to invest and finance projects • Financial projections, minimizing financial risks
WHAT DO I WANT?	End-to-end financials for cost plans. Deep financial details into projects with the ease of a spreadsheet. Easily perform thorough cost-plan analyses and drill down transaction details.

Manage and share key project finances in real time.

- A PPM app with social collaboration for discussing and customizable workflow for governing budgets
- A PPM app with personalized dashboards available on any device
- A PPM app with advanced financial analysis and connections to major BI software

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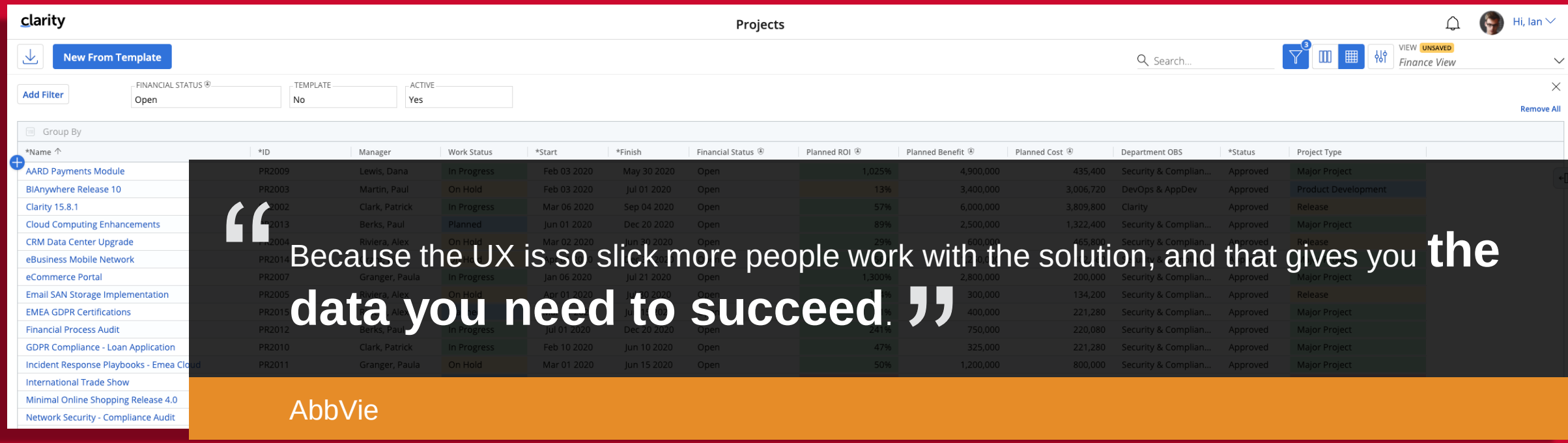
Slice ‘n’ Dice Data Inside Clarity.



Easy like Excel spreadsheets

Just cut, paste and copy

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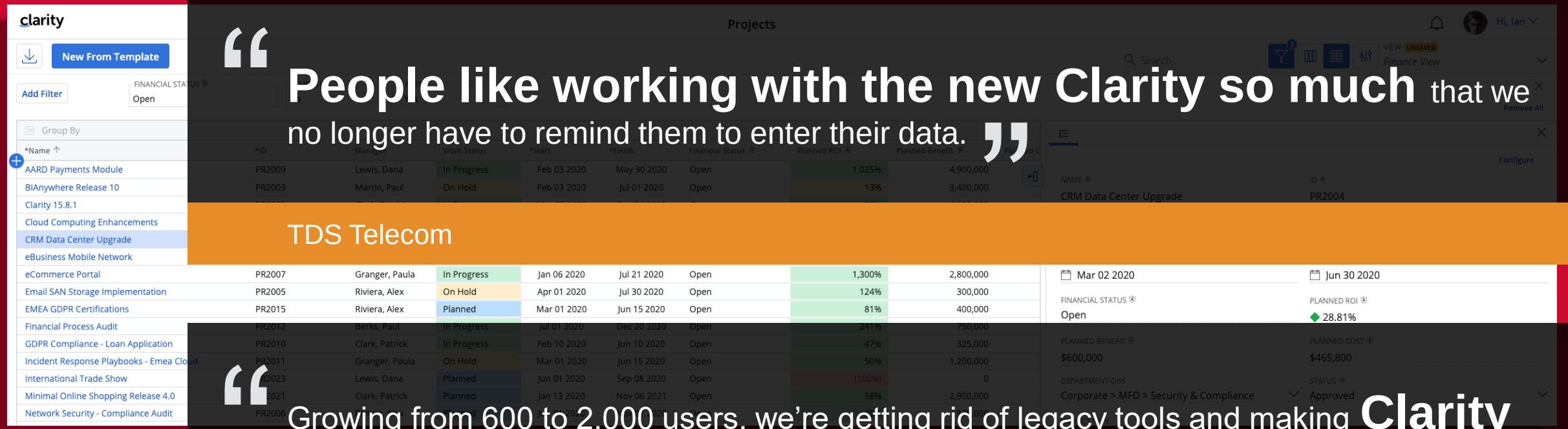
Eliminate Redundant Systems.



> **People like working with the new Clarity so much** that we no longer have to remind them to enter their data.

TDS Telecom

> Growing from 600 to 2,000 users, we're getting rid of legacy tools and making **Clarity our only solution for investment planning.**

AbbVie

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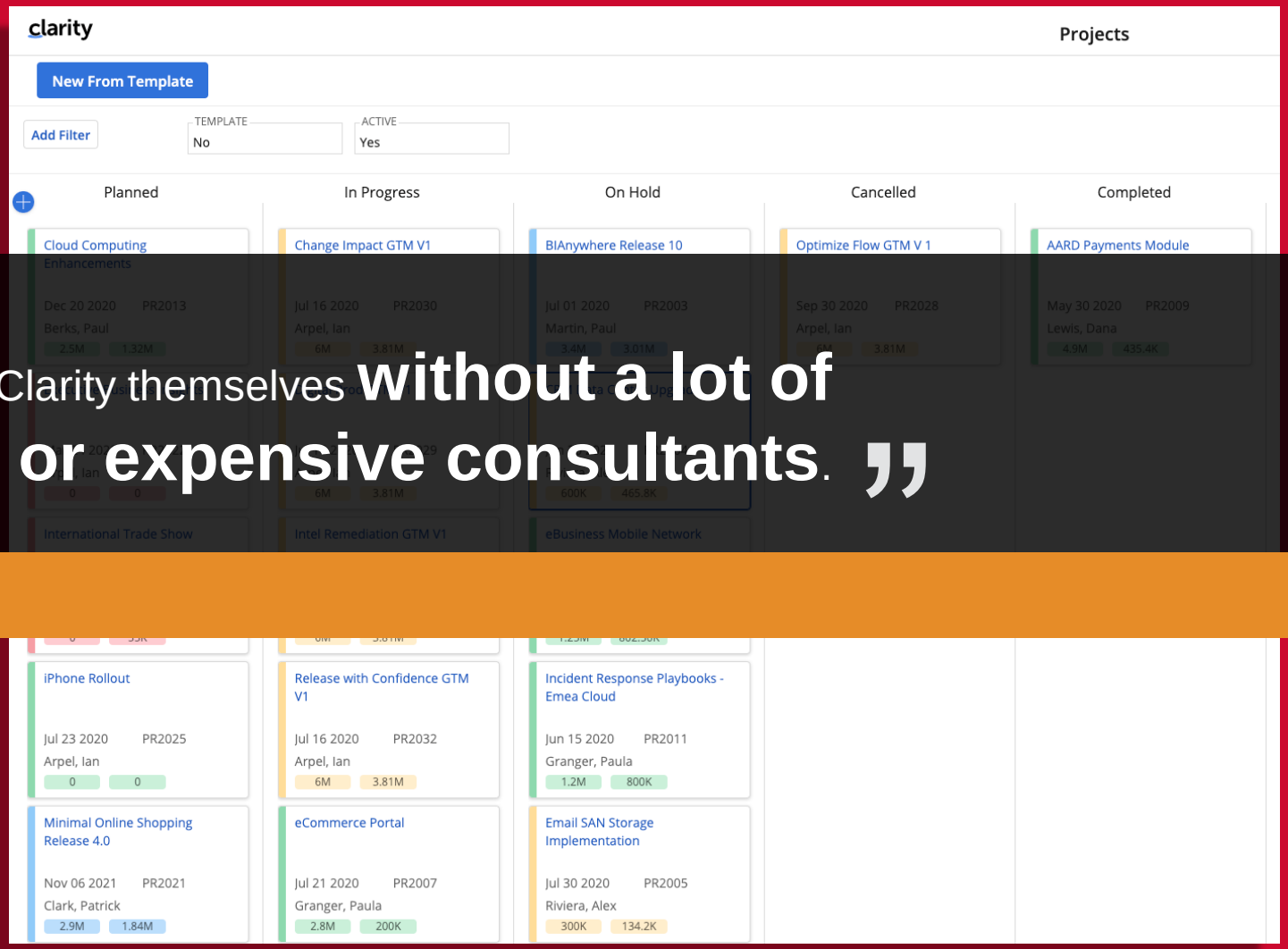
Powerful User Experience.

- Configure cards with key metrics
- Create the workflow you like
- Update information with a click
- Run reports for quick work updates

> “Our admins can manage Clarity themselves **without a lot of customizations or expensive consultants**.”

TDS Telecom



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Plan Your Work.

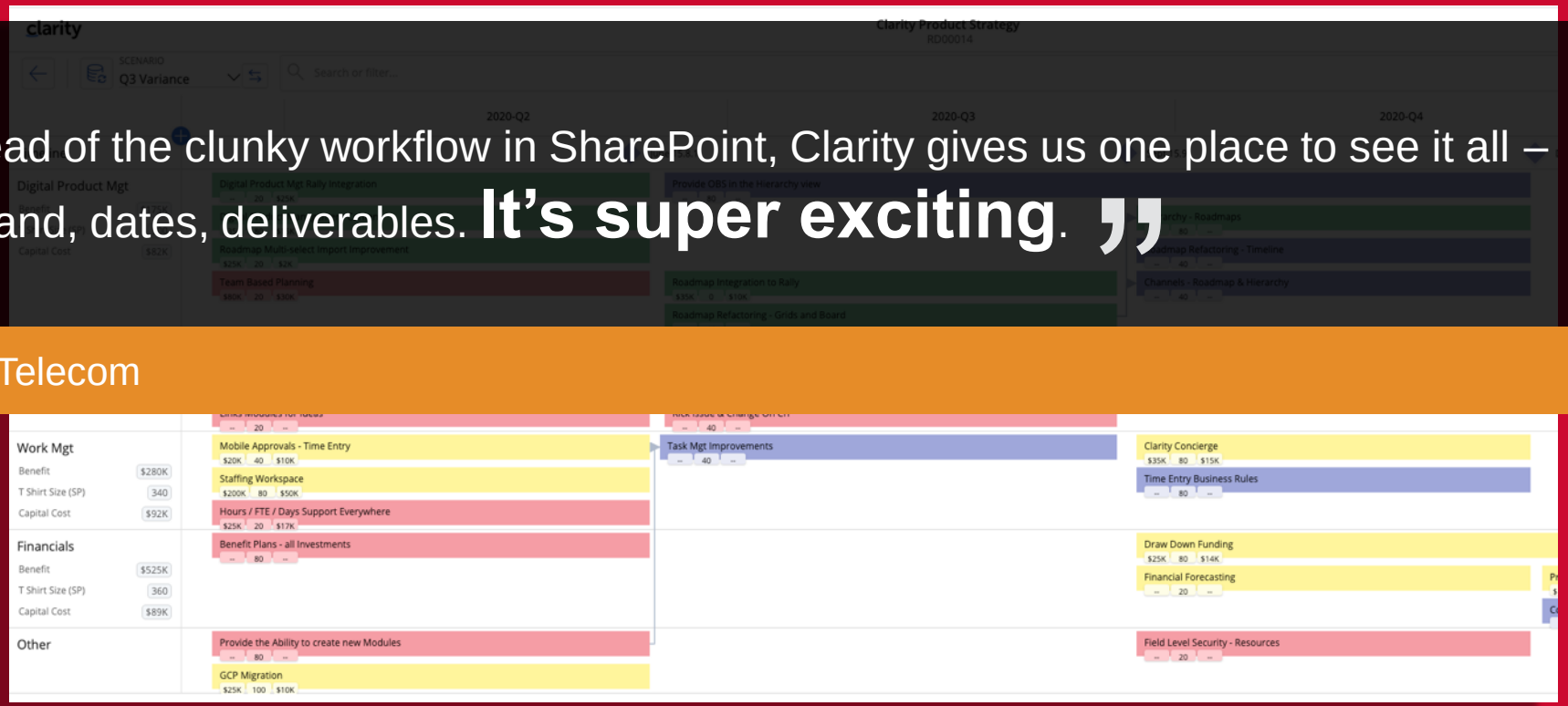
Nest multiple initiatives under one investment

Drill into underlying data with a click

See planned and actuals

Keep everyone engaged with a clear view of the business outcomes.

Track work plans as Agile Teams execute the business outcomes.



> “Instead of the clunky workflow in SharePoint, Clarity gives us one place to see it all – demand, dates, deliverables. **It’s super exciting**.”

TDS Telecom

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BROADCOM

Making the Complex Look Easy.

Your Entire Business Strategy on One Screen.

Set Up Projects, Products, Platforms or Anything Else.

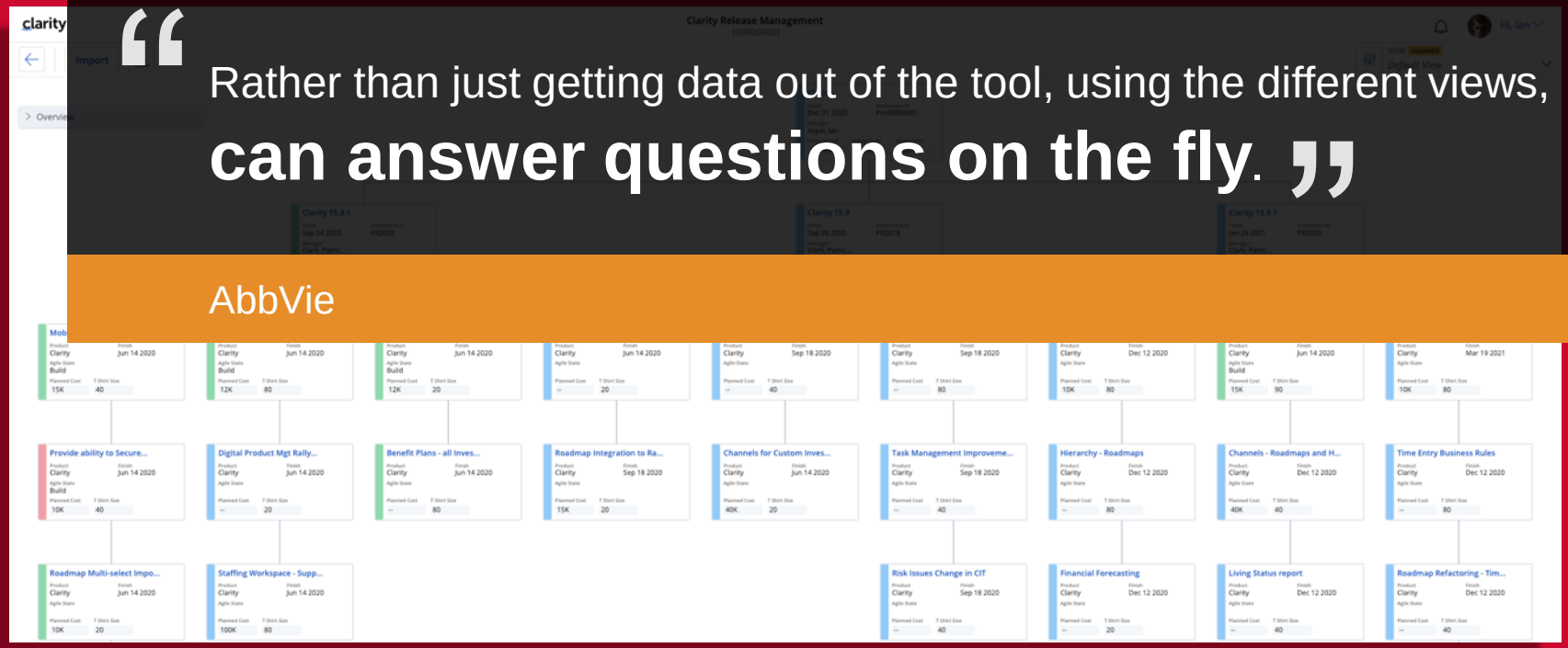
See Investment Types, Costs and Status.

Group and Filter Ideas, Projects and Custom Investments.

Configure cards with fields and metrics

Rollup costs and variances

Manage multi-dimensional hierarchies



> “Rather than just getting data out of the tool, using the different views, I **can answer questions on the fly**.”
>
> AbbVie

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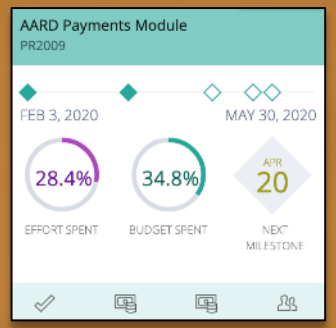
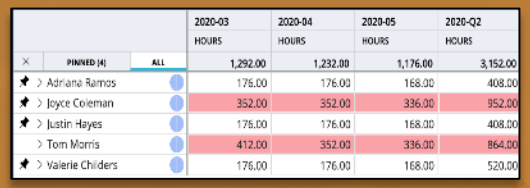
Project Portfolio Approach





	2020-03 HOURS	2020-04 HOURS	2020-05 HOURS	2020-Q2 HOURS
PINNED (4) ALL	1,292.00	1,232.00	1,176.00	3,152.00
Adriana Ramos	176.00	176.00	168.00	408.00
Joyce Coleman	352.00	352.00	336.00	952.00
Justin Hayes	176.00	176.00	168.00	408.00
Tom Morris	412.00	352.00	336.00	864.00
Valerie Childers	176.00	176.00	168.00	520.00

- Fund specific outcomes on a specific timeline
- Each outcome requires specific approval
- Changes require a rigid review process
- Resources cycle in and out depending on the work

Product Portfolio Approach

- Fund an outcome area for a period of time
- Changes require little or no rigid process
- Accountability is maintained through roadmap reviews
- Same resources are involved throughout work

Most companies will use both Projects and Products.

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Elevate the Conversation with Digital Product Management.

STRATEGY

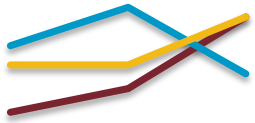
STRATEGY & OBJECTIVES

PLANNING

PRODUCTS

PEOPLE & FUNDING

BUSINESS VALUE



EXECUTION

ROADMAP PRIORITIZE ALLOCATE WORK COLLABORATE ANALYZE

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Digital Product Management

4 STEPS

Organize | Map | Prioritize | Empower

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HCL

rego consulting

Develop a roadmap with help from your partners.

Matt Schulze

Rusty Lloyd

Marc Leijten

Ruwani Weck

Lisamarie Manso

Mike Chio

Bob Vaught

Ryan Tolland

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Demo

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Appendix

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Driving Innovation with Clarity 15.x Series (1 of 3)

Re-examined how Projects get done in the Application Economy
Aug 2017

Re-examined Resource Staffing and Agile with Time & Work Transparency
March 2017

Re-examined Financial Transparency, the Power of BI & Team Task Boards
Sept 2017

Enabling solutions for surfacing product and investment strategy and portfolios
March 2018

Providing congruent ways of managing work and resources with your business practices
Sept 2018

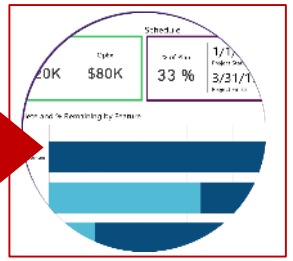
15.1

- Ethnography | Modern UX
- Adaptive PM
- Time Management 1
- Connect & Collaborate

15.2

- Resource Staffing
- PPM & AC Integration 2
- Time & Work Transparency 2

15.3



- Financial Transparency
- BI – Portfolio Analytics
- Task Boards | Blueprints
- Robust Project Management

15.4

- Top Down Planning
- Resource Staffing 2
- Financial Transparency 2
- Product Management
- Ideation

15.5

- Team Planning
- Channels
- Custom Investments
- Top Down Planning 2
- Mobile Time (15.0.1)

SIMPLE - USEFUL - POWERFUL

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Driving Innovation with Clarity 15.x Series (2 of 3)

New innovative ways to managing work in product and with agile integration
Dec 2018

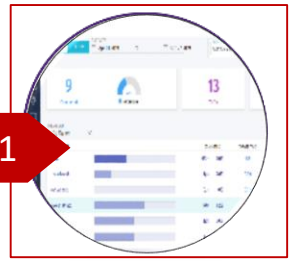
Focus on rounding out functions for clients on boarding to the new UX
March 2019

Completion of capabilities for all Project Management needs
June 2019

Focus shifted to polish and round out demand management needs in new UX
Sept 2019

Taking the first important step towards a new way for organization to plan and manage their Investments
Dec 2019

15.5.1



- To Do Scorecard
- Project Sub-Objects
- Roadmap – Custom INVs
- New Agile Integration Option

15.6

- Idea Phase I
- Budgets
- Group by in Grids
- CSV export in grids
- OBS in Roadmaps
- Phoenix UI

15.6.1

- Project Grid
- Idea Phase II
- Project Assignment Grid
- Project Task Board/Grid
- Living Status Report Updated
- Project Staff Phase II
- Public API

15.7

- Task Improvements
- Project Grid Phase II
- API Phase II
- Ideas and Custom Investment Object Financials

15.7.1

- Task Timeline
- Add'l Idea and Custom Investment services
- Timesheet Grid and configuration adds
- Grid Charting
- Hierarchies - Beta

SIMPLE - USEFUL - POWERFUL

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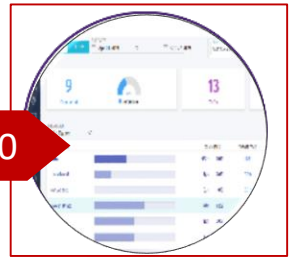
Driving Innovation with Clarity 15.x Series (3 of 3)

Evolving flexible hierarchies to support Digital Product Management
March 2020

Reducing the barriers for organizations to adopt the Modern User Experience
June 2020 - Target

15.8.0



- Investment Hierarchy – Roll-Up Metrics & Flexible Card configuration
- Process Enabled Roadmaps, Custom Investments
- Field Level Security (Projects & Ideas)

15.8.1

- Roadmaps advanced Search
- Field Level Security (Custom Investments)
- Benefit Plan Support
- Master Custom Objects

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