

rego*U*niversity 2019

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Clarity Support Organization | Best Practices

Your Guides: Jon Borden and Karen Lifsey

Introductions

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



Agenda

- Governance Structure
- Support Team Structure
- Support Work/Intake Structure

- Support Components
- Discussion

Introduction

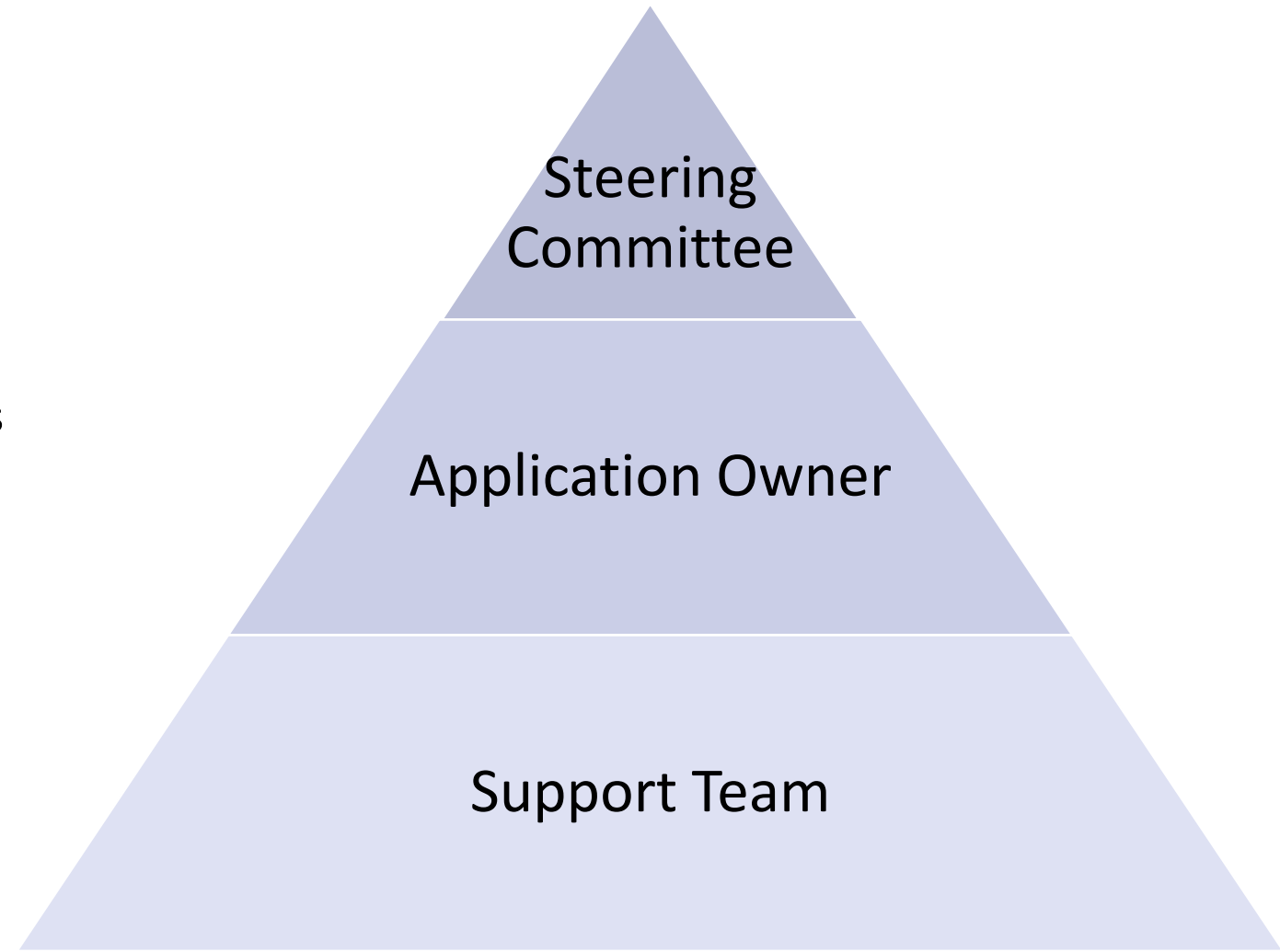
- This class will discuss how other Clarity users solve issues, discover solutions, and successfully use Clarity.
- Understanding all aspects of Clarity support, and implementing the proper support model is crucial to ensure that your Clarity system is adding great value to your company
- Volume, demand, number of users, company culture, structure, and PPM maturity all play a part in what support model works for you
- Effective Clarity Support is PROCESS, REPORTING and APPLICATION support

Open Mic

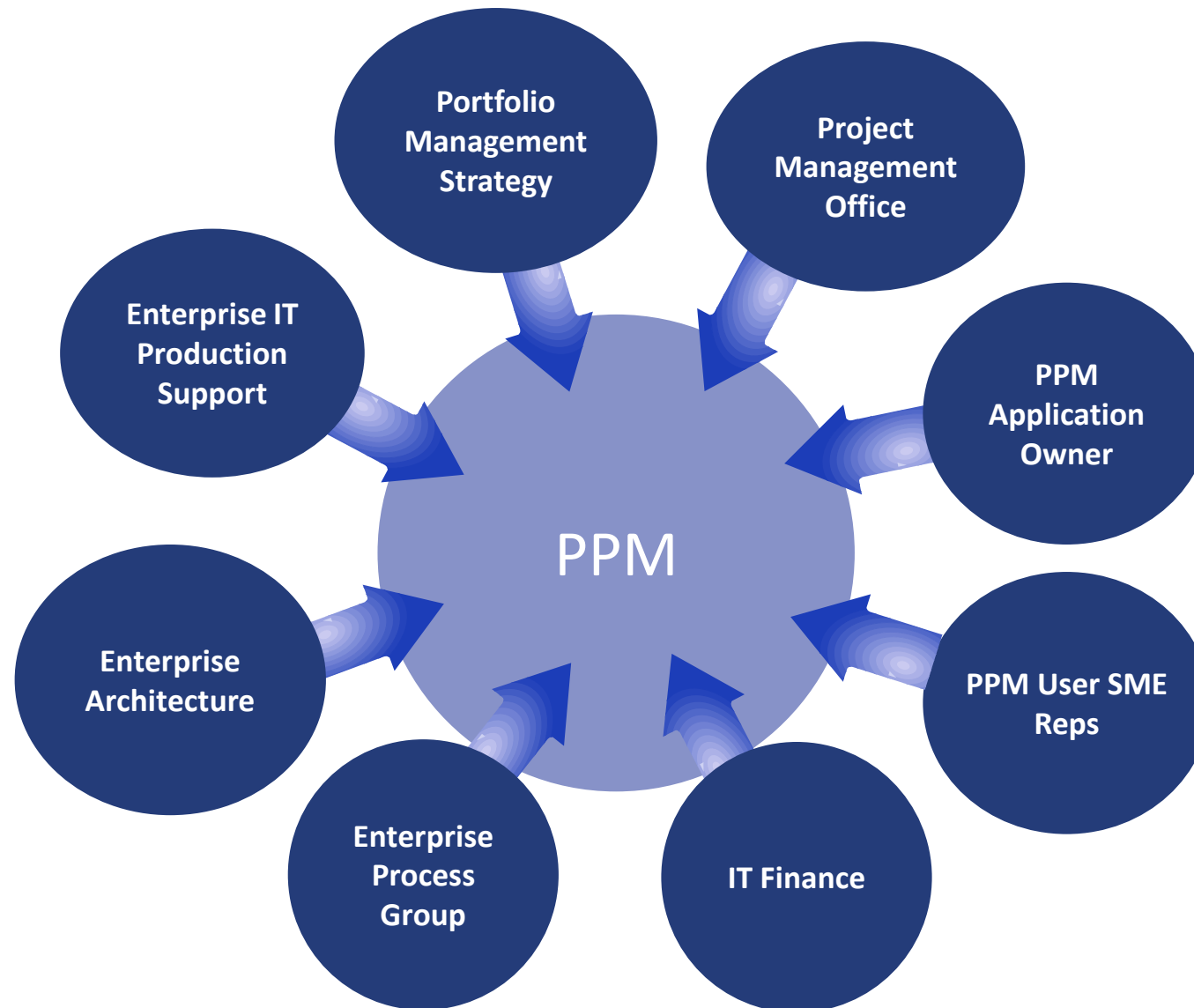
- Can your Clarity support team become more efficient?
- How do you make decisions about your PPM tool? What is your governance structure?
 - What will you enhance / upgrade /fix?
 - When will releases occur?
 - What functions will you deploy?
 - What new BUs will be onboarded?

Governance Structure

- C Level Drives the Organizational Metrics Required to Run the Business from a Project Perspective Down to PMO or other Process Leadership Team
- PMO/Other Transfers Strategic Requirements from C Level to Functional Capabilities and Reporting into Tools through the application owner.
- Application Owner ensures that all processes are able to return the required metrics and that defined methodologies are supported



Matrixed Steering Committee



Governance Structure

- Operating / Steering Committee
 - Steer Priority and Sequencing of Enhancements and New Functionality
 - Primary Team for Driving the Vision of All Solutions - Roadmap
 - Communication with Enterprise – Releases, New Functions, Reporting
 - Approval of Release Content
- Application Owner
 - Manage vendor relationships
 - Resolves Conflicts for resources and enhancements
 - Proposes new solutions and capabilities in best interest of the Organization
 - Owns Release Management Calendar & Approvals
- Core Application Team
 - Decisions on Resolution for End User Support
 - Configuration / Development - Reporting
 - Process Support, Mentoring & Training
 - Solution Architecture & Integrations

Open Mic

- How do you structure your support team?
 - Types of Resources?
 - Direct or Matrix Ownership of Technical Resources?

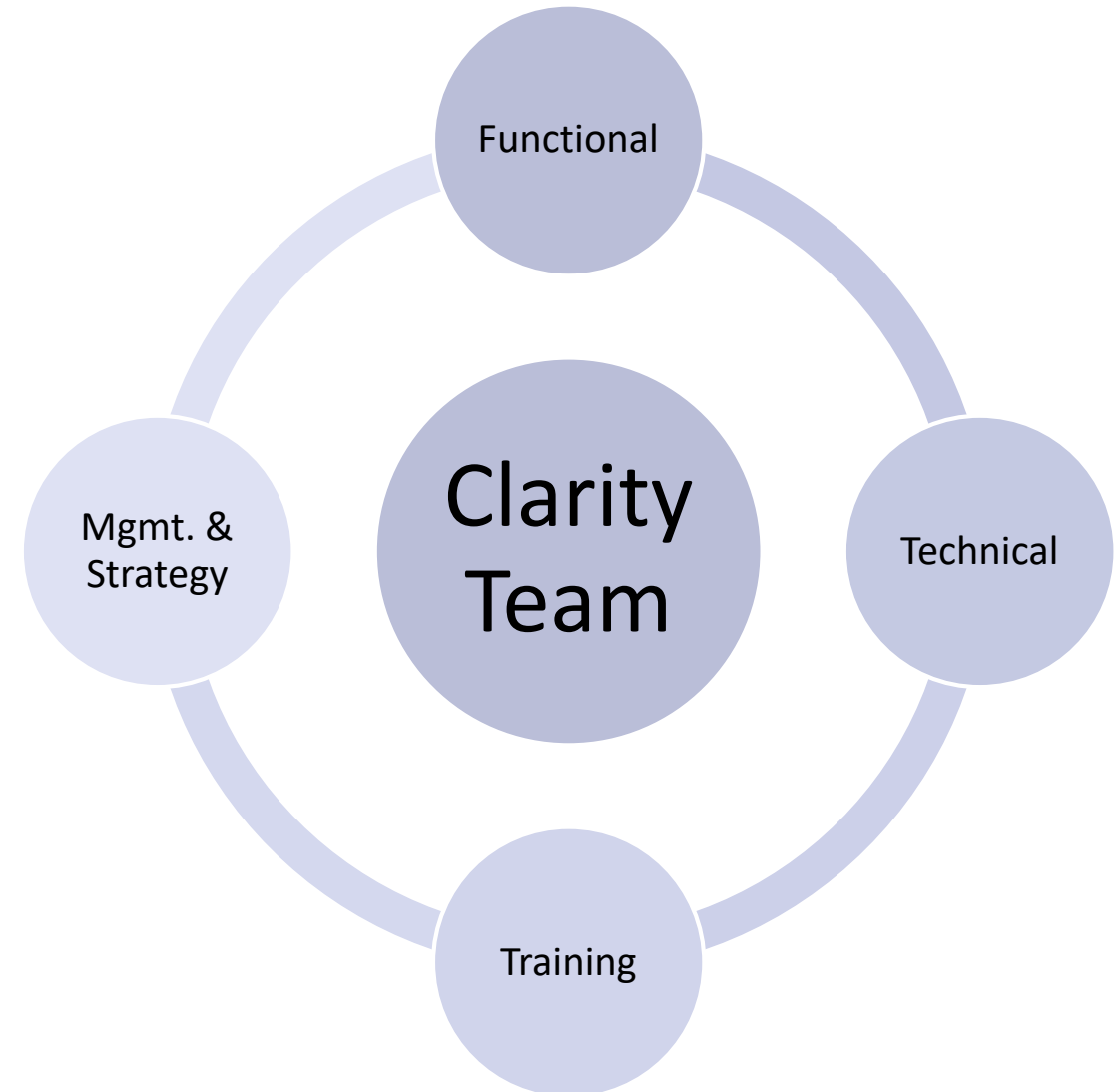
Support Model: Centralized

Advantages:

- “One vision”
- More efficient collaboration
- Cross training, multiple skills
- Accountability is more effective in Direct Reporting Structure
- Continuous Learning Opportunity

Disadvantages:

- Must Actively Seek Input from external areas
- Perceived as Overhead / Unpopular to use dedicated teams



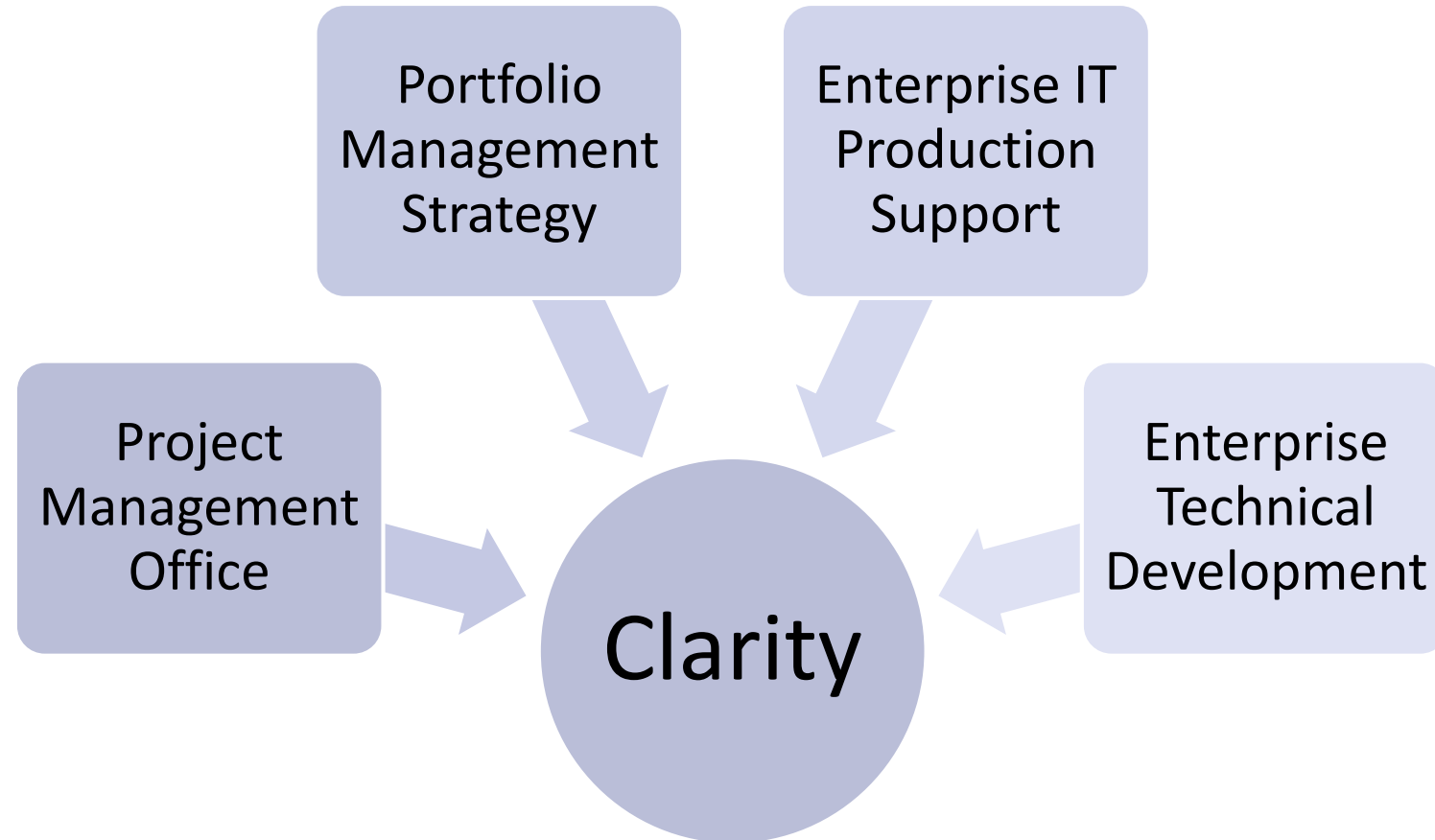
Support Model: Distributed

Advantages:

- Focused expertise
- Focused priorities
- Faster issue / response time

Disadvantages:

- Limited collaboration
- Risk of incorrect communication to end user
- Cross training challenges



Sample Staffing Data

- Includes resources outside of Core Clarity Team, Process SMEs, Power Users, etc.

Users:	50-100	100-400	400-1000	1000-2000	2000-5000
Basic System Support	.25 - .5 Tech .25 - .5 Funct .25 - .5 SME	.25 - .75 Tech .25 - .75 Funct .25 - .75 SME	.5 - 1 Tech .5 - 1 Funct .5 - 1 SME	1 - 2 Tech .75 - 1.5 Funct .75 - 1.5 SME	2 - 3 Tech 1 - 3 Funct 1 - 3 SME
ADD Project Mgmt: Scheduling (OWB/MSP), Issues/Risks/Status	0 Tech 0 Funct .10 - .25 SME	0 Tech 0 Funct .25 - .75 SME	0 Tech .25 - .5 Funct .5 - 1 SME	0 Tech .5 - 1 Funct 1 - 2 SME	0 Tech .75 - 1.5 Funct 2 - 3 SME
ADD Resource Mgmt	0 Tech 0 Funct .10 - .25 SME	0 Tech 0 Funct .25 - .75 SME	0 Tech .25 - .5 Funct .5 - 1 SME	0 Tech .5 - 1 Funct 1 - 2 SME	0 Tech .75 - 1.5 Funct 2 - 4 SME
ADD Financial Mgmt: Cost Plans, Rates, Transactions	.10 - .25 Tech 0 Funct 0 SME	.10 - .25 Tech 0 Funct 0 SME	.25 - .75 Tech .25 Funct .25 SME	.5 - 1 Tech 0 Funct 0 SME	.5 - 1 Tech 0 Funct 0 SME
ADD Demand and Portfolio Mgmt	0 Tech 0 Funct 0 SME	0 Tech 0 Funct 0 SME	.25 Tech 0 Funct .25 SME	.25 Tech 0 Funct .25 - .5 SME	0 Tech 0 Funct .5 - 1 SME
Total FTE Ranges :	1.05 - 2.25	1.35 - 4.0	4.75 - 8.5	10.5 - 13.0	10.5 - 21.0

Reducing Support Resources

- **Provide Self-Service Alternatives**
 - Project requests
 - Resource requests
 - Quick Reference Cards
 - Process FAQ's
 - Links to Process Documentation
- **Enhance and Re-Focus Training**
 - Promote CAPA and/or training videos
 - Train and Empower Subject Matter Experts in area across the organization
 - “Lunch & Learn” sessions on the week's most common request
- **Automate Recurring Activities**
 - Resource provisioning and removal
 - Project shutdown
 - Log maintenance
 - Time period maintenance

Support Model Staffing Alternatives

Area	Staffing Options
Management	<ol style="list-style-type: none"> 1. Internal PMO owns both process and tool 2. Internal PMO owns process and Internal IT group is the product owner of the tool
Functional – Level 1	<ol style="list-style-type: none"> 1. Outsourced to External vendor 2. Moved to Help Desk (rare) 3. Staffed within the internal PMO
Technical Development – Level 2	<ol style="list-style-type: none"> 1. Internal PMO performs this work 2. Internal IT product owner staffs technical resources 3. Outsourced to External Vendor
Functional – Level 2	<ol style="list-style-type: none"> 1. Internal PMO performs this work 2. Outsourced to External Vendor
Level 3 Support	<ol style="list-style-type: none"> 1. Move to On demand 2. Internal IT product owner manages 3. Internal IT product owner manages infrastructure, and some level 3 monitoring is outsourced to external vendor
Project / Release Management	<ol style="list-style-type: none"> 1. Internal PMO manages projects and releases 2. Internal IT product owner manages projects and releases 3. Outsourced to External Vendor
SMEs & Evangelists & Trainers	<ol style="list-style-type: none"> 1. Internal PMO performs this work 2. Outsourced to External Vendor (would not outsource SMEs– just trainers)

Open Mic

- What is Your Support Intake Process?
 - How to fixes come in?
 - How do Enhancements come in?
 - How do Questions come in?

Ongoing Support Levels

Level 1 Support

Administrative Requests (access, security, timesheets, new projects/users, OBS changes, lookup changes)

General Support (information, issues, reporting, how to)

Monitoring Clarity Jobs & Processes (daily, weekly)

Working with the CA On Demand team with any hosting issues

Level 2 Support

Functional Roadmap and Release Planning

Best Practice Functional Consulting

Data Defects

Reports, Portlets or Processes

End User Training

Project and Release Management

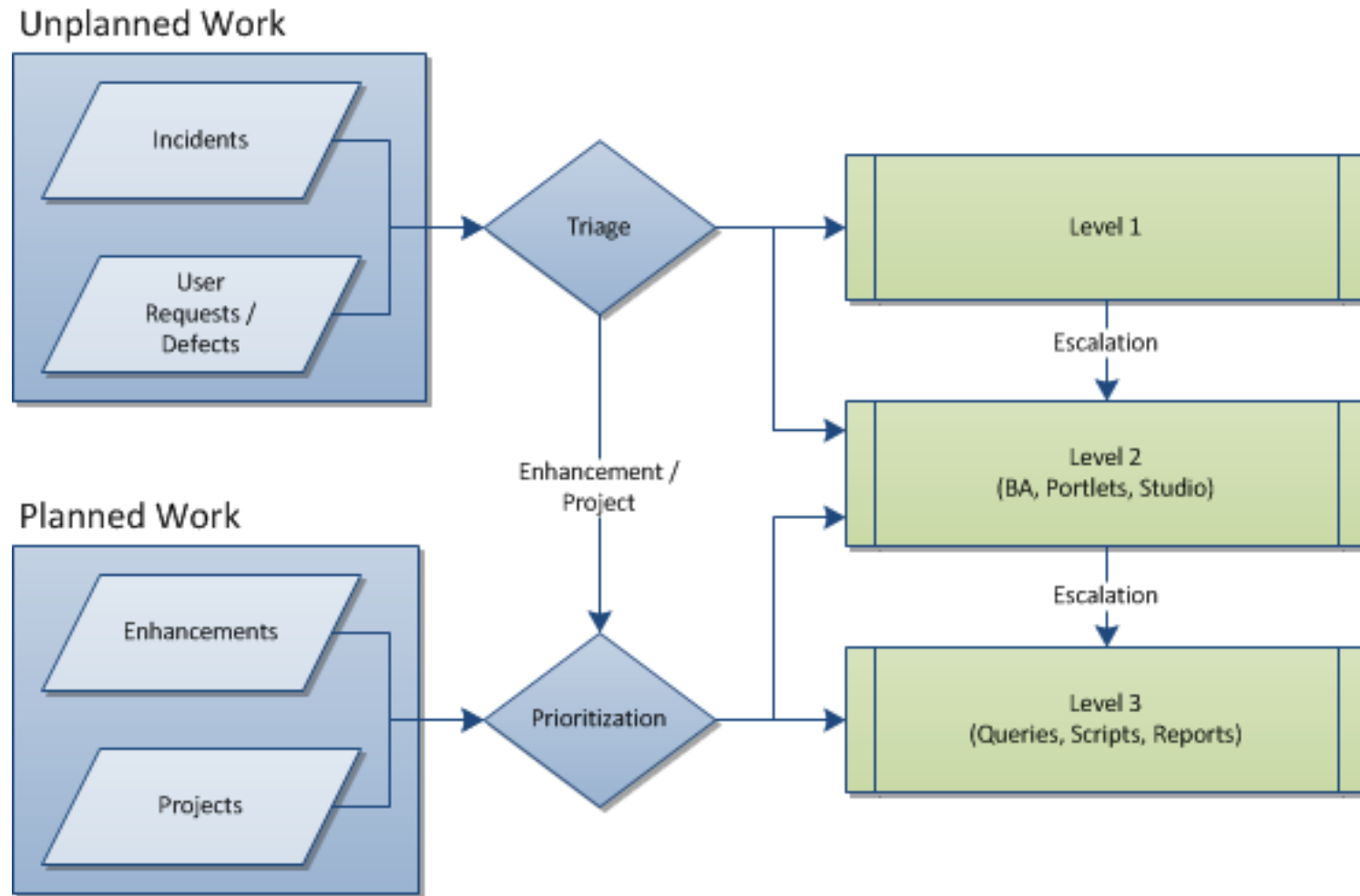
Level 3 Support

Integrations

Performance Improvements (CA On Demand Does This)

Upgrades (CA On Demand Does This)

Components Of Support: Request Process



Best Practice In Request Tracking

- Tracking of Support Work
 - The ability to track and report on all support requests is a key building block for a successful support model
 - Level 1 - Internal ticket system (ITSM) or support email
 - Level 2 / 3 - Rego's Clarity work request tracking module or a client internal tool and process
- Work Request Tracking Module (Level 2 / 3 Requests)
 - Facilitates the support process by providing a more formalize method to track the status of all Clarity work requests
 - Custom Object or SharePoint or Smart Sheet

Summary – Keys to Support

- Short Cycle Time
 - Let the users drive functionality quickly
 - If users believe their enhancements, defects, etc. take too long or do not meet their needs, they will look elsewhere to get their data or implement their process
- SMEs are a Critical Role
 - Having users constantly mentored and trained is very important; the organization constantly changes and people need a refresher
- Have a Vision and Stay Current
 - Identify targeted functionality or reporting each year
 - Always have a goal or vision for where you want the adoption of Clarity to be next year
 - Part of this is also staying current with Clarity; do not let the environment get too far behind in releases
- Staff a Solid Team
 - People are always the most important element
 - A few good people can keep you moving forward even on a shoestring budget
 - Outsourcing may make sense especially if you are concerned about turnover

Questions?



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Thank You For Attending regoUniversity

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 Name = **regoUniversity**
- Course Number = **Session Number**
- 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.



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APPENDIX

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Let Rego be your guide.

Typical Support Gaps – Roles

- Strategic Alignment & Vision
 - Roadmap creation and guidance
 - Annual Reviews / Updates of Roadmap
- Training & Mentoring
 - Onboarding support for new RMs/PMs
 - Formal mentoring to share and collect real-world best practices
 - Portlet and report optimization
 - Best practice configuration guidance, FM and RM in particular
- Change Management
 - Managing process changes vs. tool changes
 - Effective communication of all changes
 - Stick to a Release Schedule

Support Gaps – Turnover

- How many have had support staff leave?
- How were they replaced?
 - Hire a Clarity expert
 - Hire and train
 - Outsourced to a firm
- How do you retain staff?
 - Role rotations
 - Empowerment
 - Advancement path
- How do you mitigate the impact of turnover?
 - Cross-training
 - Formal back-up assignments
 - Strong documentation

Support Gaps – Internal Management

- In what tool is demand collected, prioritized, assigned, and managed through delivery?
 - Help Desk
 - Ticketing system
 - Support Email
 - Change requests – Excel, Clarity WR object, other
- Who owns triage and prioritization?
 - Specified Level 1 Resource
 - Team Manager
 - PMO
- How do you balance the book of work to ensure enhancement do not take too long to implement, causing users to lose patience and confidence?
- How is progress communicated back to the requestors?
 - Reports, Portlets
 - Email

Support Gaps – Internal Management

- Example: Custom Work request object in Clarity can be used to effectively manage Level 2 and 3 requests
- Enabled with auto-generated emails and background process that support task creation / time tracking

The screenshot displays the Clarity PPM interface for managing support gaps. The top navigation bar includes 'Home', 'Administration', and 'Favorites'. The main content area is titled 'Clarity Enhancement / Reporting Request List' and features a filter section with fields for Name, ID, Type, Status, and Planned Release. A dropdown menu for Status is open, showing options: New, Approved, Completed, Rejected, and On Hold. To the right, there are dropdowns for Progress / Phase (Not Started, Requirements, Analysis / Design, Development, Testing) and Clarity Team Owner (Andrew Norman, Alu Kurukuti, Eugene Davis, Greg Hooper, Joanne Tobaris). A 'Power Filter' button is also visible.

ID	Name	Clarity Team Owner	Numeric Ranking	Type	Requestor	Status	Progress / Phase	Target Date	Planned Release	Estimate (Hrs)	Last Updated Date	Updated By
ENH000013	Add new "Status Trend" attribute to SD	Wes McCoubrie		Enhancement	Norman, Andrew	Completed	Testing	5/11/12		2.0	7/30/12	McCoubrie, Wes
ENH000014	DBL Scripts Not Executing in SYS and DEV	Ben Rasmussen		Support	Norman, Andrew	Completed	Implemented	5/9/12		2.0	7/30/12	McCoubrie, Wes
ENH000015	Update CCA Project Template			Enhancement	Benson, Denise	Completed	Implemented	5/4/12		1.0	7/30/12	McCoubrie, Wes
ENH000017	Enhance K0 Report with Original Budget	Mark Appleby-Taylor		Reporting	Sells, Jennifer	Completed	Implemented	5/11/12		4.0	7/30/12	McCoubrie, Wes
ENH000020	Resolve Project Cost Performance Issues	Mark Appleby-Taylor		Reporting	Sells, Jennifer	Completed	Implemented	5/18/12		6.0	7/30/12	McCoubrie, Wes