



*rego*University 2019

SAN DIEGO

Surveys and Project Audit/Quality
Metrics | Clarity and SharePoint
Working Together

Your Guides: Krupa Shah and Tom Santos

Introductions

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



Open Mic

- How would you grade your organization for effectiveness and efficiency?
- Have you ever thought of using Clarity for Surveys or Lessons Learned?
- How about for Stage Gate or Product Quality audits?
- Do you use Clarity for all your reporting needs?

Part I: How effective is your organization at managing and delivering?

<Descriptor>



Let Rego be your guide.

Project Metrics

- Most organizations today send out surveys to the project team, steering committee, business owner, and other stakeholders upon project completion
- Customer satisfaction can be captured via methodologies like Net Promotor Score (NPS), Customer Satisfaction Score (CSAT), Customer Effort Score (CES)
- Lessons Learned can be also be captured from input provide in surveys or
- Lessons Learned can also be obtained during Lesson Learned meetings held at the end of the project.
 - session detail what went right, what went wrong and what we need to approve on.

Project Metrics

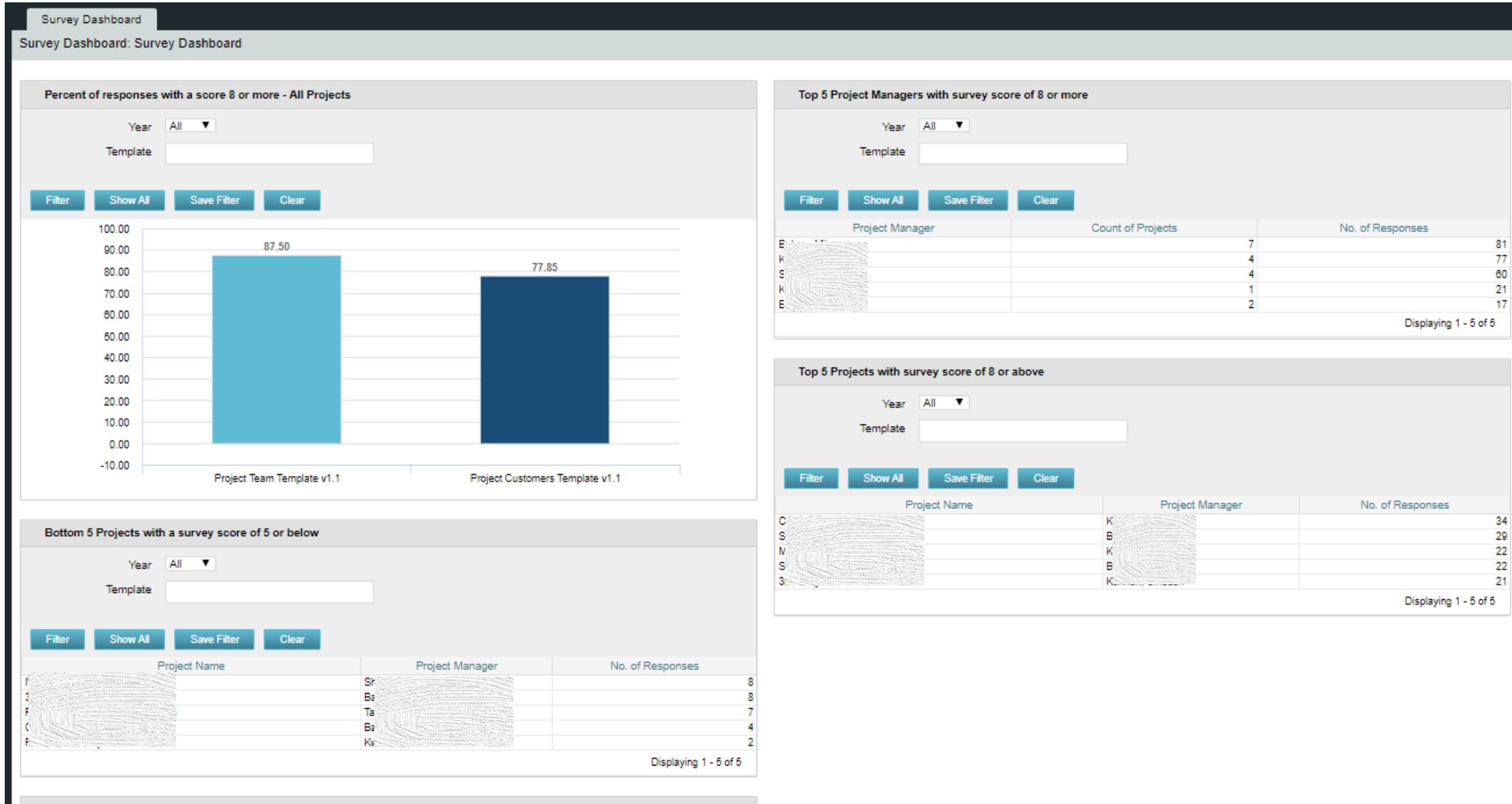
Less common metrics around project execution and delivery:

- **Product Quality**
 - Capture how well the team developed the code or product based on UAT results;
 - Common data captured:
 - Failed/Passed test cases
 - R/Y/G Status based on the 3 of Defects by Priority
- **Stage Gate Process**
 - Audit of how well the project manager adhered to the SG process
 - Audit criteria determine compliance and score
 - What was the end result of the review – was the project halted or where their actions required?

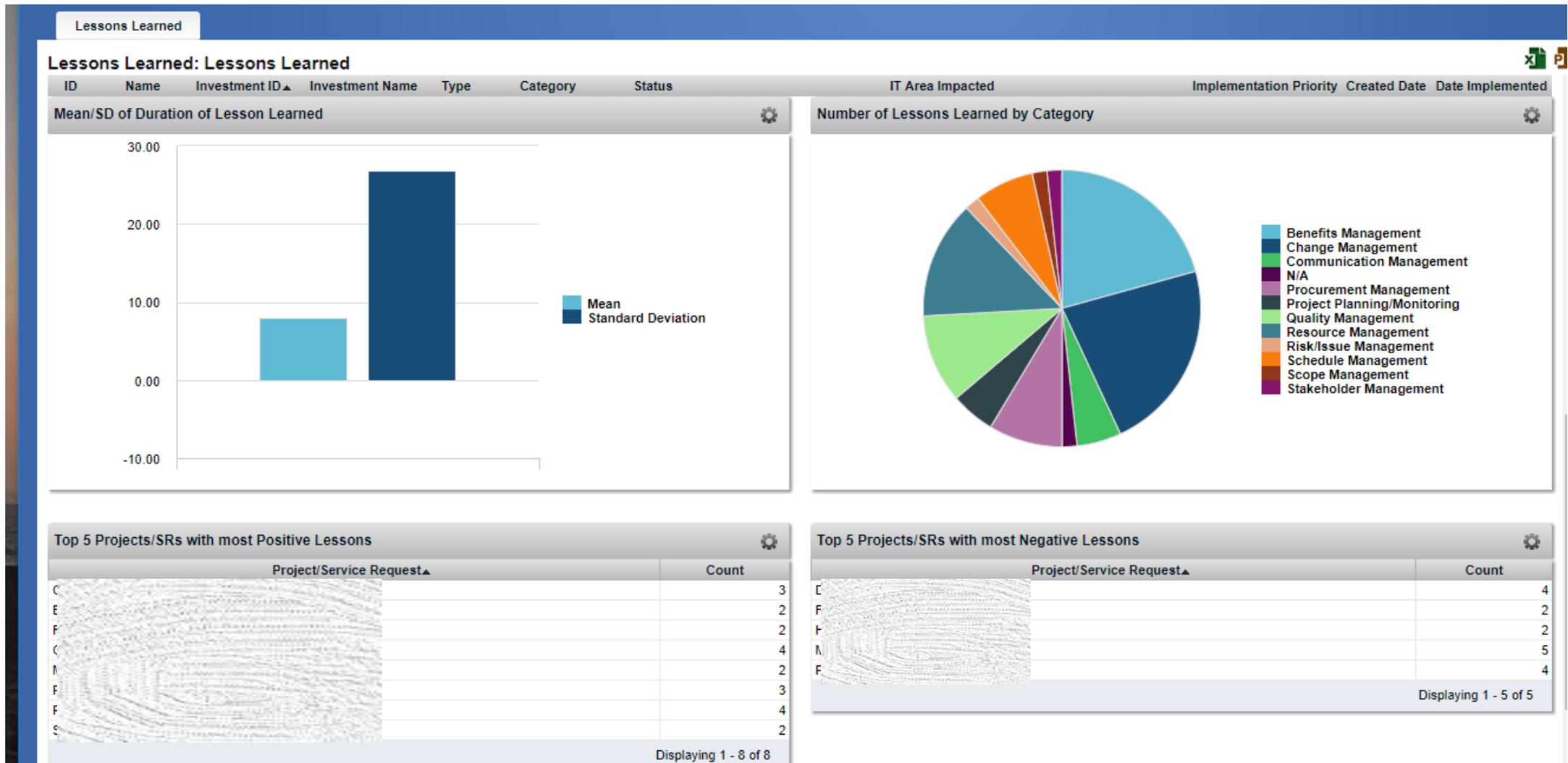
Case Study Details

- Anonymous surveys are sent following project and service requests to allow anonymous response for candid feedback.
- Surveys were captured within Sharepoint and data was sent to Clarity project.
- Lessons learned data was captured by the project manager and via the survey
- Stage Gate Process data was captured based on SG data captured in Clarity
- Product Quality data was captured in a 3rd party testing tool and entered in to Clarity as part of the last SG .

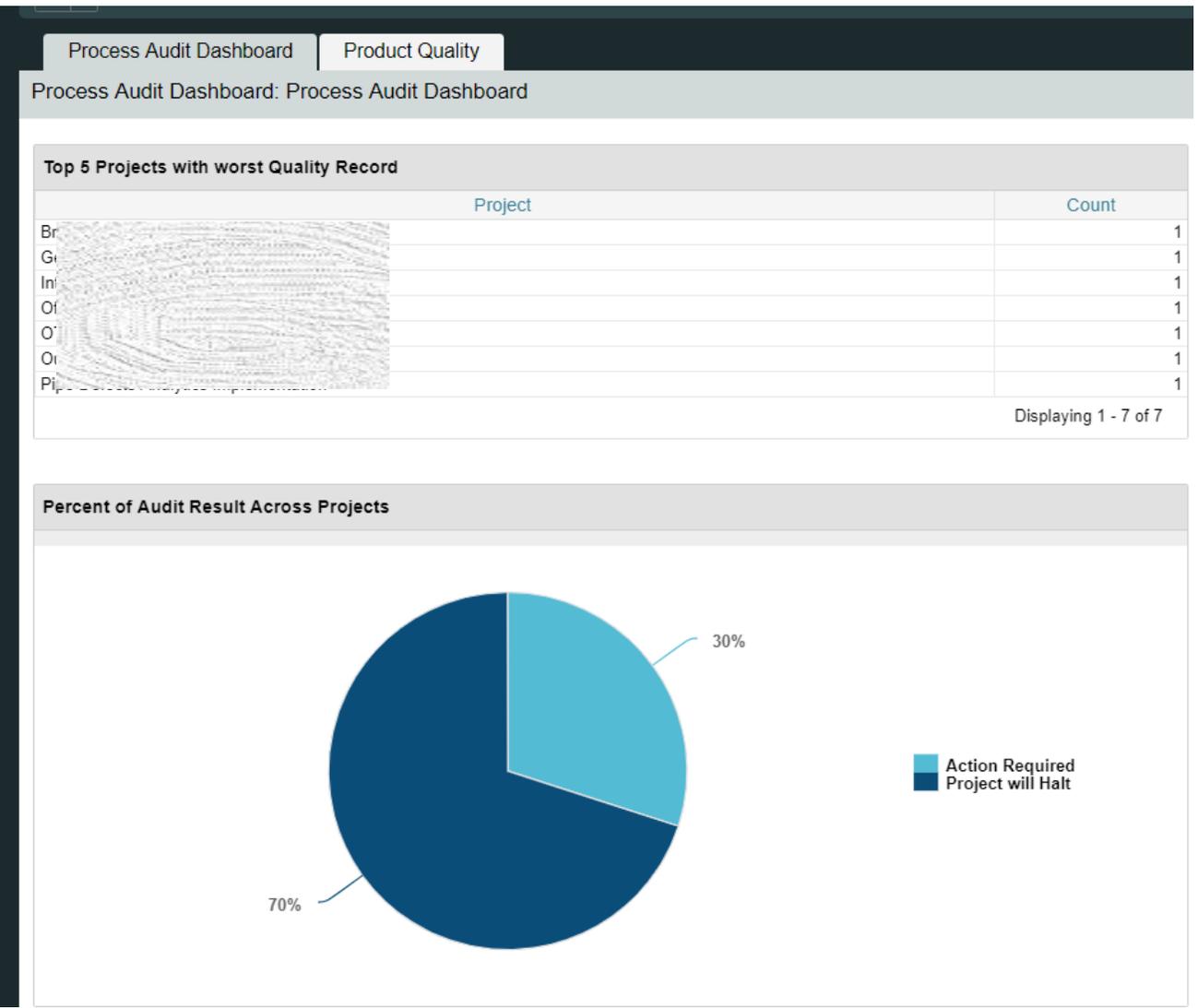
Survey Dashboard



Lessons Learned



Stage Gate Process Audit

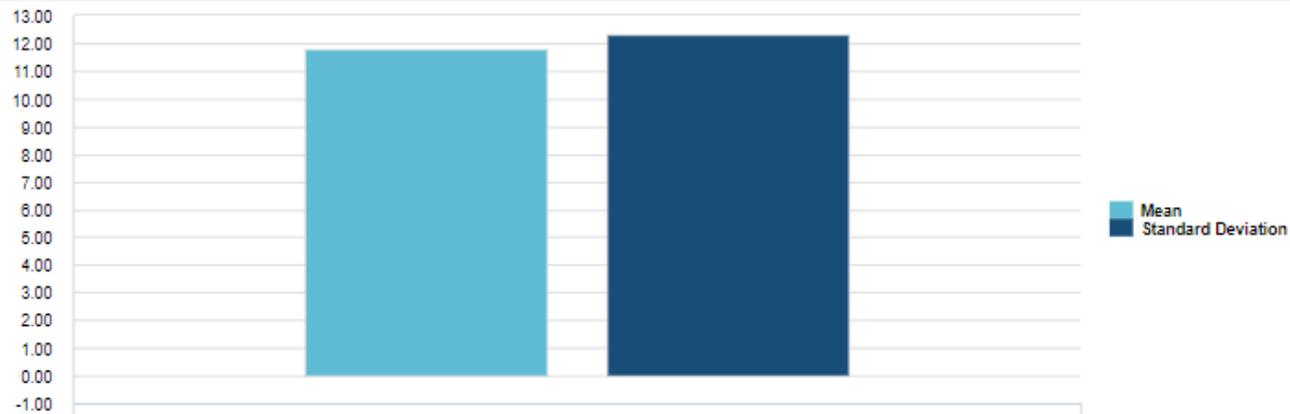


Product Quality

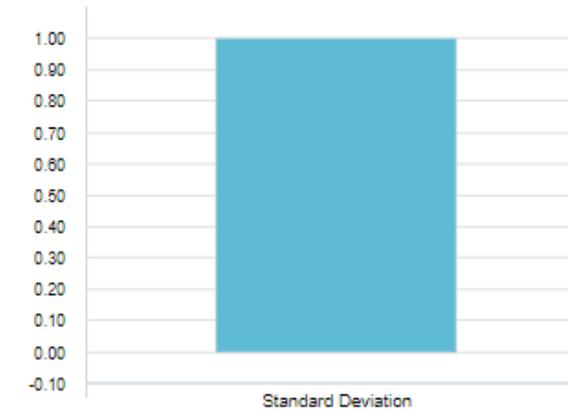
Process Audit Dashboard | Product Quality

Process Audit Dashboard: Product Quality

Mean and SD for the Testing Rounds - All Projects



Standard Deviation of # of Rounds of Testing - All Projects



Top 5 Projects with Worst Testing Record

Project	# of test cases with showstopper bugs(Cumulative %)	# of test cases with "high" bugs(Cumulative %)	# of test cases with "medium" bugs(Cumulative %)
3PP BPA Fixes & Enhancements	0.00	4.19	3.03
CA PPM Upgrade	0.00	2.72	9.96
Facilities Mobility	0.00	1.90	7.03

Displaying 1 - 3 of 3

Part II: Clarity and Sharepoint working together

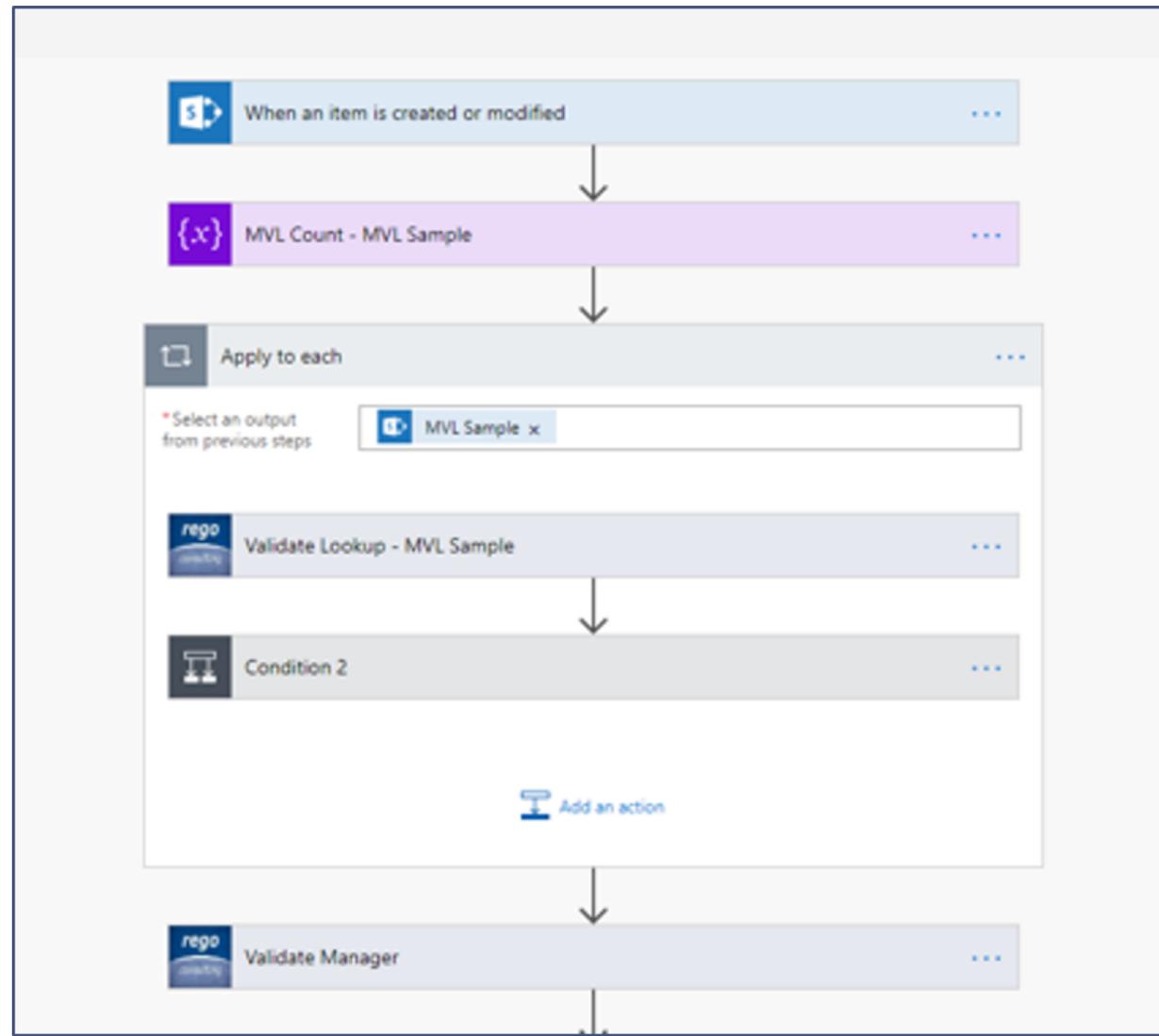
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Let Rego be your guide.

RegoLink Flow Connector

- Allows for real-time communication between Clarity and Office 365.
- Integrate with Office 365:
 - SharePoint
 - Outlook
 - PowerApps
 - Power BI
 - Flow
- Enables automation: can trigger Clarity events, notifications, surveys, etc.
- Queries in Clarity can be used by the SharePoint Connector.

RegoLink Flow Connector



Document Management

- Fully integrate Clarity with SharePoint, once a Project has a SharePoint Site or Microsoft Team created using our Flow Connector, a Portlet can be used to navigate files and folders inside of Clarity
- The Portlet includes functionality to:
 - Navigate all Document Libraries related to the Site
 - Interact with files (View Online, Download, Delete, Upload)
 - Navigate Folders and/or Create New Folders

The screenshot shows the Clarity PPM interface for 'Rego Test Project Level 4'. The 'RegoLink Document Manager' portlet is active, displaying a document library with a dropdown menu set to 'Documents'. The portlet includes buttons for '+ New Folder', 'Upload File(s)', 'Delete File(s)', 'Open in SharePoint', and 'Refresh'. Below these buttons is a table of documents with columns for Name, Owner, Modified By, and Last Modified.

Name	Owner	Modified By	Last Modified
1. Project Charter	SVC_Clarify_O365	SVC_Clarify_O365	2019-08-28
2. Business Case	SVC_Clarify_O365	SVC_Clarify_O365	2019-08-28
3. Project Management	SVC_Clarify_O365	SVC_Clarify_O365	2019-08-28
4. Product Build Decisions	SVC_Clarify_O365	SVC_Clarify_O365	2019-08-28
5. Gate Reviews	SVC_Clarify_O365	SVC_Clarify_O365	2019-08-28
6. Design Engineering	SVC_Clarify_O365	SVC_Clarify_O365	2019-08-28
7. Manufacturing	SVC_Clarify_O365	SVC_Clarify_O365	2019-08-28
8. Order Entry	SVC_Clarify_O365	SVC_Clarify_O365	2019-08-28
9. Lab & Reliability	SVC_Clarify_O365	SVC_Clarify_O365	2019-08-28
10. Controls	SVC_Clarify_O365	SVC_Clarify_O365	2019-08-28
11. Product Costing	SVC_Clarify_O365	SVC_Clarify_O365	2019-08-28

- Supports new UX and classic
- Granular rights management via SharePoint

Respond to this Survey Actions Settings

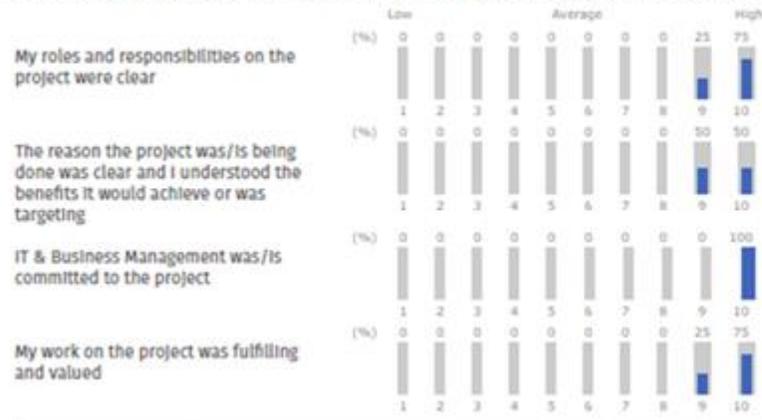
1. On a scale of 1 to 10, 10 being "high performing team" and 1 being "dysfunctional", how would you rate the project team dynamics?



2. Please rate the level of engagement/commitment of the project manager (1 = completely disinterested, 10 = highly engaged)



3. On a scale of 1 to 10, 10 meaning you absolutely agree, 1 being you completely disagree, please rate the following statements



Product Quality

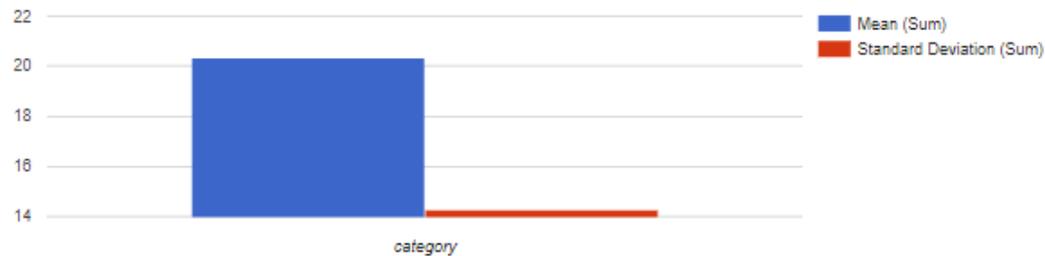
Passed Test Case Percentage Per Round

Round #	Passed Test Case Percentage	Metric
1	84.00%	<input type="checkbox"/>
2	100.00%	<input checked="" type="checkbox"/>
3	75.00%	<input type="checkbox"/>
4	76.92%	<input type="checkbox"/>
5	88.00%	<input type="checkbox"/>
6	100.00%	<input checked="" type="checkbox"/>

Actual cost of Testing

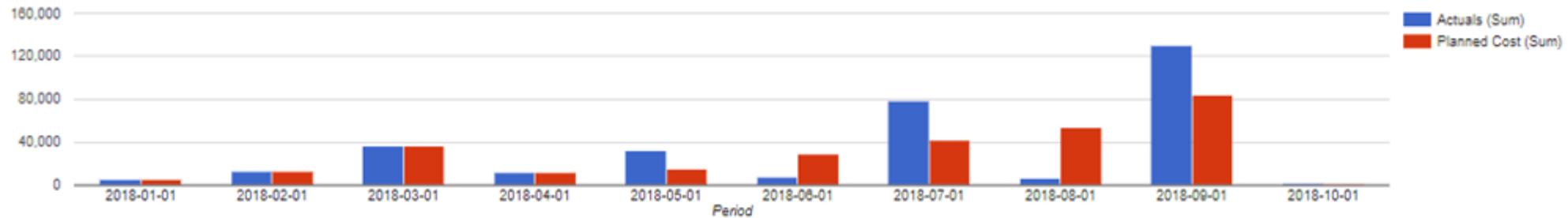


Mean and SD for the Testing Round

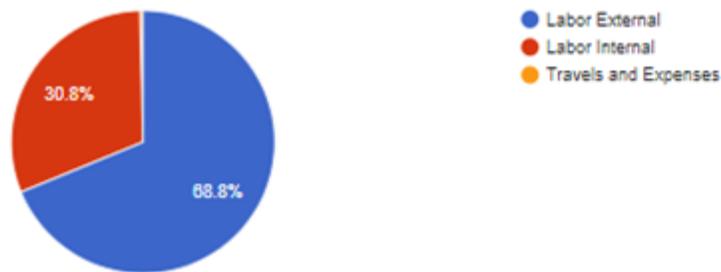


Planned vs. Actual Cost Dashboard

Planned Cost vs Actuals



Actuals by Transaction Type



Planned Cost by Cost Type



Project Status Report Dashboards

Project Status History

Overall	Status Report Name	Report Date	Storyboard	Cost & Effort	Cost and Effort - PM	Schedule	Schedule - PM	Scope - PM	Risk - PM	Risk
🟡	09/21/2018	09/21/2018	View report	🔴	🟢	🟢	🟡	🟢	🟢	🟡
🟡	09/07/2018	09/07/2018	View report	🔴	🟢	🟢	🟡	🟢	🟢	🟡
🟢	08/03/2018	08/03/2018	View report	🔴	🟢	🟢	🟢	🟢	🟢	🟡
🟢	07/20/2017	07/20/2018	View report	🔴	🟢	🟡	🟢	🟢	🟢	🟡
🟢	07/09/2018	07/09/2								
🟢	06/22/2018	06/22/2								
🟡	06/08/2018	06/08/2								
🟡	06/01/2018	05/31/2								
🟡	05/11/2018	05/11/2								
🟡	04/20/2018	04/20/2								

CA PPM Upgrade

JAN 02, 2018

On Track

OCT 03, 2018

Status Update

We are now moving full speed ahead with the remaining modules, APFM and Surveys. The plan is to deploy both by 09/28 to meet our FY deadline. It will be tight but doable

OVERALL:
On Track

SCHEDULE:
Drastic Action Required

COST:
Drastic Action Required

EFFORT:
Drastic Action Required

RISK:
Action Required

Key Accomplishments

1. Completed 2nd review of APM Prototypes
2. Deployed Quality module to PROD

Effort Metrics

100%
SPENT

Total Hours	1170
Total Hours Spent	1170
Effort Balance	0

Cost Metrics

110.72%
SPENT

Total Project Budget	\$291002.43
Total Spent to Date	\$322184.15
Remaining Balance	\$-31181.72

Upcoming Work

1. Complete development, testing and deployment of QA Module
2. Complete development, testing and deployment of APFM Module
3. Update user guide
4. Update training materials
5. Finalize Implementation plan

Let Rego be your guide.

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Project Team Summary

CA PPM Upgrade [EDIT LINKS](#)

- Dashboard
- Team**
- Financial
- Quality
- Customer Satisfaction
- Lessons Learned
- Risks, Issues and Changes
- Status Reports
- Recent
- [EDIT LINKS](#)

Project Team

Name	Role	Participant?	Collaboration Manager?	Allocation	ETC	Actual Hours
Balusu, Vijay	Project Manager	Yes	No	64	0	0
Consulting, Rego	Vendor	No	No	0	0	8
Basnet, Nabina	Business Analyst	Yes	No	80	0	45.5
Tamadonigamchi, Torkaman	Business Analyst	Yes	No	0	0	281.5
Kwame, Nana	Project Manager	Yes	Yes	395.2	0	323.5
Kandukuri, Pradeep Kumar	QA Analyst	Yes	No	650.4	0	511.5
Wenger, Kenneth	Project Manager	Yes	No	0		
Shah, Krupa	Project Manager	Yes	No	0		

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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