



# CLARIZEN CHECK-UP

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## DETAILED FINDINGS REVIEW

Prepared For:

**Client Logo**



## WORKSHOP SUMMARY



### STRATEGIC WORKSHOP

Date: July 29

Attended by:

John Smith, Dave Willtest, Anna Trust



### USABILITY WORKSHOPS

Date: August 1, August 2

Attended by:

Dave Willtest, Cliff Letters, Sandra Sample



### TECHNICAL ASSESSMENT

Date: August 3

Attended by:

Dave Willtest, Holly Exampleton

# EXECUTIVE SUMMARY

Client ABC engaged Kolme Group to perform a Clarizen Check-Up, seeking to optimize their Planview Clarizen solution.

Kolme Group met with various key stakeholders during facilitated workshops designed to gain understanding of Clarizen's value to the organization, user sentiment of the solution and related processes, and evaluate the efficiency of existing configurations and customizations.

In their review, Kolme Group has determined Client ABC had an adequate onboarding and exhibits strong knowledge of current use cases and customization, but knowledge and reinforcement of new features have not been extended to end-users.

As Client ABC becomes more mature in their use of Clarizen and its capabilities, continued focus in key areas can help achieve maximum and continued return on their Clarizen investment.

Key findings are:

- WBS and Financials are not being used at their full capacity. Leadership lacks visibility into financials for tracking and forecasting to generate accurate Business Insights.
- Configurations can be optimized to lessen computing burden, which will likely result in better performance for end-users.
- Leaders lack confidence in the roll up data shown in capacity and utilization reports, and do not have a clear view of how their direct reports are doing in both their current work and upcoming work.

Key findings and recommendations are detailed in the remainder of this document.





## KEY FINDING ONE

# WBS AND FINANCIALS

## OBSERVATION & SENTIMENT

Client 1 currently tracks financials within an Excel spreadsheet which has resulted in manual work for upkeep. Data from the spreadsheet also shows high variance between predicted revenue and actuals. PMs do not have a clear picture of insights they seek and feel disconnected to their project's health and burn/budget. Custom Action (forms) drive key data points from the beginning and help provide governance.

## BEST PRACTICES

- Where possible, a flatter project structure is best. This will help throughout the system – tracking and managing projects, tasks, resource assignments, timesheets, navigation/views, reports and even overall system performance and responsiveness.
- Use Non-Labor Resources for Revenue Recognition and manual processes.

### USER'S SCREEN SHARE

Type	Jan Pred Early	Jan Pred End	Jan Actuals
T&M		\$7,260.00	\$7,260.00
Milestone			\$1,000.00
T&M	\$104,500.00	\$95,775.00	\$94,216.11
T&M		\$43,200.00	\$31,992.00
T&M		\$2,070.00	\$3,000.00
Milestone			
T&M		\$12,000.00	\$12,000.00
T&M	\$2,000.00	\$400.00	\$0.00
T&M	\$26,320.00	\$20,216.68	\$1,987.00
Charitable			
FFP	\$239,098.11	\$239,098.11	\$239,098.11
T&M	\$13,246.44	\$7,984.44	\$33,542.00
T&M	\$10,158.88	\$19,559.61	\$68,893.11
FFP			

## RECOMMENDATIONS

### Work Plans Built for both PMs & Consultants

- Reviewing Time Reportable Levels to work for both
- Task Plans vs Financials to track and manage for both
- Custom Forms & Attributes to help with Financial Close, Contract Close, proactive notifications of spend

### Financial Planning Views for Project Managers

- Supports Contract Types (Firm Fixed Price, T&M)
- Non-Labor Resources used for Revenue Rec and manual processes as necessary
- Labor Budget at Task or Project Level (mirrors Resource Planning)
- Data rolls up to Time-Phased Executive Reports

### Intake/Governance Processes for Key Data

- Intake form to require key data points, baselines, approvals and/or notifications.
- Templates structured for each project use case

*"I don't have a real sense of my project's health since our data is manually maintained."*

– Client PM



# KEY FINDING TWO

*“Reviewing the error log takes up half of my day”*

*-Client Admin*

# CONFIGURATIONS

## OBSERVATION & SENTIMENT

Using the Performance Report, we investigated configurations shown to have long durations and large counts, which can negatively affect performance. Overall trends we identified included a **need to introduce more specific evaluation criteria** and lessen the amount of excessive looping of child items.

## BEST PRACTICES

- Evaluation criteria should be written to lessen the amount of execution needed for each Workflow Rules (WFR) or Schedule Workflow Rules (SWFR). This will cause lag in the system and unnecessary triggering
- When possible, project templates should be used to meet the basic use case of a project, then milestone templates can be used to add additional information. Using business rules to remove or replace items on a template can cause performance lags.

## RECOMMENDATIONS

- Use of Not(IsNew()) or IsChanged() can help decrease unnecessary triggers for WFRs and SWFRs
- If real-time updates are not needed, move WFRs and SWFRs to nightly
- Out-of-the-box functionality is available for replacing resources, review business use case to understand if this can be used rather than WFRs.

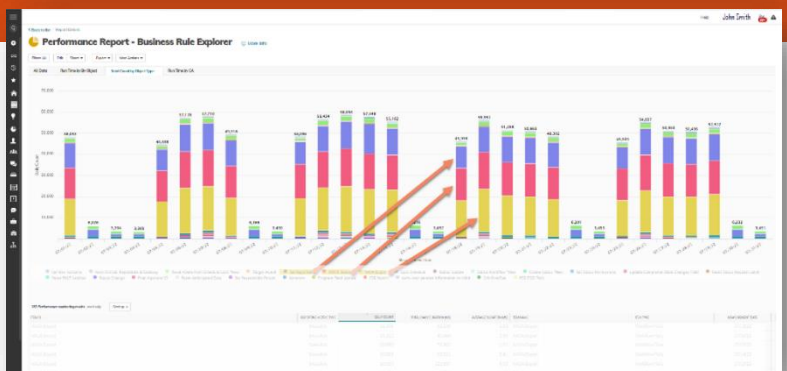
### TOP RULES – DURATIONS

Project Scheduling Modification	1,084,353ms
Create Custom Schedule	418,227ms
Update Custom Field	359,403 ms
sWFR for Reporting	189,339 ms



### TOP RULES – EXECUTIONS BY DAY

Update Slippage	53,054 DT
Update Custom Field	21,426 DT
Set Reportable	18,035 DT





## KEY FINDING THREE

# REPORTS & ALERTS

## OBSERVATION & SENTIMENT

Multiple workshop attendees expressed frustration with reports. They are unable to feel confident in the data and it **does not provide business insights for decision making** needed. Kolme observed resources with 400% capacity or resources shown on rollup dashboards reporting more milestones than they should be associated with.

Additionally, the visuals of reports for tracking and managing projects is clunky and **lacks helpful alerts** to assist PMs with proactive measures.

### USER'S SCREEN SHARE

PARENT	MAXIMUM ...	AUGUST, 22	SEPTEMBER, 22	OCTOBER, 22	NOVEMBER, 22	DECEMBER, 22	JANUARY, 23	FEBRUARY, 23
	100	9%	7%					5%
	100	261%	249%	247%	161%	163%	149%	132%
	100	462%	220%	210%	154%	206%	90%	99%
	100	110%	89%	70%	45%	35%	30%	32%



## BEST PRACTICES

- When using projects/sub-project structure, reports require specific filters to rule out parent items. Without proper filtering, data may be duplicated, causing inflated or false-positive results.
- Conditional formatting is useful for self-service configuration by each user to suit their alert needs and specific use cases.
- Configurations can be created to help provide governance or reminders for important SLAs or key dates.

## RECOMMENDATIONS

- Rework report filters to correctly align data and key business insights so stakeholders gain confidence with the reports.
- Report enablement / training session with key stakeholders.
- Reinforced training or job aids on conditional formatting and navigating views for end-users (PMs and ICs)
- Discovery and implementation of configuration to support KPIs and SLAs.

“I would like to use this [Dashboard] but it’s not as effective as we would like.” -Client Leadership

“Roadmap and Gantt are not working for us.” -Client PMO



# RECOMMENDED KOLME SERVICES



## TAM Services

### TECHNICAL ACCOUNT MANAGER

A dedicated resource available for Admin support. Weekly or bi-weekly meetings to help troubleshoot error logs, answer configuration questions, provide guidance on best practice and to help manage PV support tickets



## IPaaS Services

### INTEGRATION SERVICES

Integrate Clarizen with your key systems to automate business processes, improve data quality, reduce administrative overhead, and make your organization more efficient.



## AaaS Services

### ADMIN AS A SERVICE

A dedicated resource available to augment Clarizen Administration tasks throughout your organization. User data and license distribution, resolution of end-user requests or issues, creating or updating reports, conducting end-user trainings.



## PS Services

### PROFESSIONAL SERVICES

Engage our team of expert consultants to help optimize your solution, perform advanced configuration, implement new modules / features, roll out Clarizen to new teams, or provide end-user training.



## OCM Services

### ORGANIZATIONAL CHANGE MANAGEMENT

Engage a certified ProSci® change practitioner to help support your investment and aid in the sustained adoption of Clarizen throughout your organization.



**Our Kolme TAM consultants will sit side-by-side with you, building scalable solutions to enhance your business processes**



**Trusted Planview Clarizen Partners**



**Clarizen Admin I,II,III Certified**



**Experts in Clarizen Configuration & Technical DevOps**



**Knowledgeable in Upcoming Features**



**A Named TAM Resource for You**

# TAM SERVICES

## TECHNICAL ACCOUNT MANAGER (TAM)

A named Clarizen expert engaged to help your Clarizen administrators succeed. TAM service subscription includes weekly or bi-weekly Q&A / coaching sessions to help troubleshoot error logs, answer configuration questions, and provide guidance on best practice.

Our TAMs understand the Clarizen product inside and out, maximizing your Clarizen investment and being your trusted mentor on how to best use the tool to meet your business goals.

## SERVICE INCLUDES

- One-on-One Technical Coaching Sessions (1 hour each)
  - Options for 2x or 4x a month
- “Tier 2” Support to resolve errors without ticketing
- Liaison with Planview Support for ticket escalation
- Proactive conversation for upcoming features
  - Beta Features not available to everyone
  - Quarterly product release notes
- Access to Kolme University Configuration Masterclass to grow your technical skills

## ADDITIONAL BENEFITS

- Kolme SWAG
- Discount on additional professional services hours

## INVESTMENT

Package Options	Pay Quarterly	Pay Yearly	Yearly Plan Savings
2 x 1 hour coaching sessions per month	██████	██████	██████
4 x 1 hour coaching sessions per month	██████	██████	██████



# INTEGRATION SERVICES

**Our Kolme Infrastructure team will work directly with you to build scalable solutions to enhance your business processes**

## INFRASTRUCTURE IMPLEMENTATION & MONTHLY MAINTENANCE

An Integration expert will help evaluate Middleware options to support your business needs across multiple systems. We will build your integration and maintain it to give you assurance of quality data exchange

Our Integration Service team will work directly with you to advise and consult connecting systems in your organization.

## SERVICE INCLUDES

- Integration discovery and design
- Integration build and test, including required updates to Clarizen data and business rules to support the integration
- Annual maintenance

## INVESTMENT

Package	Setup Fee	Annual Fee
"Standard" Integration build*	██████	██████
Custom integration build	██████████	██████

\* Our integration team will work with you to determine if any of our standard integrations will fit your needs



**Trusted Advisors in Navigating CAB or Info Security Policies**



**Certified in Cloud Based Servers**



**Experts in API and Middleware Integrations**



**Knowledgeable In Data Migration Best Practices**



**A named Resource for Your Engagement**





# ADMIN AS A SERVICE

**Our Kolme Admins will look after your investment and provide support to assist with end-user support or product issues**



**Trusted Planview Clarizen Partners**



**Clarizen Admin I,II,III Certified**



**Experts in Clarizen Front End and Reporting Modules**



**Knowledgeable in system maintenance and best practices**



**A named Admin for You**

## ADMIN AS A SERVICE

A dedicated resource available to provide Clarizen Administration tasks to your organization when your team does not have the bandwidth to do so. User data and license maintenance, resolution of end-user requests and issues, creating or updating reports, conducting end-user trainings.

## SERVICE INCLUDES

- License distribution and management
- Respond to user questions and issues
- Manage any Clarizen system issues
- Provide end user assistance and ad-hoc training
- Implement minor configurations and enhancements such as reports, view configurations and new fields
- Monitor system performance
- Liaise with Planview support for product issues

## ADDITIONAL BENEFITS

- Integration with Clarizen instance for ticket management
- Quarterly health checks

## INVESTMENT

Package	3 Month Agreement	Yearly Agreement
25% dedicated Administrator		
50% dedicated Administrator		
100% Dedicated Administrator		



# PROFESSIONAL SERVICES

**Our Kolme PS consultants can help chip away at your feature backlog and even work with you to onboard new departments**

## PROFESSIONAL SERVICES

Engage our team of expert consultants to help optimize your solution, perform advanced configuration, implement new modules / features, roll out Clarizen to new teams, or provide end-user training.

Most importantly, they are prepared to deliver on the entire backlog of recommendations coming out of this assessment.

## SERVICE INCLUDES

- Clarizen technical consultants and experienced project manager SMEs to help deliver on your Clarizen solution development needs
- Agile Delivery Methodology to focus on you prioritizes
- Clarizen configuration, testing and end-user enablement
- Administrator enablement for understanding configuration
- Full onboarding for new Departments



**Trusted Planview Clarizen Partners**



**PMP, CSM, BA and Clarizen Certified**



**Experts in PMO Best Practices and Clarizen Configs**



**Knowledgeable In Similar Industries or Use Cases**



**A Team of Professionals for You**

## INVESTMENT

Package Option	Rate	Total Hours	Price
Professional services engagement to deliver all items in the recommended configuration backlog			



**We can help optimize your PMO, remediate troubled portfolios or programs, provide leadership to your initiatives, and coaching to your team.**



**Trusted Planview Clarizen Partners**



**Prosci® Certified Change Practitioners**



**Experts in OCM Techniques and Methodology**



**Knowledgeable in OCM best practices**



**A named resource to understand your specific needs**

# OCM SERVICES

## ORGANIZATIONAL CHANGE MANAGEMENT (OCM) SERVICES

A dedicated ProSci® certified change practitioner to help support your investment and aid in the sustained adoption of Clarizen throughout your organization.

### SERVICE INCLUDES

- Standardized, scientifically researched Change Management assessments
- Detailed Change Management Plans
- Coaching & Resistance Plans for Managers
- Sponsor Roadmaps & Preparation Tools
- Training Plans tailored by Risk Assessment
- Communication plan including 12+ engaging templates
- Gamification tools and onboarding activities
- Innovative Clarizen configurations & best practices designed to drive adoption

### INVESTMENT

Package	Pay Quarterly	Pay Yearly	Yearly Plan Savings



# PROPOSED SERVICES

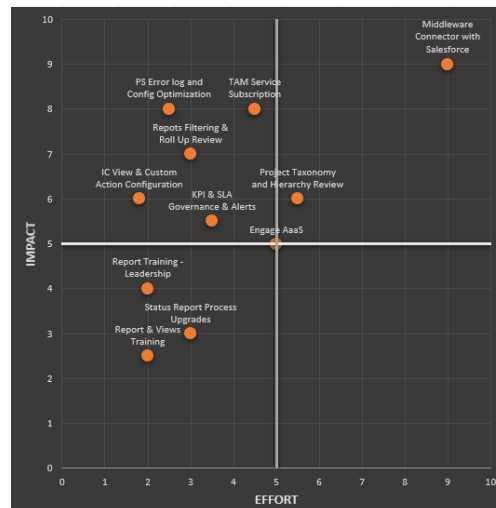
Key findings have been further broken down to help for planning and prioritization for your organization with PS hours estimates:

Back Log Item	Benefit	Est. PS Hrs
Project Taxonomy and Hierarchy Review	Reduce hierarchal complexity and provide better experience with reports and tool use	15
Custom Connector with Salesforce Integration	Eliminate iHub errors and mapping constraints	See Integration Offering
Status Report Process Upgrades	Reduce PM overhead spent on manual updates	10
IC View & Custom Action Configuration	Provide a quick and easy way to navigate and see important tasks	8
PS Error log and Config Optimization	Admin enablement to reduce PV ticketing needs	12
Repos Filtering & Roll Up Review	Gain confidence on data presented in reports	12
Report Training - Leadership	Provide enablement for self-service for other reports	8
Report & Views Training	Provide enablement for end-user times and tricks in the system	8
KPI & SLA Governance & Alerts	Provide proactive alerts for important metrics or milestones	15
<b>Total:</b>		<b>88 hrs</b>

Recommended Services	Benefit	Cost
80 Hour PS Package	Deliver the backlog items, above	\$XXX
Custom SFDC integration	Integration fit to Experian's use case	\$XXX setup, \$XXX / yr
Technical Account Manager (TAM) Services	Technical coaching for your Admin, plus help addressing PV support	Starting at \$XXX / qtr
Admin as a Services (AaaS)	Supplement your admin with assistance on daily or minor tasks	Starting at \$XXX / qtr

*\*See Subscription pricing for additional details*

Let's work together to prioritize the recommendations for quick wins, long term strategies with your budget and timeline in mind.



## IMPACT & EFFORT

Mapping of our recommendations to Effort & Impact, showing the quick wins and longer-term strategies proposed for Experian Health.