



# CLARITY™

STRATEGIC PORTFOLIO PLANNING  
DIGITAL PRODUCT MANAGEMENT  
COLLABORATIVE TEAM WORK



# GET CLARITY

**PLEASE YOUR CUSTOMERS, DISRUPT YOUR COMPETITORS AND MAXIMIZE YOUR BUSINESS VALUE WITH CLARITY - THE FIRST AND ONLY ENTERPRISE SOLUTION BUILT FOR STRATEGIC PORTFOLIO PLANNING, DIGITAL PRODUCT MANAGEMENT AND COLLABORATIVE WORK.**

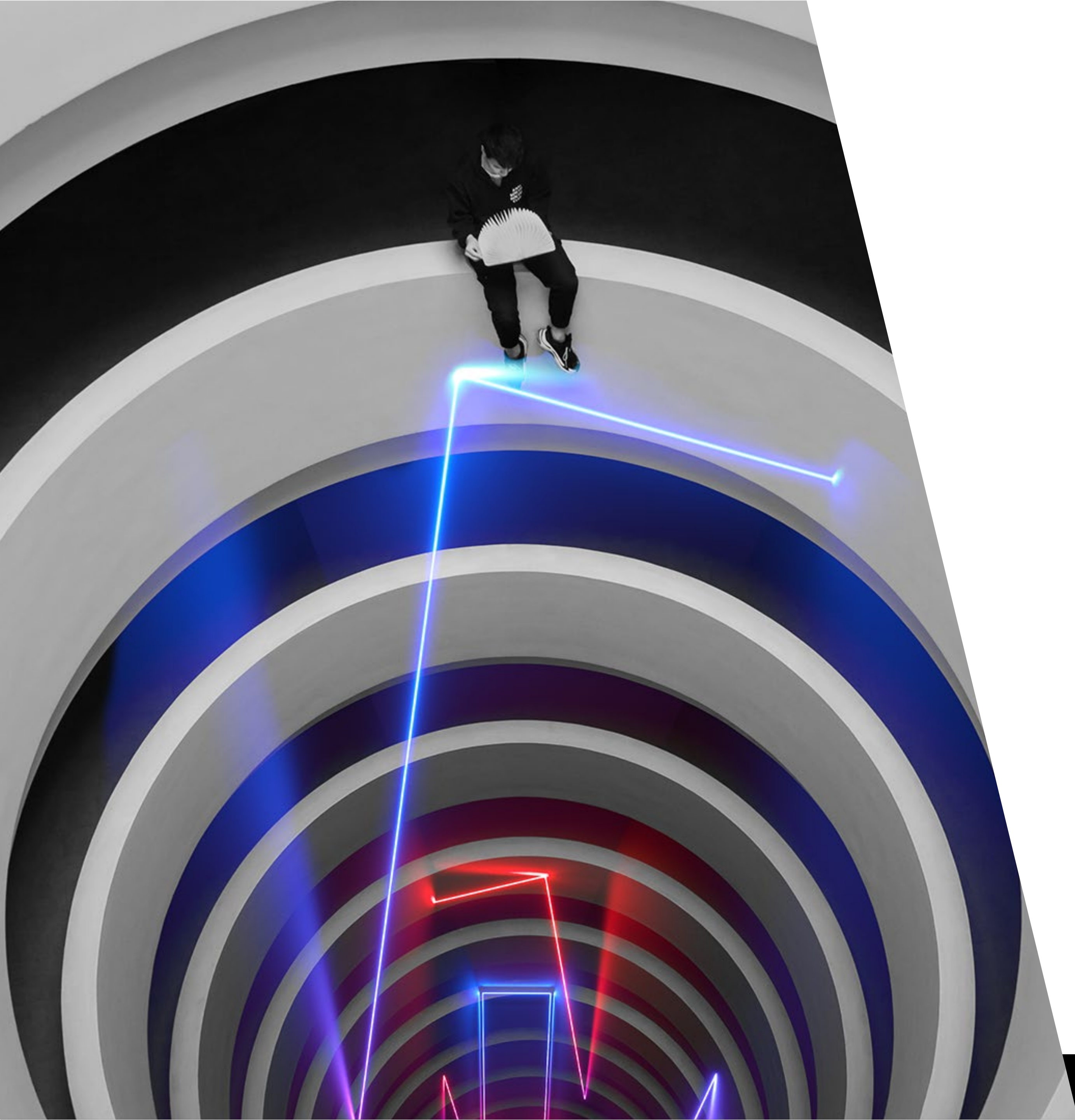
Clarity™ helps you organize investments the way your business operates. Instead of running one-off projects, you can see your money, your people and your work by product or service lines.

Map strategies to objectives on drag-and-drop roadmaps. Nest workstreams under each investment with links to resource, work and financial data.

Money talks, so let's prioritize work based on business outcomes, not gut feelings. The must-have prioritization in Clarity makes planning more powerful and realistic.

And to get the job done, let teams collaborate by creating, sharing and automating simple to-do checklists.

**Here is an overview of how Clarity supports your investment planning from strategy and funding to staff allocation and team execution.**



## STRATEGY → PG.4

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STRATEGIC ROADMAPS →	5
CUSTOM INVESTMENTS →	9
INVESTMENT HIERARCHIES →	12

## PEOPLE → PG.25

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STAFFING AND RESOURCE MANAGEMENT →	26
TO-DO CHECKLISTS →	30
COLLABORATION →	31

## MONEY → PG.14

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FINANCIAL MANAGEMENT →	15
ONE-CLICK CHARTS →	20
BUSINESS INTELLIGENCE →	21

## WORK → PG.34

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PROJECT MANAGEMENT →	35
DASHBOARDS AND REPORTS →	39
COLOR SCHEMES →	40



# STRATEGY

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Organize investments by focusing on sustained assets, such as products, platforms and value streams.

**STRATEGIC ROADMAPS →**

**CUSTOM INVESTMENTS →**

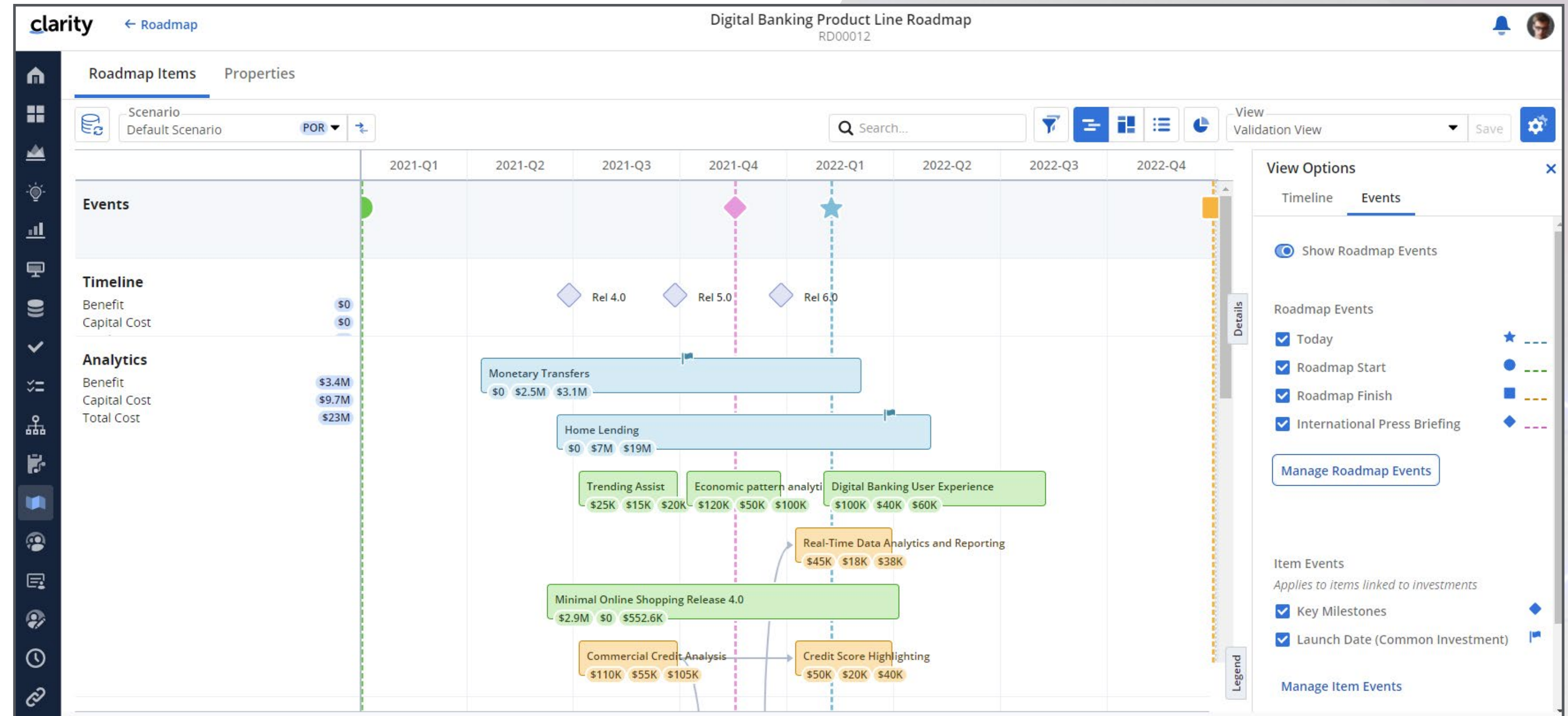
**INVESTMENT HIERARCHIES →**



CLARITY  
**STRATEGY**

**STRATEGIC ROADMAPS**

Plan your enterprise investments with drag-and-drop speed on strategic roadmaps in Clarity to continuously collaborate on business outcomes.







CLARITY  
**STRATEGY**

**STRATEGIC ROADMAPS**

FEATURES 01-02



Speed up innovation with a top-down investment planning.



Multiple timelines with user-defined swimlanes, configurable Kanban boards and local picklists.



CLARITY  
**STRATEGY**

**STRATEGIC ROADMAPS**

FEATURES 03-05

Roadmap Item	In Plan	Strategy	Must Have	Stakeholder	Investment Lifecycle	Goal	Architectural Fit	Start	Finish
<input type="checkbox"/> AARD Payments Module	In Plan	Exploit AI & Analytics	Carryover	Greg	Launched			Apr 11, 2022	Aug
<input type="checkbox"/> BIAnywhere Release 10	Not In Plan	Delight Customers to Drive Revenue	Top Choice	Greg	Launched	Grow the Business	Medium	Apr 19, 2022	Aug
<input type="checkbox"/> Datasecurity for BYOD	Not In Plan	Secure the Enterprise	Required	Angela	Launched	Cost Avoidance	Medium	Apr 3, 2022	Ju
<input type="checkbox"/> Digital Banking User Experience	Not In Plan	Delight Customers to Drive Revenue		Sanjay	Working	Grow the Business	Medium	Apr 8, 2022	Jc
<input type="checkbox"/> DPM Loan App Rel 4.0	Not In Plan	Exploit AI & Analytics	Required	Greg	Estimate & Prioritize	Grow the Business	Medium	May 13, 2022	Se
<input type="checkbox"/> eBusiness Mobile Network	In Plan	Optimize Back Office Operations	Carryover	Nikki	Working			Jun 8, 2022	M
<input type="checkbox"/> eCommerce Portal	In Plan	Exploit AI & Analytics	Carryover	Angela	Estimate & Prioritize			Mar 14, 2022	M
<input type="checkbox"/> Email SAN Storage Implementation	In Plan	Optimize Back Office Operations	Required	Dom	Working	Infrastructure Improv...	Medium	Jun 8, 2022	O
<input type="checkbox"/> Emea GDPR Certifications	In Plan	Secure the Enterprise	Carryover	Dom	Completing			May 8, 2022	Aug



Allocate teams and budgets with a few clicks and share big ideas with the entire company.



Grids that mimic Microsoft Excel and let you save unlimited views.



Optimize investment mix with constrained-based planning.



CLARITY  
**STRATEGY**

STRATEGIC ROADMAPS

**FEATURE 06**

**clarity** Idea and Project Roadmap RD00004

SCENARIO Initial Plan Search or filter...

COMPARE TO New Data Center Im... Show Items not in Initial Plan

	2020-Q1	2020-Q2	2020-Q3	2020-Q4
<b>Delight Customers to Drive Growth</b> Benefit: \$551K Total Cost: \$1.9M ROI: --		Product Launch for Minimal Online Sho... \$0   \$425K   47%		
		Green IT Initiative \$551K   \$1M   150%		
		BIAnywhere Release 10 \$0   \$500K   80%	BIAnywhere Release 10	
<b>Optimize Back Office Operations</b>	CRM Data Center Upgrade \$1.1M   \$790K   39%	CRM Data Center Upgrade	Email SAN Storage Implementation \$410K   \$350K   17%	Email SAN Storage Implementation
<b>Secure the Enterprise</b> Benefit: \$2.3M Total Cost: \$2.4M ROI: --		HR Performance Mgt Security Upgrade \$675K   \$421K   60%		Compliance Audit - Security \$1.1M   \$790K   39%
		PCI Compliance Changes \$0   \$700K   57%		Compliance Audit - Security
		Datasecurity for BYOD \$567.4K   \$450K   44%	Datasecurity for BYOD	
<b>Exploit AI &amp; Analytics</b> Benefit: \$533.5K Total Cost: \$1.8M ROI: --				Financial Process Audit \$533.5K   \$369.4K   44%
		eCommerce Portal		

METRICS: Benefit | Total Cost | ROI  
COLORS: None | Demand | Estimate & Prioritize | Launched | Working | Completing

Compare multiple business outcomes and run what-if scenarios.



CLARITY  
**STRATEGY**

**CUSTOM INVESTMENTS**

Go beyond traditional project management norms and name your own investments.

**FEATURE 07**

**clarity** Business Capability

← New From Template Search... View Default Save

Manage Widgets Filter Widgets

**Capability Type**

- Marketing... 14%
- Customer... 43%
- Finance &... 14%
- Other 29%

**Management**

- Arpel, Ian 71%
- Beasley, Frank 14%
- Childers, Valerie 14%

Select All Deselect All

Group By

Starred	Name ★ ↑	Manager	Capability Type	Sub-Capability
<input type="checkbox"/>	Ensure the on-boarding of new employees	Arpel, Ian	Finance & Controlling	Human Resource Management Sys
<input type="checkbox"/>	Enterprise Capabilities	Arpel, Ian	Strategic Management	Manage Core Business
<input checked="" type="checkbox"/>	Maintain System Uptime	Beasley, Frank	Product & Service Development	Quality Management
<input type="checkbox"/>	Monitor Production Process	Arpel, Ian	Production	Production Order Management
<input type="checkbox"/>	Process opportunities to next stage of procurement	Arpel, Ian	Marketing & Sales	Sales
<input type="checkbox"/>	Report sales/feature delivery across the enterprise	Childers, Valerie	Marketing & Sales	Sales
<input type="checkbox"/>	Respond to Customer Issues in a timely manner	Arpel, Ian	Customer Relationships	Customer Management

**Enterprise Capabilities (BC1007)** Close

**Details** Configure

Starred

Name ★ Enterprise Capabilities

Manager Arpel, Ian

Capability Type Strategic Management

Sub-capability Manage Core Business

Capability Assessment Stage Strategic Alignment

Parent Search...

Initiatives Search...

Strategy

🔍

First-and-only enterprise solution with configurable investments types.



CLARITY  
**STRATEGY**

**CUSTOM INVESTMENTS**

**FEATURE 08**



Blueprint investment types with relevant details and modules, such as financials, staffing and tasks.

**FEATURE 09**

TOTAL COST	BENEFIT	ROI
\$250,000	\$400,000	60%



Import or link custom investments to your roadmaps.



**FEATURE 10**

The screenshot displays the Clarity software interface for a 'Retail Banking Product Strategy Roadmap'. A 'SYNC LINKED ITEMS' dialog box is open, allowing users to sync data between custom investments and specific roadmap items. The dialog box includes the following sections:

- Sync All Attributes:**
  - Matching Custom Attributes
  - Start and Finish Dates
    - Without Events
    - With Events
- Capacity:**
  - Capacity
    - Allocations
    - Assignments
  - Actual
- Financials:**
  - Capital Cost
  - Operating Cost
  - Actual Capital Cost
  - Actual Operating Cost
  - Budget Capital Cost
  - Budget Operating Cost
  - Forecast Capital Cost
  - Forecast Operating Cost
  - Benefit
  - NPV
  - ROI
  - IRR
  - Payback Period
  - Currency
- Other:**
  - Roadmap Item
  - Description
  - Manager
  - Goal
  - Priority
  - Stage
  - Status Indicator
  - Investment Status
  - Department
  - Location

The background Gantt chart shows various project items with their costs and timelines across quarters (2023-Q1 to 2023-Q4). Examples include 'Product purchase confirmation' (\$12K, \$25K), 'Routing Security' (\$10K, \$20K), 'Economic pattern analytic engine' (\$10K, \$25K), 'User Profile' (\$12K, \$35K), 'Online Refunds' (\$12K, \$25K), 'Fraud CounterIntelligence', 'Loan Application AI' (\$15K, \$35K), 'RPA Assistant V2.0', 'Knowledgebase' (\$10K, \$25K), 'Loan Calculator Tool' (\$10K, \$50K), 'Improve Save and Return' (\$20K, \$40K), 'Credit Scoring' (\$25K, \$50K), 'V3.0 Loan Assist' (\$18K, \$20K), 'Integrate with AAPI Gateway' (\$12K, \$25K), 'Credit Score Highlighting' (\$14K, \$25K), 'Trending Assist' (\$25K, \$25K), and 'V3.0 Fraud Alert System' (\$12K, \$35K). A 'Loan Application' summary shows an operating cost of \$126K and a benefit of \$220K.



Sync data between custom investments and specific roadmap items for real-time updates.



CLARITY  
**STRATEGY**

**INVESTMENT HIERARCHIES**

Set up investment planning the way your company actually funds, staffs and executes work.

**FEATURES 11-13**

**Define requirements in your own business language so the whole company understands.**

**Create and connect multiple hierarchies.**

**Import ideas, projects and custom investments.**



CLARITY  
**STRATEGY**

INVESTMENT HIERARCHIES

**FEATURES 14-15**

The screenshot displays the Clarity software interface for an investment hierarchy. The main view shows a tree structure under the heading 'Retail Banking'. The root node is 'Retail Banking' (Investment ID: PRO0000001, Manager: Chase, Linda, Planned Capital: 184K). It branches into three main categories: 'Monetary Transfers' (Investment ID: PRO0000002, Manager: Chase, Linda, Planned Capital: 4.4M, 916K), 'Credit Cards' (Investment ID: PRO0000006, Manager: Chase, Linda, Planned Capital: 7M, 12M), and 'Home Lending' (Investment ID: PRO0000007, Manager: Chase, Linda, Planned Capital: 7M, 12M). 'Monetary Transfers' further branches into 'Routing Security' (Investment ID: EPI00000020, Manager: Chase, Linda, % Complete: 50%, Planned Capital: 10K). 'Credit Cards' branches into 'Online refunds' (Investment ID: EPI00000012, Manager: Chase, Linda, % Complete: 0%, Planned Capital: 12K) and 'Product purchase confirmation' (Investment ID: EPI00000025, Manager: Chase, Linda, % Complete: 30%, Planned Capital: 12K). 'Home Lending' branches into 'Knowledgebase' (Investment ID: EPI00000023, Manager: Chase, Linda, % Complete: 50%, Planned Capital: 10K). The interface includes a sidebar with navigation icons, a top navigation bar with 'Import' and 'Overview' buttons, and a 'View' dropdown menu.

**Gauge metrics, such as planned cost and work status, for individual hierarchy items with board or grid views.**

**Roll up aggregations and calculations for each hierarchy view.**



# MONEY

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See how your investments are doing in real time.

[FINANCIAL MANAGEMENT →](#)

[ONE-CLICK CHARTS →](#)

[BUSINESS INTELLIGENCE →](#)



CLARITY  
**MONEY**

**FINANCIAL MANAGEMENT**

View and compare planned, actual and forecasted costs and benefits in any category, across all timelines, split by product, capability, initiative, objective or any other perspective.

The screenshot displays the Clarity software interface for the 'AARD Payments Module' (PR2009). The top navigation bar includes tabs for Properties, Tasks, Baselines, Financials (selected), Staff, Assignments, Checklists, To Dos, Risks, Issues, Status, Links, Conversations, Documents, and Dashboard. A search bar and view options (Default View) are also present.

The main content area features three summary widgets:

- Plan Comparison:** Shows 'Financial Plan V2' at 1.74M and 'Financial Plan V1' at 815.48K.
- Plan Revisions:** A purple-bordered box containing the number '2'.
- POR Amount:** A green-bordered box containing '815.48K'.

Below these widgets is a table with columns: Name, Period Ty..., Start Peri..., Finish P..., Total Cost, Benefit Plan 1, Grouping Attributes, and ID. The table lists two rows:

Name	Period Ty...	Start Peri...	Finish P...	Total Cost	Benefit Plan 1	Grouping Attributes	ID
Financial Plan V1 <b>Plan of Record</b>	Monthly	2022-04	2022-07	815,480	Benefit Plan	Cost Type; Transaction Class	CP000...
Financial Plan V2	Monthly	2022-04	2022-07	1,740,672	Benefit Plan	Cost Type; Transaction Class	CP000...



**FEATURE 01**

clarity AARD Payments Module PR2009 Needs Help Hi, Ian

FINANCIALS FINANCIAL PLANS STAFF DETAILS TASKS AGILE PERFORM... RISKS ISSUES CHANGES STATUS LINKS RALLY

**Financial Plan V1** PLAN OF RECORD

SHOWING VIEW Planned To Forecast

Group By		2020-06				2020-07				TOTALS			
		PLANNED	FORECAST	VARIANCE	% VARIANCE	PLANNED	FORECAST	VARIANCE	% VARIANCE	PLANNED	FORECAST	VARIANCE	% VARIANCE
Cost T... ↑	Transact...	325,200	154,760	170,440	52%	260,200	60,093	200,107		744,480	230,924	513,556	69%
+	Capital Internal La...	0	0	0	0%	37,400	33,187	4,213		132,080	49,258	82,822	63%
	Capital Hardware	125,000	110,000	15,000	12%	150,000	0	150,000		275,000	110,000	165,000	60%
	Operating Internal La...	161,200	5,760	155,440	96%	26,800	26,907	(107)		202,400	32,667	169,733	84%
	Operating Travel	4,000	2,000	2,000	50%	4,000	0	4,000		16,000	2,000	14,000	88%
	Operating License Co...	35,000	37,000	(2,000)	(6%)	42,000	0	42,000		119,000	37,000	82,000	69%

1 - 5 of 5 FIRST PREVIOUS NEXT LAST



Budgets and forecasts for investments, programs, applications, products and services.



**FEATURE 02**

AARD Payments Module PR2009

Financial Plan V1 PLAN OF RECORD

			2020-06				2020-07				2020-08				TOTALS			
			PLANNED	ACTUAL	REMAINING	% SPENT	PLANNED	ACTUAL	REMAINING	% SPENT	PLANNED	AC	PLANNED	ACTUAL	REMAINING	% SPENT		
Group* 2↑	Cost Typ...	Transact...	325,200	154,760	170,440	48%	260,200	60,093	200,107	23%	121,080		744,480	230,924	513,556	31%		
▼ Hardware	Hardware	Hardware	125,000	110,000	15,000	88%	150,000	0	150,000	0%	0		275,000	110,000	165,000	40%		
	Capital	Hardware	125,000	110,000	15,000	88%	150,000	0	150,000	0%	0		275,000	110,000	165,000	40%		
▼ Internal Labor	Internal La...	Internal La...	161,200	5,760	155,440	4%	64,200	60,093	4,107	94%	75,080		334,480	81,924	252,556	24%		
	Capital	Internal La...	0	0			37,400	33,187	4,213	89%	75,080		132,080	49,258	82,822	37%		
	Operating	Internal La...	161,200	5,760	155,440	4%	26,800	26,907	(107)	100%	0		202,400	32,667	169,733	16%		
▼ License Costs	License Co...	License Co...	35,000	37,000	(2,000)	106%	42,000	0	42,000	0%	42,000		119,000	37,000	82,000	31%		
	Operating	License Co...	35,000	37,000	(2,000)	106%	42,000	0	42,000	0%	42,000		119,000	37,000	82,000	31%		
▼ Travel	Travel	Travel	4,000	2,000	2,000	50%	4,000	0	4,000	0%	4,000		16,000	2,000	14,000	13%		
	Operating	Travel	4,000	2,000	2,000	50%	4,000	0	4,000	0%	4,000		16,000	2,000	14,000	13%		

Dynamic grid views for easy grouping, sorting and filtering.

**FEATURE 03**

AARD Payments Module PR2009

Cost Plans

*Name	*Period Type	*Start Period	*Finish Period	Total Cost	Benefit Plan ↑	*Grouping Attributes	*ID
Financial Plan V1 PLAN OF RECORD	Monthly	2020-06	2020-09	744,480	Benefit Plan	Cost Type; Transaction Class	CP000...
Financial Plan V2	Monthly	2020-06	2020-09	1,740,672	Benefit Plan	Cost Type; Transaction Class	CP000...
Revised June Plan	Monthly	2020-06	2020-10	2,150,448	Benefits by Geo	Cost Type; Transaction Class	CP000...
Revised Plan July - Resource & Role	Monthly	2020-06	2020-10	1,797,448		Resource; Role	CP000...

Cost, budget and benefit plans.



FEATURES 04-05

The screenshot displays the 'Minimal Online Product Roadmap' in the Clarity software. At the top, there are summary cards for Benefit, Operating Cost, and Estimated Story Points. Below these is a detailed table of roadmap items with columns for In Plan, Rank, Roadmap Item, Persona, Must Have, Start, Finish, ROI, IRR, NPV, Total Cost, Operating Cost, and Benefit. A search and filter sidebar is visible on the right.

In Plan	Rank	Roadmap Item*	Persona	Must Have	Start	Finish	ROI	IRR	NPV	Total Cost	Operating...	Benefit
✓	1	Auto-renewal	Customer	Carryover	Jan 11 2021	Jun 24 2021	133%			15,000	15,000	
✓	2	Backorder fulfillment	BackOffice	Carryover	Jan 11 2021	Jun 19 2021	133%	10%	20,000	15,000	15,000	
✓	3	Credit card error messaging	Finance	Required	Jul 06 2020	Dec 30 2020	100%	5%	10,000	10,000	10,000	
✓	4	Credit card payments	Customer	Required	Jul 07 2020	Dec 31 2020	100%	5%	10,000	10,000	10,000	
✓	5	Duplicate order fulfillment	BackOffice	Top Choice	Jul 06 2020	Dec 30 2020	67%	6%	8,000	12,000	12,000	
✓	6	Homepage	Customer	Top Choice	Jul 06 2020	Dec 30 2020	150%	11%	15,000	10,000	10,000	
✓	7	Implement Fraud Detection	Integration	Required	Jan 06 2020	Jun 30 2020	150%	6%	15,000	10,000	10,000	
✓	8	Integrate with Amex Gateway	Integration	Required	Jul 05 2020	Dec 30 2020	108%	9%	13,000	12,000	12,000	
✓	9	Integrate with Paypal	Integration	Required	Jan 06 2020	Jun 30 2020	250%	9%	25,000	10,000	10,000	
✓	10	Knowledgebase	Integration	Carryover	Jul 06 2020	Dec 30 2020	150%	11%	15,000	10,000	10,000	
✓	12	Online refunds	Finance	Top Choice	Jan 06 2020	Jun 30 2020	108%	5%	13,000	12,000	12,000	
✓	13	Product Listings	Customer	Top Choice	Jan 06 2020	Jun 30 2020	192%	8%	23,000	12,000	12,000	
✓	14	Product purchase confirmation	Customer	Top Choice	Jul 06 2020	Dec 30 2020	108%	9%	13,000	12,000	12,000	
✓	15	Promotional Campaigns	Customer	Carryover	Jan 11 2021	Jun 24 2021	108%			15,000	15,000	
✓	18	Search for products	BackOffice	Top Choice	Jul 06 2020	Dec 30 2020	150%	11%	15,000	10,000	10,000	
✓	19	Shopping Cart	Customer	Top Choice	Jan 06 2020	Jun 30 2020	33%	2%	5,000	15,000	15,000	
✓	22	User Profile	BackOffice	Top Choice	Jan 06 2020	Jun 30 2020	192%	8%	23,000	12,000	12,000	
	16	Sales Credits and Returns	Finance	Carryover	Jan 10 2020	Jun 20 2021	67%			15,000	15,000	
	17	Refund management	BackOffice	Top Choice	Jan 06 2020	Jun 30 2020	67%	4%	10,000	15,000	15,000	

Constraint-based budgeting to optimize funding.

Automatic financial calculations, including net present value (NPR), return on investment (ROI), internal rate of return (IRR).



CLARITY  
**MONEY**

FINANCIAL MANAGEMENT

FEATURES 06-08



Time-specific rate structures for roles, locations, investments and resources.



Support of non-labor financials, multi-currency, vendors and contractors.



Complete cost allocation, including rate matrix, chargebacks and transaction entry.




CLARITY  
**MONEY**

**ONE-CLICK CHARTS**


Charts turn data points into business strategies.

FEATURES 09-11


The screenshot shows the Clarity Ideas interface. On the left is a sidebar with navigation icons. The main area displays a table of ideas with columns for Subject, Description, Idea Type, Idea Priority, Start Date, Planned Capital, Planned Operations, Planned Benefits, Planned ROI, and Corporate Priority. A pie chart titled 'Ideas by NPV' is overlaid on the table, showing the distribution of ideas by their Net Present Value. The chart is divided into several segments, each corresponding to an idea in the table. A settings panel for the chart is visible on the right, allowing for customization of stroke width, offset, shadow, color, blur, and X/Y offsets.



Point-and-click reporting, just like Microsoft Excel.



Select from a variety of chart formats, including column, bar, pie, line, area and X Y (scatter).



Data is always up-to-date, showing you the remaining budgets and pending benefits in real time.

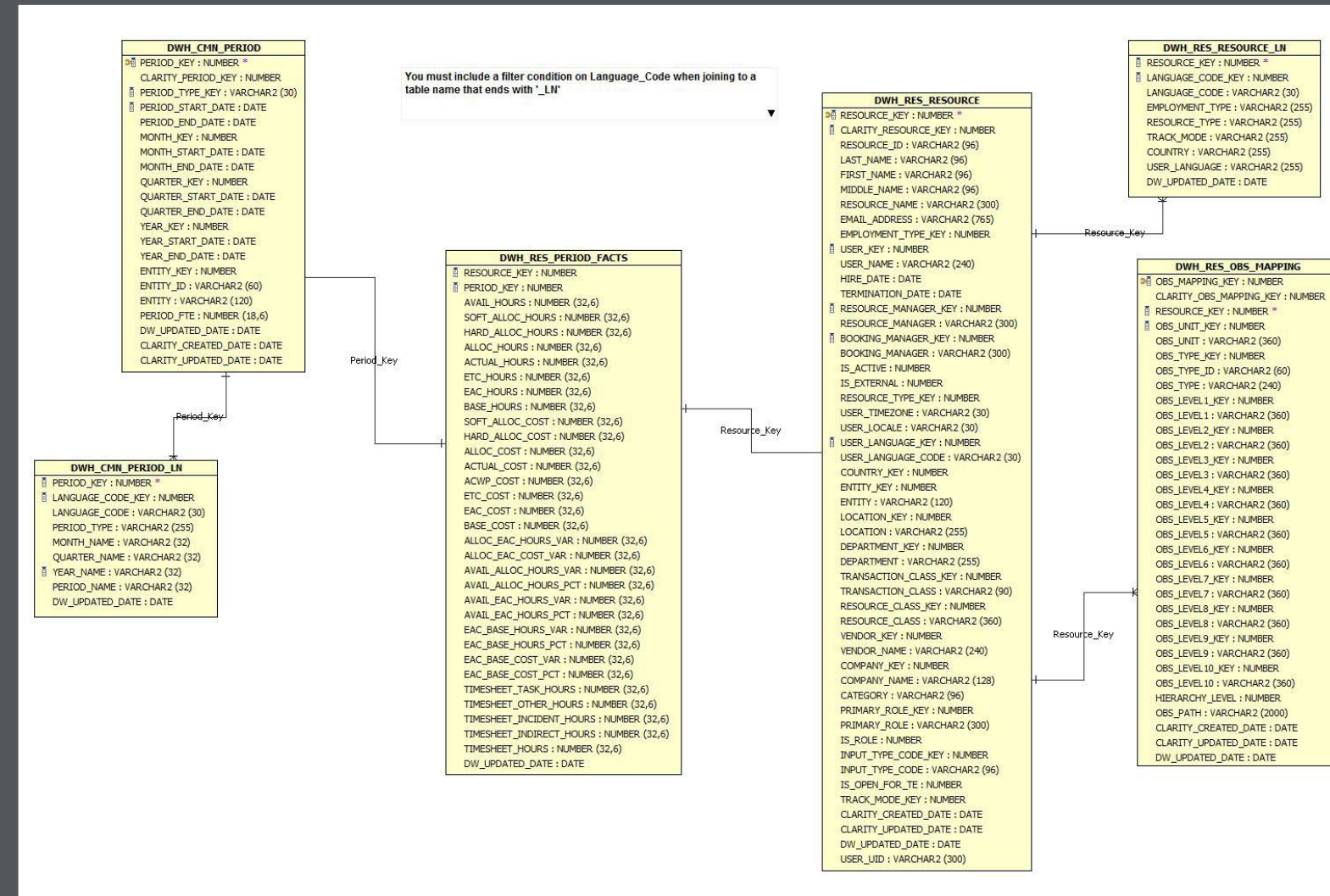


CLARITY  
**MONEY**

**BUSINESS INTELLIGENCE**

Clarity is the first-and-only investment planning solution with its own data warehouse and open BI connections.

FEATURE 12



FEATURES 13-14



Ad hoc reporting capabilities eliminate cumbersome custom reports.



OData connector to integrate third-party tools, like Spotfire, Power BI, Tableau and Qlik.



Clarity comes with a business intelligence data warehouse, protected by field-level security.



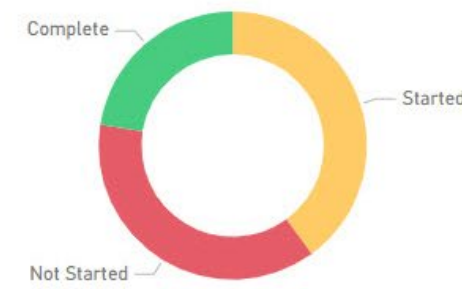
FEATURE 15

OKR Dashboard

Overall Attainment



Goal Progress



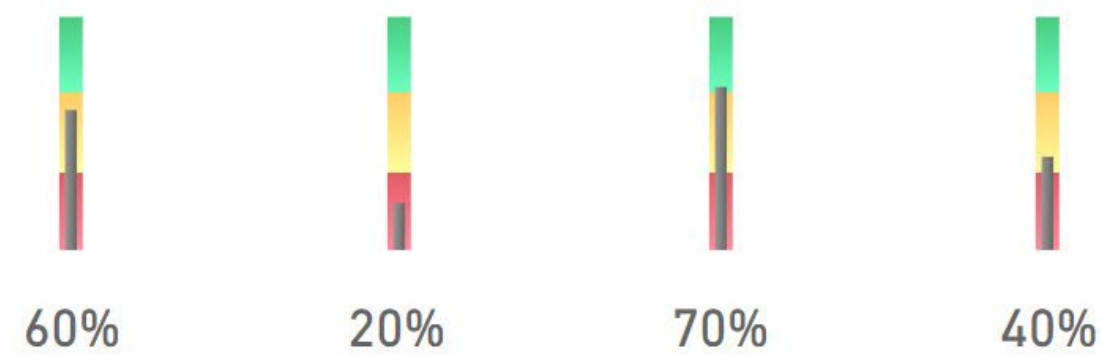
OKR Breakdown

Product	OKR Goal Attainment	Completed OKRs
Credit Cards	60%	20%
Home Lending	20%	10%
Loan Applications	70%	50%
Monetary Transfers	40%	10%

% Completion of OKRs



Attainment by Product



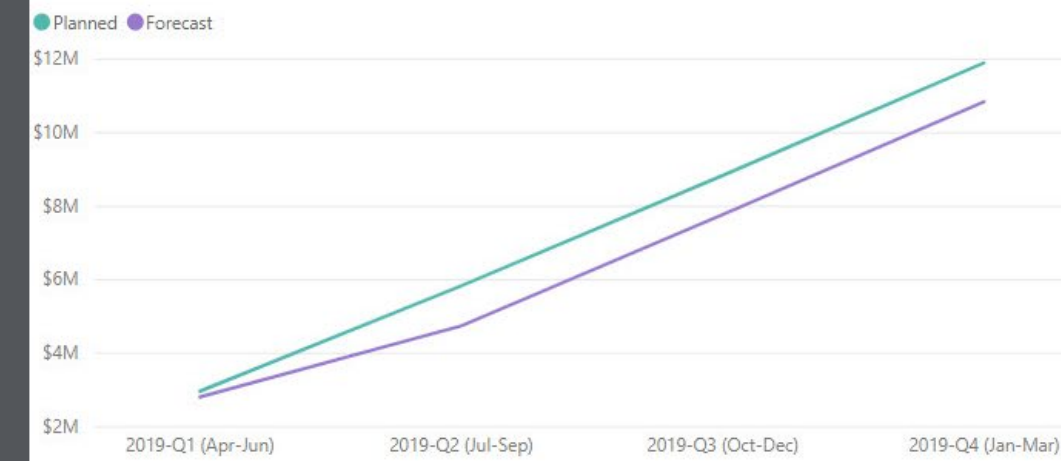
Track financial key performance indicators (KPI).

FEATURE 16

FY19 PPM Product Development

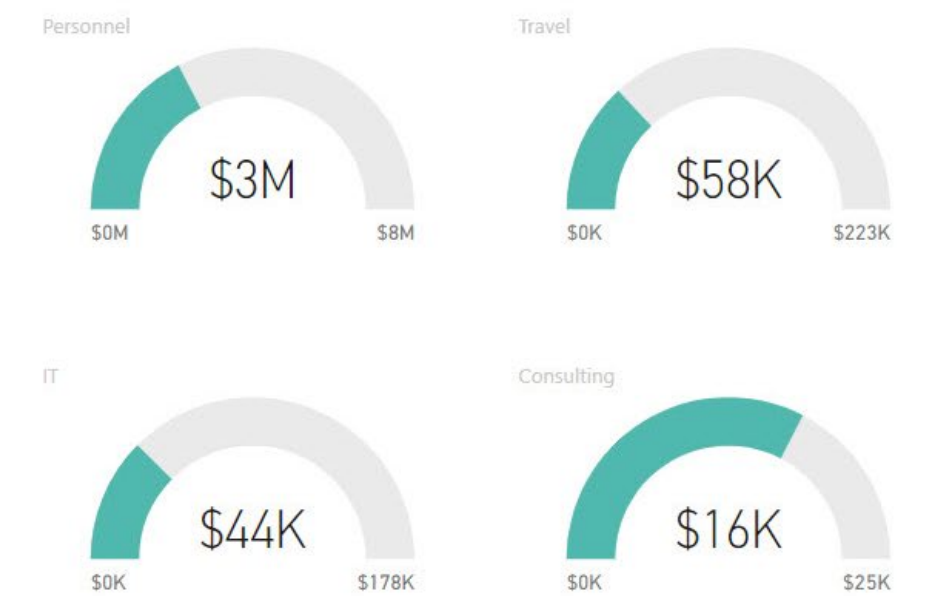
- Department
- 10011442 US ITBM PPM Dev
  - 10011527 US ITBM PPM Prod Mgt
  - 10011562 US Proj & Portfolio Mgmt Dev
  - 73020035 India ITBM PPM Dev
  - 73020193 India ITBM PPM Prod Mgt

Cumulative Plan vs Forecast



Quarter	2019-Q1 (Apr-Jun)			2019-Q2 (Jul-Sep)			2019-Q3 (Oct-Dec)			2019-Q4 (Jan-Mar)			Total		
	Planned	Forecast	Variance	Planned	Forecast	Variance	Planned	Forecast	Variance	Planned	Forecast	Variance	Planned	Forecast	Variance
Consulting	\$6,705	\$16,320	(\$9,615)	\$4,917	\$6,705	(\$1,788)	\$6,705	\$6,705	\$0	\$6,705	\$6,705	\$0	\$25,032	\$36,435	(\$11,403)
IT	\$47,765	\$44,253	\$3,513	\$35,028	\$47,765	(\$12,737)	\$47,765	\$47,765	\$0	\$47,765	\$47,765	\$0	\$178,324	\$187,549	(\$9,225)
Office	\$975	\$50	\$925	\$715	\$975	(\$260)	\$975	\$975	\$0	\$975	\$975	\$0	\$3,640	\$2,975	\$665

Actual Cost as % of Plan



Take snapshot for variance comparisons.

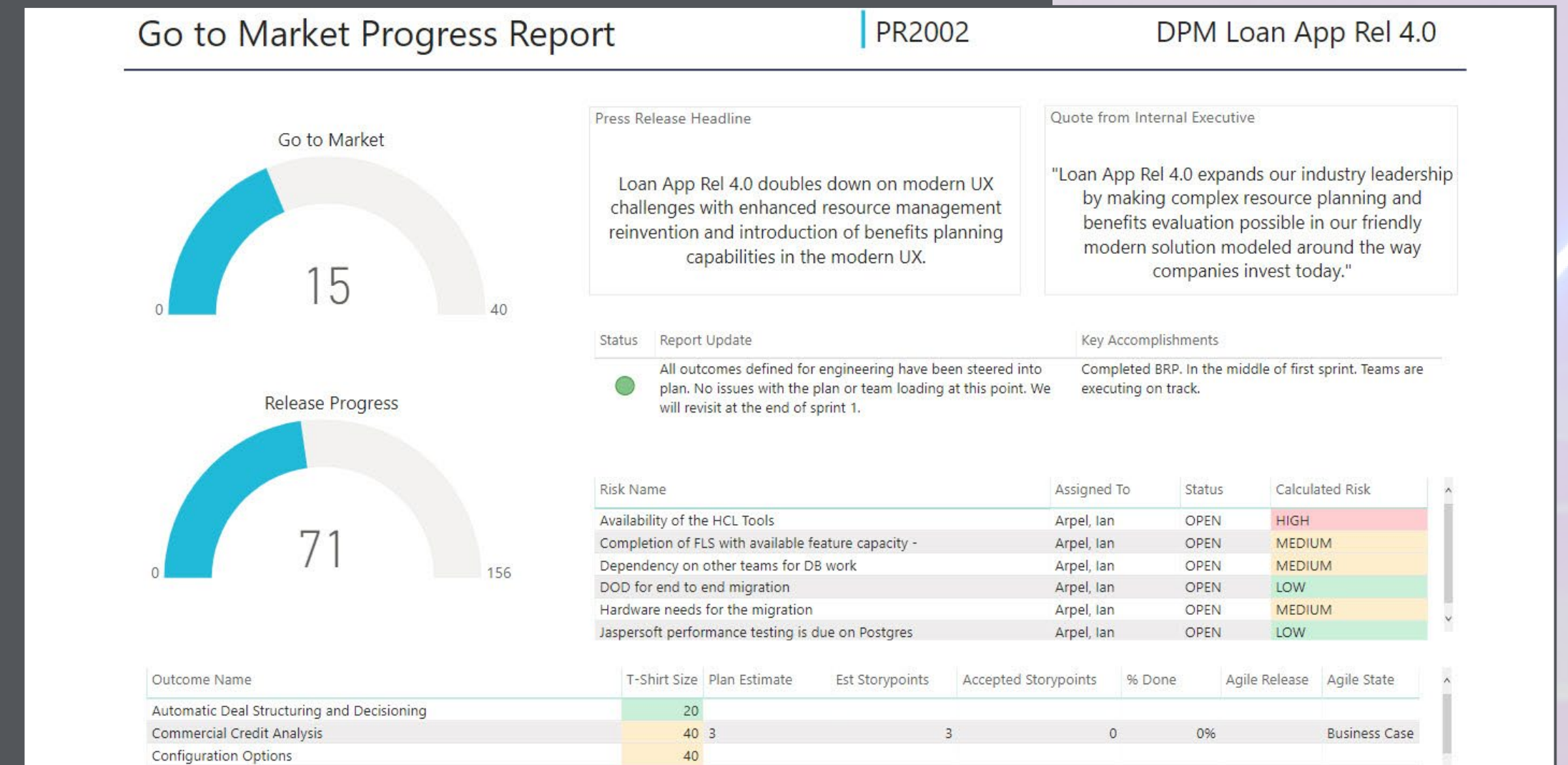


FEATURE 17



Risk management analysis.

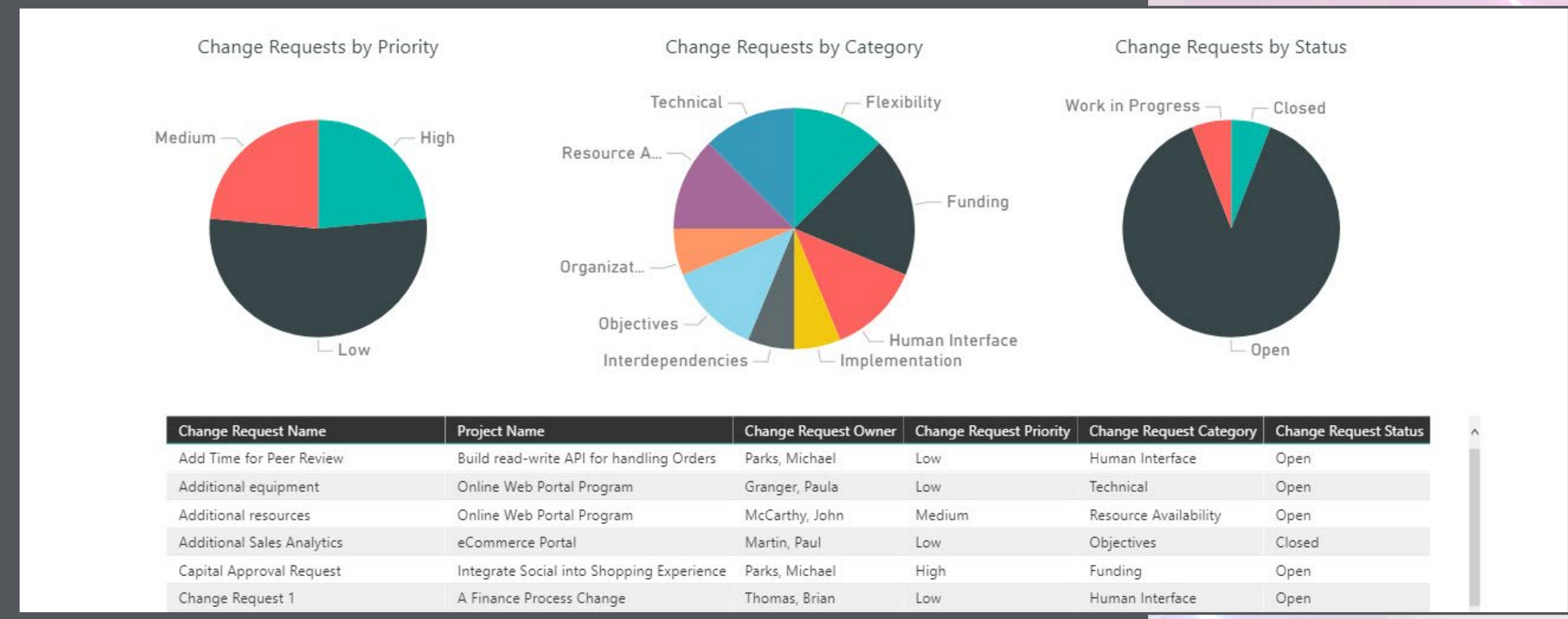
FEATURE 18



Analytic metrics, including quick views of project status, ROI, NPV.



FEATURE 19



Change management reporting:  
what changed, by whom and when?



# PEOPLE

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Find the right people for the right job right away.

[STAFFING AND RESOURCE MANAGEMENT →](#)

[TO-DO SCOREBOARD →](#)

[COLLABORATION →](#)



CLARITY  
**PEOPLE**

**STAFFING AND RESOURCE  
MANAGEMENT**

Manage teams and individuals, non-labor and non-project resources with a 360-degree view of capacity and demand across the company.

The screenshot displays the Clarity People interface. The main view shows a resource allocation table for 'Resources Investments' across months from 2020-06 to 2020-11. A detailed view for 'Adriana Ramos' is open on the right, showing her role as 'Architect' and 'Soft' booking status for a 'GDPR Compliance - Loan Application (PR2010)' investment.

	2020-06 FTE	2020-07 FTE	2020-08 FTE	2020-09 FTE	2020-10 FTE	2020-11 FTE
<b>Resources Investments</b>	<b>306.88</b>	<b>246.59</b>	<b>228.14</b>	<b>173.86</b>	<b>143.59</b>	<b>92.95</b>
<b>Adriana Ramos</b>	<b>0.36</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
GDPR Compliance - Loa...	0.36					
AI Team	63.00	49.61	35.00	20.05	14.00	14.00
Alex Garcia	0.23	0.10	0.00	0.00	0.00	0.00
Alex Riviera	0.00	0.00	0.00	0.00	0.00	0.00
Alicia Gaurand	1.00	1.00	2.00	1.27	1.00	0.00
Amy Donegal	1.00	1.00	2.00	1.27	1.00	0.00
Anita Rodriguez	0.00	0.00	0.00	0.00	0.00	0.00
Art Kingsley	0.00	0.00	0.00	0.00	0.00	0.00
Arun Krishna	0.50	0.00	0.00	0.00	0.00	0.00
Arun Kumar	0.00	0.00	0.00	0.00	0.00	0.00
Ashley Parker						

	2020-06 FTE	2020-07 FTE	2020-08 FTE	2020-09 FTE	2020-10 FTE	2020-11 FTE
<b>Requests</b>	<b>53.05</b>	<b>46.00</b>	<b>38.83</b>	<b>30.86</b>	<b>29.05</b>	<b>22.00</b>
ABM Marketing	8.50	7.09	5.00	2.86	1.05	1.00
Analyst Relations	0.00	0.00	0.00	0.00	0.00	0.00
Architect	6.36	5.96	4.83	4.00	4.00	3.00
Business Analyst	5.36	5.00	4.83	4.00	4.00	3.00
Corporate Marketing	0.00	0.00	0.00	0.00	0.00	0.00
Data Analytics Engineer	0.00	0.00	0.00	0.00	0.00	0.00
Engineer	6.36	5.96	4.83	4.00	4.00	3.00
Manager	0.00	0.00	0.00	0.00	0.00	0.00
All Engineer						

**Adriana Ramos**  
GDPR Compliance - Loan Application (PR2010)

**DETAIL** | CONVERSATIONS

INVESTMENT  
GDPR Compliance - Loan Application (PR2010)

INVESTMENT MANAGER  
Patrick Clark

ALLOCATION DATES  
START DATE: Feb 10 2020 | FINISH DATE: Jun 10 2020

ALLOCATION %  
100

INVESTMENT ROLE  
Architect

BOOKING STATUS \*  
Soft

FORECAST RATE  
 Open for Time Entry



CLARITY  
**PEOPLE**

**STAFFING AND RESOURCE  
MANAGEMENT**

FEATURES 01-02

clarity Staffing

Allocations Timeline Staff Grid

View: Role Replace - Architect Save

Allocations By Investment All Staffed Investments Columns

Add Filter

Remove All Match All Match Any

Name	Role	Start	End	2022-01	2022-02	2022-03	2022-04	2022-05	2022-06	2022-07	2022-08	2022-09	2022-10	2022-11	2022-12
Establish Emea Private Cloud		Sep 13, 2021		672	640	736	672	704	704	672	736	704	160		
Evans, Nick	Engineer	Sep 13, 2021		168	160	184	168	176	176	168	184	176	40		
Hill, Wayne	Business Analyst	Sep 13, 2021		168	160	184	168	176	176	168	184	176	40		
Murphy, Mary	Business Analyst	Sep 13, 2021		168	160	184	168	176	176	168	184	176	40		

Resources By Role Columns

Full Name	Primary Role	Manager	2022-01	2022-02	2022-03	2022-04	2022-05	2022-06	2022-07	2022-08	2022-09	2022-10	2022-11	2022-12
Architect			0 / 840	0 / 800	408 / 920	872 / 840	1,056 / 880	1,130 / 880	1,114 / 840	1,092 / 920	897 / 880	840 / 840	800 / 880	536
Childers, Valerie	Architect	Fowler, Ray	0 / 168	0 / 160	112 / 184	168 / 168	176 / 176	176 / 176	168 / 168	184 / 184	176 / 176	168 / 168	176 / 176	176



Book hours or FTE in spreadsheet-style views.



Reserve resources with soft bookings.



# CLARITY PEOPLE

## STAFFING AND RESOURCE MANAGEMENT

FEATURE 03

The screenshot displays the Clarity People interface. On the left, there are two tables: 'Resources Investments' and 'Requests'. The 'Resources Investments' table shows resource allocation by quarter and year for various team members. The 'Requests' table shows resource requirements for different departments. On the right, a chat window titled 'Architect' is open, showing a conversation between Dana and Derrick regarding the need for an architect to support a DB conversion project.

	2020-07 HOURS	2020-08 HOURS	2020-09 HOURS	2020-Q4 HOURS	2021-Q1 HOURS	2021-Q2 HOURS	2021 HOURS
ALL	2,639.79	2,376.52	2,486.26	10,671.56	640.00	0.00	640.00
AI Team	0.00	0.00	0.00	240.00	0.00	0.00	0.00
Alex Garcia	33.89	154.91	176.00	376.00	0.00	0.00	0.00
Alicia Gaurand	0.00	0.00	0.00	512.00	64.00	0.00	64.00
Amy Donegal	0.00	0.00	0.00	512.00	64.00	0.00	64.00
Beth Roberts	36.80	33.60	35.20	75.20	0.00	0.00	0.00
Brett Jenson	0.00	0.00	0.00	512.00	64.00	0.00	64.00
Cheryl Amos	184.00	168.00	176.00	376.00	0.00	0.00	0.00
Christophe Lefevre	0.00	0.00	0.00	512.00	64.00	0.00	64.00
Dana Lewis	184.00	168.00	176.00	888.00	64.00	0.00	64.00
Digital Team	538.47	491.65	515.06	1,100.36	0.00	0.00	0.00
Ed Carmen	184.00	168.00	176.00	376.00	0.00	0.00	0.00
Henry Reed	0.00	0.00	0.00	512.00	64.00	0.00	64.00
Jason Berry	184.00	168.00	176.00	376.00	0.00	0.00	0.00

	2020-07 HOURS	2020-08 HOURS	2020-09 HOURS	2020-Q4 HOURS	2021-Q1 HOURS	2021-Q2 HOURS	2021 HOURS
ALL	5,564.80	5,009.60	5,371.20	20,851.20	17,752.00	5,584.00	25,880.00
ABM Marketing	552.00	504.00	584.00	2,112.00	2,048.00	1,224.00	3,704.00
Analyst Relations	0.00	0.00	0.00	0.00	0.00	0.00	0.00



Concise handshake between project and resource managers when allocating resources to role-based requirements.

FEATURE 04

The screenshot displays the Clarity interface for the 'AARD Payments Module' project. It shows a table of resource allocations with columns for resource name, role, start and finish dates, and various allocation metrics. The table includes resources like 'AI Team', 'Architect', 'Berry, Jason', 'Bhatt, Rakesh', 'Carmen, Ed', 'Digital Team', 'Garcia, Alex', 'Granger, Paula', 'License Costs', 'Morris, Tom', 'Quinn, Randy', 'Roberts, Beth', 'Stoneburg, Sam', 'Travel', and 'Web-Conferencin...'. The 'AI Team' and 'Architect' rows are highlighted.

Conversations	*Resource ↑	Role	Start	Finish	Default All...	Allocation	Hard Alloca...	Allocations
<input checked="" type="checkbox"/>	AI Team		11/2/20	12/6/20	100%	1		0
<input checked="" type="checkbox"/>	Architect	Architect	6/8/20	12/6/20	20%	0	1	0
<input type="checkbox"/>	Berry, Jason	Engineer	6/8/20	12/6/20	100%	1	1	1
<input type="checkbox"/>	Bhatt, Rakesh	Engineer	6/8/20	12/6/20	100%	1	1	1
<input type="checkbox"/>	Carmen, Ed	QA			100%	1		1
<input type="checkbox"/>	Digital Team		6/8/20	12/6/20	100%	3	1	2
<input type="checkbox"/>	Garcia, Alex	ML Engineer	6/8/20	12/6/20	100%	1	0	0
<input type="checkbox"/>	Granger, Paula	Project Manager	6/8/20	12/6/20	20%	0	1	1
<input type="checkbox"/>	License Costs	Equipment	6/8/20	12/6/20	0%			
<input type="checkbox"/>	Morris, Tom	Architect	6/8/20	12/6/20	80%	1	1	1
<input type="checkbox"/>	Quinn, Randy	Business Analyst	6/8/20	12/6/20	100%	1	1	1
<input type="checkbox"/>	Roberts, Beth	Security Architect	6/8/20	12/6/20	20%	0	0	0
<input type="checkbox"/>	Stoneburg, Sam	QA	6/8/20	12/6/20	100%	1	1	1
<input type="checkbox"/>	Travel	Travel Expenses	6/8/20	11/17/20	0%			
<input type="checkbox"/>	Web-Conferencin...	Equipment	7/29/20	11/17/20	0%			



Support for non-labor and non-project resources, including training and services.



CLARITY  
**PEOPLE**

**STAFFING AND RESOURCE  
MANAGEMENT**

**FEATURE 05**

Analytics of resource capacity and demand by team and time.

	2020-10 HOURS	2020-11 HOURS	2020-12 HOURS	2021-Q1 HOURS	2021-Q2 HOURS	2021-Q3 HOURS	2021 HOURS	TOTALS HOURS
<b>PINNED (6) ALL</b>	<b>14,915.20</b>	<b>12,772.00</b>	<b>13,560.80</b>	<b>33,301.60</b>	<b>22,662.00</b>	<b>6,480.00</b>	<b>62,443.60</b>	<b>103,691.60</b>
> Diane Stewart	160.00	168.00	184.00	512.00	136.00	0.00	648.00	1,160.00
> Ed Carmen	352.00	304.00	184.00	168.00	0.00	0.00	168.00	1,008.00
★ > John McCarthy	<b>704.00</b>	<b>672.00</b>	<b>736.00</b>	<b>2,048.00</b>	<b>1,712.00</b>	<b>432.00</b>	<b>4,192.00</b>	<b>6,304.00</b>
DPM Loan App Rel 4.0	176.00	168.00	184.00	512.00	520.00		1,032.00	1,560.00
DPM Loan App Rel 5.0	176.00	168.00	184.00	512.00	152.00		664.00	1,192.00
DPM Loan App Rel 6.0	176.00	168.00	184.00	512.00	520.00	432.00	1,464.00	1,992.00
Minimal Online Shoppi...	<b>176.00</b>	<b>168.00</b>	<b>184.00</b>	<b>512.00</b>	<b>520.00</b>		<b>1,032.00</b>	<b>1,560.00</b>
> Joyce Bauer	352.00	184.00	184.00	672.00	350.00	0.00	1,022.00	1,742.00
> Mobile Team	<b>7,392.00</b>	<b>6,048.00</b>	<b>6,440.00</b>	<b>16,912.00</b>	<b>11,984.00</b>	<b>3,024.00</b>	<b>31,920.00</b>	<b>51,800.00</b>
BIAnywhere Release 10	1,232.00	168.00						1,400.00
Digital Banking User Exp...	1,232.00	1,176.00	1,288.00	2,576.00			2,576.00	6,272.00
DPM Loan App Rel 4.0	1,232.00	1,176.00	1,288.00	3,584.00	3,640.00		7,224.00	10,920.00
DPM Loan App Rel 5.0	1,232.00	1,176.00	1,288.00	3,584.00	1,064.00		4,648.00	8,344.00



CLARITY  
**PEOPLE**

**TO-DO CHECKLISTS**

Just get it done by creating, sharing and automating simple to-do lists.

FEATURES 06-08

clarity
My Workspace
🔔
👤

Checklists +

- Facilities checklist - Australia
- Facilities checklist - London Jul 20
- Facilities checklist - Vienna
- Facilities checklist - Vienna Jun 30
- Office Location - London Jun 30

Smartlists +


- 🌟 My To Dos
- 🌟 Not yet Completed

### Facilities checklist - London


🏠 London Sales Office 📅 Jul 20

👤👤👤 3
🔗 Share
⋮


- Corporate branding - signup Jul 07 👤
- Copiers & phones Jul 05 👤
- + New To Do
- Completed**
- Office furniture Jun 15 👤
- Reception area setup Jul 01 👤
- Office supplies Jul 06 👤



Set up workspaces with lists, calendars, boards and more.



Invite anyone to work on your to-do lists.



Build simple workflow to automate basic activities.

BROADCOM.COM/CLARITY 30

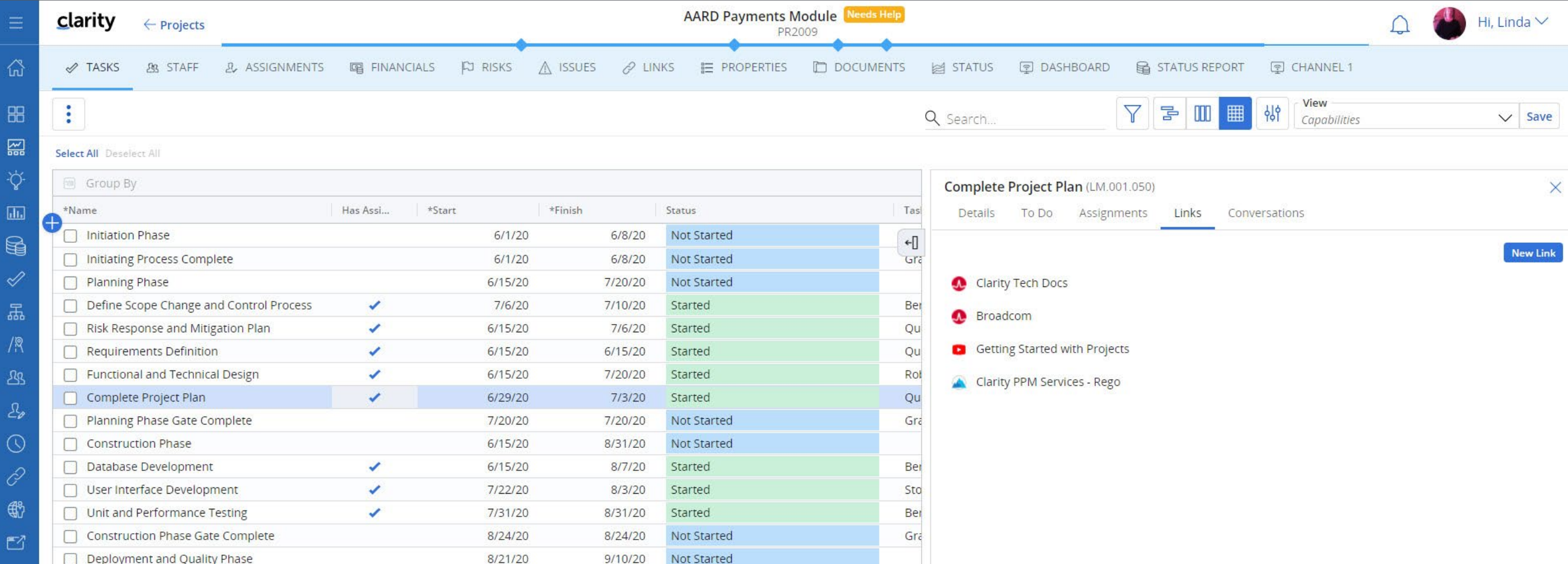


CLARITY  
**PEOPLE**


**COLLABORATION**

Stay connected and up-to-date with all the information in one app.


FEATURES 09-10



The screenshot displays the Clarity software interface for a project named 'AARD Payments Module'. The main view is a project plan table with columns for Name, Has Assi..., \*Start, \*Finish, and Status. The 'Complete Project Plan' task is highlighted. A sidebar on the right shows a 'Complete Project Plan (LM.001.050)' window with tabs for Details, To Do, Assignments, Links, and Conversations. The Links tab is active, showing a list of links including 'Clarity Tech Docs', 'Broadcom', 'Getting Started with Projects', and 'Clarity PPM Services - Rego'.



Clarity supports critical in-app collaboration without accessing outside websites or platforms.



Saves overall end-user operational time in day-to-day collaboration process.



FEATURES 11-12

The screenshot displays the Clarity software interface for a project named "AARD Payments Module PR2009". The top navigation bar includes tabs for TASKS, STAFF, ASSIGNMENTS, FINANCIALS, RISKS, ISSUES, LINKS, PROPERTIES, DOCUMENTS, STATUS, DASHBOARD, STATUS REPORT, and CHANNEL 1. A search bar and view options are also present.

The main content area shows a task list with columns for Name, Has Assi..., \*Start, \*Finish, Status, and Tas. The tasks are as follows:

*Name	Has Assi...	*Start	*Finish	Status	Tas
<input type="checkbox"/> Initiation Phase		6/1/20	6/8/20	Not Started	
<input type="checkbox"/> Initiating Process Complete		6/1/20	6/8/20	Not Started	
<input type="checkbox"/> Planning Phase		6/15/20	7/20/20	Not Started	
<input type="checkbox"/> Define Scope Change and Control Process	✓	7/6/20	7/10/20	Started	Be
<input type="checkbox"/> Risk Response and Mitigation Plan	✓	6/15/20	7/6/20	Started	Qu
<input type="checkbox"/> Requirements Definition	✓	6/15/20	6/15/20	Started	Qu
<input type="checkbox"/> Functional and Technical Design	✓	6/15/20	7/20/20	Started	Ro
<input type="checkbox"/> Complete Project Plan	✓	6/29/20	7/3/20	Started	Qu
<input type="checkbox"/> Planning Phase Gate Complete		7/20/20	7/20/20	Not Started	Gr
<input type="checkbox"/> Construction Phase		6/15/20	8/31/20	Not Started	
<input type="checkbox"/> Database Development	✓	6/15/20	8/7/20	Started	Be
<input type="checkbox"/> User Interface Development	✓	7/22/20	8/3/20	Started	Sto
<input type="checkbox"/> Unit and Performance Testing	✓	7/31/20	8/31/20	Started	Be
<input type="checkbox"/> Construction Phase Gate Complete		8/24/20	8/24/20	Not Started	Gr

On the right, a "Complete Project Plan (LM.001.050)" conversation window is open, showing a message from Linda and a reply from Dana with an attached document "SQL Developers.docx".



Project conversations with @-mentions to automatically notify team members.



Attach items to specific conversations or the dedicated project-document area.



**FEATURE 13**

The screenshot displays the Clarity software interface for the 'AARD Payments Module'. The main table lists risks with columns for Name, Calculated Risk, Description, Category Type, and Priority. A detailed view for the 'Underfunded' risk is shown on the right, including fields for Name, Description, Category Type, Priority, Impact, Calculated Risk, Status, Assigned To, Target Resolution Date, Last Updated Date, and ID.

Conv...	*Name	Calculated Risk	Description	Category Type ↑	*Priority	Prob
<input type="checkbox"/>	Underfunded	High	Budget was approved lower than the original ask and we are u...	Funding	High	
<input checked="" type="checkbox"/>	Scope Change	Low	Infrastructure must be completed. Delays here will cause us to ...	Implementation	Low	LO
<input type="checkbox"/>	Sponsorship Risk	High	Executive Steering Meetings are poorly attended	Sponsorship	Medium	Hig

**Underfunded (RSK00000002)**

Details Conversations

NAME \* Underfunded

DESCRIPTION Budget was approved lower than t...

CATEGORY TYPE Funding

PRIORITY \* High

PROBABILITY Medium

IMPACT High

CALCULATED RISK 6

Is Above Threshold

STATUS \* Open

ASSIGNED TO \* Lewis, Dana

TARGET RESOLUTION DATE 1/4/20

LAST UPDATED DATE 6/17/20

ID \* RSK00000002

Create risks, note critical issues, prioritize action items, start discussions, upload documents and assign work to resources.



# WORK

---

Let teams work the way they want while staying engaged with the business.

[PROJECT MANAGEMENT →](#)

[DASHBOARDS AND REPORTS →](#)

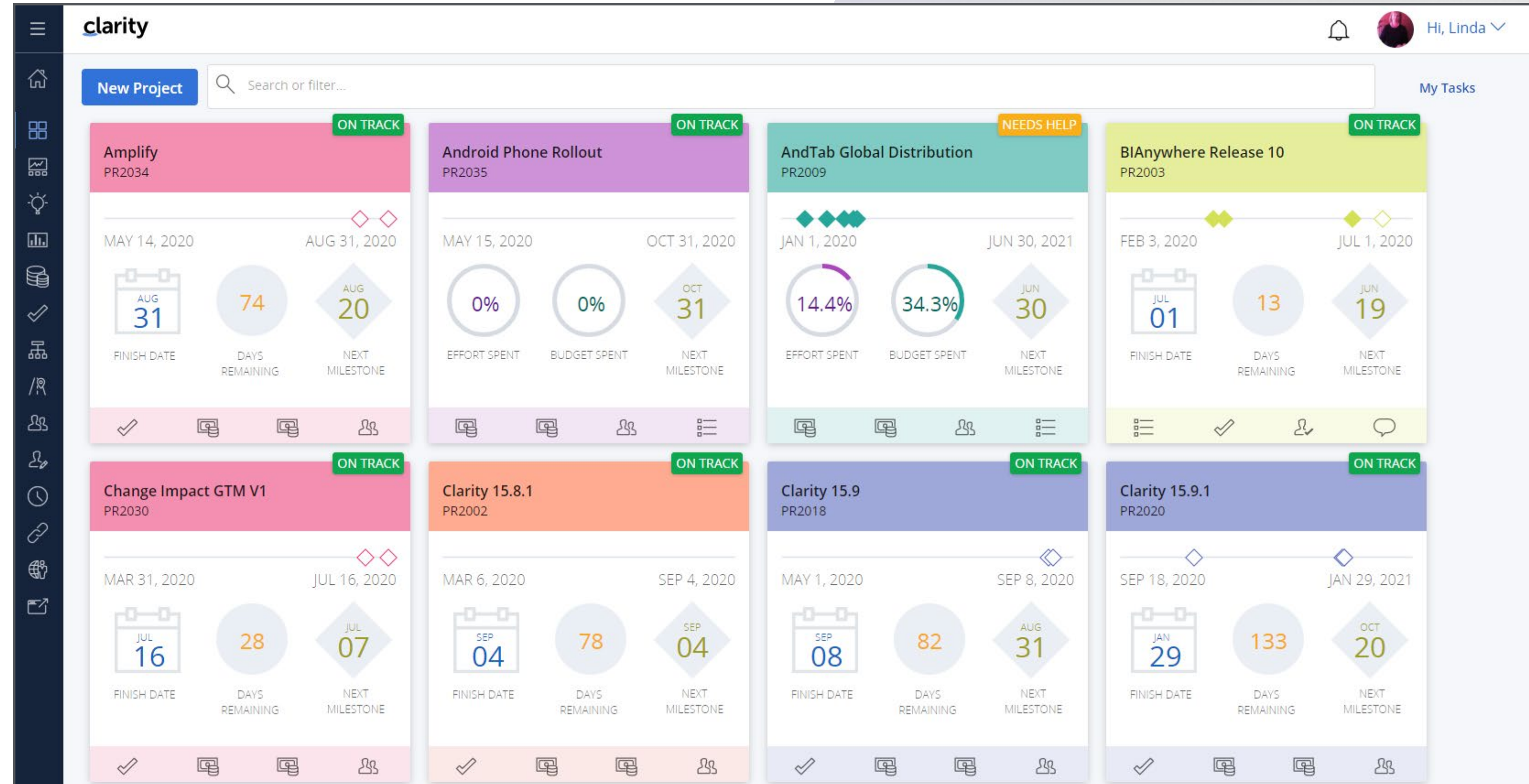
[COLOR SCHEMES →](#)



CLARITY  
**WORK**

**PROJECT MANAGEMENT**

Spin up work in minutes with preconfigured blueprints for big transformation ventures or small quick fixes.

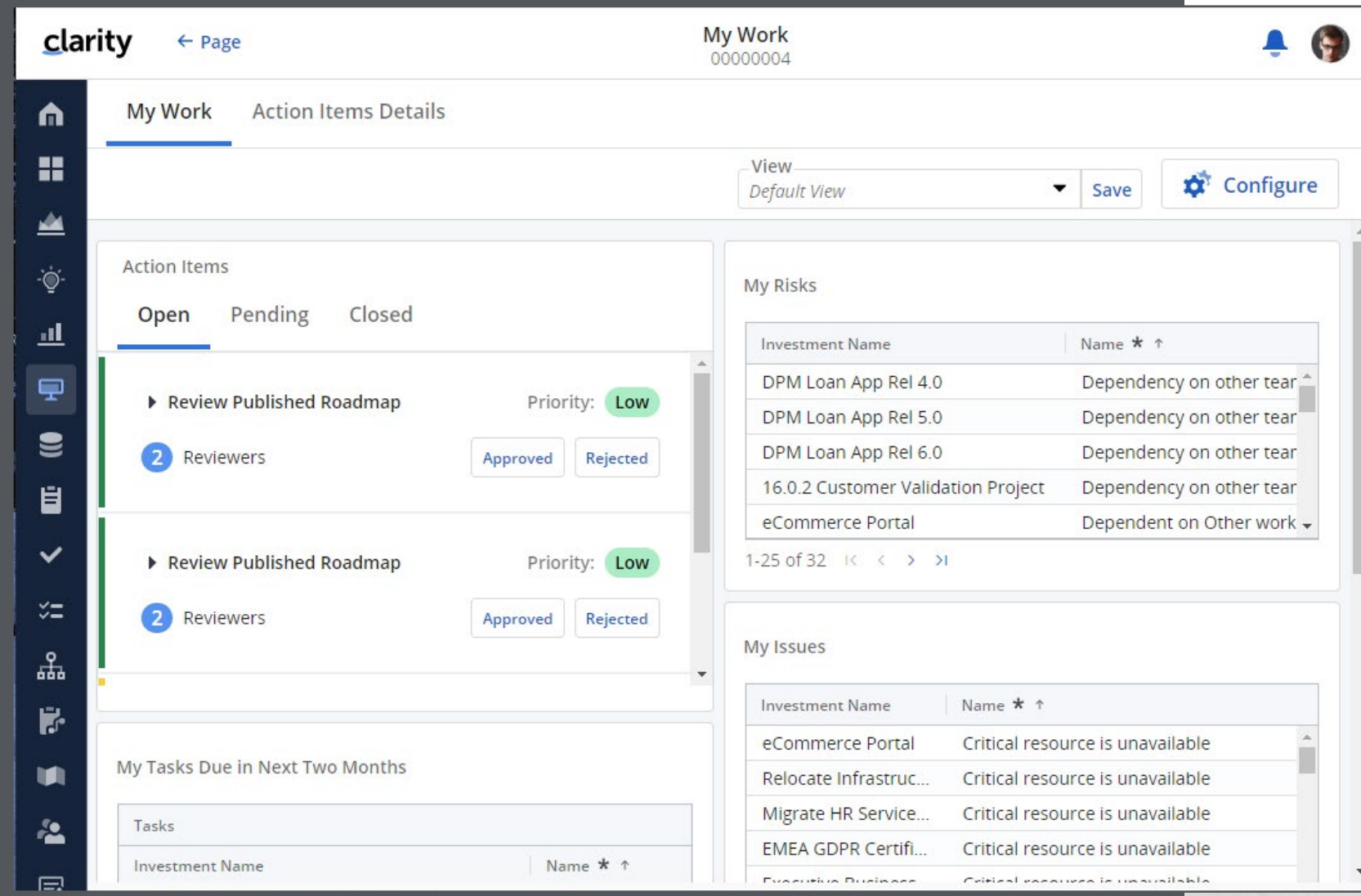




CLARITY  
**WORK**

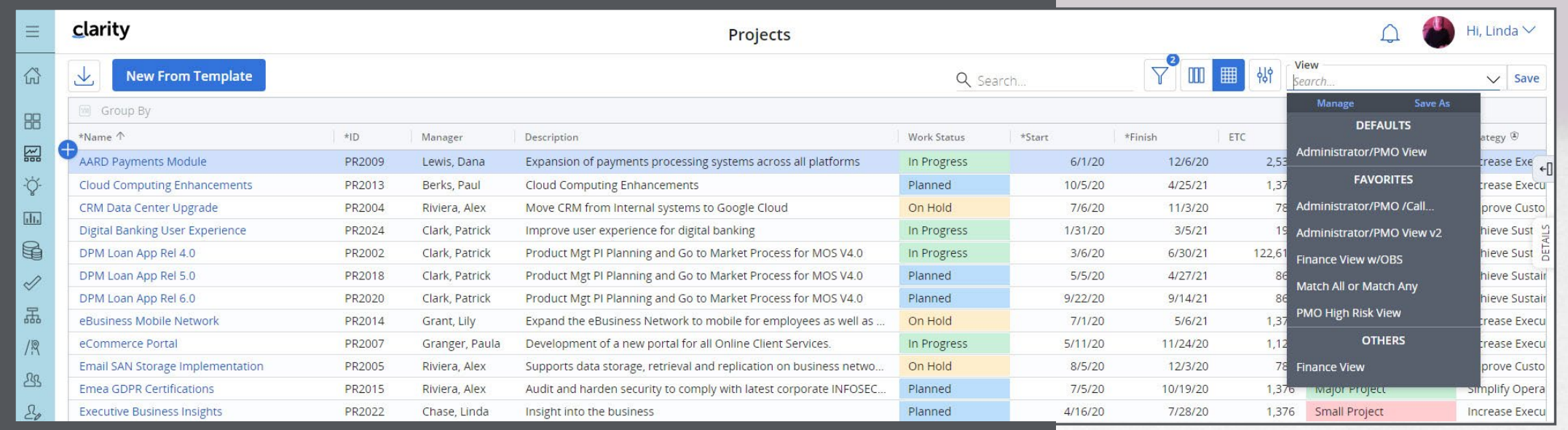
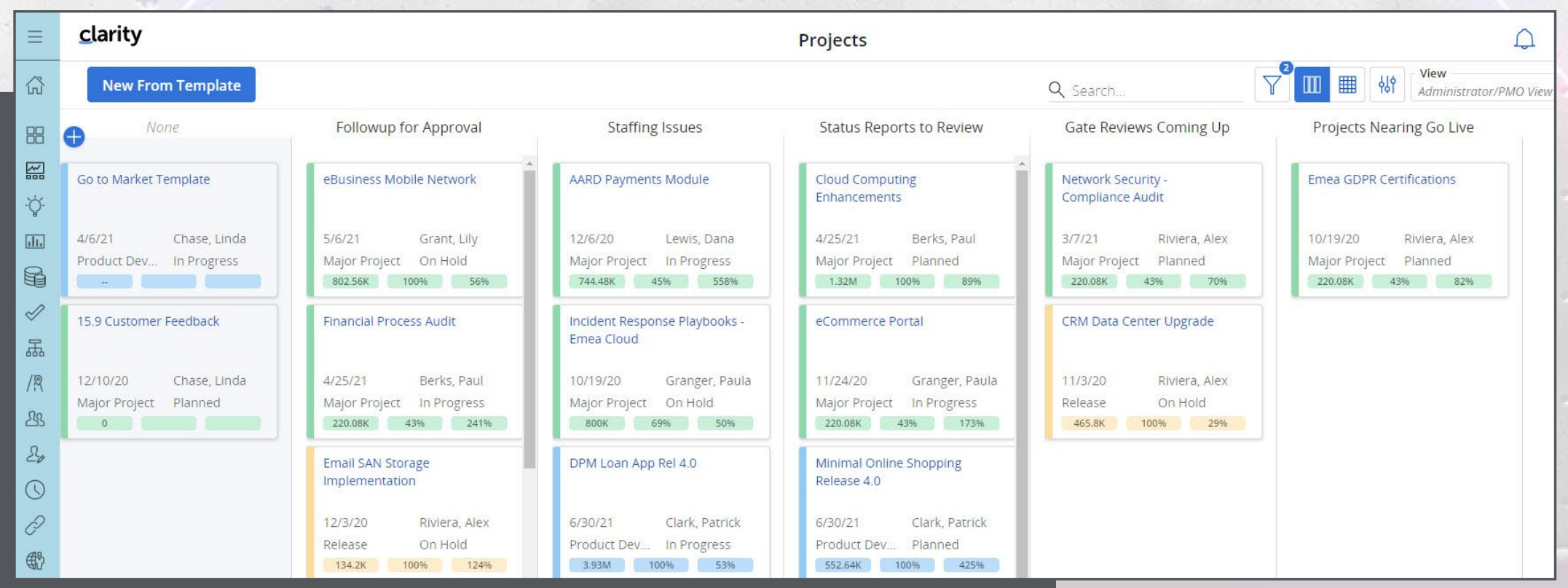
PROJECT MANAGEMENT

FEATURE 01



Pick projects with the right fields, modules and metrics, or configure with a few clicks.

FEATURE 02



Work with multiple views, including task lists, task boards, Gantt charts.



CLARITY  
**WORK**

**PROJECT MANAGEMENT**

FEATURE 03

Task ID	Task Name	Start	Finish	Status
2.4	Functional and Technical Design	Apr 25, 2022	May 6, 2022	Started
2.5	Complete Project Plan	Apr 26, 2022	Apr 29, 2022	Started
2.6	Planning Phase Gate Complete	May 9, 2022	May 9, 2022	Not Star...
3	Construction Phase	Apr 29, 2022	Aug 9, 2022	Not Star...
3.1	Payment API Work	Apr 28, 2022	Jun 21, 2022	Not Star...
3.2	Database Development	Apr 29, 2022	May 20, 2022	Started
3.3	User Interface Development	May 6, 2022	May 30, 2022	Started
3.4	Unit and Performance Testing	May 13, 2022	May 30, 2022	Started



Connects easily to Microsoft Project and Open Workbench.

FEATURE 04

Metric	Value
Total Effort	1,464.00
Spent	0.00
Total Budget	\$815,480.00
Spent	\$192,660.00



Dynamic status reports include task completions, team utilization and financial metrics.



**FEATURE 05**

The screenshot displays the Clarity software interface for the 'AARD Payments Module' project (PR2009). The main view is a task list with columns for Name, Has Assi..., \*Start, \*Finish, Status, and Task. The 'Complete Project Plan' task is highlighted. A conversation window is open on the right, showing a message from Linda asking 'What roles are you looking for in this project?'.

*Name	Has Assi...	*Start	*Finish	Status	Task
<input type="checkbox"/> Initiation Phase		6/1/20	6/8/20	Not Started	
<input type="checkbox"/> Initiating Process Complete		6/1/20	6/8/20	Not Started	
<input type="checkbox"/> Planning Phase		6/15/20	7/20/20	Not Started	
<input type="checkbox"/> Define Scope Change and Control Process	✓	7/6/20	7/10/20	Started	Be...
<input type="checkbox"/> Risk Response and Mitigation Plan	✓	6/15/20	7/6/20	Started	Qu...
<input type="checkbox"/> Requirements Definition	✓	6/15/20	6/15/20	Started	Qu...
<input type="checkbox"/> Functional and Technical Design	✓	6/15/20	7/20/20	Started	Ro...
<input type="checkbox"/> Complete Project Plan	✓	6/29/20	7/3/20	Started	Qu...
<input type="checkbox"/> Planning Phase Gate Complete		7/20/20	7/20/20	Not Started	Gr...
<input type="checkbox"/> Construction Phase		6/15/20	8/31/20	Not Started	

**Complete Project Plan (LM.001.050)**

Details To Do Assignments Links **Conversations**

Start a conversation...

**Linda** a few seconds ago  
Dana Lewis: What roles are you looking for in this project?

Reply...



Digital collaboration eliminates long conference calls and email threads.



CLARITY  
**WORK**

**DASHBOARDS AND REPORTS**

Get your answers now.

FEATURES 06-08

The screenshot shows a project dashboard with the following data:

#### Project Indicators

Stage	Schedule %	Days Late	Projected Cost Variance %	Projected Effort Variance %	Risk	Issue	Change
1	64	64					

#### Status Report Indicators

Overall Status	Report Date	Project Manager	Schedule	Scope	Cost and Effort	Status Reports
Yellow Diamond	6/16/20	Lewis, Dana	Yellow Diamond	Green Diamond	Green Diamond	Home Icon

#### Upcoming Milestones

Milestone	Finish	Schedule %	Days Late	Gantt Schedule					
				Nov 20	Dec 20	Jan 21	Feb 21	Mar 21	Apr 21
Planning Phase Gate Complete	7/20/20	64	120						
Construction Phase Gate Complete	8/24/20	64	85						
Deployment Phase Gate Complete	9/10/20	64	68						
Closing Phase Gate Complete	9/18/20	64	60						

#### Actuals by Transaction Type

Transaction / Resource / Date	Task	Quantity	Cost
+ Equipment		2	147,000
+ Expense		1	2,000
+ Labor		487	78,298

#### Project Baselines

Line chart showing Cumulative Usage in Hours from Jun 20 to Sep 20. The chart compares the Updated Baseline (blue), Initial Baseline (green), and Current Plan (red). The Current Plan shows a significant increase in usage starting in July 2020.

#### Team Utilization

Resource	Avg Alloc %	Weekly Team Utilization					
		11/16/20	11/23/20	11/30/20	12/7/20	12/14/20	12/21/20
AI Team	17.14%						
Amos, Cheryl	100.00%						
Andersson, Peter	100.00%						
Berry, Jason	100.00%						
Bhatt, Rakesh	100.00%						
Carmen, Ed	100.00%						
Digital Team	45.02%						
Garcia, Alex	73.85%						
Granger, Paula	48.15%						
Grant, Lily	100.00%						
Lewis, Dana	100.00%						



Big library of out-of-the-box dashboards and reports.



Aggregate Agile and non-Agile initiatives in a single dashboard.



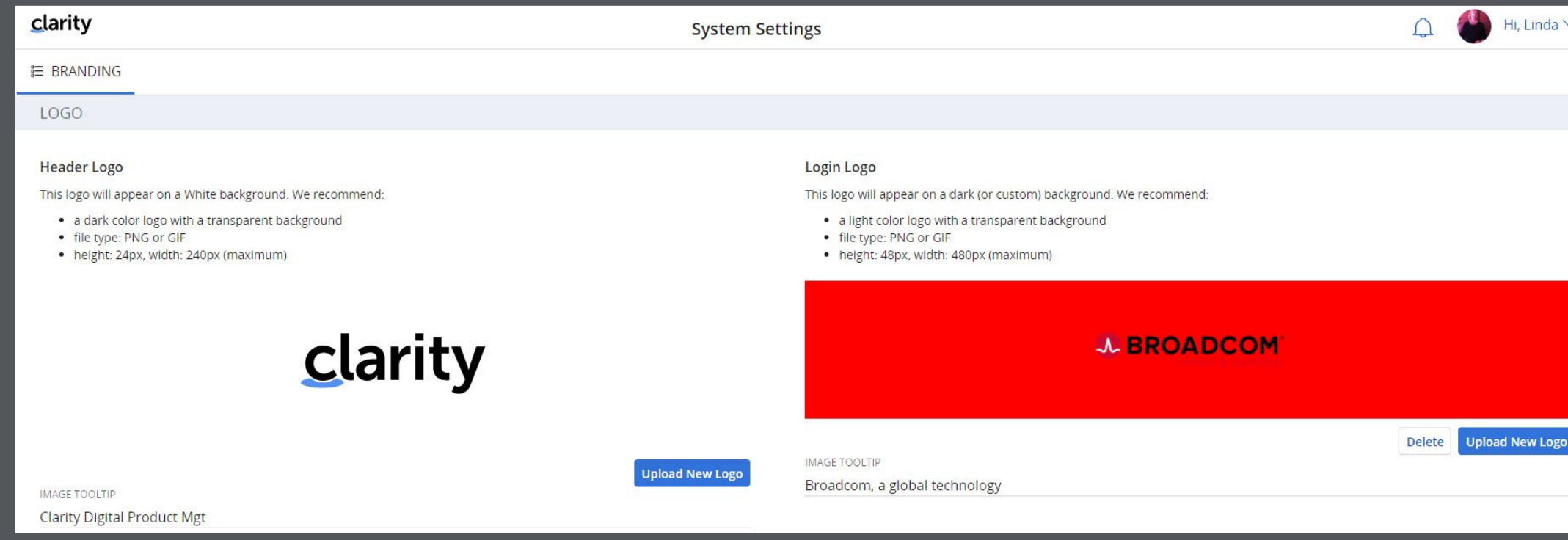
Create your own dashboard or configure your own gauges.



CLARITY  
**WORK**

COLOR SCHEMES

FEATURE 09-10

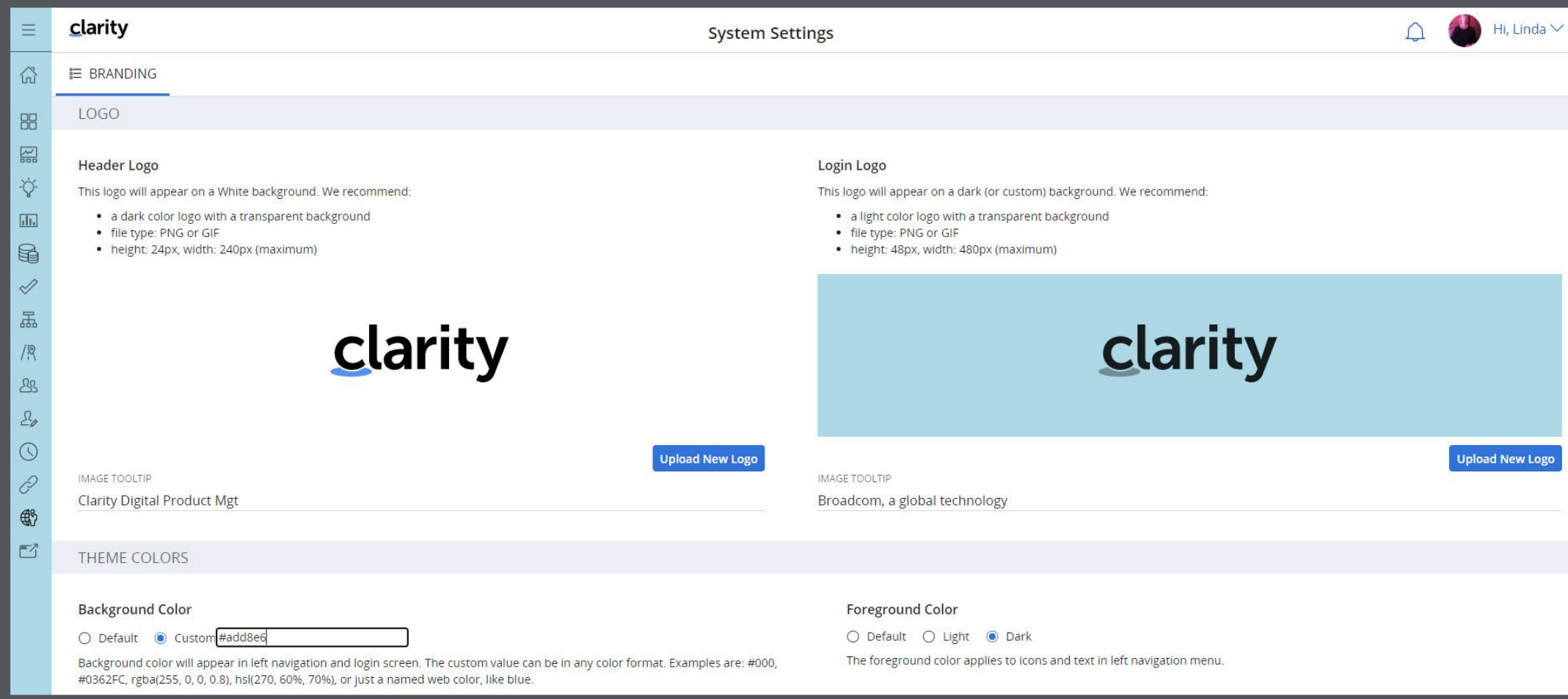


Replace the Clarity login and header icons with your company logo.



Give instances, like Development and Production, different icons.

FEATURE 11



Set a background color that matches your brand.



Please your customers, disrupt your competitors and maximize your business value.

---



CLARITY

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