



regoUniversity

NASHVILLE • 2022

Gain Valuable Insights with Value Stream Metrics

Your Guides:
Heather Kanser and Lynn Reling

Sponsored by

ValueOps

Clarity
Rally Software

BROADCOM
SOFTWARE

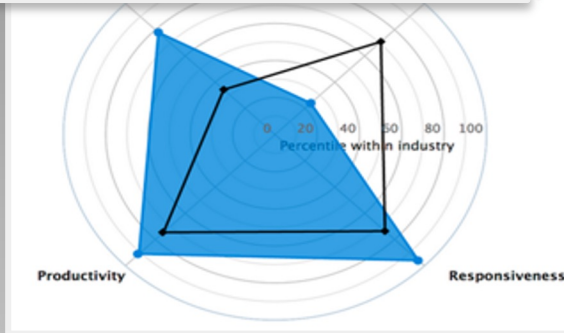
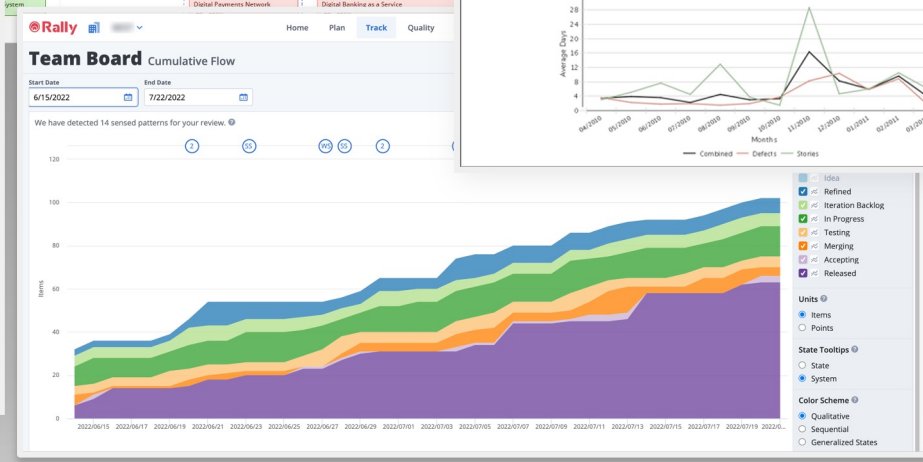
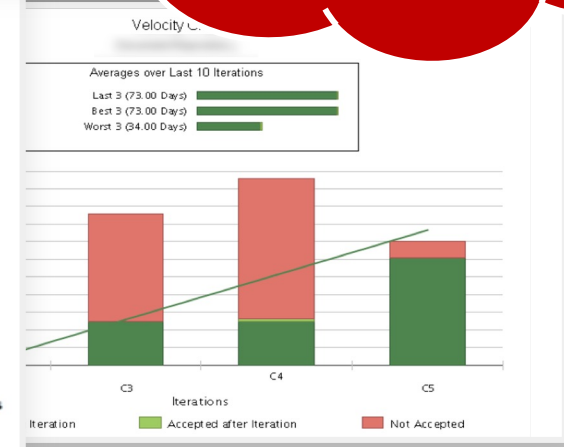
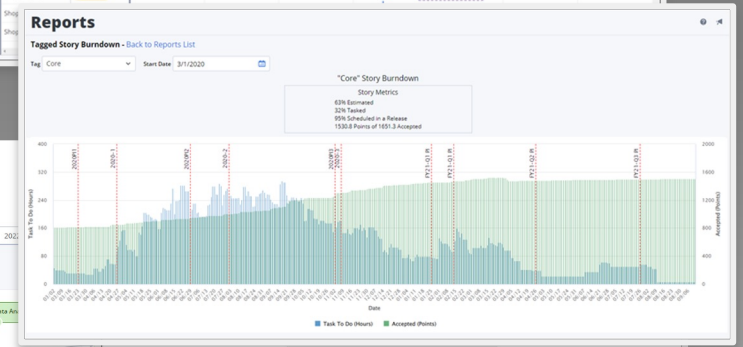
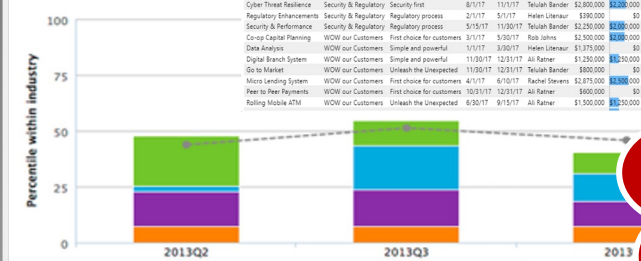
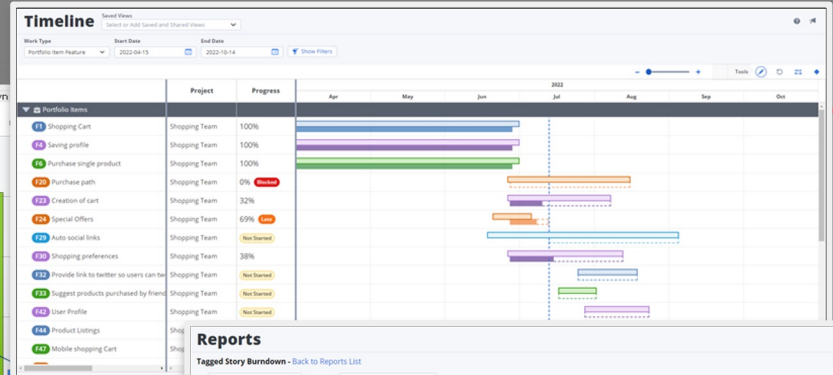
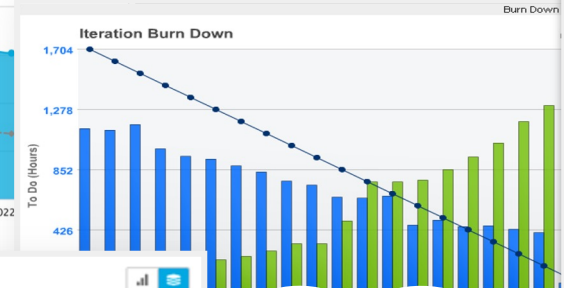
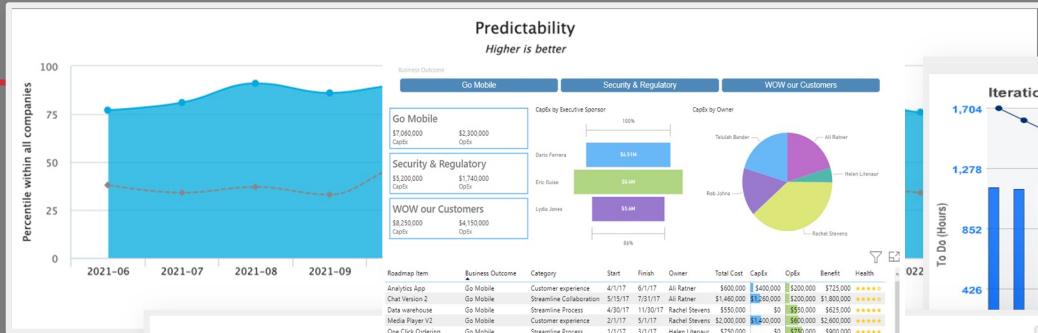
Introductions



Lynn Reling,
Executive Advisor, Value Stream Management



Heather Kanser,
Agile Strategist, Value Stream Management



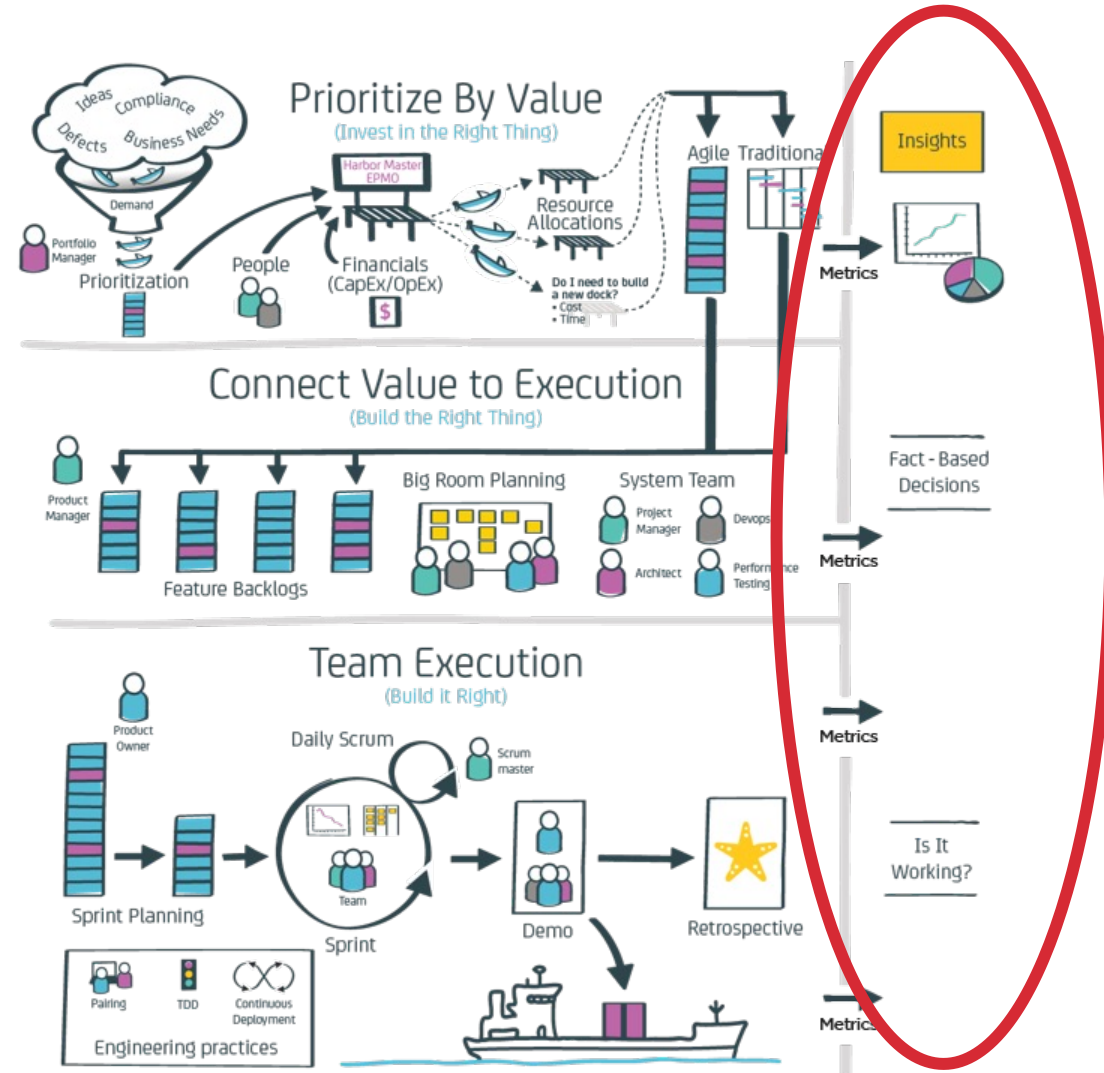
Metrics at Every Level

We want to prioritize by customer value to invest in the right things

Connect the value to execution to build the right things

Align team execution to build it right

And have the data as a natural outcome to make data-driven decisions



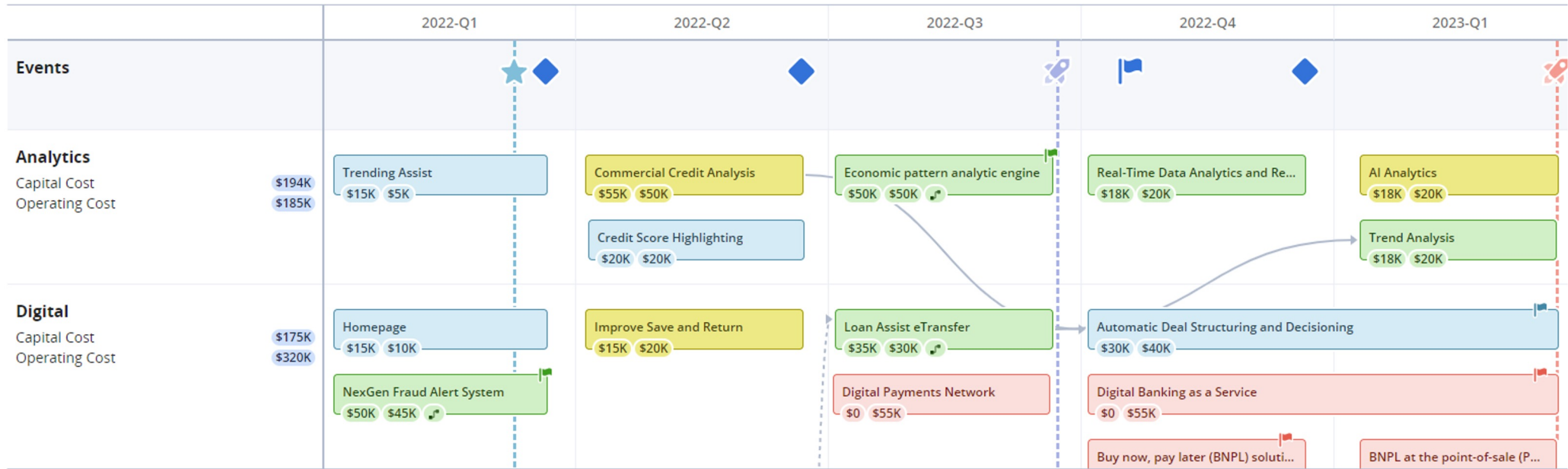
Steering the Business with Metrics

People, Money and Business Value



Roadmap Planning

- What are the investment priorities?
- How much are we investing in the big rocks to drive our strategy?



Strategy and OKRs

Value Stream Investment

Strategic Themes and Key Results

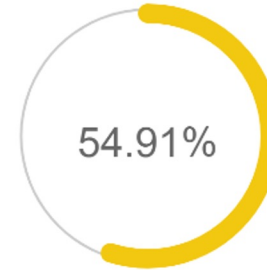
Value Stream: Business Bank Engagement

Product: Digital Banking Application

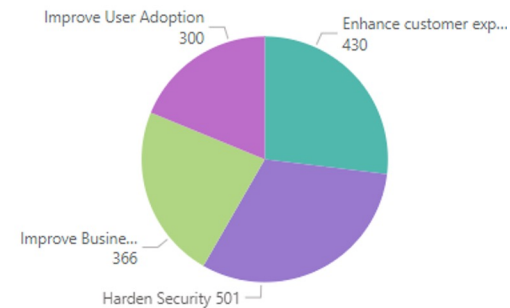
Strategic Theme	Key Results	% Attainment	Status
Improve Business User Support	Complete Self Serve portal V2.0	30%	In Progress
Improve User Adoption	Complete self service B2B portal enhancements	70%	In Progress
Improve Business User Support	Convert in person to online support time by 50%	20%	In Progress
Harden Security	Detect all Cloud Based automated attacks	99%	In Progress
Harden Security	Implement disruptionware processes to prevent emerging threats	50%	In Progress
Enhance customer experience	Improved NPS score by 4points	42%	In Progress
Enhance customer experience	Improved sales funnel conversion metrics by 10%	45%	In Progress
Harden Security	Mitigate Insider Risks created by Work From Home	75%	In Progress
Improve Business User Support	Reduce MTTR by 30%	40%	Partially Achieved
Enhance customer experience	Reduce Peak to Peak time by 20% by Q4 2021	50%	Partially Achieved

Supporting Epics	Lifecycle	Storypoints	Delivery Timeframe
Automatic Deal Structuring and Decisioning	Analyzing	100	2021-P2
Build read-write API for handling loan applications	Backlog	15	2021-P2
Commercial Credit Analysis	Analyzing	15	2021-P2
Configuration Options	Analyzing	15	2021-P2
Consumer Portal	Done	6	2021-P1
Credit Score Highlighting	Reviewing	15	2021-P3
Credit Scoring	Implementing	40	2021-P1
Digital Banking User Experience	Implementing	200	2021-P1
Total		1597	

Key Result Attainment



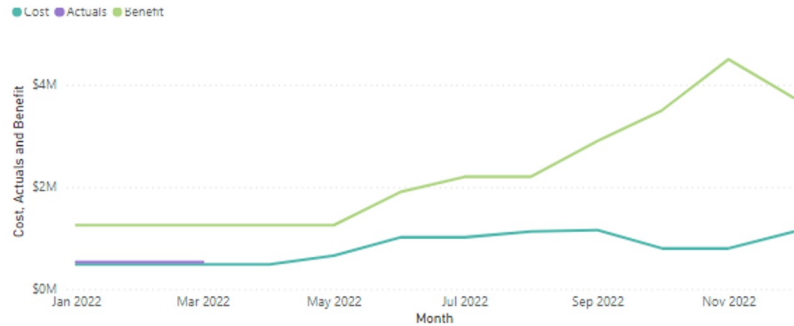
Storypoints by Strategic Theme



- Are we making the right investments to deliver on our strategy?
- How are we progressing again our OKRs?

Financials and Guardrails

Value Stream Investment



Quarter Trans Class	2022-Q1		2022-Q2		2022-Q3		2022-Q4	
	Cost	Actuals	Cost	Actuals	Cost	Actuals	Cost	Actuals
External Labor	\$75,000	\$82,500	\$385,000	\$925,000	\$325,000			
Hardware	\$330,000	\$363,000	\$610,000	\$750,000	\$675,000			
Internal Labor	\$570,000	\$627,000	\$680,000	\$900,000	\$900,000			
License Costs	\$105,000	\$115,500	\$115,000	\$135,000	\$105,000			
Maintenance	\$144,000	\$158,400	\$144,000	\$144,000	\$144,000			
Software	\$135,000	\$148,500	\$135,000	\$165,000	\$180,000			
Travel	\$75,000	\$82,500	\$75,000	\$275,000	\$375,000			

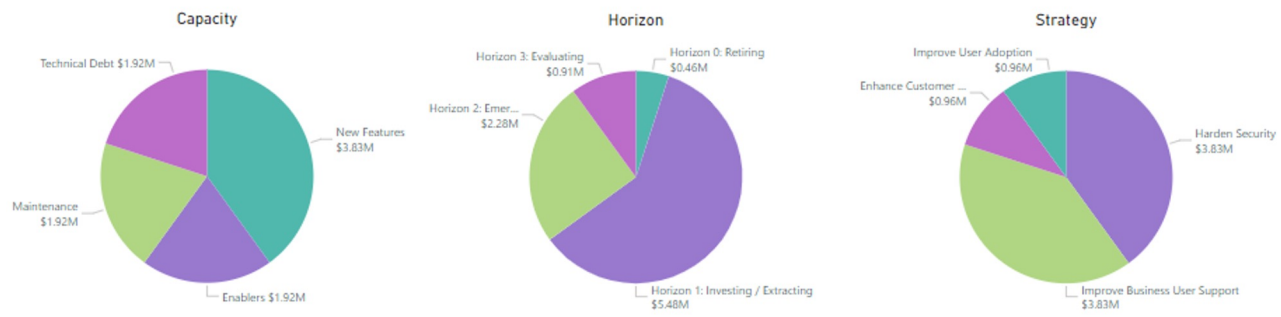
\$9.6M
2021 Plan

\$27.2M
Benefit

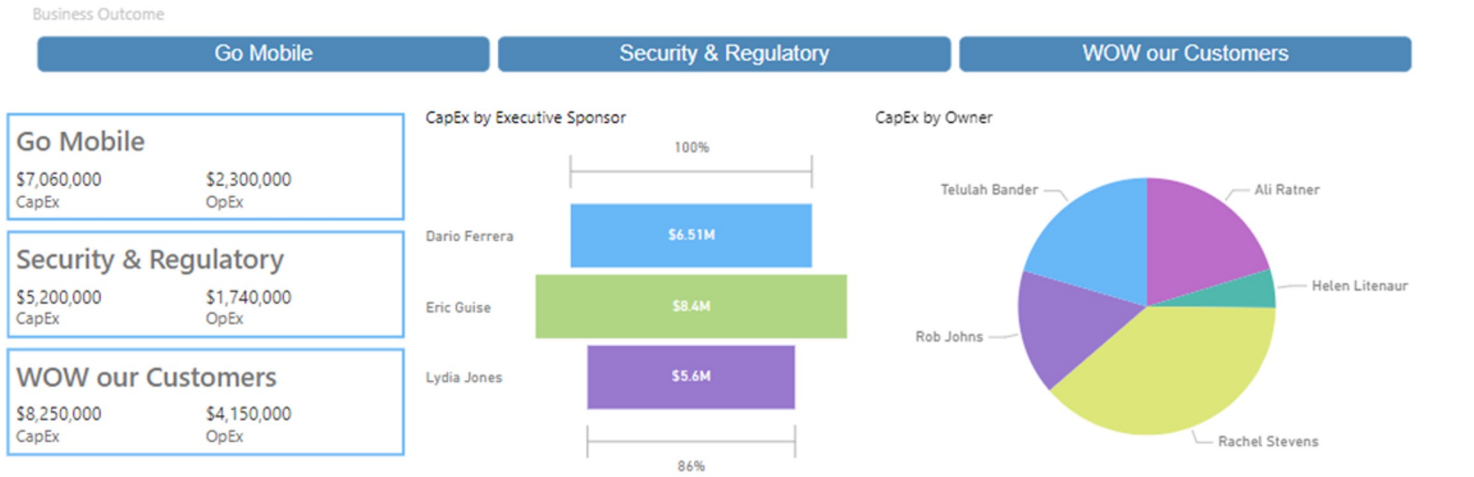
184%
ROI

- What is our financial performance by Value Stream or Product?
- Are we allocating our investment as planned?
- Do we have the right investment mix to ensure success for today as well as the future?

Guardrails: Planned Investment per Category



Capex / Opex Financial Reporting



- How much of our investment can be capitalized?
- What is the financial allocation between Capex and Opex?
- What is our capital allocation by strategic theme?

Roadmap Item	Business Outcome	Category	Start	Finish	Owner	Total Cost	CapEx	OpEx	Benefit	Health
Analytics App	Go Mobile	Customer experience	4/1/17	6/1/17	Ali Ratner	\$600,000	\$400,000	\$200,000	\$725,000	★★★★☆
Chat Version 2	Go Mobile	Streamline Collaboration	5/15/17	7/31/17	Ali Ratner	\$1,460,000	\$1,260,000	\$200,000	\$1,800,000	★★★★☆
Data warehouse	Go Mobile	Streamline Process	4/30/17	11/30/17	Rachel Stevens	\$550,000	\$0	\$550,000	\$625,000	★★★★☆
Media Player V2	Go Mobile	Customer experience	2/1/17	5/1/17	Rachel Stevens	\$2,000,000	\$1,400,000	\$600,000	\$2,600,000	★★★★☆
One Click Ordering	Go Mobile	Streamline Process	1/1/17	3/1/17	Helen Litenauro	\$750,000	\$0	\$750,000	\$900,000	★★★★☆
Search	Go Mobile	Streamline Process	5/30/17	10/1/17	Rachel Stevens	\$4,000,000	\$4,000,000	\$0	\$5,100,000	★★★★☆
Authentication	Security & Regulatory	Security first	1/1/17	3/1/17	Helen Litenauro	\$1,500,000	\$1,000,000	\$500,000	\$1,800,000	★★★★☆
Cyber Threat Resilience	Security & Regulatory	Security first	8/1/17	11/1/17	Telulah Bander	\$2,800,000	\$2,200,000	\$600,000	\$3,000,000	★★★★☆
Regulatory Enhancements	Security & Regulatory	Regulatory process	2/1/17	5/1/17	Helen Litenauro	\$390,000	\$0	\$390,000	\$420,000	★★★★☆
Security & Performance	Security & Regulatory	Regulatory process	5/15/17	11/30/17	Telulah Bander	\$2,250,000	\$2,000,000	\$250,000	\$3,200,000	★★★★☆
Co-op Capital Planning	WOW our Customers	First choice for customers	3/1/17	5/30/17	Rob Johns	\$2,500,000	\$2,000,000	\$500,000	\$2,900,000	★★★★☆
Data Analysis	WOW our Customers	Simple and powerful	1/1/17	3/30/17	Helen Litenauro	\$1,375,000	\$0	\$1,375,000	\$1,500,000	★★★★☆
Digital Branch System	WOW our Customers	Simple and powerful	11/30/17	12/31/17	Ali Ratner	\$1,250,000	\$1,250,000	\$0	\$1,600,000	★★★★☆
Go to Market	WOW our Customers	Unleash the Unexpected	11/30/17	12/31/17	Telulah Bander	\$800,000	\$0	\$800,000	\$950,000	★★★★☆
Micro Lending System	WOW our Customers	First choice for customers	4/1/17	6/10/17	Rachel Stevens	\$2,875,000	\$2,500,000	\$375,000	\$3,200,000	★★★★☆
Peer to Peer Payments	WOW our Customers	First choice for customers	10/31/17	12/31/17	Ali Ratner	\$600,000	\$0	\$600,000	\$700,000	★★★★☆
Rolling Mobile ATM	WOW our Customers	Unleash the Unexpected	6/30/17	9/15/17	Ali Ratner	\$1,500,000	\$1,250,000	\$250,000	\$1,900,000	★★★★☆

Value Stream Business Value



Value Stream: Business to Bank Engagement
Digital Product: Digital Banking Application

Portfolio Epic: NexGen Fraud Alert System

Lean Business Case: **What problem are we solving?**
- Maintain and Improve Consumer Trust in online and mobile banking through improved Fraud Detection and Prevention.

Portfolio Lifecycle: Implementing
Delivery Timeframe: 2021-P2

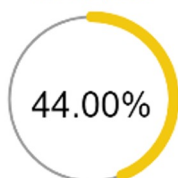
MVP: Ability to meet or Exceed current Fraud Cyber Security Standards 3.0

Provides a clear line of sight into:

- Business Value
- Delivery Progress
- Financial Costs

Delivery Progress

% Complete



\$1.08M

Planned Cost

\$475K

Expended Cost

08/26/21

Eng Planned Finish

XXL

T Shirt Size

300

T Shirt Storypoints

290

Engineering Est

119

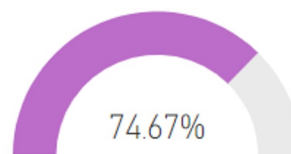
Accepted Storyp...

32

Accepted Stories

Business Value

% Attainment



\$5M

Benefit

342%

ROI

Strategic Theme: Harden Security

Objective: Improve Fraud Detection and Alerting processes to maintain Banking Trust with consumers

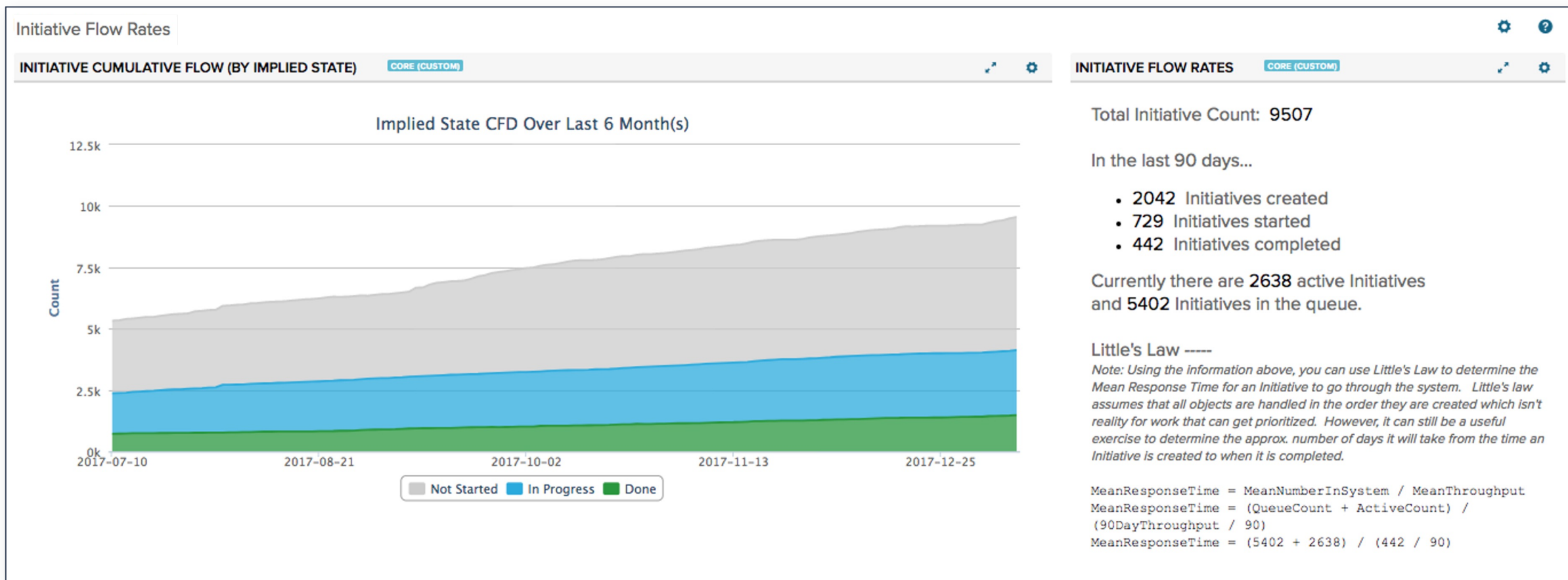
Key Results	Target Date	% Complete
Detect all Cloud Based automated attacks	09/30/21	99%
Implement disruptionware processes to prevent emerging threats	07/30/21	50%
Mitigate Insider Risks created by Work From Home	07/30/21	75%

Executing the Strategy

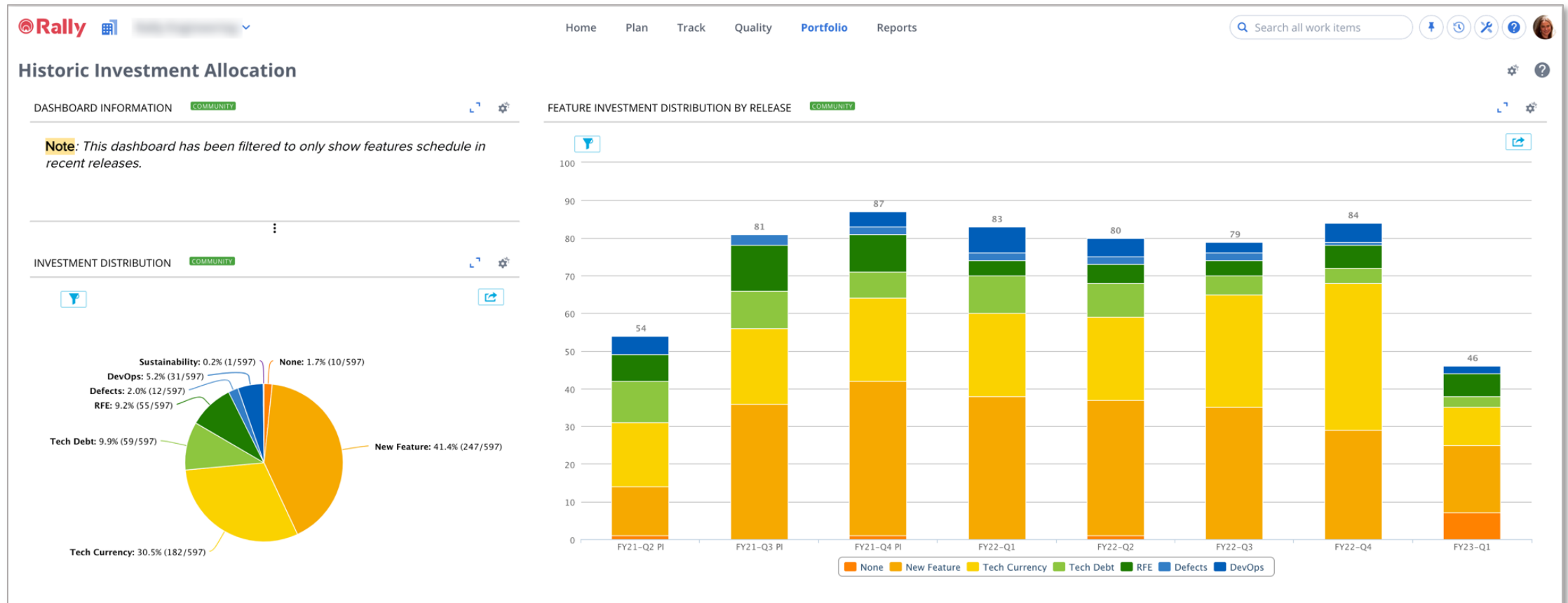
Data Driven Continuous Improvement



How Does Strategic Work Flow Through the System?



Are We Executing our Investment Strategy?



Team Agile Fundamentals

The screenshot displays the Rally Team Iteration Health Dashboard. At the top, navigation tabs include PLAN, TRACK, QUALITY, PORTFOLIO, and REPORTS. The dashboard title is "Team Iteration Health Dashboard (S)".

ITERATION HEALTH METRICS

Number of Iterations: 20 | Metric: By Points

Iteration	Start Date	End Date	# Days	Percent Estimated	Average Daily In-Progress Percentage	Acceptance Rate Score	Last Day Completion Ratio	Last Day Acceptance Ratio	Scope Churn	Scope Churn Direction
			10	100%	31%	90%	94%	94%	11%	=
			10	88%	40%	80%	87%	87%	10%	+
			10	97%	34%	80%	82%	82%	7%	+
			10	100%	31%	90%	100%	100%	17%	=
			10	96%	36%	80%	96%	91%	9%	+
			10	97%	38%	100%	100%	100%	5%	=
			10	88%	33%	100%	98%	98%	6%	=
			10	100%	46%	100%	100%	100%	20%	+
			10	100%	52%	100%	100%	97%	12%	=
			10	0%	42%	Never	10%	0%	9%	-
			10	100%	55%	100%	66%	66%	7%	+
			10	100%	53%	100%	81%	76%	7%	+
			10	100%	41%	100%	92%	79%	12%	+
			10	96%	24%	90%	100%	100%	8%	+
			10	93%	31%	Never	79%	6%	6%	+
			10	100%	31%	90%	79%	76%	20%	+
			10	70%	46%	100%	98%	67%	2%	=
			10	77%	81%	Never	85%	0%	41%	-
			10	87%	82%	Never	51%	18%	8%	+
			10	100%	72%	100%	73%	73%	9%	=

DASHBOARD INFORMATION AND FEEDBACK

VELOCITY CHART (ALL)

The Velocity Chart shows team velocity over time. The Y-axis represents points (0-80), and the X-axis represents iterations. A green trend line shows an overall upward trend in velocity.

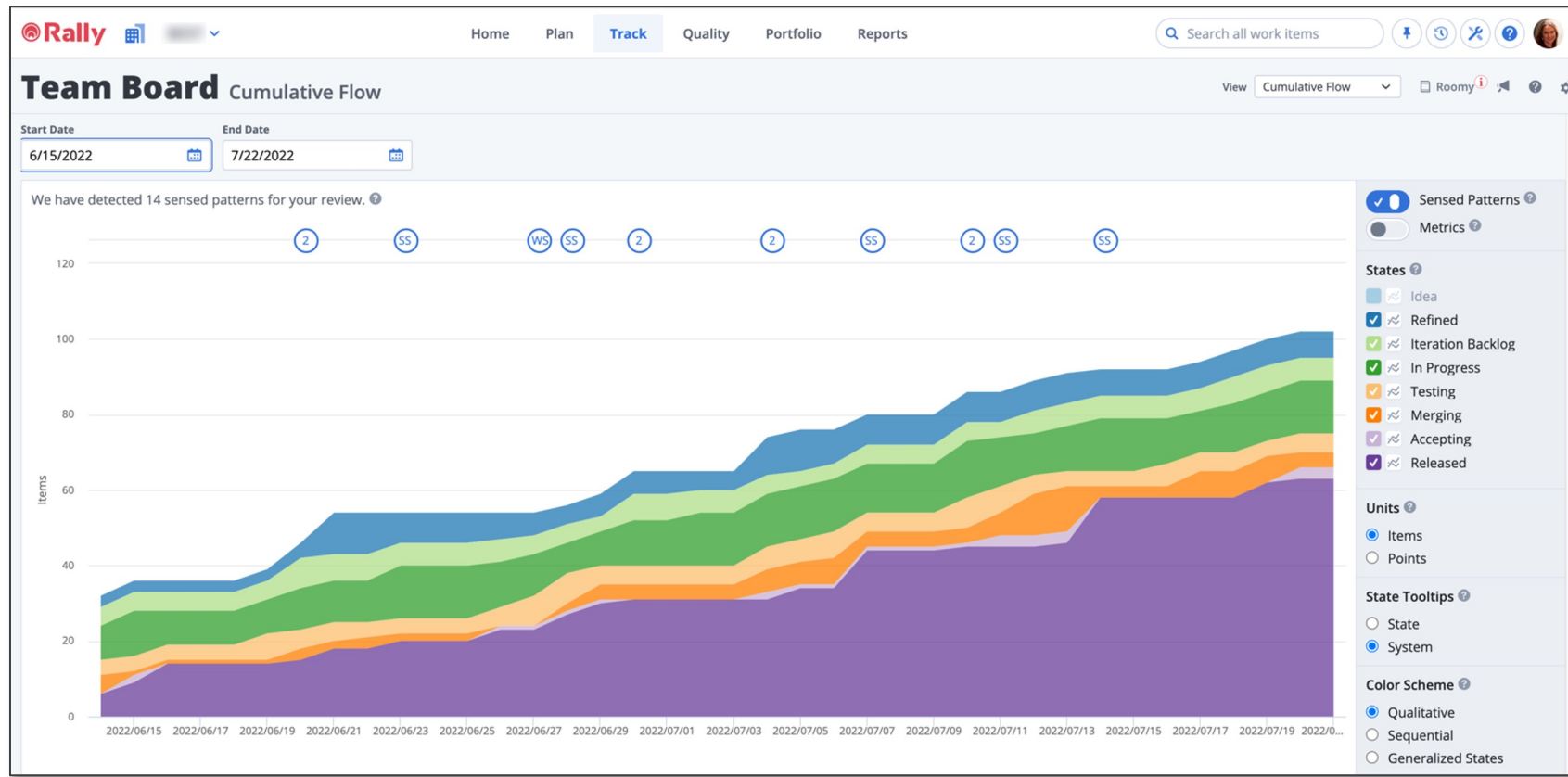
ITERATION CUMULATIVE FLOW

The Iteration Cumulative Flow chart shows the cumulative flow of work items over time. The Y-axis represents the number of items (0-70), and the X-axis represents iterations. The chart is divided into colored areas representing different stages of work.

ITERATION BURNDOWN

The Iteration Burndown chart shows the burndown of work items over time. The Y-axis represents the number of items (0-70), and the X-axis represents iterations. The chart shows a downward trend in the number of items remaining.

Rally Cumulative Flow Diagram with Smart Analytics



Stair Step

Stair Step detected in Merging, Accepting, Released on 2022/07/08

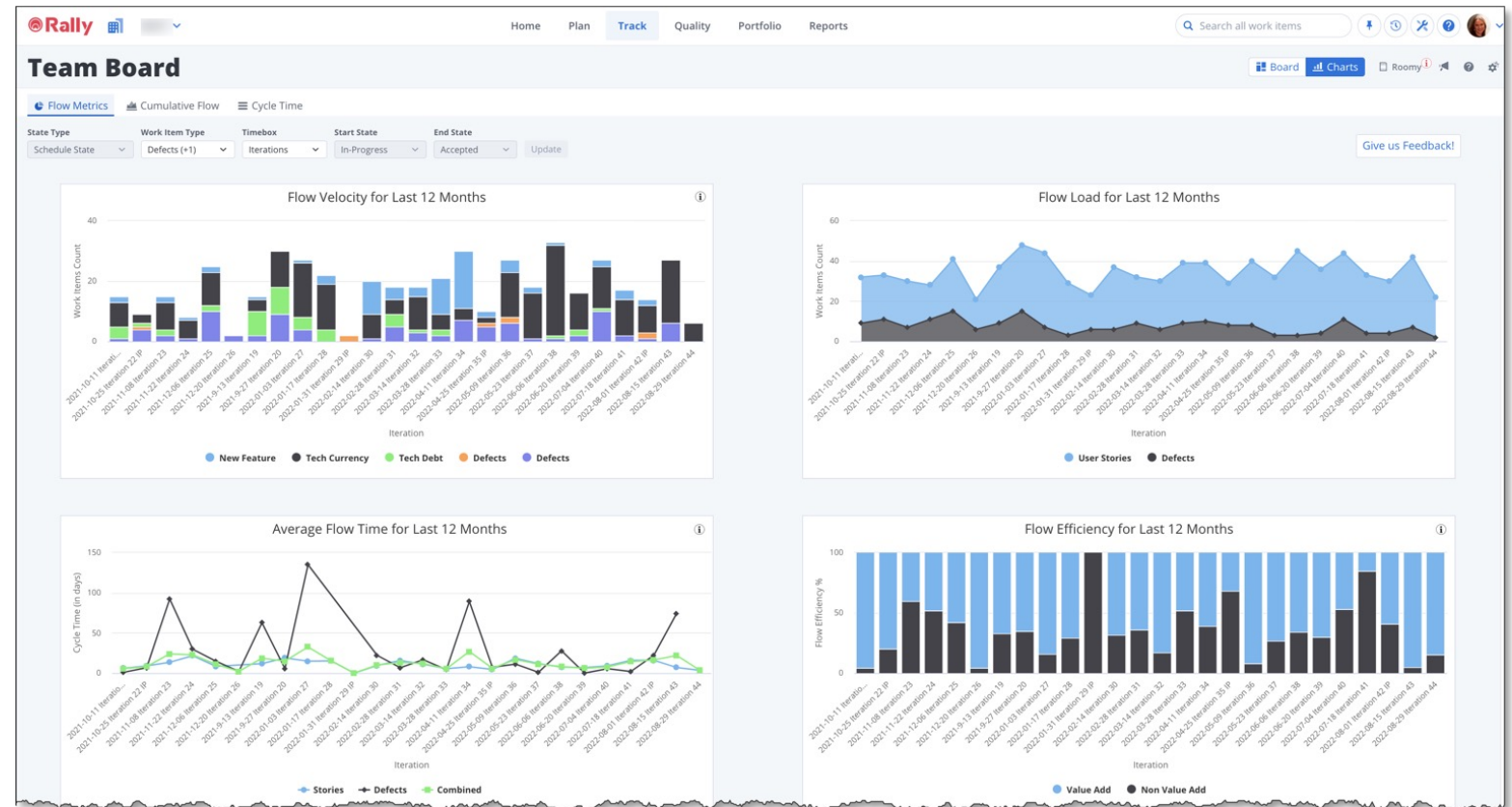
Insight: This CFD is expressing stepped flat lines that suggest work is being batched rather than continuously flowing.

Action: Try getting to a place where work is consistently flowing through your system. Try reducing batch sizes. Keep WIP low to enhance flow. Consult with an Agile coach to help your team identify actions for improvement.

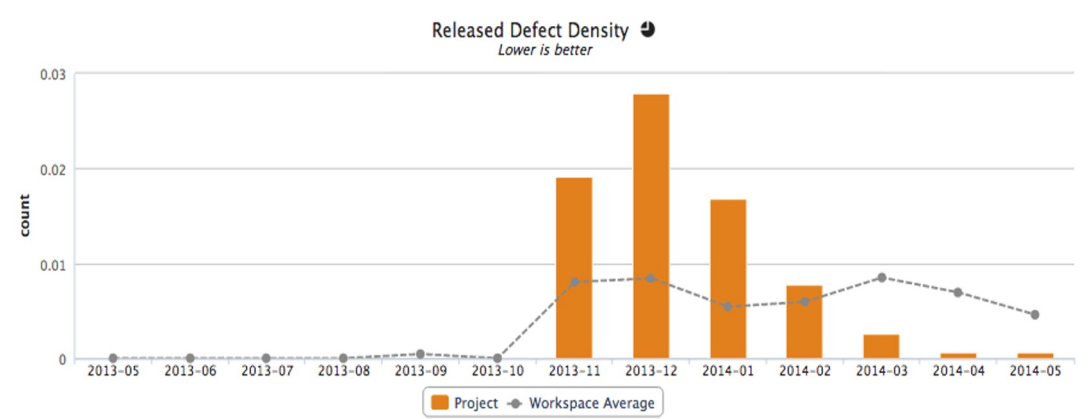
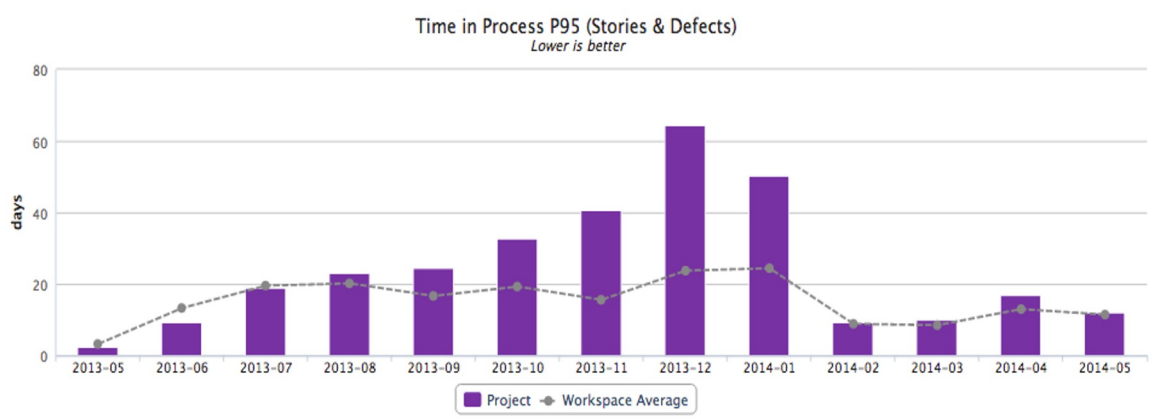
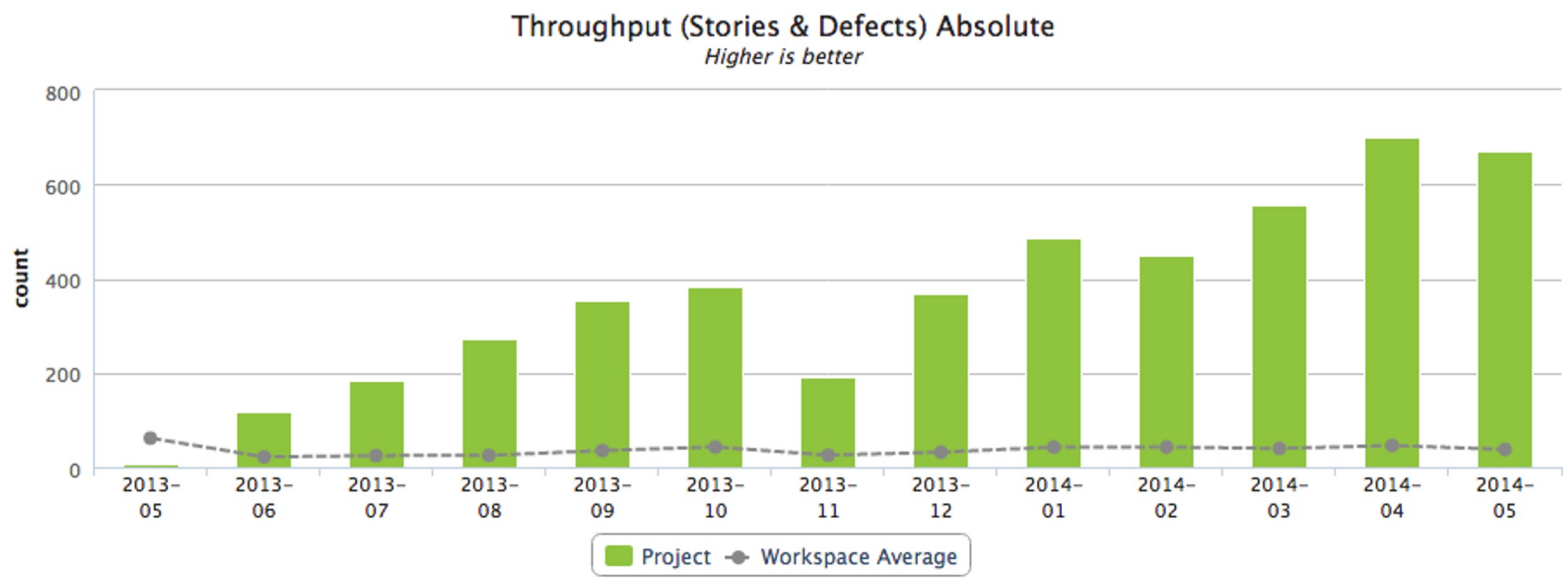
[^ Hide Guidance](#)

Flow Metrics – Coming to Rally Soon!

- Flow Velocity
- Flow Time
- Flow Load
- Flow Efficiency
- Flow Distribution
- Flow Predictability



Enterprise Actionable Insights Example



Metrics Approach

How to use data for improvements and decision making, not as levers for judgement.



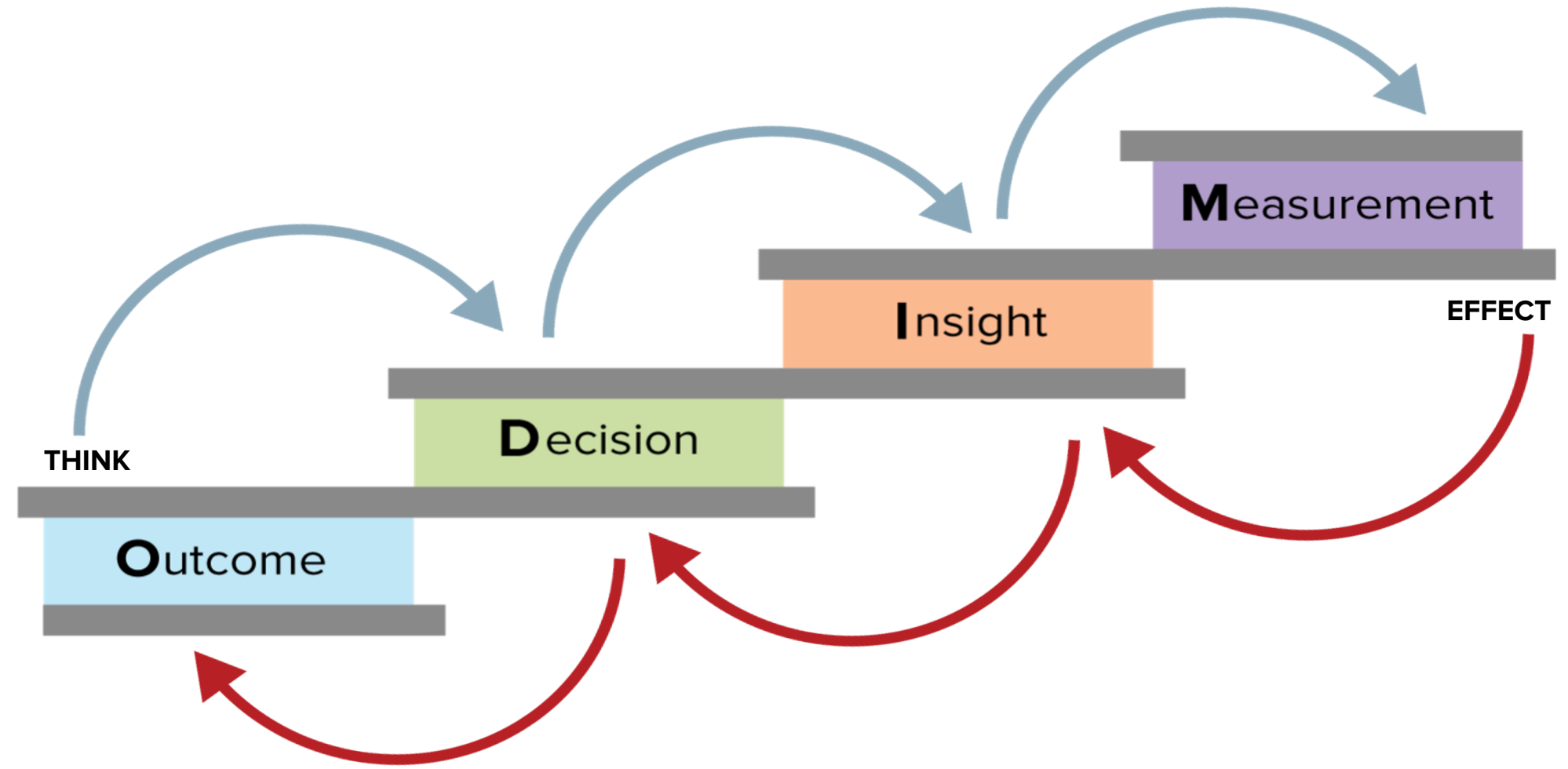
**How well are we
doing Agile?**



**How well is Agile
doing for us?**



Metrics Support Desired Outcomes



Metrics Traps

- Manipulation
- Unbalanced Metrics
- Costly KPIs
- Availability Bias
- Mechanical Decision Making
- False Negatives (and Positives)



Questions?



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 Provider = **Rego Consulting**
- Class Name = **regoUniversity**
- Course **Description**
- 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.



Phone

888.813.0444



Email

info@regoconsulting.com



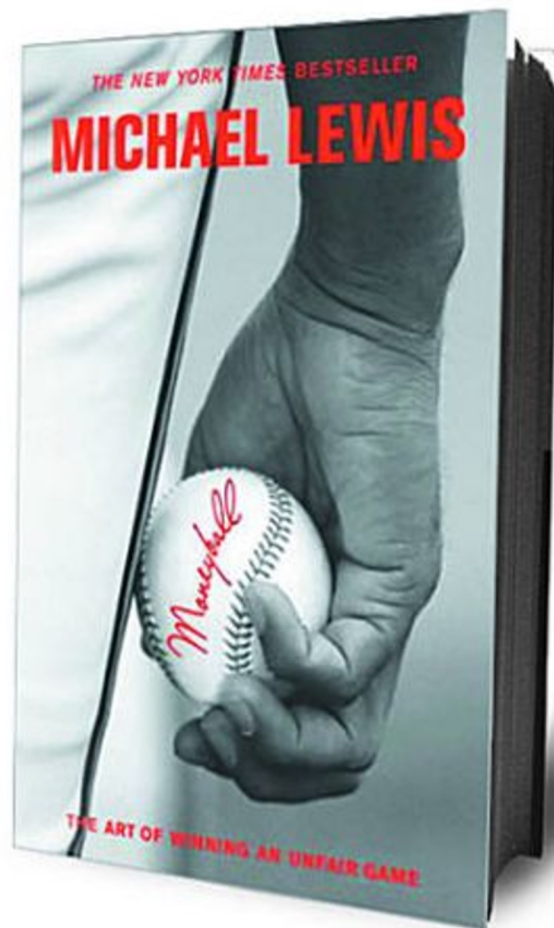
Website

www.regouniversity.com

Extra Slides for Supporting Questions



Using Data Effectively to Achieve Better Outcomes

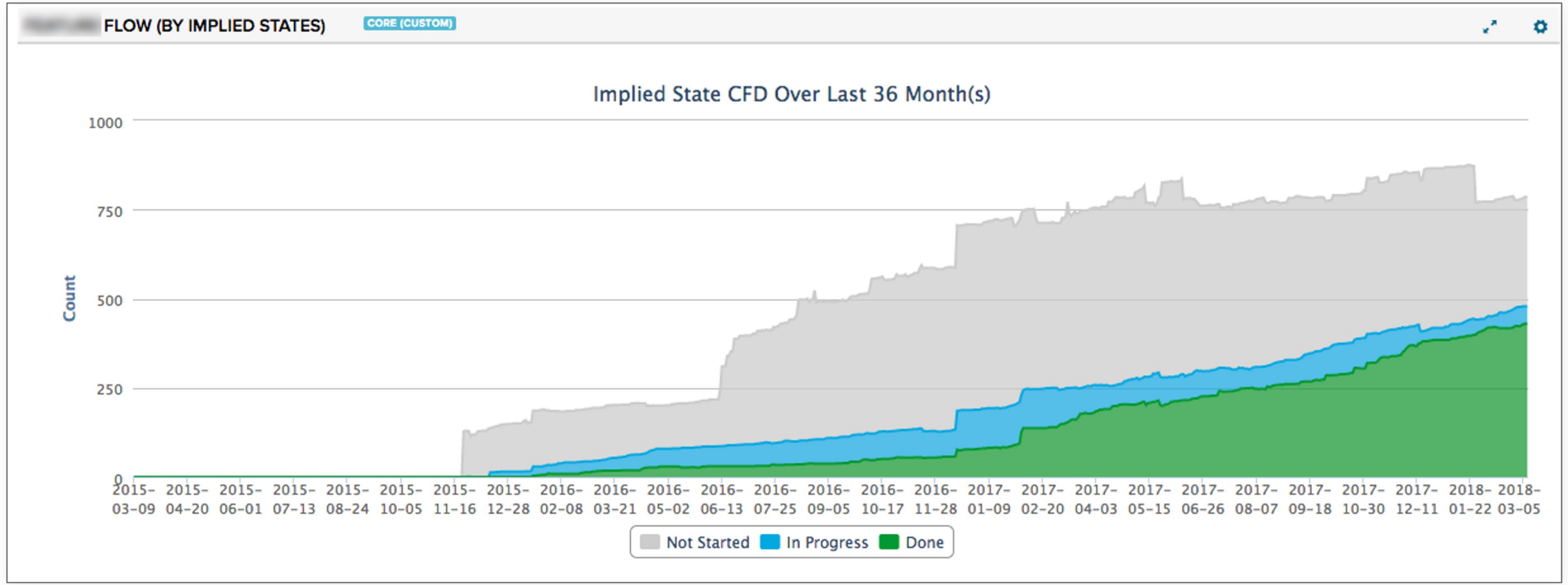


W.W. Norton & Co.

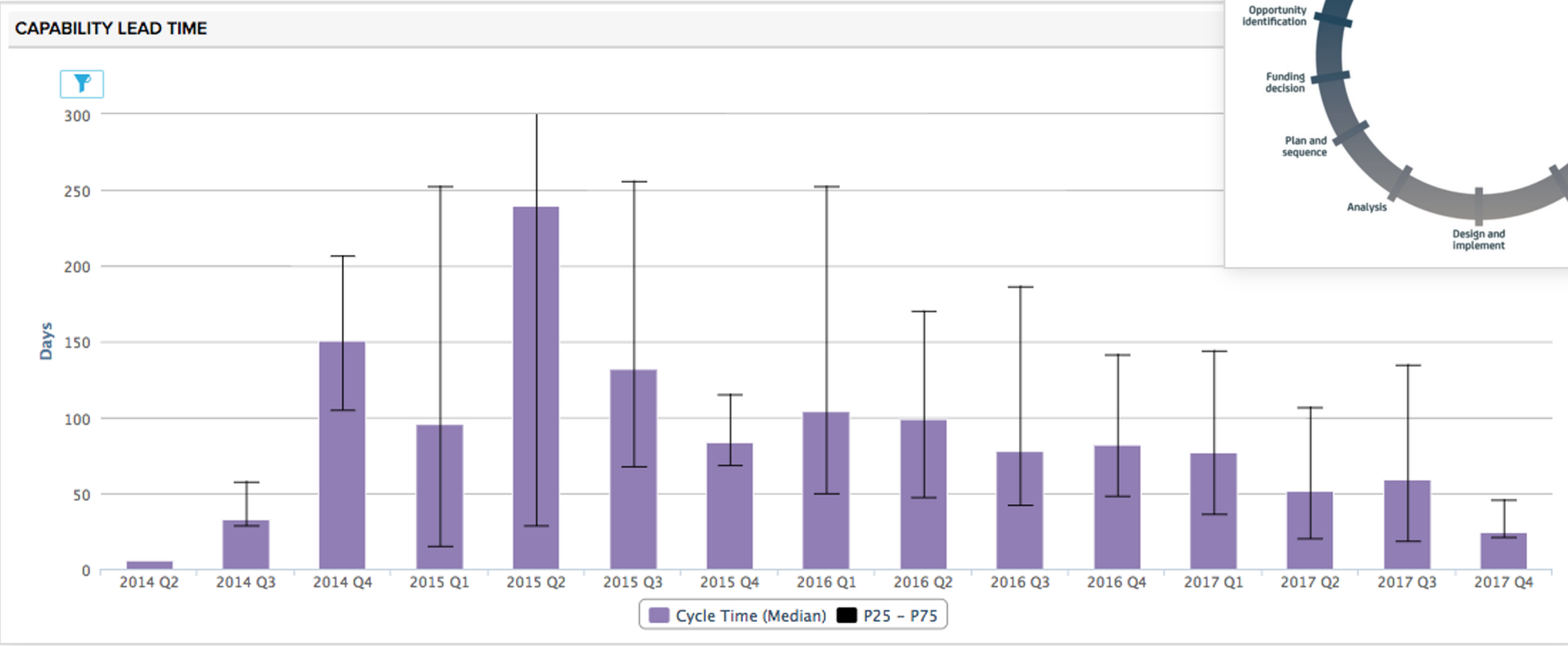
Transitioning from the
“**What**” to the
“**So What**” and “**Now What**”



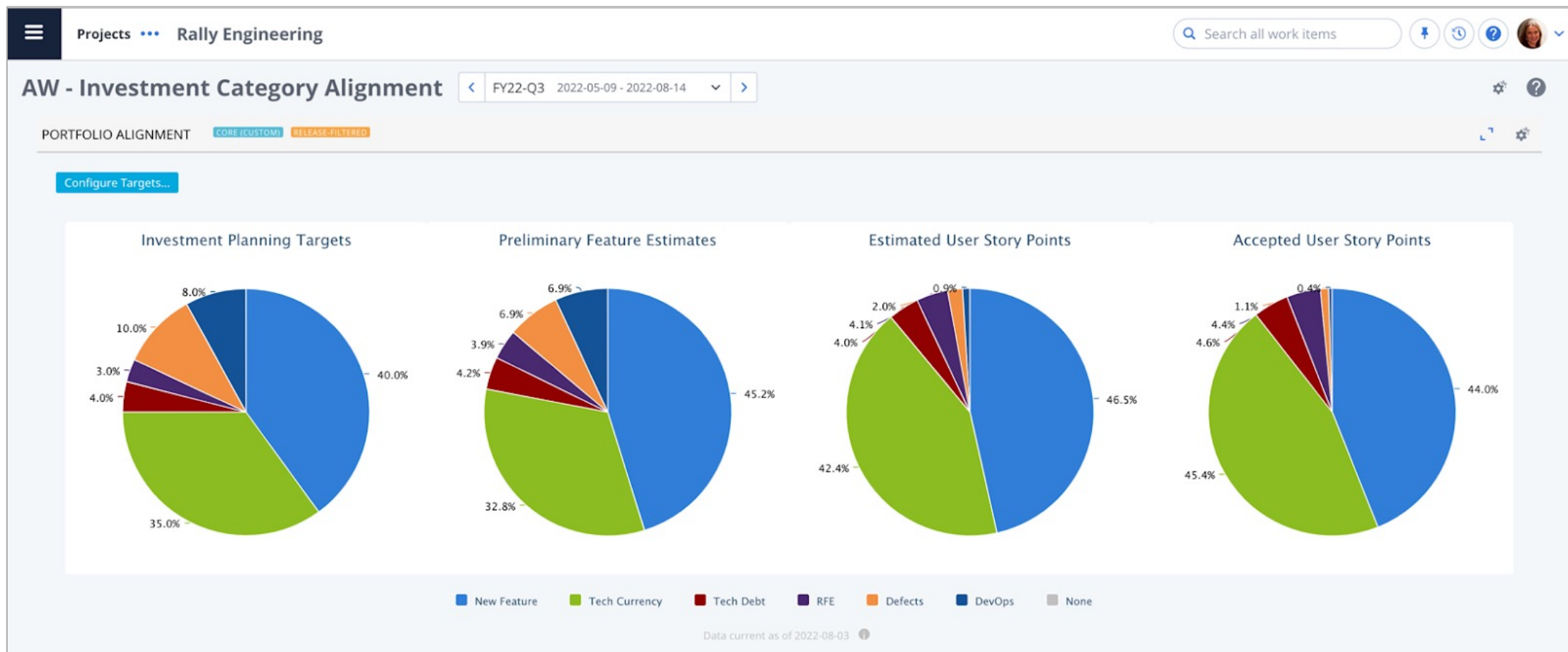
Healthier Flow



Are we becoming more responsive?



Defining an Investment Strategy



Performance Index



Rally Insights Framework

