



# regoUniversity

NASHVILLE • 2022

## Objectives and Key Results in Agility at Scale

### Your Guides:

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Sponsored by

**ValueOps**

Clarity  
Rally Software

**BROADCOM**  
SOFTWARE

# Introductions

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

# Agenda

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- What are OKRs? Why are they important?
- Why ValueOps for OKRs?
- How do we do this?

# Part I: What are OKRs & Why are they Important?



# Objectives & Key Results (aka OKRs)

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- It is a **collaborative goal-setting methodology** used by **teams and individuals** to set challenging, ambitious goals with measurable results\*. OKRs are how you **track progress, create alignment, and encourage engagement** around **measurable goals**.

Objectives are **memorable qualitative descriptions of what you want to achieve**. Objectives should be short, inspirational and engaging. An Objective should motivate and challenge the team.

Key Results are a set of metrics that **measure your progress towards the Objective**. For each Objective, you should have a set of 2 to 5 Key Results.

# Examples of Objectives & Key Results (Value Based!)

**Deliver high value to our customers**

Qualitative

Quantitative

**NPS Scores for our top 10 customers increase by 10%**

**Make corn production profitable**

**Revenues from corn production improve from X to Y**

**Produce higher quality software**

**Defect rates for our platform decrease by 30%**

How does OKRs differ from the MBO approach?

Traditional MBO's	OKRs
"What"	"What" and "How"
Annual	Quarterly or Monthly
Private and Siloed	Public and Transparent
Top-down	Bottom-up or Sideways
Tied to Compensation	Mostly Divorced from Compensation
Risk Averse	Aggressive and Inspirational

# Why do Customers feel OKRs are so Important?

*“We’ve been talking about OKRs for several years and working on them at an LPM level. Enterprise and LoB Sr. Leadership has made progress in 2021 but we’re still trying to connect to the work.”*

*“Some of the major strategic initiatives we have use Rally as the source of record. We have to leverage that OKR to capture the trackable metric within that OKR. Ultimately, we want to be able to ask, ‘How can we move the needle within the OKR?’ The challenge we face in bubbling that up is consistency in being able to compare apples to apples.”*

*“Our team is managing their OKRs via Excel spreadsheets that then get put into a relational database that they then associate with the work items that are in Rally... So this is where we have a ton of opportunity for OKRs. We do not have a centralized system to capture those objectives. And then the measurable key results.”*

*“We really identify which opus is contributing to which higher key results. That helps us also to look a little bit at which initiatives are bringing the most value in terms of the delivery to the organization so that in terms of priorities, when we come to capacity issues, we know which one should come first, if there is competition for the same resource.”*

*“We have begun building out Power BI dashboards for the tracking of our Key Results. We will marry OKR data from Rally to provide cost details that, paired with KR trending, will help us assess if we should continue to fund, pivot, or kill the investment entirely. We use our cost per team model to transform point roll-up at the portfolio level to cost per investment.”*

*“When I talk about value outcomes, there are outcomes that we define at a platform level that ideally would cascade down to the fleet level. And those would cascade down to the individual squad level. And so, at each level, they should be able to align their work and say, ‘This work is going to contribute to an outcome.’ That’s going to feed up to the broader fleet outcomes and then each fleet will be able to define a set of outcomes and say, ‘We have aligned all of our work of the respective squads up to the overall outcomes of the platform.’”*

*“We have a need to operationalize OKRs at all levels of our organization, particularly at the lower levels. We want to offer full transparency”.*

*“We have recently established Enterprise OKRs. Usage of lower level OKRs is taking off across the organization. We use PI Objectives at PI Planning and are now focused on helping people/teams understand the differences between OKRs and PI Objectives.”*

# Pain Points that our Customers Experience

## 1 Siloing of Information

Teams are really fiefdoms on different hills. The business is on one, development is on another. It's very hard to share.

2

## OKRs are separated from the actual outcomes and work!

OKRs are here. Some work is there. What the business wants is somewhere else. Chaos in bringing everything together!

3

## Lack of Clarity and Scope

What do we mean by Objectives and Key Results? How should we use them?






# Part II: Why ValueOps for OKRs?



# Align Business AND Development

- ValueOps leverages both Clarity & Rally to connect and align both Business AND Development executives in an organization
- Most OKR solutions just focus on one group or the other – missing key context that each group wants to have

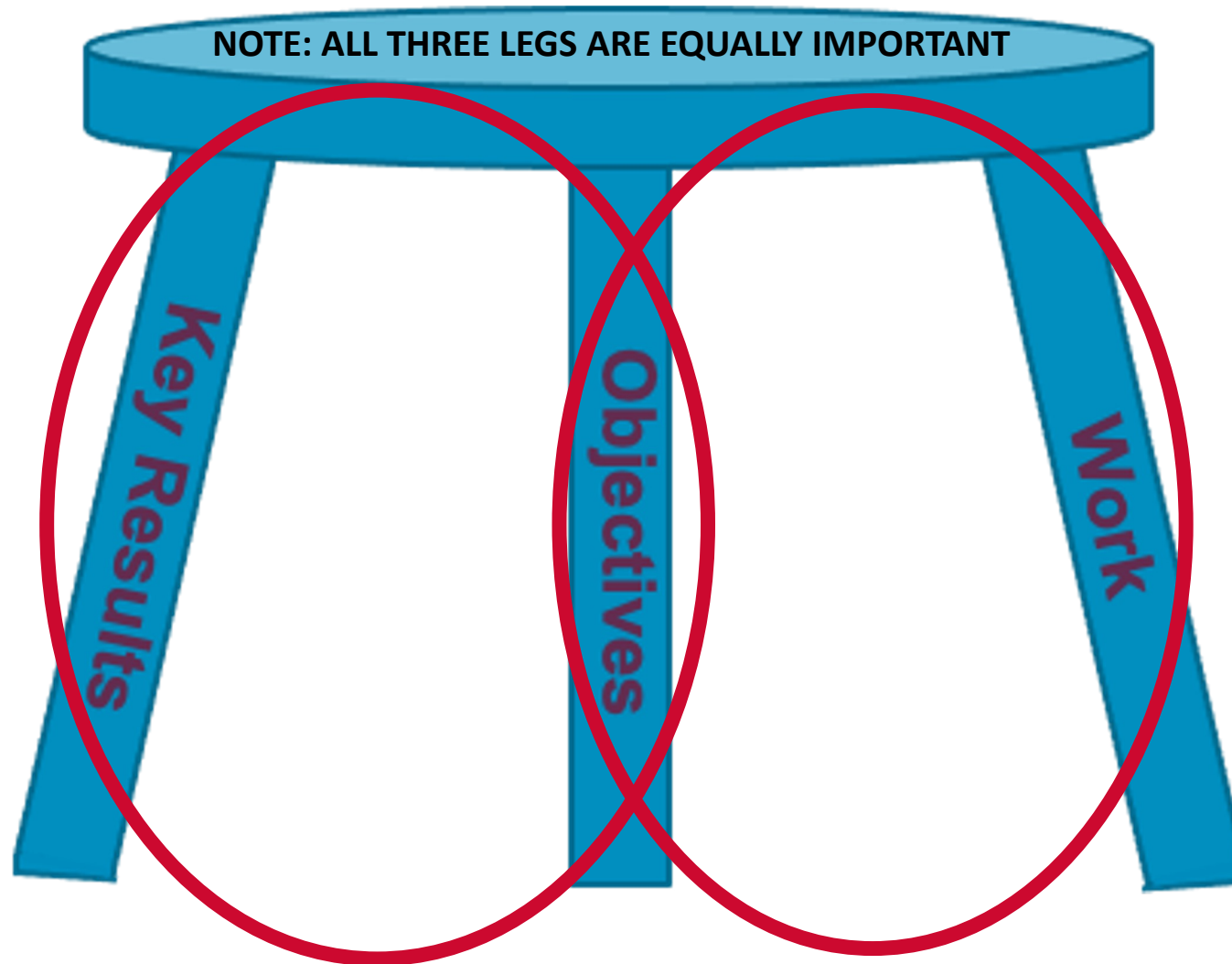
Journey Steps Which step of the experience are you describing?	Objective Definition How can Executives manage Objectives, Outcomes and Key Results?	Aligning Work to Objectives How can Development Executives ensure work aligns to OKRs?	Progress Tracking How can Executives track the progress of work and outcomes?
<b>Actions</b> What does the Business or Development Executive do? What information do they need? What is their context?	<div>Clarity is the master record for connected objectives</div> <div>Clarity pushes the objective information to Rally</div> <div>Further objectives can be defined in either tool</div> <div>Define key results for each objective</div>	<div>Align work to Objectives in Rally</div> <div>Align work to Objectives in Clarity for teams that aren't in Rally (non-technical teams)</div> <div>Rally Report to check on unaligned work</div>	<div>Rally pushes information about work progress</div> <div>Reconcile progress toward key results in Clarity and push to Rally</div>
<b>Needs and Pains</b> What does the Executive want to achieve or avoid?	<div>I want to have flexibility and configurability when defining OKRs</div> <div>I want to define OKRs at different levels of the organization</div> <div>OKRs are kept in separate tools</div> <div>Siloed and misaligned information</div>	<div>Ensure that the work I'm planning is in support of business objectives</div> <div>I want to know if it's possible to meet my objectives</div> <div>Currently, there's no way to align the work to the objectives</div> <div>Introducing waste to our system because we're working on work that doesn't support progress to meeting business</div>	<div>I want to know the progress of my work that's aligned to my business objectives</div> <div>I want to know if I'm going to be able to meet my target outcomes</div> <div>Currently, there's no way to see if we're going to complete the work on time</div> <div>There's no way to see if we're actually doing is still aligned</div> <div>There's no way to see if we're moving the needle with the work we're doing</div>
<b>Touchpoint</b> What part of the software do Executives interact with?	<div>Custom Clarity Investment Object</div> <div>Rally Objective Object</div> <div>Key results live within the Objective</div>	<div>Associate work to objectives in Rally</div> <div>View objectives as part of the planning process to help prioritize the work</div> <div>Tie tasks to the objective object in Clarity</div>	<div>Progress updates in Objective objects in Rally and Clarity</div> <div>Objective reporting in Clarity</div> <div>Track progress of work in Rally</div>
<b>Customer Feeling</b> What is the Executive feeling?			
<i>Backstage</i>			
<b>Opportunities</b> What could we improve or introduce?	<div>Ability to create clear alignment between high level business objectives and OKRs that are defined on different time cadences and at different levels of the organization</div> <div>Ability to connect business objectives to development objectives while providing teams with the autonomy to create their own objectives that roll up to the main business objectives</div> <div>Integrate with external OKR software?</div> <div>High Value Low Confidence Low Reach</div>	<div>Ability to more effectively prioritize backlogs and plan to ensure alignment to business objectives</div> <div>Ability to plan against business objectives to ensure teams are prioritizing the highest value work</div> <div>Understand the planned allocation of work against objectives</div> <div>Understand if you can possibly achieve your outcomes given the required effort</div> <div>High Value Low Confidence Low Reach</div>	<div>Understand the progress of outcome achievement in the context of work completion</div> <div>Ability to understand risk and be able to make adjustments faster and earlier in the process to increase chances of achievement</div> <div>Know if the work that is actually being completed is aligned to the objectives of the business</div> <div>High Value Low Confidence Low Reach</div>

# Full Enterprise Visibility Across OKRs

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- Objectives can be defined in either solution & associated to the investment/strategy tied to their delivery
- Clarity allows for planning and cataloguing of OKRs for the entire organization, including those for business stakeholders that do not use (and have no interest in using) an Agile solution, like Rally.
- Rally enables cataloguing of OKRs by Agile delivery organization stakeholders in the context of the environment in which they spend most of their time with seamless forwarding to the overall organization's repository as needed – eliminating the need for dual entry or tracking
- By tracking all of the work done to satisfy an OKR, Rally can also provide real-time status of execution

# Our Approach Is Different & Better



Traditional OKRs focus more on Objectives and Key Results; this is good, but it doesn't capture the "effort" required

We focus on Key Results and the effort required to achieve them – the "Work."

*Why? Because value is not realized until results are achieved – and results will not be achieved without work being applied.*

# Part III: How Do We Do This?



# ValueOps: Adaptive Strategy Planning & Execution



Key Persona(s):  
Business Execs,  
Product Managers

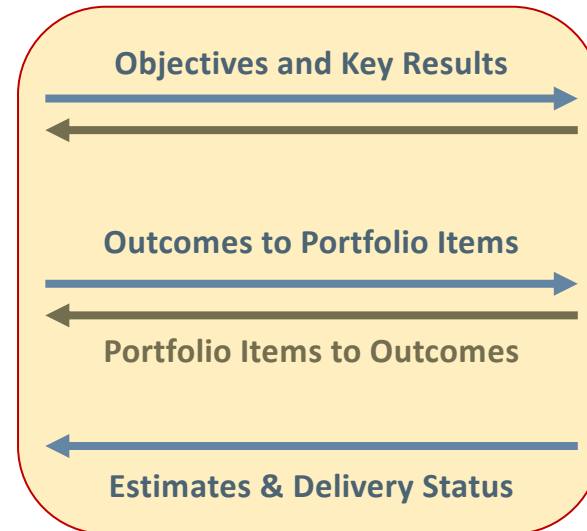
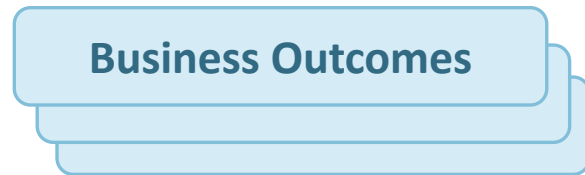


Key Persona(s):  
Product Owners,  
R&D/Engineering

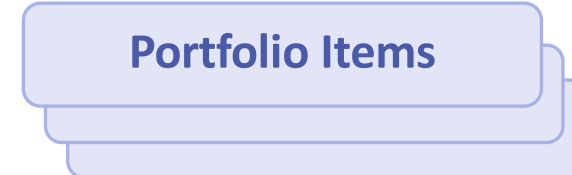
**Customer Engagement**  
→



↕  
**Business Prioritization to Optimize Delivered Value**



↕  
**Agile Execution**



→  
**Area of focus for Clarity and Rally Integration**



# Use Cases 1 & 2

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1. As a **business leader** creating **business objectives and key results for my organization in Clarity**, I know they will be **automatically made visible in Rally to the Agile teams**, ensuring **full transparency of business OKRs for the engineering organization**.
2. As an **engineering leader** creating **engineering objectives and key results for my organization in Rally**, I know they will be **automatically made visible in Clarity for the business leaders**, ensuring **full transparency of the engineering OKRs for the business stakeholders**.

# Flow

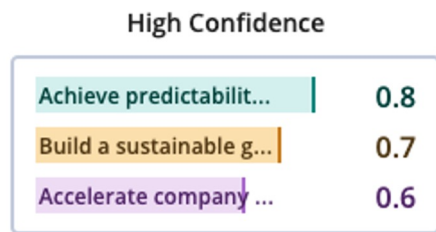
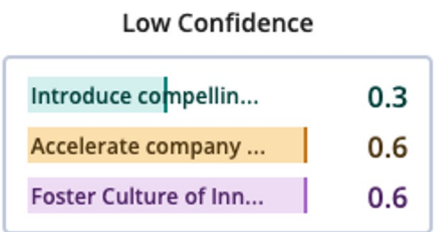
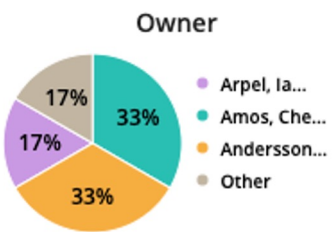
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- Business Objectives are in Clarity
  - Only those that have a direct impact on Engineering\* Objectives
  - They are pushed to Rally (along with any pre-existing Engineering Objectives in Clarity)
- Engineering Objectives are created in Rally
  - They are pushed to Clarity
- As Objectives/Key Results are updated on either side, they are updated on the other to insure full transparency



Navigation and search bar with filters, view selector (OKR Business View), and save button.

Manage Widgets  Filter Widgets



Select All Deselect All

Group By		Starred	Confidence Score	Owner	Name *	Fulfillment (%) ↑	Period	Start Date *	Fin
<input type="checkbox"/>	★	60%	Andersson, Peter	Foster Culture of Innovation & Transparency	39	2022-Q4	Aug 1, 2022		
<input type="checkbox"/>	★	70%	Barry, Debra	Build a sustainable growth engine	40	2022-Q4	Aug 1, 2022		
<input type="checkbox"/>	★	30%	Amos, Cheryl	Introduce compelling solutions and increase relevance with CIO/CEO	40	2022-Q4	Aug 1, 2022		
<input type="checkbox"/>	★	60%	Andersson, Peter	Accelerate company solution adoption	49	2022-Q4	Aug 1, 2022		
<input type="checkbox"/>	★	60%	Amos, Cheryl	Simplify Operations & Improve Execution	57	2022-Q4	Aug 1, 2022		
<input type="checkbox"/>	★	80%	Arpel, Ian	Achieve predictability and consistency of execution	100	2022-Q4	Aug 1, 2022		

This is a **Custom Object** in Clarity. You can configure whatever you like onto the object and call it whatever you want. (e.g. Objective, Goal, KPI, Measure)

*A Cooking with Clarity guide for OKRs is available if you want to use the configurations that are part of this presentation.*



- Capture whatever details you want about your objectives using the configurable flyout
- Includes quick access to the Key Results subobject (custom subobject)

**Owner**

Arpel, Ia...	33%
Amos, Che...	17%
Andersson...	17%
Other	33%

**Low Confidence**

Introduce compelling...	0.3
Accelerate company ...	0.6
Foster Culture of Inn...	0.6

**High Confidence**

Achieve predictabil...	0.8
Build a sustainable g...	0.7
Accelerate company ...	0.6

Starred	Confidence Score	Owner	Name * ↑
<input type="checkbox"/>	60%	Andersson, Peter	Accelerate company solution adoption
<input type="checkbox"/>	80%	Arpel, Ian	Achieve predictability and consistency of ex...
<input type="checkbox"/>	70%	Barry, Debra	Build a sustainable growth engine
<input type="checkbox"/>	60%	Andersson, Peter	Foster Culture of Innovation & Transparency
<input type="checkbox"/>	30%	Amos, Cheryl	Introduce compelling solutions and increase
<input type="checkbox"/>	60%	Amos, Cheryl	Simplify Operations & Improve Execution

**Accelerate company solution adoption (00000005)**

**Details** | Key Results

Starred

Confidence Score: 60%

Owner: Andersson, Peter

Name \*: Accelerate company solution adopti...

Fulfillment (%): 49

Period: 2022-Q4



Start Date \*: Aug 1, 2022

Finish Date: Nov 1, 2022

Conversation



Objective Type: [Dropdown]

Integration mappings: [Dropdown]


Key Results **Conversations** Properties Start a conversation...  **Ian** Aug 11, 2022 5:17 pm, edited Aug 11, 2022 5:31 pm  **Dana Lewis** Please work with the team to accelerate the process to obtain 5 reference customers for the new integrated solution **Dana** Aug 11, 2022 5:34 pm **Ian Arpel** Thanks for the reminder. I'm on this. In fact, I am personally working with two other customers that are close to go live and have agreed to be a reference.

Reply...

Conversations module is (optionally) available to have on-the-record discussions about each objective.

clarity ← Integration Mappings Clarity and Rally OKRs  


Object Mappings Sub-Object Mappings **Beta** Rally Objects Lookup Mapping To Clarity To Rally

↓ Search... View Standard View  Save


Select All Deselect All

Group By	Name *	Direction *	Clarity Object *	External Object * ↑	Active
<input type="checkbox"/>	Objectives	Both	Objectives	Objective	

Columns

**Objectives (OM00000005)** 

Details Field Mappings

Search... 

Group By	Direction *	Sync Option *	Clarity Field * ↑	Clarity Data Type	Clarity Extended Data Type	External Field *	External Data Type
<input type="checkbox"/>	Both	Create and Update	Confidence Score	Number	percent	Score	Decimal
	Both	Create and Update	Description	Richtext		Description	Text
	Both	Create and Update	Finish Date	Date		Target Date	Date
	Both	Create and Update	Name	String		Name	String
	Rally to Clarity	Update	Projects	String	lookup	Projects	Collection
	Both	Create and Update	Start Date	Date		Start Date	Date
	Rally to Clarity	Update	State	String	lookup	State	Object

Columns

## Clarity Connections

*Custom Objects are now available for mapping*

“Objectives” in Clarity can map to the Objective object in Rally.

productmgmt5.clarityengg.broadcom.net/pm/#admin/integrations/mapping/5002000/subObjectMappings

clarity ← Integration Mappings

Clarity and Rally OKRs

Object Mappings Sub-Object Mappings **Beta** Rally Objects Lookup Mapping To Clarity To Rally

Select All Deselect All

Group By

Name *	Direction *	Clarity Object *	External Object *	Active
<input type="checkbox"/> Key Results	Both	Objectives/Key Results	Key Result	

Columns

Key Results (SO00000001)

Details Sub Field Mappings

Search... (Copy) Standard View Save

Search... Expand

Direction *	Sync Option *	Clarity Field *	External Field *
Both	Create and Update	Start Metric	Starting Value
Both	Create and Update	Target Metric	Target Value
Both	Create and Update	Name	Name
Rally to Clarity	Create and Update	Current Metric	Latest Actual Value

Columns

## Clarity Connections

*A Custom Object/Subobject combo in Clarity can map to the Key Result object in Rally*  
 “Key Results” in Clarity can map to the Key Result object in Rally.

<input type="checkbox"/>	Rank ↑↓	ID	Name	Confidence Score↑↓	Key Result Average Progress↑↓	Key Results	Projects	Start Date	Target Date	Integration Mappings	State
<input type="checkbox"/>	>	T60	Accelerate company solution adoption	60%	35%	5	1	08/01/2022 12:00 AM MDT	11/01/2022 11:59 PM MDT	Clarity Rally OKR	Discovering
<input type="checkbox"/>		T59	Achieve predictability and consistency of execution	80%	100%	1	1	08/01/2022 12:00 AM MDT	11/01/2022 11:59 PM MDT	Clarity Rally OKR	Developing
<input type="checkbox"/>	>	T62	Build a sustainable growth engine	70%	40%	4	1	08/01/2022 12:00 AM MDT	11/01/2022 11:59 PM MDT	Clarity Rally OKR	Discovering
<input type="checkbox"/>		T57	Foster Culture of Innovation & Transparency	60%	39%	4	1	08/01/2022 12:00 AM MDT	11/01/2022 11:59 PM MDT	Clarity Rally OKR	Discovering
<input type="checkbox"/>		T61	Introduce compelling solutions and increase relevance with CIO/CEO	30%	40%	3	1	08/01/2022 12:00 AM MDT	11/01/2022 11:59 PM MDT	Clarity Rally OKR	Developing
<input type="checkbox"/>	>	T58	Simplify Operations & Improve Execution	60%	41%	2	1	08/01/2022 12:00 AM MDT	11/01/2022 11:59 PM MDT	Clarity Rally OKR	Discovering

Objectives are brought over from Clarity to Rally (and vice versa) via the Integration sync

# Use Cases 3 through 6

3. As a **Product Manager**, I can **see objectives and key results in Rally and relate portfolio items I have defined to those they support**, enabling me to **verify the work I'm planning for the coming PI is supporting the organization's OKRs**.
4. As a **Team Member**, I can **easily see the objectives and key results that my team is contributing to in the current PI**, enabling me to **ensure my work is fully aligned in helping achieve them**.
5. As an **Engineering Leader**, I can **easily see the supporting PI work/commitments for each of the objectives**, enabling me to **verify my release train is appropriately supporting business objectives and key results**.
6. As a **Product Owner**, I can **relate my team commitments for the PI to the objectives/key results they support**, **providing business context for the planned work**.



# Objectives BETA

Objective: Initiative Objective ▼ Saved Views: Theme View ▼

<input type="checkbox"/> Rank ↑↓	ID	Name	Confidence Score↑↓	Key Result Average Progress↑↓	Key Results	Projects	Start Date	Target Date	Integration Mappings
<input type="checkbox"/>	I1007	DevOps - Ansible CI/CD Pipeline	70%	50%	1	1	08/08/2022 12:00 AM MDT	10/31/2022 11:59 PM MDT	Clarity Rally OKR
<input type="checkbox"/>	I1012	Improve Rally Administration Functionality	80%	55%	2	1	01/01/2022 12:00 AM MST	12/31/2022 11:59 PM MST	Clarity Rally OKR
<input type="checkbox"/>	I1008	Improve Rally Analytics - Horizontal and Vertical Reporting (FY22-23)	50%	103%	3	1	06/23/2022 12:00 AM MDT	10/31/2023 11:59 PM MDT	Clarity Rally OKR
<input type="checkbox"/>	I1010	Timebox Tracking Adoption	80%	60%	1	1	08/01/2022 12:00 AM MDT	07/01/2023 11:59 PM MDT	Clarity Rally OKR
<input type="checkbox"/>	I1009	Work Rules Adoption	60%	50%	1	1	06/13/2022 12:00 AM MDT	01/31/2023 11:59 PM MST	Clarity Rally OKR

## Add or Update Objectives in Rally





# 11012 Improve Rally Administration Functionality

Improve overall look and feel as well as performance

Start: 01/01/2022 Target: 12/31/2022

Dana

Developing

80% Confidence Score

Average Key Result Progress



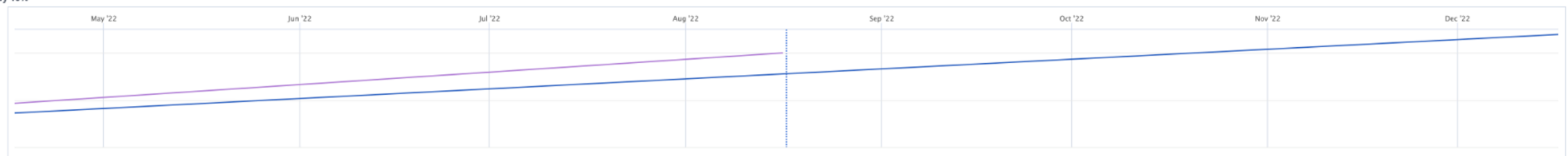
- Overview
- Associated Work
- Discussions
- Revisions

## Key Results

### 1 Improve Work Rules usage by 10%

Starting: 0  
Actual Value: 40000  
Final Target: 50000(80%)

Update Actuals



### 2 Improve Timebox Admin usage by 10%

Starting: 0  
Actual Value: 15000  
Final Target: 50000(30%)

Update Actuals



# View Details of Key Results



Projects ... Online Store

Search all work items

### T19 Become The Top In Position

Winner

Average Key Result Progress  
45%

Overview Associated Work Discussions Revisions

#### Key Results

1 Gartner moves Clarity up and to the right

Date	Actual Value	Remove
06/22/2022	20	
07/13/2022	25	
07/28/2022	30	
08/03/2022	32	

Start: 06/22/2022 Target: 01/19/2023

Cheryl Amos

Measuring

80% Confidence Score

MM/DD/YYYY Value + Add Done

Starting: 5

Actual Value: 32

Jul '22 Aug '22 Sep '22 Oct '22 Nov '22 Dec '22 Jan '23 Feb '23

## Capture New Actuals for Key Results

## 11010 Timebox Tracking Adoption

As the team implements a new solution for release tracking utilizing the timeline as the starting point, we would like to see the usage of the page(s) increase to match the levels of timeline. Data currently suggests that the pre-packaged views that allow a user to track timeboxes (mainly releases) are as follows (all values are maximum weekly views over the past 90 days): Release Planning: 220,000 Release Tracking: 45,000 Release Status: 88,000 Plan Progression: 1,600 By way of comparison, the maximum usage of the Timeline page over the same period of time was: 48,000 This suggests that it is about equal to Release Tracking today.

### Next Interim Target Key Result Progress



### Average Key Result Progress



Start 08/01/2022 Target 07/01/2023

Dana

Developing

80% Confidence Score

Overview **Associated Work** Discussions Revisions

### Associated Work

Saved Views

[Link Existing](#) [Show Filters](#) [Show Fields](#) [Share](#)

ID	Name	State	Percent Done By Story Plan Estimate	Percent Done By Story Count	Project	Owner
<a href="#">I28447</a>	SAFe Flow Metrics - Dashboard Experience	Build	73% 14/19 points complete	80% 4/5 stories complete	Online Store	Dana
<a href="#">I28448</a>	Advanced Cycle time analysis tooling	Build	66% 10/15 points complete	66% 2/3 stories complete	Online Store	Dana
<a href="#">I28449</a>	Flow Metrics & CFD for Rally Portfolio Items	Build	45% 5/11 points complete	50% 2/4 stories complete	Online Store	Dana
<a href="#">I28451</a>	Standardize Rally CFDs	Idea	0% 0/0 points complete	0% 0/0 stories complete	Online Store	Dana

Show what Work is Associated to the Objective

Objectives Saved Views Select or Add Saved and Shared Views

Search Work Items + Add New Link Existing Show Filters Show Fields Total Objectives: 1

Rank	ID	Name	State	Start Date	Target Date	Owner	Key Results
1	TO1	Create comprehensive alert syst...	Deve...	2021-10-01 12:00...	2022-07-31 06:00...	Rusty Lloyd	2

Objectives can be Accessed from the Work Side too

**Rally** Projects Online Store

Search all work items

**Objectives** Objective Theme Objective Saved Views Select or Add Saved and Shared Views

Search Work Items Add New Hide Filter Show Fields

Creation Date Integration Mappings (Theme Obj... Projects Switch to Advanced Filters

select date Clarity and Rally OKRs Select Projects... Add or Remove Filters Clear Filters

Rank	ID	Name	Description	State	Confidence Score	Key Result Average Progress	Key Results	Projects	Start Date	Target Date
	T19	Become the top in position in the Leader Quadrants for ValueOps	<b>Winner takes all!!</b>	Measuring	80%	47%	2	2	06/22/2022 12:00 AM MDT	01/19/2023 11:59
	T31	Date and Time testing	5:35am PT Tuesday Aug-2-2022- Start and Finish date are the same		20%	0%	0	0	08/02/2022 12:00 AM MDT	08/02/2022 11:59
	T32	Date and Time testing2	5:38am PT Tuesday Aug-2-2022- Start and Finish date are not the same		30%	0%	0	0	08/02/2022 12:00 AM MDT	08/03/2022 11:59
	T23	Enhance Customer Experience	<b>Improve</b> customer NPS score to 15 (+5 points) from last year	Developing	40%	28%	2	2	06/02/2022 12:00 AM MDT	12/24/2022 11:59
	T25	Harden Security for fraud Attacks	Work with <b>all parties to harden all subscriptions</b>	Developing	40%	26%	1	2	06/02/2022 12:00 AM MDT	12/03/2022 11:59
	T24	Implement Secure Banking Network	Work with other banks to create a secure banking network	Discovering	30%	0%	0	2	06/02/2022 12:00 AM MDT	04/27/2023 11:59
	T21	Improve Business User Support	<b>Complete all necessary activities to improve Business Support by 20%</b>	Developing	50%	13%	1	2	06/02/2022 12:00 AM MDT	10/25/2022 11:59
	T20	Improve Customer Usage in FY 22	<b>Improve Customer</b> Usage <b>by 50%</b> in FY22	Developing	50%	17%	1	2	06/19/2022 12:00 AM MDT	09/25/2022 11:59
	T22	Improve User Adoption	Improve overall user adoption <b>by 50%</b>	Developing	40%	5%	1	2	06/02/2022 12:00 AM MDT	10/25/2022 11:59

Objectives can be of Different Types/Levels in Rally

Select All Deselect All

Group By

Name *	Description	Objective % Complete	Confidence Score	Start Date *	Finish Date	Projects	State	Objective Type	Last
Become the top in position in the Leader Quadrants for ValueOps	Winner takes all!!	44	80%	Jun 22, 2022	Jan 19, 2023			Theme Objective	Upd
Enhance Customer Experience	Improve customer NPS score to 15 (+5 points) fr...	28	40%	Jun 2, 2022	Dec 24, 2022			Theme Objective	Upd
Improve Business User Support	Complete all necessary activities to improve Bus...	13	50%	Jun 2, 2022	Oct 25, 2022			Theme Objective	Upd
Implement Secure Banking Network	Work with other banks to create a secure banki...	40%	40%	Jun 2, 2022	Apr 26, 2023			Theme Objective	Upd
Eliminate all security vulnerabilities	test	20	80%	Jun 2, 2022	Sep 25, 2022			Initiative Objective	Upd
Improve Customer Usage in FY 22	Improve Customer Usage by 50% in FY22	17	50%	Jun 19, 2022	Sep 24, 2022			Theme Objective	Upd
Improve User Adoption	Improve overall user adoption by 50%	5	40%	Jun 2, 2022	Oct 24, 2022			Theme Objective	Upd
Harden Security for fraud Attacks	Work with all parties to harden all subscriptions	26	40%	Jun 2, 2022	Dec 3, 2022			Theme Objective	Upd
Enhance all Cloud deployments	Harden all deployments to prevent fraud	15	60%	Jun 2, 2022	Feb 26, 2023			Initiative Objective	Upd
Build a sustainable growth engine		61	75%	Aug 1, 2022	Oct 31, 2022				
Introduce compelling solutions and increase relevance with CIO/CEO		62	50%	Aug 1, 2022	Oct 31, 2022				
Simplify Operations & Improve Execution		92	80%	Aug 1, 2022	Oct 31, 2022				
Foster Culture of Innovation & Transparency		31	30%	Aug 1, 2022	Oct 31, 2022				
Accelerate company solution adoption		41	60%	Aug 1, 2022	Oct 31, 2022				
Achieve predictability and consistency of execution		70	80%	Aug 1, 2022	Oct 31, 2022				

Columns

Details

Those levels get “flattened” in Clarity

You use view the Objective Type and regroup as necessary  
*(Custom attribute using a provided cross lookup to Rally Objective types)*

# Use Cases 7 through 9

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7. As a **Product Owner**, I can **continuously review progress on the key results my team has committed to**, enabling them to **see if the in-progress work we are completing is supporting our objectives positively and help me determine if we should pivot or persevere.**
8. As an **Engineering Leader**, I can **easily see the progress of teams and trains in completing their objectives and key results in Rally**, enabling me to **quickly react and address issues if I see the possibility that we will miss business objectives and key results in the current PI.**
9. As a **Business Leader**, I can easily **see engineering progress on their OKRs in Clarity**, enabling me to **ensure the overall organization is progressing appropriately against both quarterly and yearly objectives and help resolve issues as they arise.**

Objectives BETA Objective: Strategic Objective Saved Views: Select or Add Saved and Shared Views

Search Work Items Add New Show Filter Show Fields Total Objectives: 4

Rank	ID	Name	Creation Date	Target Date	Confidence Score	Key Result Average Progress	Key Results	Owner	Associated Work
1	SO1	Harden Security	2021-12-02 08:58 A...	2022-04-19 06:00...	80%	74%	3	Rusty Lloyd	1
	TO1	Create comprehensive alert system	2021-12-02 09:49 A...	2022-07-31 06:00...	30%	42%	2	Rusty Lloyd	4
	TO3	Research trends and align strategy	2022-06-28 01:19 P...	2022-12-01 11:59...	70%	55%	1	Rusty Lloyd	0
2	SO4	Improve User Adoption	2021-12-02 08:58 A...	2022-02-28 07:00...	70%	70%	1	Rusty Lloyd	1
3	SO2	Enhance Customer Experience	2021-12-02 08:58 A...	2022-11-01 11:59...	50%	43%	2	Rusty Lloyd	1
	TO4	Improve Error Handling in Predictive Module	2022-06-28 01:36 P...	2022-08-01 11:59...	50%	60%	1	Rusty Lloyd	0
4	SO3	Improve Business User Support	2021-12-02 08:58 A...	2022-01-31 07:00...	30%	24%	3	Rusty Lloyd	1

**Key Results for SO1 Harden Security**

Use Full Editor Total Work Items: 3

ID	Name	Starting	Target	Owner
KR3	Mitigate Insider Risks created by Work fro...	1	100	
KR2	Implement disruptionware processes to p...	1	100	
KR1	Detect all Cloud Based Automated Attacks	1	100	

Key Results Rollup to Calculate Progress Against each Objective



**Objectives** BETA Objective: Strategic Objective Saved Views: Select or Add Saved and Shared Views

Search Work Items + Add New Show 1 Filter Show Fields

Total Objectives: 4

Rank	ID	Name	Creation Date	Target Date	Confidence Score	Key Result Average Progress	Key Results	Owner	Associated Work	Percent Done By Story Count	Percent Done By Story Points
1	SO1	Harden Security	2021-12-02 08:58 A...	2022-04-19 06:00...	80%	74%	3	Rusty Lloyd	1	20% 6/29 stor...	35% 44/123 points complete
2	SO4	Improve User Adoption	2021-12-02 08:58 A...	2022-02-28 07:00...	70%	70%	1	Rusty Lloyd	1	20% 6/29 stor...	35% 44/123 points complete
3	SO2	Enhance Customer Experience	2021-12-02 08:58 A...	2022-11-01 11:59...	50%	43%	2	Rusty Lloyd	1	20% 6/29 stor...	35% 44/123 points complete
4	SO3	Improve Business User Support	2021-12-02 08:58 A...	2022-01-31 07:00...	30%	24%	3	Rusty Lloyd	1	20% 6/29 stor...	35% 44/123 points complete

Associated Work for SO1: Harden Security

- 1: 20% 6/29 stor... 35% 44/123 points complete
- 1: 20% 6/29 stor... 35% 44/123 points complete
- 1: 20% 6/29 stor... 35% 44/123 points complete
- 1: 20% 6/29 stor... 35% 44/123 points complete

Progress of the Associated Work can also be Tracked

**Associated Work for SO1** Harden Security

Link Existing Use Full Editor Total Work Items: 1

ID	Name	Release	State	Percent Done By Story Plan	Percent Done By Story Count	Project	Owner
E1	NexGen Fraud Alert Sy...	--	Build	35% 4.	20% 6.	Digital Ban...	Rachel



Select All Deselect All

Group By

Name *	Description	Objective % Complete	Confidence Score	Start Date *	Finish Date	Projects	State	Objective Type	Last Sy
Become the top in position in the Leader Quadrants for ValueOps	Winner takes all!!	44	80%	Jun 22, 2022	Jan 19, 2023			Theme Objective	Upda
Enhance Customer Experience	Improve customer NPS score to 15 (+5 points) fr...	28	40%	Jun 2, 2022	Dec 24, 2022			Theme Objective	Upda
Improve Business User Support	Complete all necessary activities to improve Bus...	13	50%	Jun 2, 2022	Oct 25, 2022			Theme Objective	Upda
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Achieve predictability and consistency of execution		70	80%	Aug 1, 2022	Oct 31, 2022				

Pass back Engineering updates to Clarity  
(% Complete, Confidence Score, Start & Finish dates)

# In Conclusion

- Using Clarity and Rally together allows your organization to capture OKRs in either solution and mirror those records to the other side
- Occurs seamlessly through the out-of-the-box integration mapping utility (requires Clarity v16.0.3 for OKRs)
- Progress updates made in either solution can be passed to the other side... although usually it is Rally updates being passed back to Clarity
- All this helps to **Track Progress, Create Alignment, and Encourage Engagement** around **Measurable Goals**.

# Questions?



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- Class Name = **regoUniversity**
- Course **Description**
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- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
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