



# regoUniversity

NASHVILLE • 2022

## Product Roadmap for ValueOps, Clarity & Rally

### 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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- VSM – What & Why
- VSM with ValueOps (Clarity & Rally Together)
- Clarity
- Rally



# What Challenges Does VSM Solve?

## Quantified Benefits for Business and Development Leaders

### Business Leaders

80% of companies report that they still have organizational silos ...



83%

correlate these silos with reduced customer value and product ROI

### Delivery Leaders

96% of companies have digital transformation initiatives ...



92%

are still challenged with poor product visibility and delivery inefficiency

### Enterprise VSM Benefits

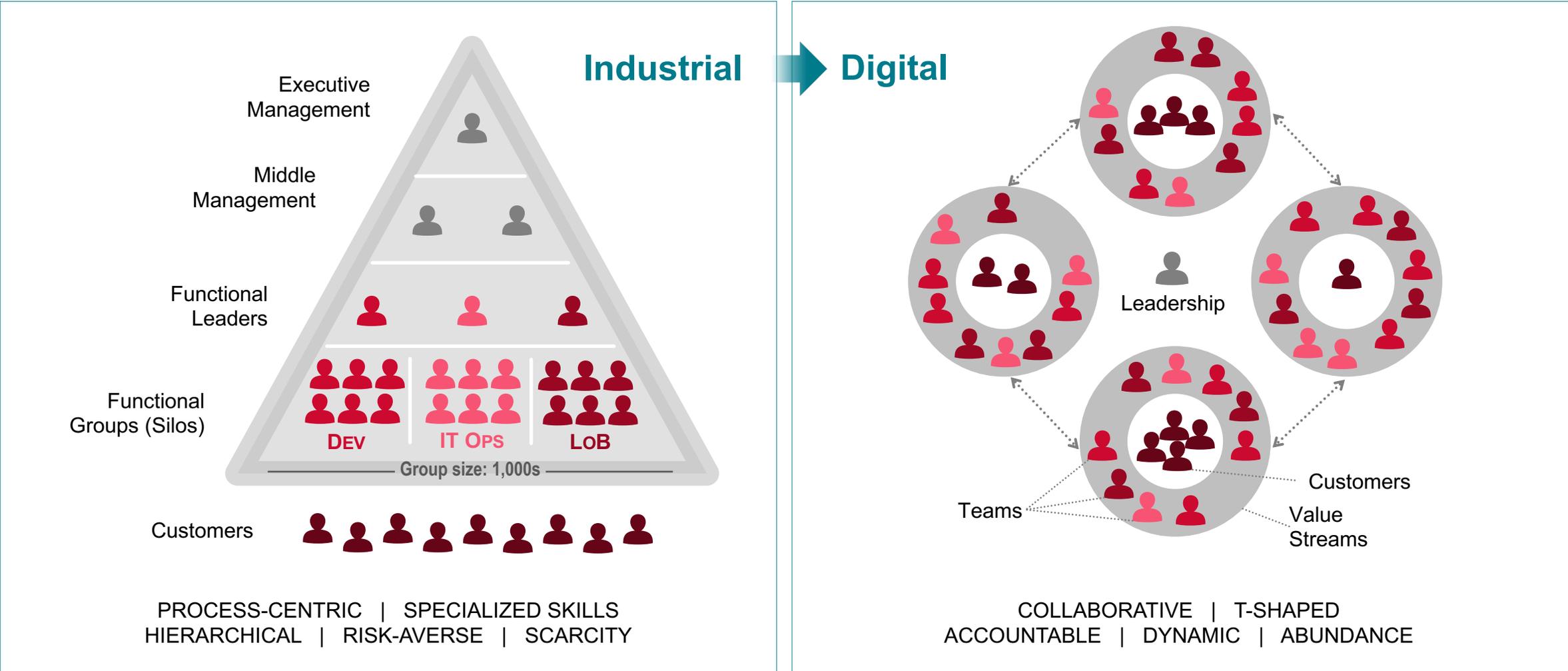
42% of companies believe they currently have “value streams”



99%

state they either benefit or would benefit from VSM capabilities

# Innovation Requires an Agile Operating Model

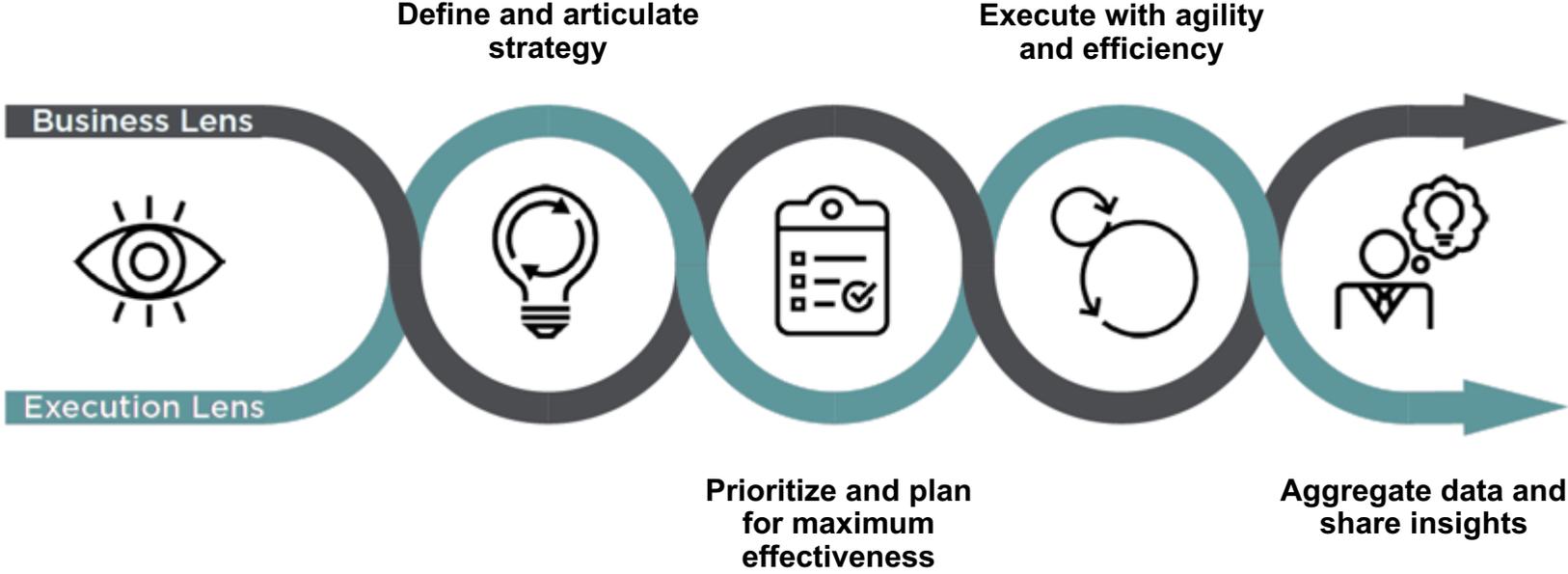


# Value Stream Management Aligns the Enterprise

“I need to prioritize, define, and fund the most valuable capabilities and ensure our resources are being used **efficiently.**”



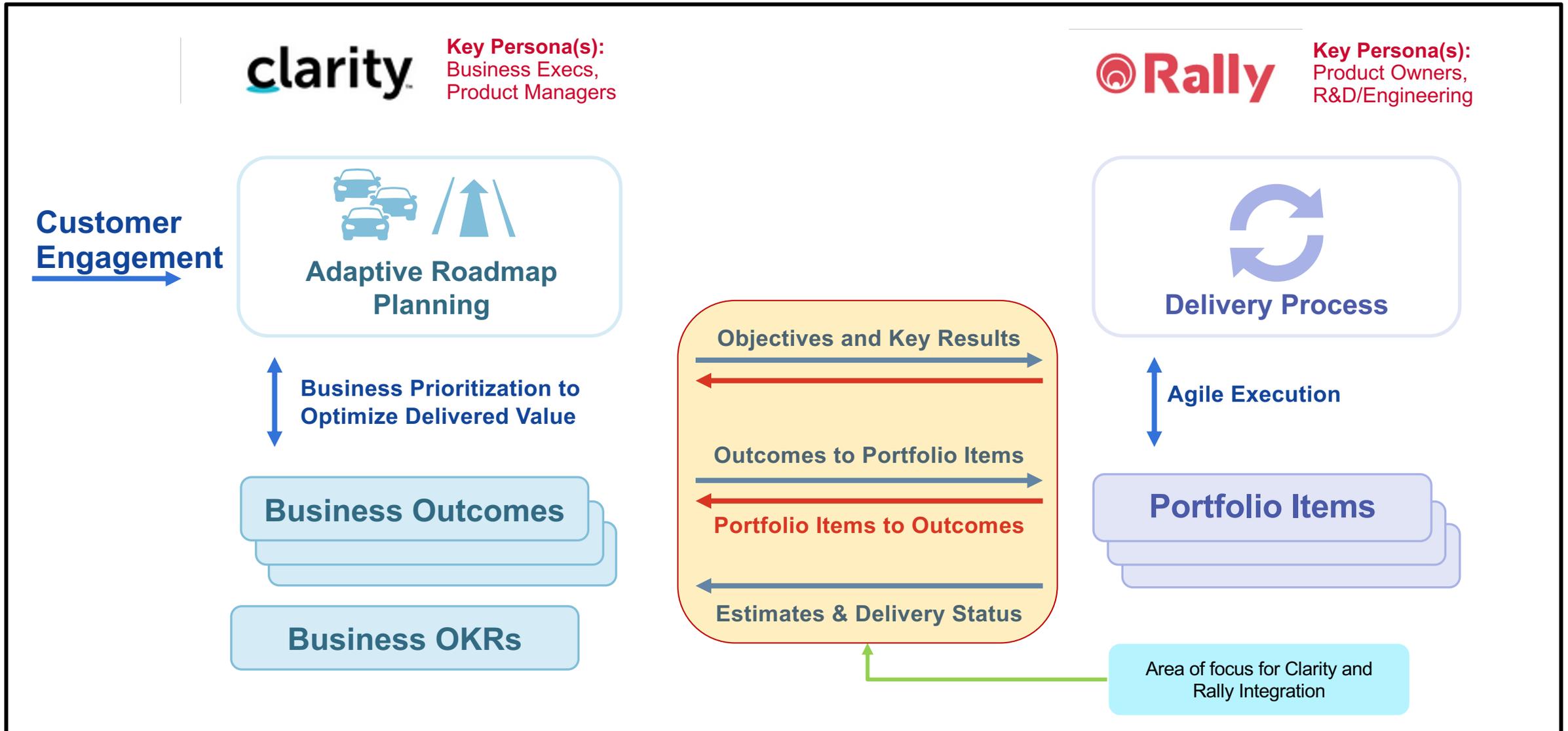
“I need to plan, manage, and track delivery with quality and speed to ensure we are executing most **efficiently.**”



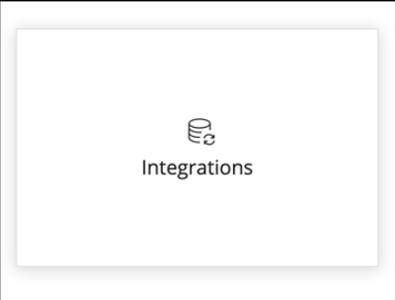
# Part II: VSM with ValueOps (Clarity & Rally Together)



# ValueOps: Adaptive Strategy Planning & Execution



# Clarity & Rally Integration – Configurable Out-of-the-Box



- Ability to sync single investments
- Ability to transform data in transfer

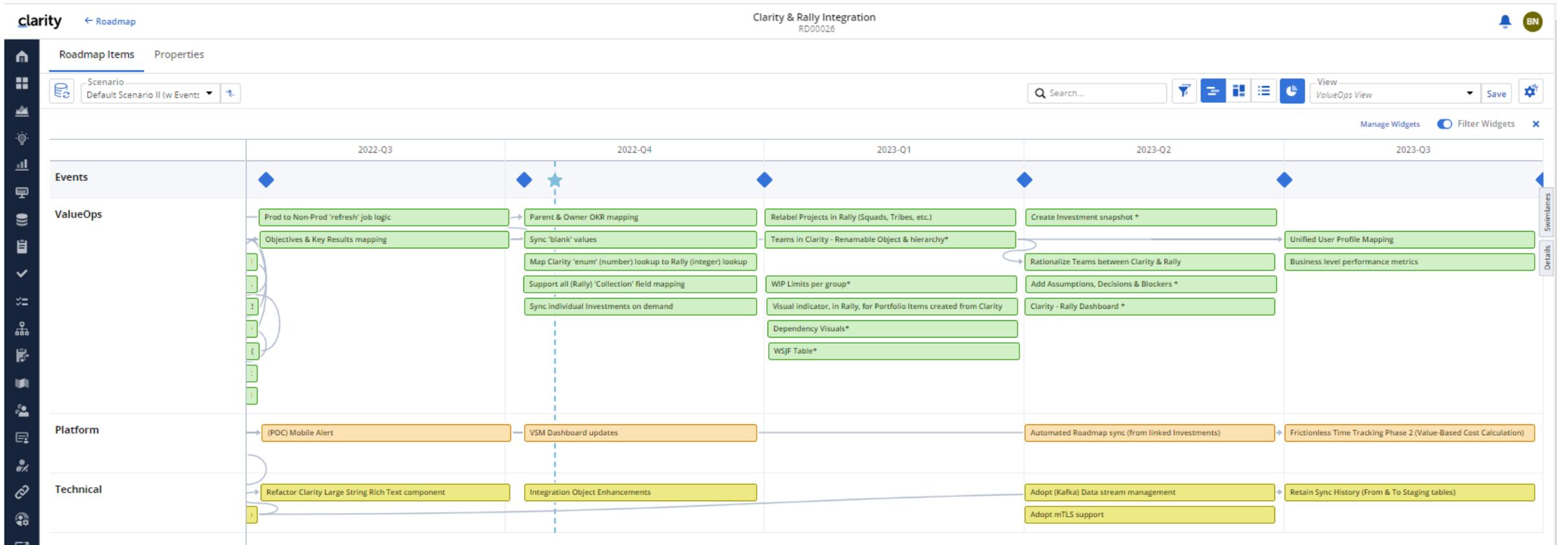
The screenshot shows the Clarity software interface. At the top, there is a navigation bar with "clarity" and "Integrations" on the left, and "Clarity to Rally" on the right. Below the navigation bar, there are three tabs: "Object Mappings" (highlighted with a red box), "External Objects", and "Staging Table". The main content area is divided into two sections. On the left, there is a table with columns "Name\*", "External Object\*", and "Clarity Object\*". The table contains three rows: "Strategy" (Strategic Theme), "Vision" (Portfolio Vision), and "Epic" (Business Epic). On the right, there is a "Details" section with a "Field Mappings" tab (highlighted with a red box). This section contains a table with columns "Direction\*", "Clarity Field\*", "Clarity Data Type", "External Field\*", and "External Data Type". The table lists various mappings between Clarity and Rally fields, such as "Clarity to External" for ID, Name, and Start Date, and "External to Clarity" for % Done by Story Count, Agile Start Date, and Agile State. A dropdown menu is open for the "Agile State" field, showing a list of options including "Accepted Leaf Story Count", "Actual End Date", "Actual Start Date", "Archived", "Attachments", "Blocked", "Blocked Reason", "Blocker", and "Changesets".

**Powerful**

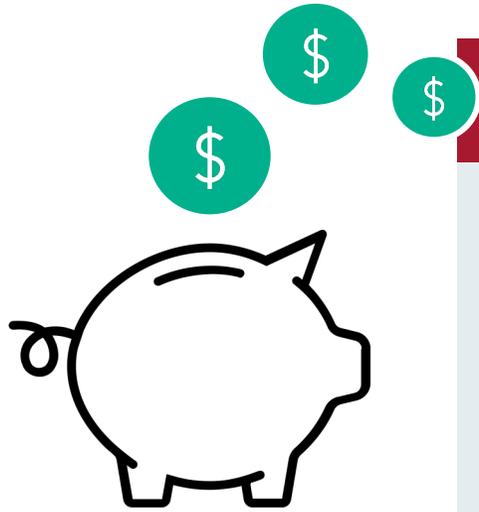


Combine the power of the industry's leading PPM & Agile Portfolio solutions to get transparency from your internal flow

# Roadmap



# Unified Resources & Teams



Resources & Teams

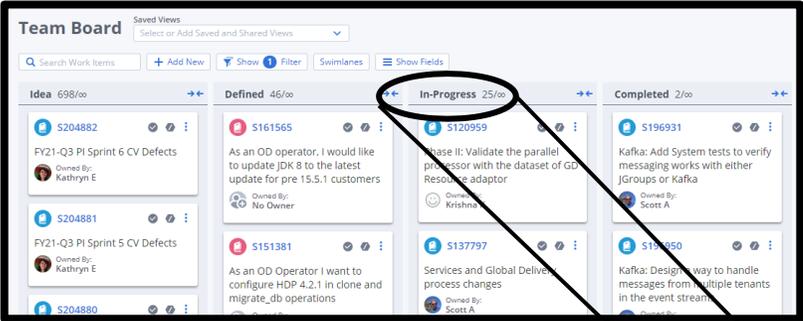
A grid of 12 circular headshots of diverse individuals, representing a team of resources. The grid is arranged in three rows and four columns. The top row contains four headshots of a woman with blonde hair, a man with a beard, a young man with short hair, and a man with a beard. The middle row contains four headshots of a woman with dark hair, a man wearing a baseball cap, a woman with dark hair, and a man with glasses. The bottom row contains four headshots of an older woman with glasses, a man with glasses, a man with a beard, and a man with short hair.

Synchronize **resources & teams** between planning in Clarity and execution in Rally

# Team Forecasting



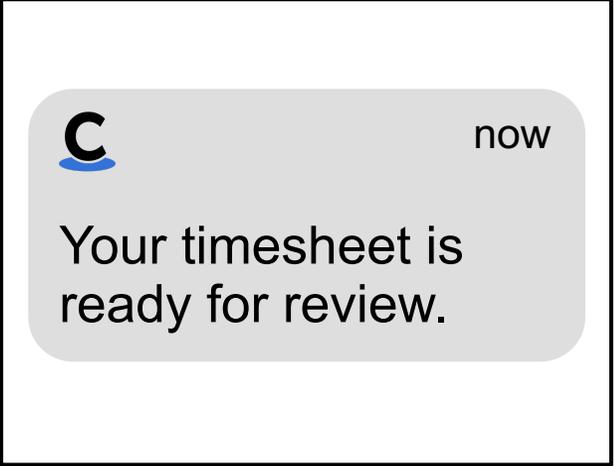
# Frictionless Accounting – Automated Timekeeping via Rally



- Leverage work item status changes to determine effort spent



- Time sent to timecard at feature level or (optional) story level



- Alert sent to mobile device to indicate timesheet is ready for attestation

**Powerful**



Combine the power of the industry's leading PPM & Agile Portfolio solutions to make accounting much easier

# OKRs: To Align Business AND Development

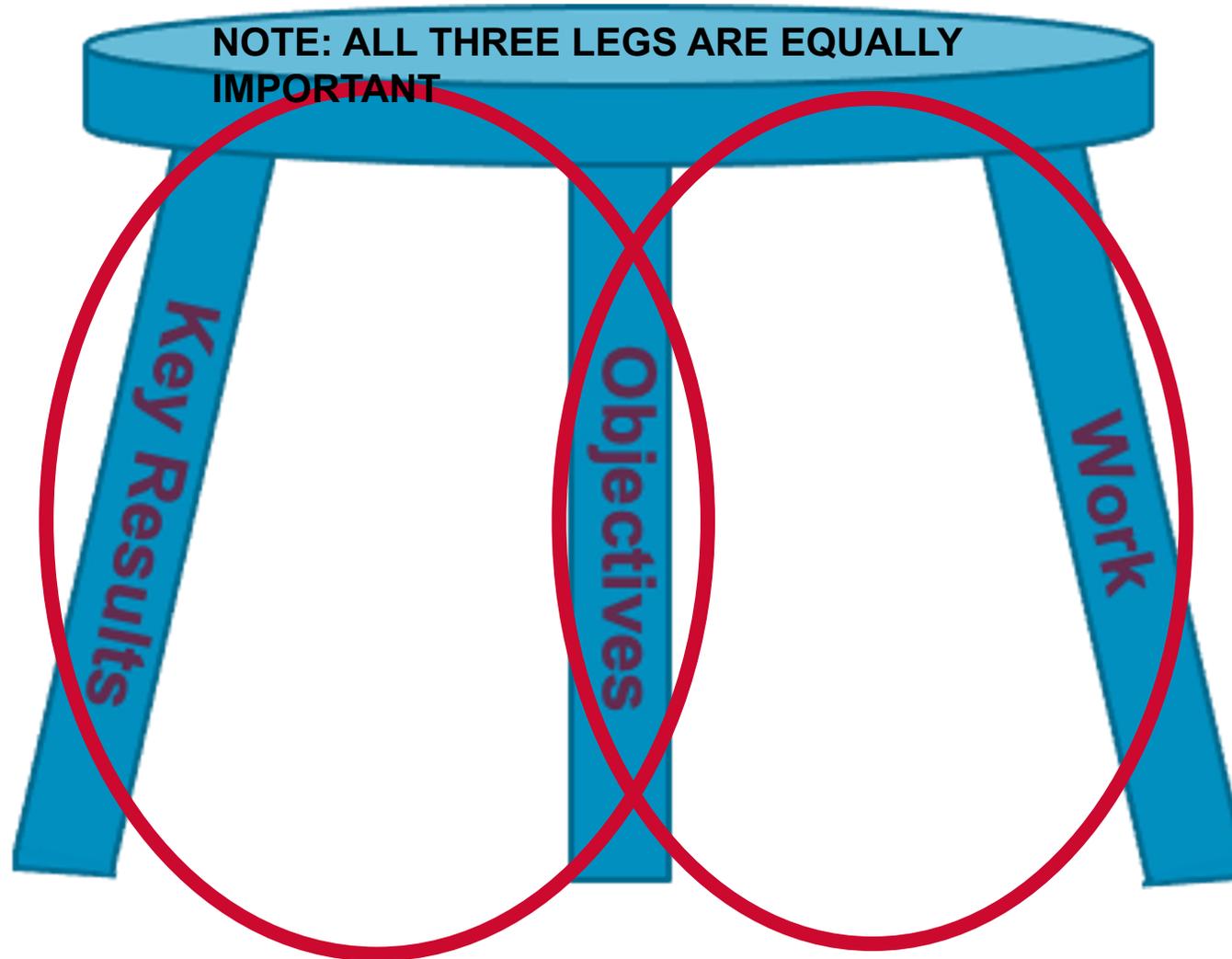
- ValueOps leverages both Clarity & Rally to connect and align both Business AND Development executives in an organization
- Most OKR solutions just focus on one group or the other – missing key context that each group wants to have

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?	<ul style="list-style-type: none"> <li>Clarity is the master record for connected objectives</li> <li>Clarity pushes the objective information to Rally</li> <li>Further objectives can be defined in either tool</li> <li>Define key results for each objective</li> </ul>	<ul style="list-style-type: none"> <li>Align work to Objectives in Rally</li> <li>Align work to Objectives in Clarity for teams that aren't in Rally (non-technical teams)</li> <li>Rally Report to check on unaligned work</li> </ul>	<ul style="list-style-type: none"> <li>Rally pushes information about work progress</li> <li>Reconcile progress toward key results in Clarity and push to Rally</li> </ul>
<b>Needs and Pains</b> What does the Executive want to achieve or avoid?	<ul style="list-style-type: none"> <li>I want to have flexibility and configurability when defining OKRs</li> <li>I want to define OKRs at different levels of the organization</li> <li>OKRs are kept in separate tools</li> <li>Siloed and misaligned information</li> </ul>	<ul style="list-style-type: none"> <li>Ensure that the work I'm planning is in support of business objectives</li> <li>I want to know if it's possible to meet my objectives</li> <li>Currently, there's no way to align the work to the objectives</li> <li>Introducing waste to our system because we're working on work that doesn't support progress to meeting business</li> </ul>	<ul style="list-style-type: none"> <li>I want to know the progress of my work that's aligned to my business objectives</li> <li>I'm going to be able to meet my target outcomes</li> <li>Currently, there's no way to see if we're going to complete the work on time</li> <li>There's no way to see if the work we're actually doing is still aligned</li> <li>There's no way to see if we're moving the needle with the work we're doing</li> </ul>
<b>Touchpoint</b> What part of the software do Executives interact with?	<ul style="list-style-type: none"> <li>Custom Clarity Investment Object</li> <li>Rally Objective Object</li> <li>Key results live within the Objective</li> </ul>	<ul style="list-style-type: none"> <li>Associate work to objectives in Rally</li> <li>View objectives as part of the planning process to help prioritize the work</li> <li>Tie tasks to the objective object in Clarity</li> </ul>	<ul style="list-style-type: none"> <li>Progress updates in Objective objects in Rally and Clarity</li> <li>Objective reporting in Clarity</li> <li>Track progress of work in Rally</li> </ul>
<b>Customer Feeling</b> What is the Executive feeling?			
<i>Backstage</i>			
<b>Opportunities</b> What could we improve or introduce?	<p>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</p> <p>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</p> <p>Integrate with external OKR software?</p> <p>High Value Low Confidence Low Reach</p>	<p>Ability to more effectively prioritize backlogs and plan to ensure alignment to business objectives</p> <p>Ability to plan against business objectives to ensure teams are prioritizing the highest value work</p> <p>Understand the planned allocation of work against objectives</p> <p>Understand if you can possibly achieve your outcomes given the required effort</p> <p>High Value Low Confidence Low Reach</p>	<p>Understand the progress of outcome achievement in the context of work completion</p> <p>Ability to understand risk and be able to make adjustments faster and earlier in the process to increase chances of achievement</p> <p>Know if the work that is actually being completed is aligned to the objectives of the business</p> <p>High Value Low Confidence Low Reach</p>

# OKRs with ValueOps: Full Enterprise Visibility

- 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 [e.g. do not use 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
- Objectives can be defined in either solution & associated to the investment/strategy tied to their delivery

# 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.



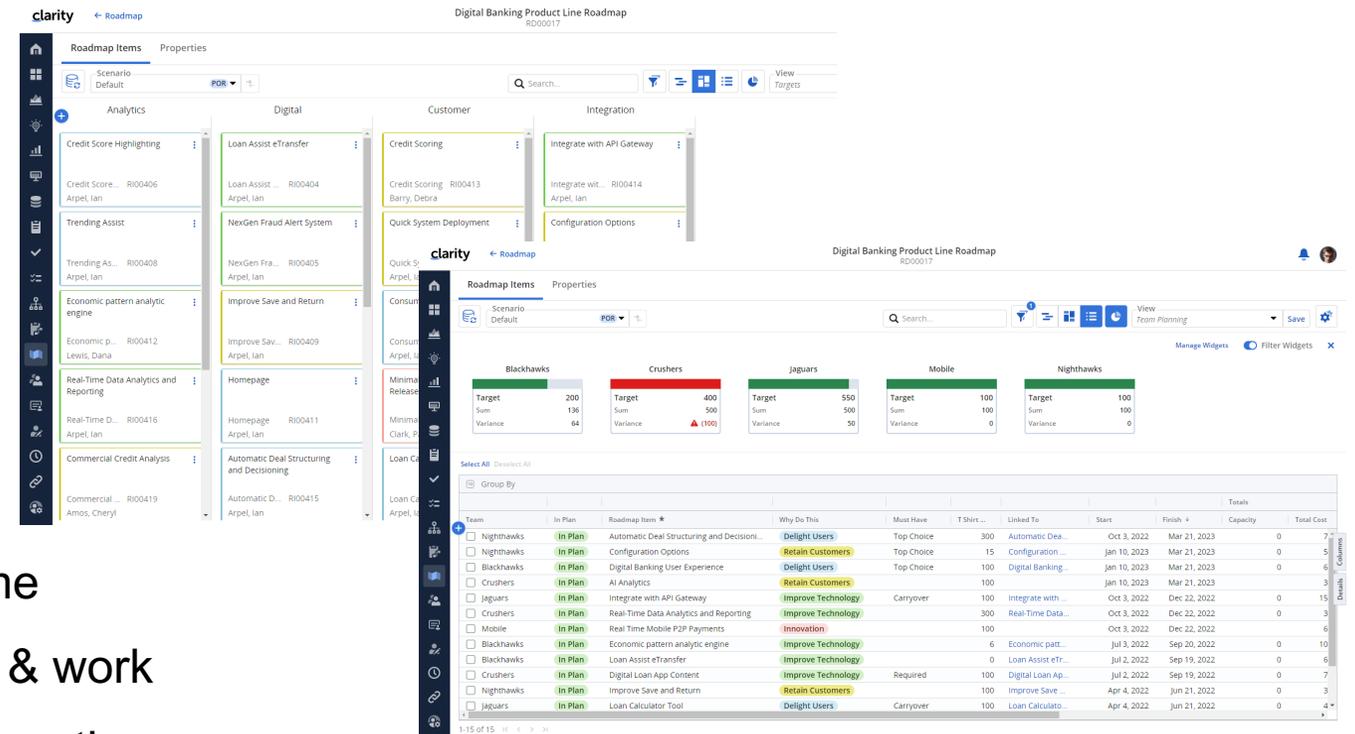
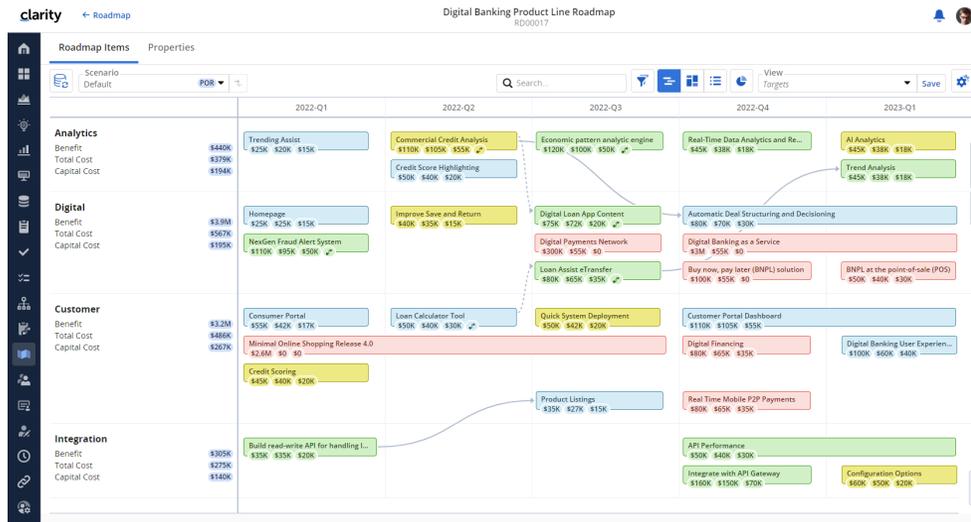
# Vision Statement

**For** Business & Technology Investment Leaders **who** are looking to get better visibility into their money and people, **our product is** a business planning & process governance solution **that** *transforms reactive investment governance into proactive strategy realization* that serves as a competitive advantage over other firms in their industry.

**Unlike** every other PPM solution in the market today that forces your organization to plan investments in their terms, **our product** provides *unparalleled flexibility in modeling your organization* and the way you want to plan and invest.

# Tie your most common tools together and you have something

## PowerPoint® Slide, Excel® Sheet, and Trello® Board all reading the same data



- ✓ Timelines: Visualize and model work over time
- ✓ Boards: Manage the lifecycle of investments & work
- ✓ Grids: Simple data updates and entry of information

# How People Work



Provide tools that work the way people do and you'll get adoption and acceptance. Don't focus on dashboards.

What do people use to manage their lives?

# Tie your most common tools together and you have something

Expanding our available layouts to encompass 3 new modes of work

The screenshot shows the 'My Work' dashboard in Clarity. It features a sidebar with navigation icons and a main content area with several sections: 'Action Items' with a list of items and 'Open'/'Pending'/'Closed' filters; 'My Risks' with a table of risks including 'Investment Name', 'Name', 'Target Resolution Date', and 'Priority'; 'My Issues' with a table of issues including 'Investment Name', 'Name', 'Status', and 'Priority'; and 'My Tasks Due in Next Two Months' with a table of tasks including 'Investment Name', 'Name', 'Finish', 'Status', and 'ETC'. There are also buttons for 'Approve' and 'Reject' for various items.

The screenshot shows two views of the Clarity interface. On the left is a calendar view with a weekly layout from Monday to Friday. Tasks are placed on specific days, such as 'Update design specs' on Monday, 'Fix issue with scrolling' on Monday, 'Product demo video edits' on Wednesday, 'Final filtering mockups' on Wednesday, 'Choose icons for new areas' on Tuesday, 'Edits to wiki p.' on Wednesday, 'Report design updates to lead...' on Friday, 'Presentation changes' on Friday, and 'Update cost plan info' on Friday. On the right is a checklist view titled 'Office Location - Vienna' with a search bar and a list of tasks with due dates: 'RFP for ANZ Services' (Jul 20), 'Facilities checklist - London' (Jul 20), 'Facilities Checklist - Vienna' (Jun 24), 'Office Location - London' (Jun 30), 'Office Location - Vienna' (May 20), 'Partner & Channel Development' (Aug 24), 'Identify candidate locations' (May 02), 'Select local agency' (May 13), 'Virtual property reviews and walk thru' (May 18), 'Lease completion' (May 20), 'Begin issuing new credentials' (May 20), 'Review security apparatus' (May 20), 'Determine lease length and office opening timeframe' (May 03), and 'Top candidate visits and review for fit' (May 20). A red box highlights the 'Select local agency' task with a 'Blocked' message: 'We are having trouble with selecting the right agency - a local resource would help us with this.'

- ✓ Canvas: Prepare readouts the way you see fit
- ✓ Calendar: Coordinate timing more intuitively
- ✓ Checklist: Capture work & progress without overhead

## How People Work



Provide tools that work the way people do and you'll get adoption and acceptance. Don't focus on dashboards.

What do people use to manage their lives?

Historically, major technology investments were in hardware and networks and vendor spending (i.e. big one-time projects).

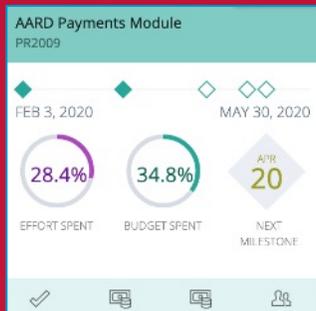




Now, technology spending is ongoing investments in digital products/assets that change much more quickly and require constant care & feeding.

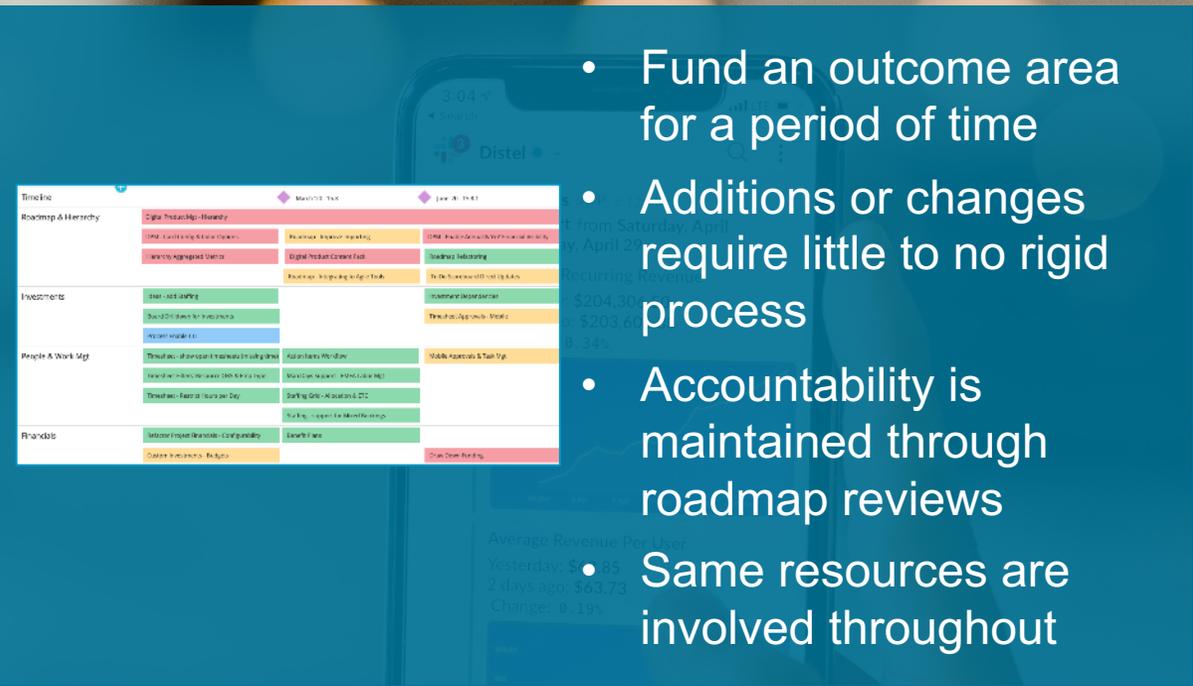
# Project Portfolio Approach

# Product Portfolio Approach



- Fund specific outcomes on a specific timeline
- Each outcome requires specific approval
- Changes require a rigid review process
- Resources cycle in & out depending on the work

	2020-Q3	2020-Q4	2020-Q5	2020-Q2	
	HOURS	HOURS	HOURS	HOURS	
×	PINNED (H)	ALL			
	1,292.00	1,232.00	1,176.00	3,152.00	
↕	Adriana Ramos	176.00	176.00	168.00	408.00
↕	Joyce Coleman	352.00	352.00	336.00	952.00
↕	Justin Hayes	176.00	176.00	168.00	408.00
↕	Tom Morris	412.00	352.00	336.00	964.00
↕	Valerie Childers	176.00	176.00	168.00	520.00



- Fund an outcome area for a period of time
- Additions or changes require little to no rigid process
- Accountability is maintained through roadmap reviews
- Same resources are involved throughout

Both Projects AND Products will exist in most organizations



clarity

IT'S NOT  
JUST FOR  
PROJECTS.



# Meeting the Challenge of Investment Management at Scale

## IN PRACTICE

Roadmaps | Custom Investment Types | Hierarchies | Agreements | To Do's

# Stay Engaged with Us

Weekly	Monthly	Quarterly	Semiannually	
<p><b>Office Hours</b></p> <p><b>40 attendees</b></p> <p><i>Relationship-building open conversations between customers &amp; Product Management</i></p>	<p><b>Roadmap Review</b></p> <p><b>110 attendees</b></p> <p><i>Gives customers <b>confidence &amp; validates our strategy</b></i></p>	<p><b>End to End Demo</b></p> <p><b>200 attendees</b></p> <p><i>Drives <b>awareness &amp; adoption</b> by showcasing product capabilities</i></p>	<p><b>Release Preview</b></p> <p><b>300 attendees</b></p> <p><i>Go-to-market for the release allows us to <b>take credit for the value delivered</b></i></p>	<p><b>User Groups</b></p> <p><b>600 attendees</b></p> <p><i>Regional meetings featuring customer presentations that <b>promote our community</b></i></p>
	<p><b>Innovation Call</b></p> <p><b>40 attendees</b></p> <p><i>Customers <b>participate in prioritization</b> by pitching ideas &amp; voting</i></p>	<p><b>Design Studio</b></p> <p><b>15 attendees</b></p> <p><i>Open discussion between UX and customers <b>on use cases</b></i></p>	<p><b>Value Validation</b></p> <p><b>6 attendees</b></p> <p><i>3 day customer-led sprint where they <b>use the new features &amp; provide feedback</b></i></p>	<p><b>CAB</b></p> <p><b>10 attendees</b></p> <p><i>Forum for large customers to <b>share experiences &amp; identify industry trends</b></i></p>

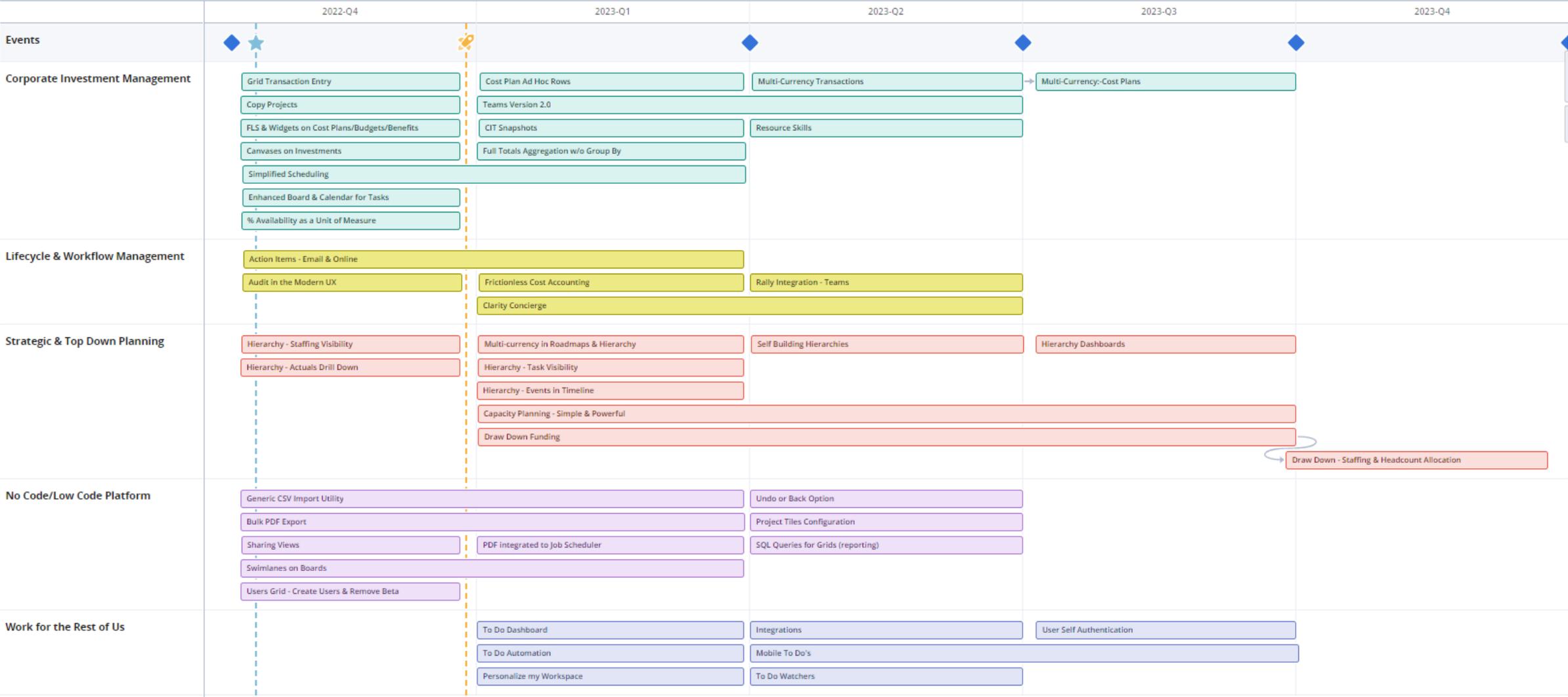
Email [clarity@broadcom.com](mailto:clarity@broadcom.com) to sign up for any program

# Clarity Release Schedule – Unified w/ AOD Release Policies

Release	Release Date (Actual/ Projected)	EOS Date
<b>16.0.3 (22-PI-3)</b>	<b>August 8, 2022</b>	November 30, 2024
16.1.0 (22-PI-4)	November 7, 2022	November 30, 2025
16.1.1 (23-PI-1)	February 6, 2023	November 30, 2025
16.1.2 (23-PI-2)	May 8, 2023	November 30, 2025
16.1.3 (23-PI-3)	August 7, 2023	November 30, 2025
16.2.0 (23-PI-4)	November 6, 2023	November 30, 2026

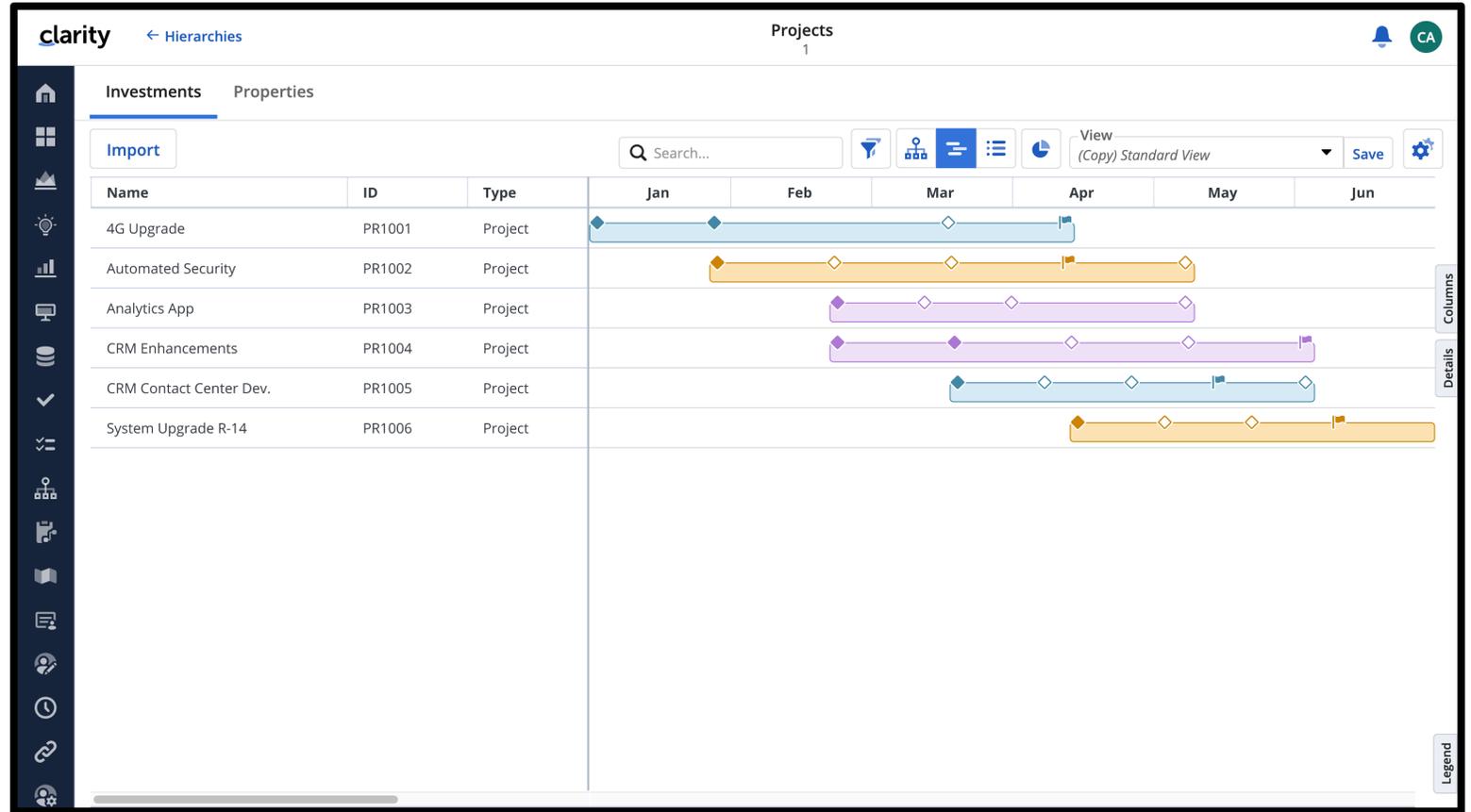
- Release (or General Availability – GA – date) is the date when the software is available for an On Premise customer to download
- GCP SaaS customers will receive non-production and production upgrades according to the published calendar (non-production within 1-2 weeks and production 3-4 weeks following that).
- Hosted SaaS customers (e.g. AWS) can begin to request their non-production environments be upgraded approximately 3-4 weeks after this date. Production requests can typically begin 3-4 weeks following that.

# Roadmap



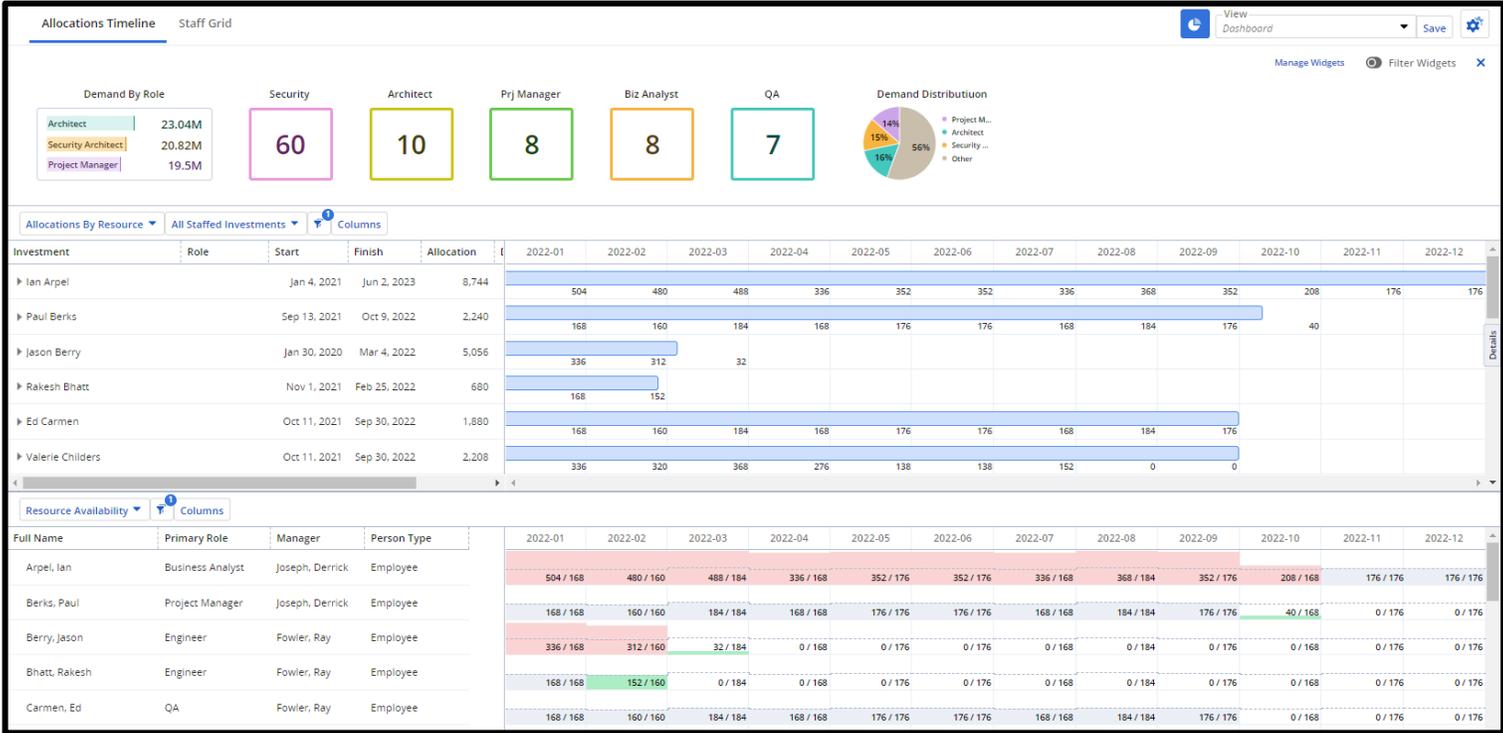
# Transforming Investment Management

- Copy projects
- Simplified Scheduling: Moving a task shifts all dependent tasks
- Board w/ swimlanes for organizing tasks
- Calendar for scheduling tasks
- Retention of task timeline expand/collapse state & baseline compare
- Status Report Improvements
  - Option to set Status Report Date to Current Date on preview
  - Bulk PDF export for Status Reports
  - Status Reports workspace (across investments)
  - Make To Do's table available on Status Reports



# Reinventing Resource Management

- ‘% Availability’ as a unit of measure
- Teams: Expand attributes in resources grid



# Providing **Financial** Transparency

- Transaction entry via grid
- Visual widgets on Cost Plan/Budget/Benefit Plan Details
- Field level security (FLS) on Cost Plans/Budgets/Benefit Plans

The top screenshot displays a 'Simple Hierarchy' view of financial data. It includes a navigation bar with 'Investments', 'Properties', and 'Financials'. Below this, there are controls for 'Plan Type' (Cost Plan) and 'View' (Standard View). The main data area is a grid with columns for months (2022-08 to 2023-01) and a 'Totals' column. The grid contains rows for 'Investment \*', 'Cost Type \*', and 'Transaction C... \*' with corresponding cost values.

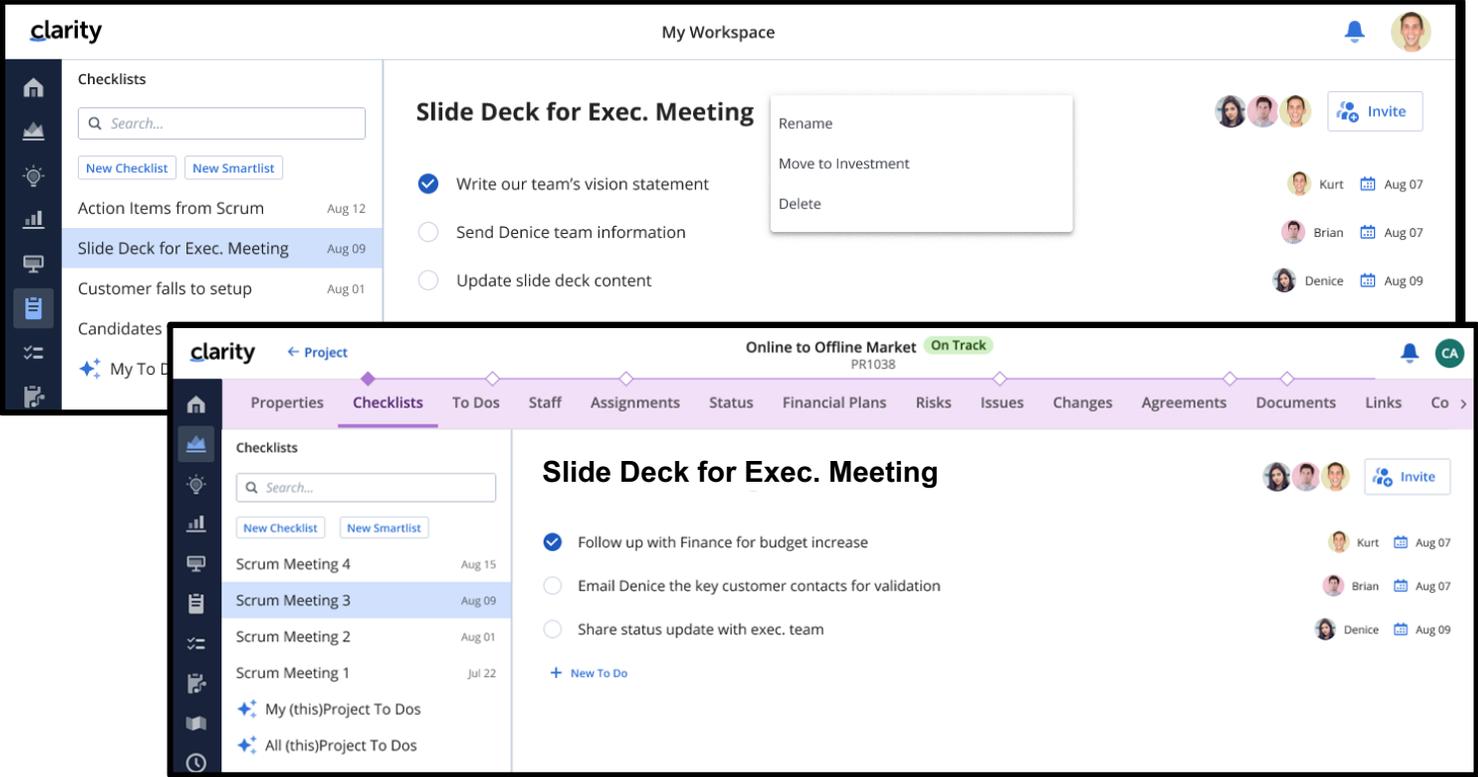
The bottom screenshot shows a similar view but with a summary dashboard overlay. The dashboard includes five widgets:
 

- Planned Cost:** 740k
- Capital %:** 38%
- Operating %:** 62%
- Internal Labor:** 578k
- External Labor:** 162k

 Below the dashboard is a detailed grid view of 'Transaction Class' data, showing a hierarchy of 'Group' (External Labor, Internal Labor) and 'Cost Type \*' (Operating, Capital) with their respective costs over time.

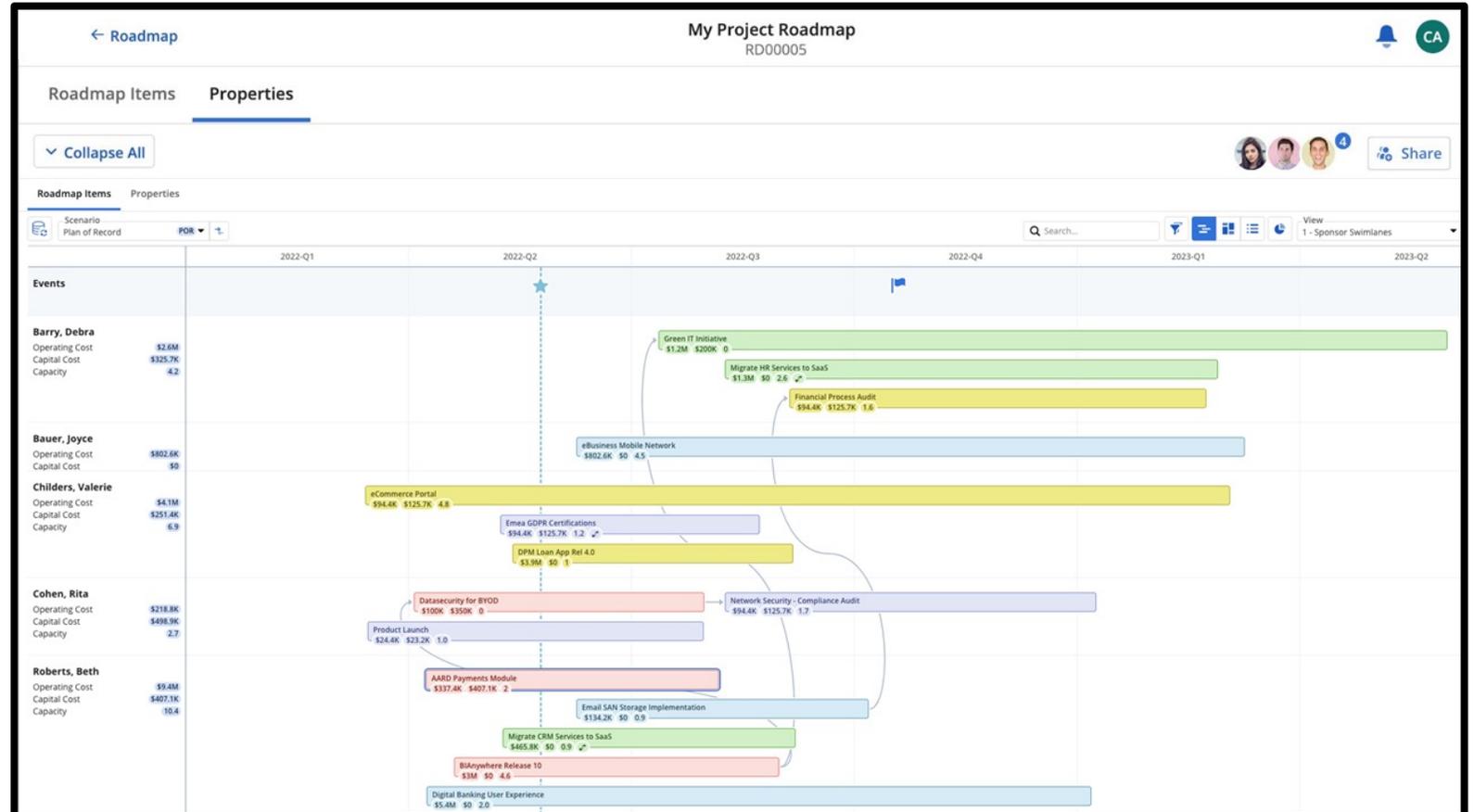
# Clarity Checklists & To Do's

- My Workspace: Conversations
- Visual widgets on To Do modules within investments



# Top Down Planning (aka **Roadmaps**)

- Drag-and-drop ordering of roadmap items in grid
- Filters for 'Has dependencies' & 'Has agreements'
- View option to display names on roadmap events



# Lifecycle Management (incl. Demand Management)

- Process Action Items: Ability to respond via email
- Action Items module on blueprint enabled master objects
- Hierarchies: Staff module with visual widgets
- Hierarchies: Financials module editable w/ actuals drill down
- Hierarchies: TSVs available for custom subobjects

The image displays two overlapping screenshots of the Clarity software interface. The background screenshot shows the 'Simple Hierarchy' view for the 'Staff' module. It features a navigation bar with 'Investments', 'Properties', 'Financials', and 'Staff'. Below the navigation bar is a table with columns for 'Group', 'Resource \*', 'Role', 'Booking Status \*', 'Open...', 'Allocation', 'Actuals', and 'ETC'. The table is filtered by 'Investment' and shows three groups: '4G Upgrade Readiness', 'BYOD Management', and another '4G Upgrade Readiness' group. Each group lists various roles like Architect, Business Analyst, Developer, Project Manager, Storage Architect, and Test Engineer, all with a 'Soft' booking status. A sidebar on the left contains various icons for navigation and actions. The foreground screenshot shows the 'Project' view for 'eCommerce Portal PR2007'. It displays a progress bar at the top and a list of 'Open Items' with details such as 'eCommerce Portal Needs Approval by June 1, 2023' (High Priority), 'eCommerce Portal Has High Priority Risk Due on May 25, 2022' (Medium Priority), and 'Resource Department Review' (Low Priority). A 'Click' button is visible near the 'Closed Items' section.

# Other Notable Items

- Enable canvases on all Investments
- Canvas: Custom subobjects available in tables
- Ability to star (favorite) various subobjects (e.g. Roadmap Items, Risks)
- Users grid: Create users & mark as starred
- Conversations: Generic @mentions across viewable resources
- Conversations: Option to show in flyout for blueprintable objects
- Option to configure subobject modules in flyout for blueprintable objects
- Audit grid in Modern UX
- Grouping for filter options
- Sharing views via access groups
- Edit/remove widgets in shared view & save as new view
- Generic CSV import for custom master objects

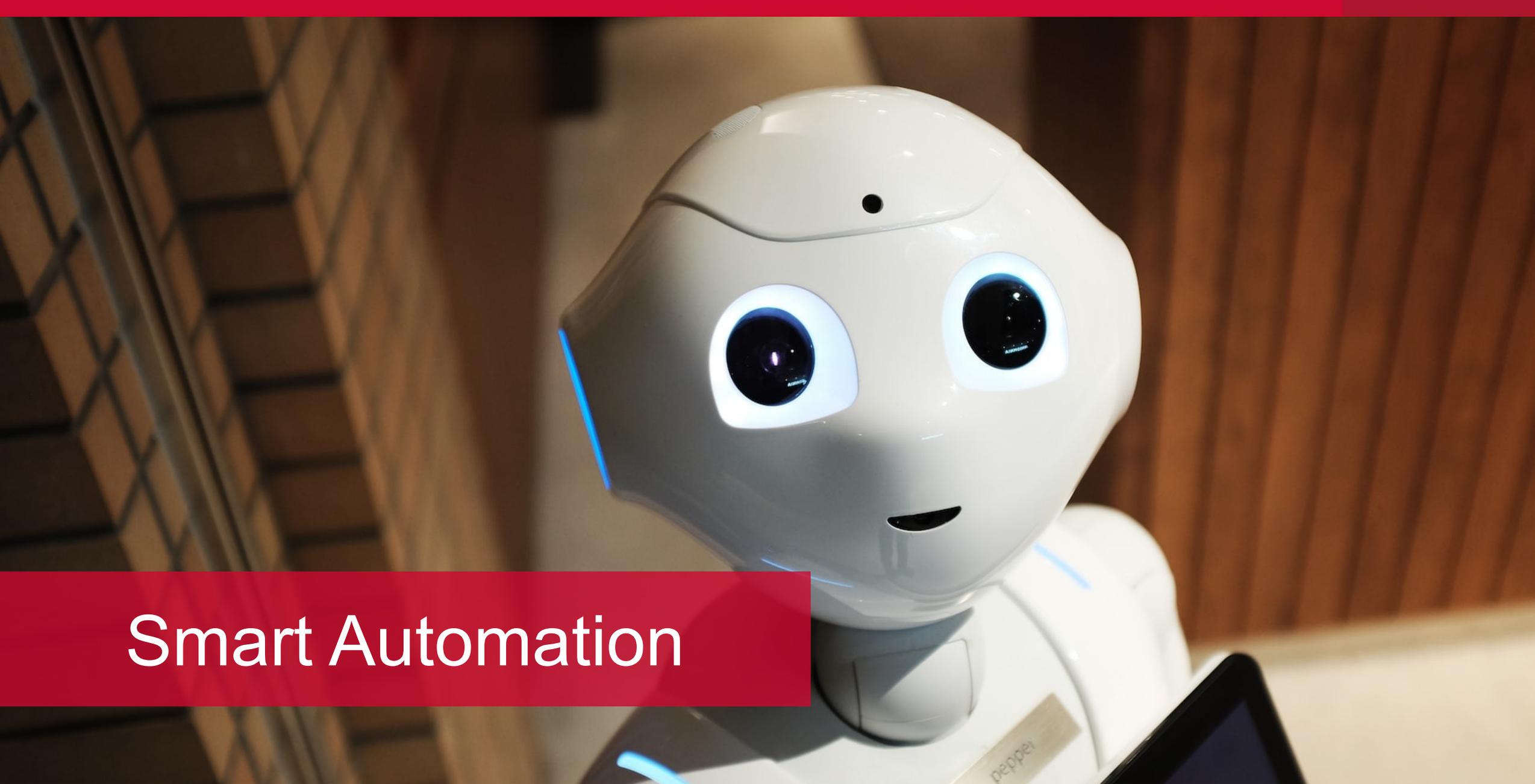


clarity

**INVEST! DON'T MANAGE.**



# Workforce Modeling



# Smart Automation



# Augmented Audit

# Draw Down Funding



# FY23: Introducing Clarity Cookbooks



Welcome to the Cooking with Clarity series. Clarity Cookbooks help to break down the complexity of the Clarity product by showing a detailed demonstration of a best practice implementation of key features in Clarity, followed by detailed configuration steps to accomplish the same implementation yourself. Our inaugural Cookbook, [Roadmaps That Tell a Story](#) shows you how to configure effective Clarity Roadmaps using all of the valuable visual and technical capabilities available.

# Part IV: Rally



# Rally's Product Vision

To be a **Holistic** Agile Enterprise Management Platform

*Holistic is defined as: ability to -*

- Do agile management at scale*
- Track execution back to business outcomes*
- Inform and Improve work management based on insights from Rally and other IT tools in the enterprise*

Rally is a pillar to Value Stream Management. The insight from Rally contributes to Value Stream Management by allowing business leaders to answer tough questions about prioritization of capabilities related to development, how capabilities relate to development outcomes, monitoring how capabilities progress from planning to delivery, and identifying opportunities to optimize flow. Value streams leverage Rally to make complex processes visible and so the business can quickly pivot based on data driven decisions.

# Product Roadmap Overview



## Traceability – Projects to Products

- Seamless tracking of deliverables starting from the core- business investments
- Rich analytics and reporting of flow metrics



## Unified DevOps

- Bridging business and engineering preferences by - integration with Jira
- Data consistency across the enterprise - by integrations with DevOps toolsets such as Azure DevOps, gitLab



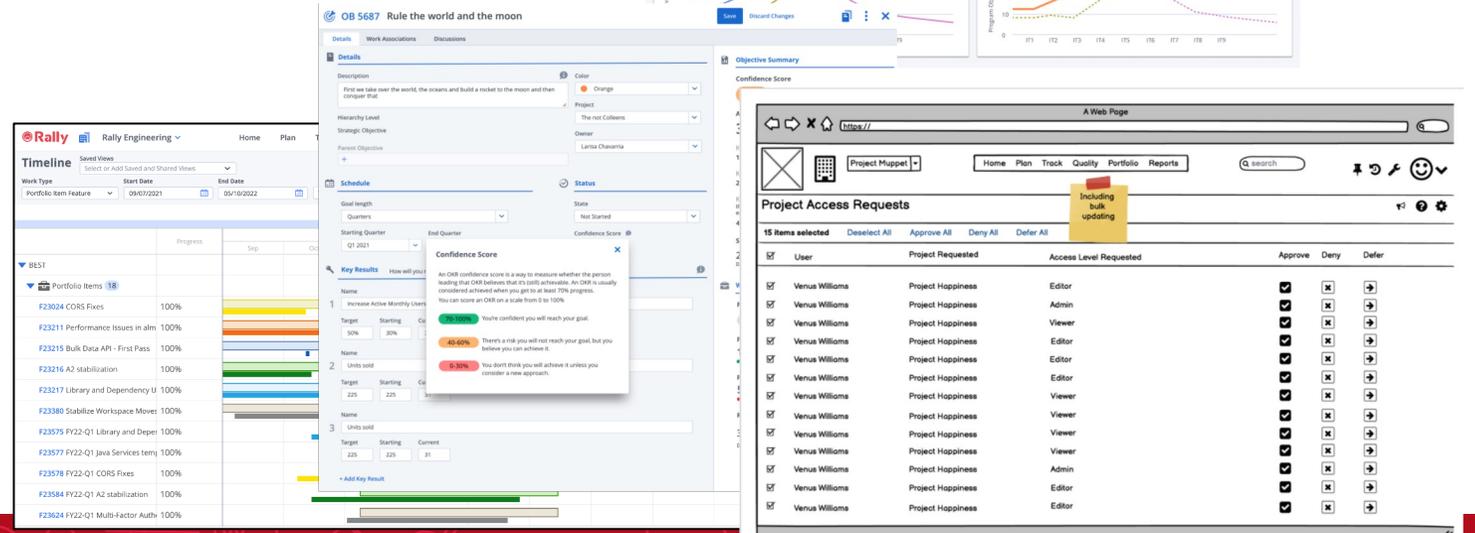
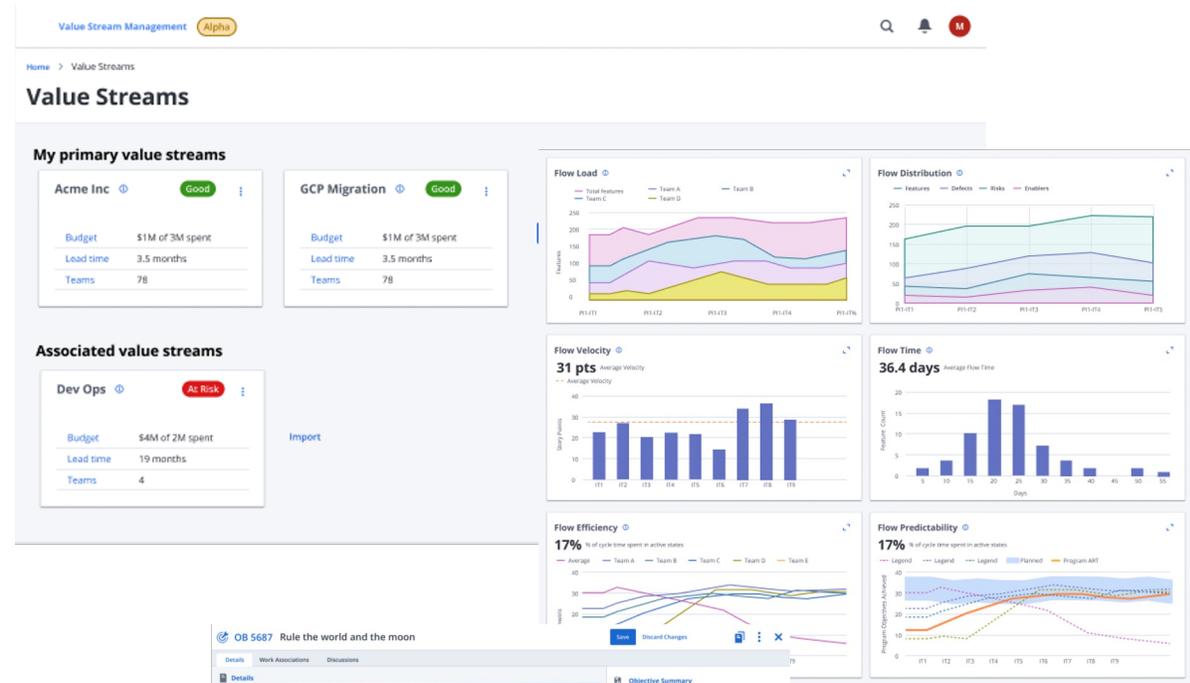
## Simpler & Scalable Agile

- Holistic planning and tracking experience
- Flexible Administration
- Data powered insights



## More Secure, Modern UX

- Unified experience across functionality
- FedRAMP Compliance
- 508 Compliance



# Enhancing the way users can access important information

**Leading indicator of success:**  
Better work management across enterprise teams

## Key Features:

- Custom List 2.0 app
  - Allows you to set up a view of a set of work items.
  - Can display data from multiple criteria.
  - Improved display and editing capabilities.

### Custom list 1.0 and 2.0

CUSTOM LIST CORE

+ Add New

	RANK	ID	NAME	RELEASE	ITERATIO	SCHEDULE	STATE	PL ESTIMAT	T/ ESTIMAT	TO DO	PROJECT	OWNER
								1,097	Pr:2,802	Hk 2,785	Hk	
<input type="checkbox"/>	1	US291	Hello World				D		0.00	0.00	Core Team	Deno
<input type="checkbox"/>	2	US290	Hello World				D		0.00	0.00	Core Team	
<input type="checkbox"/>	3	US275	Add location specific purchase attr	FY21 PI02 Q2	2021 Sp06		A	3.00	24.00	24.00	Security Team (Jira Team)	Deb
<input type="checkbox"/>	4	US269	Wireframe other recommended options	FY21 PI02 Q2	2021 Sp06		D	3.00	24.00	24.00	Core Team	Tony
<input type="checkbox"/>	5	US257	Product listing analysis for marketing		2021 Sp07		D	5.00	24.00	24.00	Core Team	Dudley
<input type="checkbox"/>	6	US283	Warn user on QuickBuy profile settings	FY21 PI01 Q1	2021 Sp01		A	8.00	0.00	0.00	API Team 1 (Azure Team)	Dudley
<input type="checkbox"/>	7	US282	Determine CC authority for QuickBuy	FY21 PI01 Q1	2021 Sp01		A	8.00	0.00	0.00	API Team 1 (Azure Team)	Peter
<input type="checkbox"/>	8	US281	Modify auth codes and profile setting for QuickBuy	FY21 PI01 Q1	2021 Sp01		A	8.00	0.00	0.00	API Team 1 (Azure Team)	Dudley
<input type="checkbox"/>	9	US280	Implement personal profile for QuickBuy policy	FY21 PI01 Q1	2021 Sp01		A	8.00	0.00	0.00	API Team 1 (Azure Team)	Peter
<input type="checkbox"/>	10	US279	Warn user on duplicate orders and suggest to verify	FY21 PI01 Q1	2021 Sp01		A	5.00	0.00	0.00	Core Team	Dudley

### CUSTOM LIST 2.0

CUSTOM LIST 2.0 CORE

Saved Views

+ Add New Show Filters Group By Show Fields

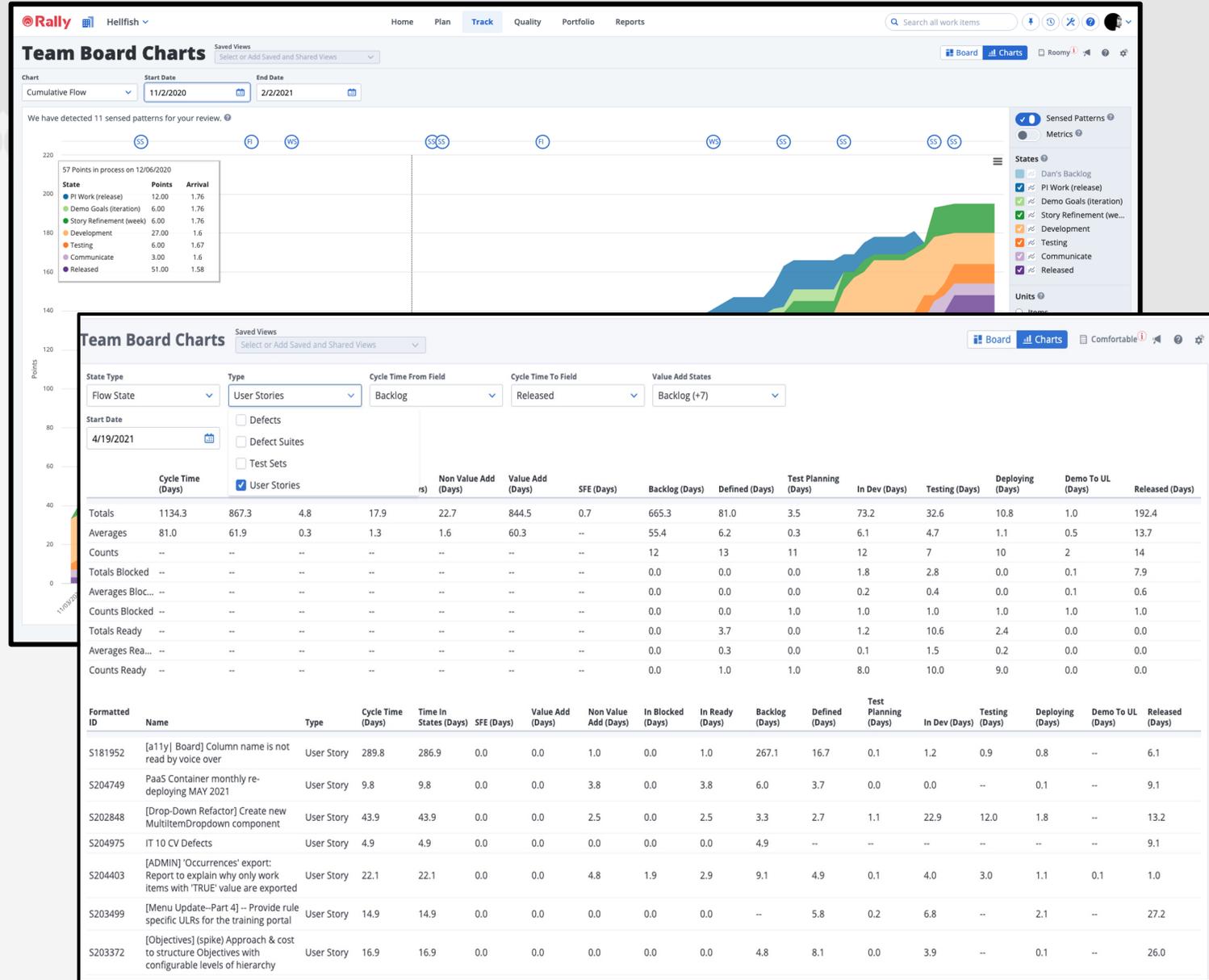
<input type="checkbox"/>	Rank	ID	Name	Owner	Project	Tags
<input type="checkbox"/>	1	US291	Hello World	Deno	Core Team	PI Candidate
<input type="checkbox"/>	2	US290	Hello World		Core Team	PI Candidate
<input type="checkbox"/>	3	DE49	Re-order invalidated promo code	Dan	Core Team	PI Candida... +1
<input type="checkbox"/>	4	DE48	State drop down is missing all two wor...	Dudley	Core Team	PI Candida... +1
<input type="checkbox"/>	5	DE47	Unable to login after entering 3 securit...	Dudley	Core Team	PI Candida... +1
<input type="checkbox"/>	6	US275	Add location specific purchase attr	Deb	Security Team (Jira T...	
<input type="checkbox"/>	7	DE46	Mastercard not showing in valid CC dr...		Security Team (Jira T...	
<input type="checkbox"/>	8	DE45	CCV codes not being verified on check...	Dave	Security Team (Jira T...	
<input type="checkbox"/>	9	DE44	Unable to connect to staging server wi...	Dora	API Team 1 (Azure T...	
<input type="checkbox"/>	10	DE43	302 response code on /api page	Dora	API Team 1 (Azure T...	
<input type="checkbox"/>	11	DE42	Unable to undelete an order from hist...	Diane	Core Team	
<input type="checkbox"/>	12	DE41	Unable to check status of past orders	Diane	Mobile Team	
<input type="checkbox"/>	13	DE40	Monthly product re-order is duplicatin...	Dan	Core Team	
<input type="checkbox"/>	14	DE39	"Remember me" cookie not working	Dan	Core Team	
<input type="checkbox"/>	15	US269	Wireframe other recommended options	Tony	Core Team	
<input type="checkbox"/>	16	DE38	Unable to login after entering invalid p...	Dudley	Core Team	
<input type="checkbox"/>	17	DE37	Old font found on contact us page	Dan	Core Team	
<input type="checkbox"/>	18	DE36	Button color on checkout page does n...	Dan	Core Team	

# Enhancing performance and leveraging Agile best practices at scale

**Leading indicator of success:**  
Leverage your data to identify patterns, improve team performance and reduce delivery bottlenecks

## Key Features:

- **Cumulative Flow Diagram (CFD)**
  - Sensed patterns and In-context guidance provided to help coaches and teams with actionable feedback.
- **Team Board - Flexible Cycle Time Reporting**
  - Choose state types, From-To and Value Add States
  - Look at Stories, Defects, Defect Suites and Test Sets



# Enhancing the Ability to integrate

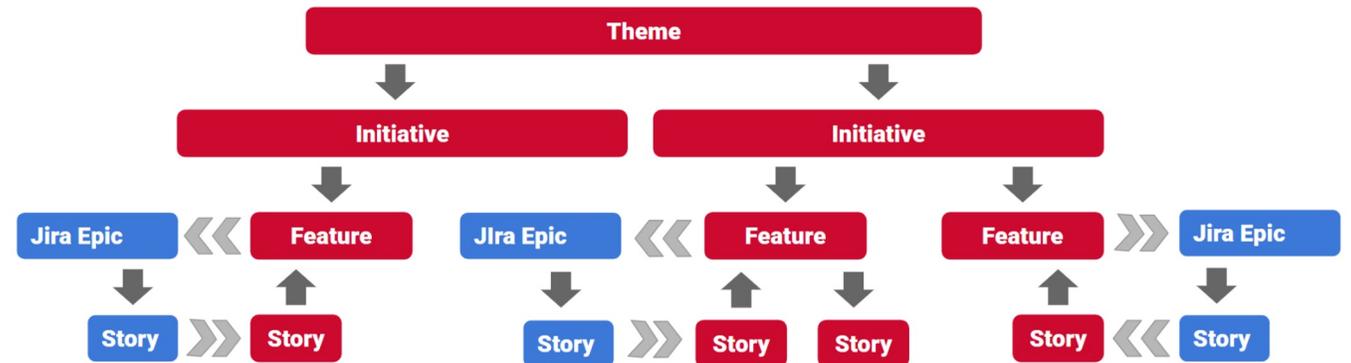
**Leading indicator of success:**  
**Easy Connections between Rally and Jira for every customer - At EVERY level**

## Key Features:

- Rally-Jira Work Item Connector (WIC) - Updated
  - Bi-directional copying and updating of stories, defects and tasks
  - Recommended for less than 200 projects in Rally
  - Can use the **Rally Adapter for Jira** for more Enterprise level Rally - Jira integration needs
- Rally Adapter for Jira 3.5
  - Recommended for more than 200 Rally Projects
  - Can connect to multiple Jira instances
  - Supports multiple configurations

## Rally / Jira Integration

Visualizes and tracks work across an organization's Jira instances and projects in line with your Rally teams, providing a comprehensive view of planned and in-progress work across your execution teams.



## Better support for Federal customers

**Leading indicator of success:**  
Enable our Federal customers to  
work safely and securely.

---

### Key Features:

- Received ATO from Sponsor
- Deployed FedRAMP Moderate
- Beginning work on IL4 Roadmap
- Rally + Clarity = **FIRST** VSM Solution FedRAMP Authorization



# Refining the user experience to reflect the right information

**Leading indicator of success:**  
**Viewing only the Right Information for your Work Items and Test Cases**

## Key Features:

- Viewing Associated (Child) Work Items in Closed Projects
- Non-Administrator users can only see Test Cases in active projects that they have permission for

The screenshot displays two views from the Jira software interface. The top view is 'Iteration Status' for the iteration '2021 Sp10' (2022-01-09 - 2022-01-22). It shows progress bars for 'Planned Velocity' (60% of 50 Points), 'Iteration End' (0 of 10 days left), 'Accepted' (0% of 30 Points), 'Defects' (2 Active), and 'Tasks' (9 Active). Below this is a table of work items with columns for Rank, ID, Name, Schedule State, Blocked, Plan Estimate, Task Estimate, Owner, and Defects. The bottom view is 'Test Cases', showing a table with columns for Rank, ID, Name, Work Product, Type, Priority, Owner, Method, Results, and Last Verdict. The interface includes search bars, filters, and navigation options.

Rank	ID	Name	Schedule State	Blocked	Plan Estimate	Task Estimate	Owner	Defects
Totals								
			30 Points		66 Hours			
1	DE47	Unable to login after entering 3 ...	D	✓	3	13	Dudley	--
2	DE42	Unable to undelete an order fro...	D	✓	2	0	Diane	--
3	US232	Any size cart should be allowed	D	✓	13	0	Drew	✖
4	US125	View or Change your One-Click s...	D	✓		0		✖
5	US124	View By Order	D	✗	3	23		✖
6	US123	Validate Customer Contact/Shi...	D	✓	5	30	Dan	✖
7	US121	Log-off Website	D	✓	4	0	Dan	✖
8	T55	mini checkout	D	✓		0	Deno	--
	TC34	Validate Email Address - Permiss...	--	--	--	--	Terri	✖
	TC33	Validate Email Address - Invalid ...	--	--	--	--	Terri	✖
	TC32	Validate Email Address - Email A...	--	--	--	--	Terri	✖

Rank	ID	Name	Work Product	Type	Priority	Owner	Method	Results	Last Verdict
1	TC1	Calculate shipping costs for mult...	US63: Calculate Split Shipping	Acceptance	Critical	Tony	Manual	0	
2	TC2	Check Invoice Creation	US66: Ship Multi-Site Orders	Acceptance	Important	Tony	Manual	2	Pass
3	TC3	Check the Status of Your Orders	US42: Check the Status of You...	Acceptance	Useful	Terri	Manual	4	Pass
4	TC4	Validate data fields for Shipping i...	DE48: State drop down is miss...	Acceptance	Important	Terri	Manual	0	
5	TC5	Default Shipping - Ground		Acceptance	Useful	Terri	Manual	2	Fail
6	TC6	GUI - Checkout Button	US99: Purchase Your Items	Acceptance	Critical	Terri	Manual	3	Pass
7	TC7	GUI - Checkout Button for Empty...	US99: Purchase Your Items	Acceptance	Useful	Terri	Manual	3	Pass
8	TC8	GUI - Multi-Site Shipping Options		Acceptance	Critical	Terri	Manual	3	Fail
9	TC9	Invalid Promo Code		Acceptance	Useful	Terri	Manual	3	Fail
10	TC10	Log-in to Secured Website	US120: Log-in to Secured Web...	Acceptance	Important	Terri	Manual	4	Pass

# Improving the product information search

**Leading indicator of success:**  
**Improving the ability to find and make use of information in our help documentation.**

## Key Features:

- Improved searchability when searching from Google and other external sites.
- Improved searchability inside the help system itself.
- Improved navigation and user experience, with shorter help pages that require less scrolling.

The screenshot displays the RALLY help documentation interface. At the top, there is a navigation breadcrumb: Home / CA Enterprise Software / Agile Development and Management / Rally. The RALLY logo is prominently displayed in the top left. A search bar in the top right corner contains the text "Search this product" and a magnifying glass icon. The main content area is a grid of 12 topic cards, each with a title, a brief description, and a "VIEW ALL" button with a right-pointing arrow. The cards are arranged in three rows and four columns:

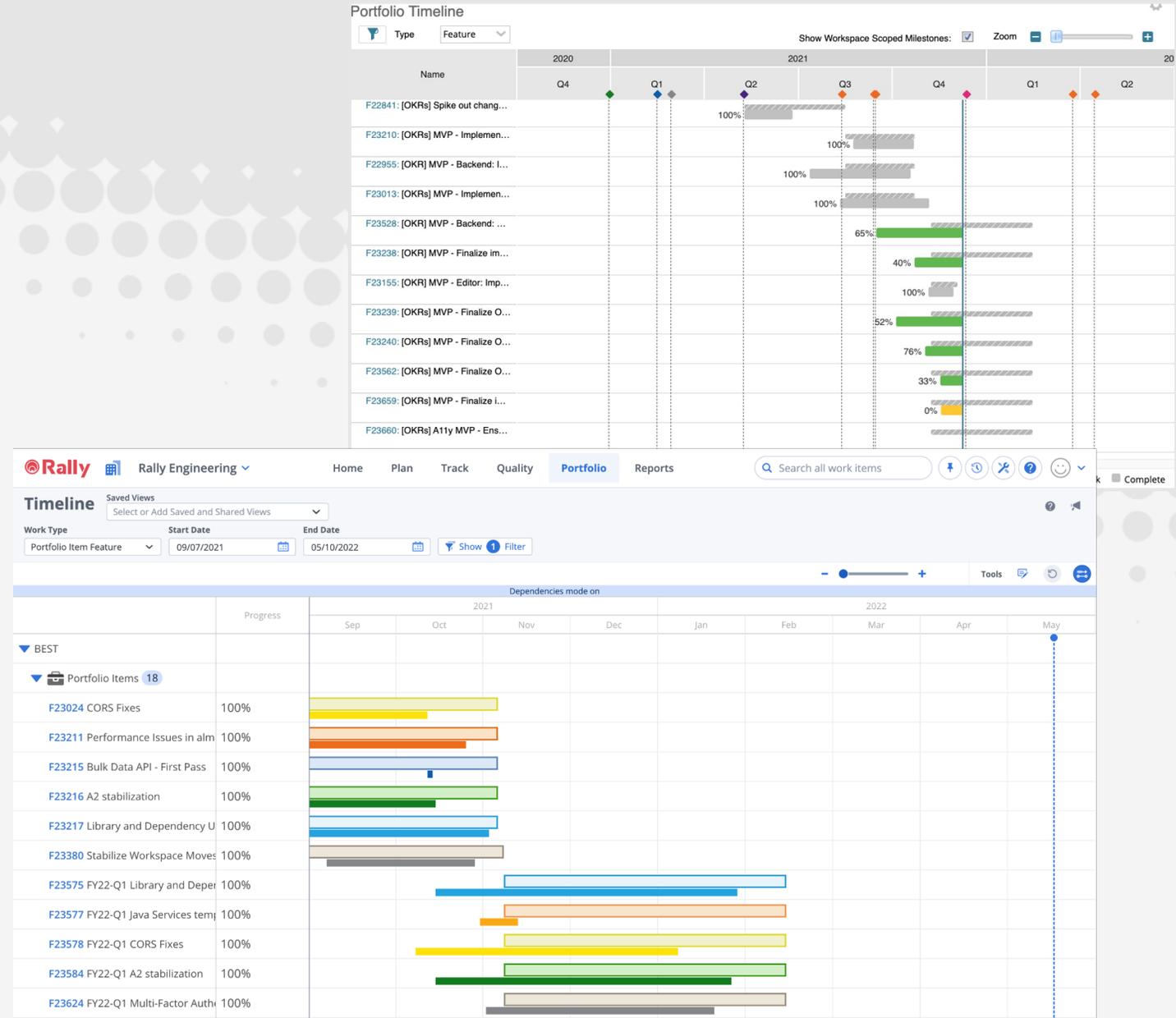
- Release Notes:** Rally provides quarterly release notes that include pertinent information regarding features, changes, and defect f... (VIEW ALL)
- Getting Started:** This section introduces your first few actions as a new user in Rally and provides additional learning resources. (VIEW ALL)
- Learning Rally:** Rally provides free online courses, short video tutorials, and a guide to using our help topics. (VIEW ALL)
- Learning Agile:** Whether you are starting your first agile pilot or scaling across an enterprise, Rally provides a framework to help... (VIEW ALL)
- Rally Administrator Guide:** As a Rally administrator, you have the ability to set up your workspaces, projects, and users to sync Rally with yo... (VIEW ALL)
- Using:** Learn how to use Rally to plan, manage, and track your work effectively. This section contains detailed description... (VIEW ALL)
- Reporting:** Learn how to use Rally to report on your work. (VIEW ALL)
- Integrating with Rally:** Learn how to integrate Rally with other products you use such as defect trackers, IDEs, testing tools, and more. (VIEW ALL)
- Extending Rally with Apps:** Learn how to add apps to extend Rally and customize your views and dashboards. (VIEW ALL)
- Rally On-Premises Edition:** The Rally On-Premises Edition provides you with all the great features of Rally, running in your own IT environment... (VIEW ALL)
- Glossary:** Brief explanations of terms used throughout Rally or related to Agile and SAFE practices. (VIEW ALL)
- Documentation Legal Notice:** Information about the documentation legal notice. (VIEW ALL)

# A modern and flexible tracking experience

**Leading indicator of success:**  
New Timeline increases adoption as Portfolio Timeline usage wanes

## Key Features:

- New Timeline
  - Filters help solve the too much data to display issue
  - Mouse-over to view percent complete
  - Color shading improvements for portfolio items
  - Timeline page now contains a 'Hide Empty' rows link
- Advanced flexible tracking
  - See full name of portfolio items
  - Filter display by project
  - Represent Actual Start / End Dates
  - Show item progress summary (On Track, Late, Very Late, Complete)
  - Edit planned dates inline



# Focusing on delivering measurable business value

**Leading indicator of success:**  
Connect what the business wants- to what is being done

## Key Features:

- Objectives and Key Results functionality
  - Create clear connections between Strategic Themes / Business Outcomes and the work your teams are doing
  - Current improvements include:
    - Visual KR Tracking
    - Ability to set Interim Key Result Targets and actuals over time
    - Custom Fields for Objectives

The screenshot displays the Rally software interface, which is used for managing Objectives and Key Results (KR). The interface is divided into several sections:

- Objectives List:** A table showing a list of objectives with columns for ID, Name, Owner, Status, Key Results, Key Result Progress, Aligned work, and Due date. One objective is highlighted: "Establish Rally as the centerpiece of the customer SDLC ecosystem" (ID: T9).
- Details View:** A detailed view of the selected objective, including fields for Owner (Kristy 209), Objective Hierarchy Level, Train Objective, Parent Objective, and Description. It also shows a Confidence Score (80%) and a Status (Starting).
- Key Results Tracking:** A section showing two key results with visual progress bars and charts. The first key result is "Increase adoption of GitHub integration by 30%", and the second is "Add 10% new users via integrations with other products". Both charts show progress over time from February 2022 to August 2022.
- Confidence Score Pop-up:** A pop-up window explaining the Confidence Score metric, which is a way to measure whether the person leading that KR believes that it's (fully) achievable. It provides a scale from 0-30% (low confidence) to 75-100% (high confidence).

# Managing Project Data and Auditing Processes

**Leading indicator of success:**  
Flexibly manage the processes you want and ensure your users only access essential data across states

## Key Features:

- Work Rules provides flexibility to affect multiple object types in Rally
- Configurable at the Workspace or Project levels
  - This includes read only, required and field visibility work rules
- Cascading Rules at Project level

The screenshot displays the Rally 'Workspace Work Rules' configuration page. The main heading is 'Workspace Work Rules' with the subtitle 'Create rules for your data. Enforce workflow, permissions, or whatever'. Below this, there is a link to 'See a list of all work rules for this Workspace' and a 'Work rules list' link. The page is divided into three sections: 'Workflow rules (rules based on state)', 'Read Only rules', and 'Permission rules (rules based on state)'. A mouse cursor is pointing at the 'Create a new Required fields rule' link in the 'Workflow rules' section. This opens a modal window titled 'Create a Required fields rule for this Workspace'. The modal contains a 'Rule Name' field with the text 'Description, Owner, Release, and Iteration are required for in-progress work'. Below this is a 'When these types are changed' section with a dropdown menu containing 'Defect, DefectSuite, HierarchicalRequirement'. There are also checkboxes for 'Investment', 'Iteration', 'Milestone', 'PortfolioItem', 'Project', and 'Release'. A second modal window is shown below the first, which is a more detailed view of the 'Create a Required fields rule' modal. It shows the 'Rule Name' field with the same text. The 'When these types are changed' dropdown is expanded to show 'Defect, DefectSuite, HierarchicalRequirement, TestSet'. Below this is a section 'and the ScheduleState is' with a row of buttons: 'Idea', 'Defined', 'In-Progress', 'Completed', 'Accepted', and 'Released'. A mouse cursor is pointing at the 'Accepted' button.

# Modernizing the look and feel of reporting

**Leading indicator of success:**  
Improved understanding and utilization of reporting via clearer presentation of data

## Key Features:

- Reporting Technology and Organization Updates
- More interactivity with data displayed

## Reports

Report Filter  Show Details

### Burndown / Burnup

#### Iteration Burndown



Work remaining in the iteration to proactively anticipate whether the committed work will be delivered by the end of the iteration.

#### Iteration Burnup



Work delivered so far in the iteration to proactively anticipate whether the iteration scope will be delivered

#### Release Burnup



Work delivered so far in the release to proactively anticipate whether the release scope will be delivered

#### Story Burnup



High-level progress view for a feature/product/initiative (represented by an epic story) implemented by multiple teams across multiple releases

#### Story Burndown



Work remaining to deliver a story, or a feature (epic story) supported by a group of stories

#### Tagged Story Burndown



Work remaining to deliver a set of stories grouped by a common tag

### Cumulative Flow

#### Iteration Cumulative Flow Diagram (CFD)

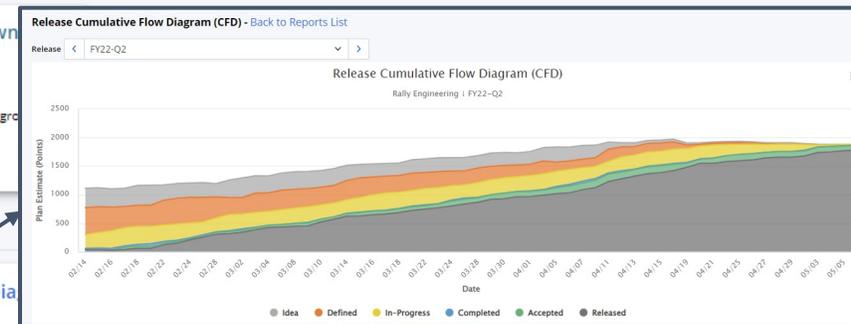


Work-in-progress status to visually analyze the trend in lead time for delivery of working code

#### Release Cumulative Flow Diagram (CFD)



Work-in-progress status to visually analyze the trend



### Throughput and Velocity

#### Cycle/Lead Time



The average number of days it takes work to flow through your process



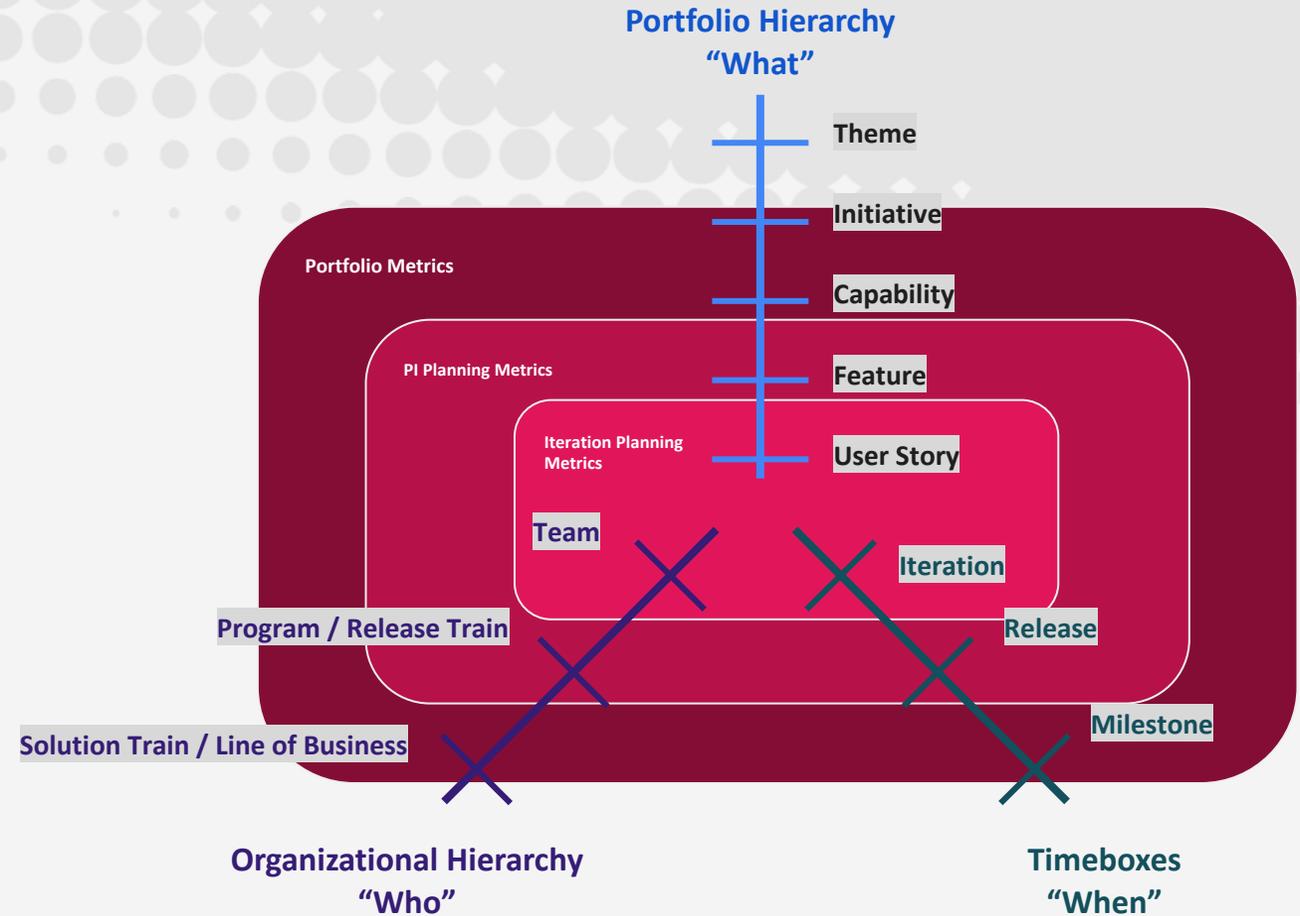
# Vertical analytics\*

**Leading indicator of success:**  
**A holistic analytics experience at all levels and across the Rally product.**

Problems to solve related to this goal:

- Lack of consistency in analytics and metrics experience
- Key metrics missing at the portfolio level
- Old and outdated charts
- Enabler for smart analytics and guidance systems

\*Functionality released incrementally over 2022-23



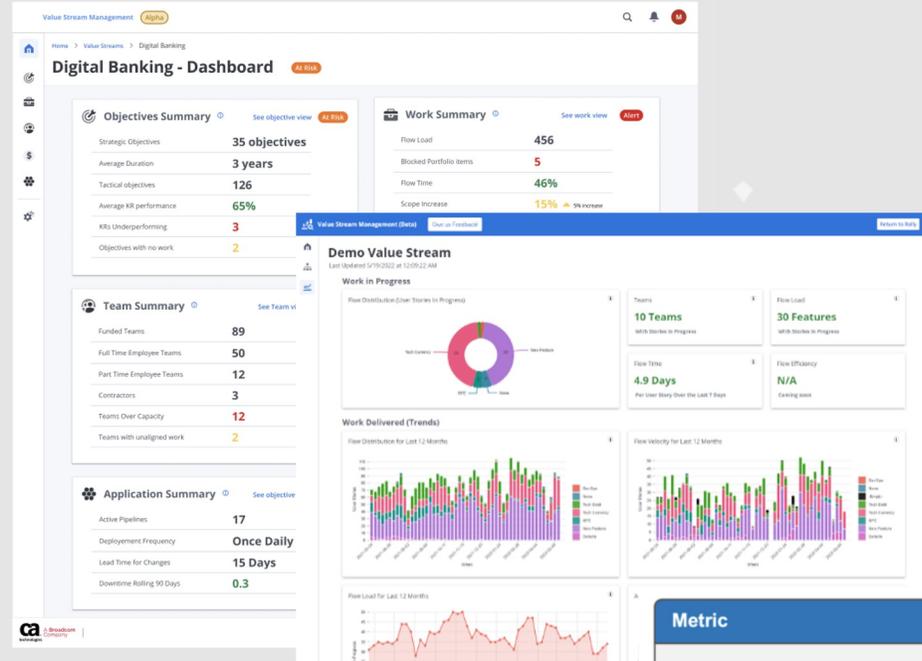
# Vertical Analytics - Enabling and Improving Value Stream visibility

**Leading indicator of success:  
Executive Visibility from Product  
Funding to Delivery. View info  
across all Value Streams.**

## Key Features:

- Identify inefficiencies and opportunities to improve from investment to deployment.
- Visualize value streams outside of traditional organizational hierarchies.
- Insights into portfolio and value stream flow metrics.
- Maintain continuity of business initiatives from investment through execution.

## Value Stream Dashboard



Metric	Description
Flow Distribution	The proportion of each backlog item type in the flow
Flow Velocity	Number of items completed in a given time
Flow Time	Time elapsed from when an item enters the workflow to when it is released to the customer
Flow Load	Total work-in-progress (across all steps of the flow)
Flow Efficiency	The portion of time backlog items are actively worked on to the total time elapsed
Flow Predictability	Overall planned vs. actual business value

© Scaled Agile, Inc.

Figure 4. The six SAFe flow metrics

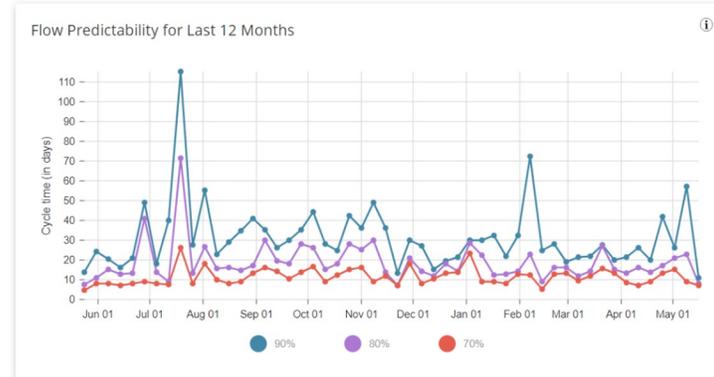
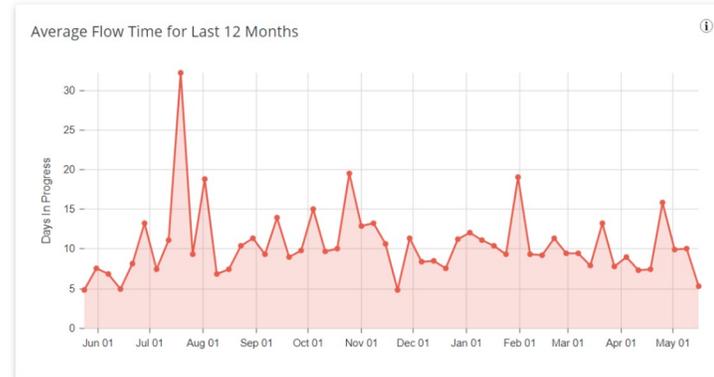
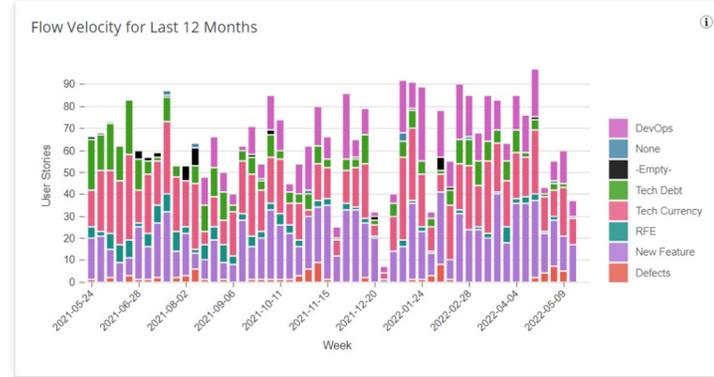
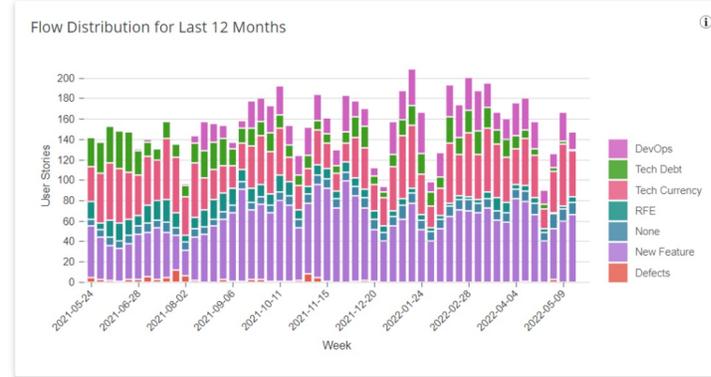
# Vertical Analytics - Enhancing your Team's ability to execute

**Leading indicator of success:**  
**One and only one dashboard that  
teams need to understand how they are  
doing when it comes to execution**

## Key Features:

- Team Board - Flow Metrics Report
  - Understand Flow Efficiency (where are the Non Value Adding activities)
  - See how team's work aligns to Investment categories
  - Understand optimal WIP for your team
  - Establish SLAs and define the probability of different commitment points being met

### Work Delivered (Trends)

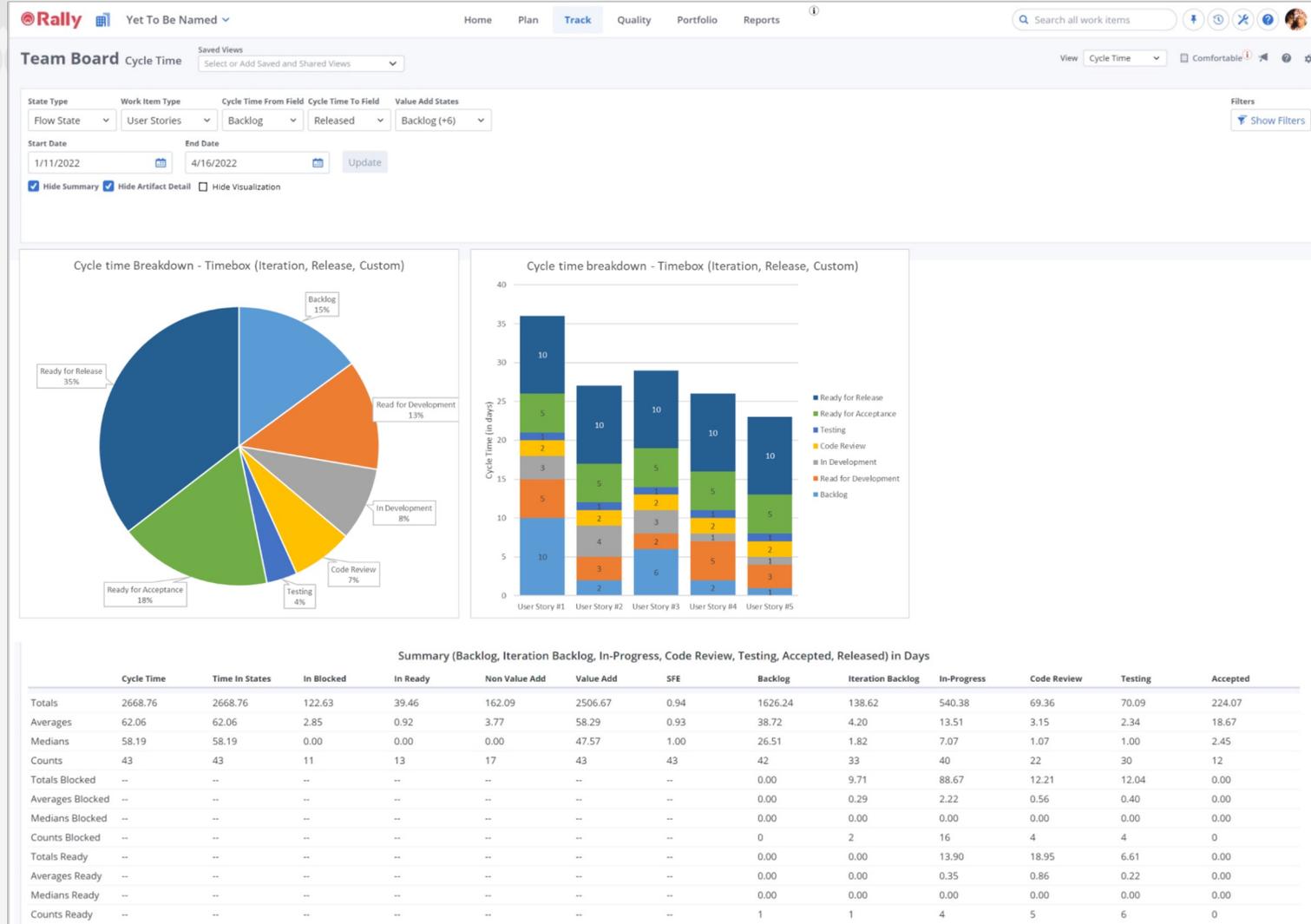


# Vertical Analytics - Improving performance and leveraging Agile best practices at scale, cont'd

**Leading indicator of success:  
Ability to visualize and analyze Cycle  
Time data within Rally**

## Key Features:

- Addition of Visual Charts to the Team Board - Cycle Time Report
  - Spot problematic states with the long cycle times
  - Drill down into cycle times of individual artifacts and easily understand where the work is being bottlenecked
  - Identify opportunities for improvement

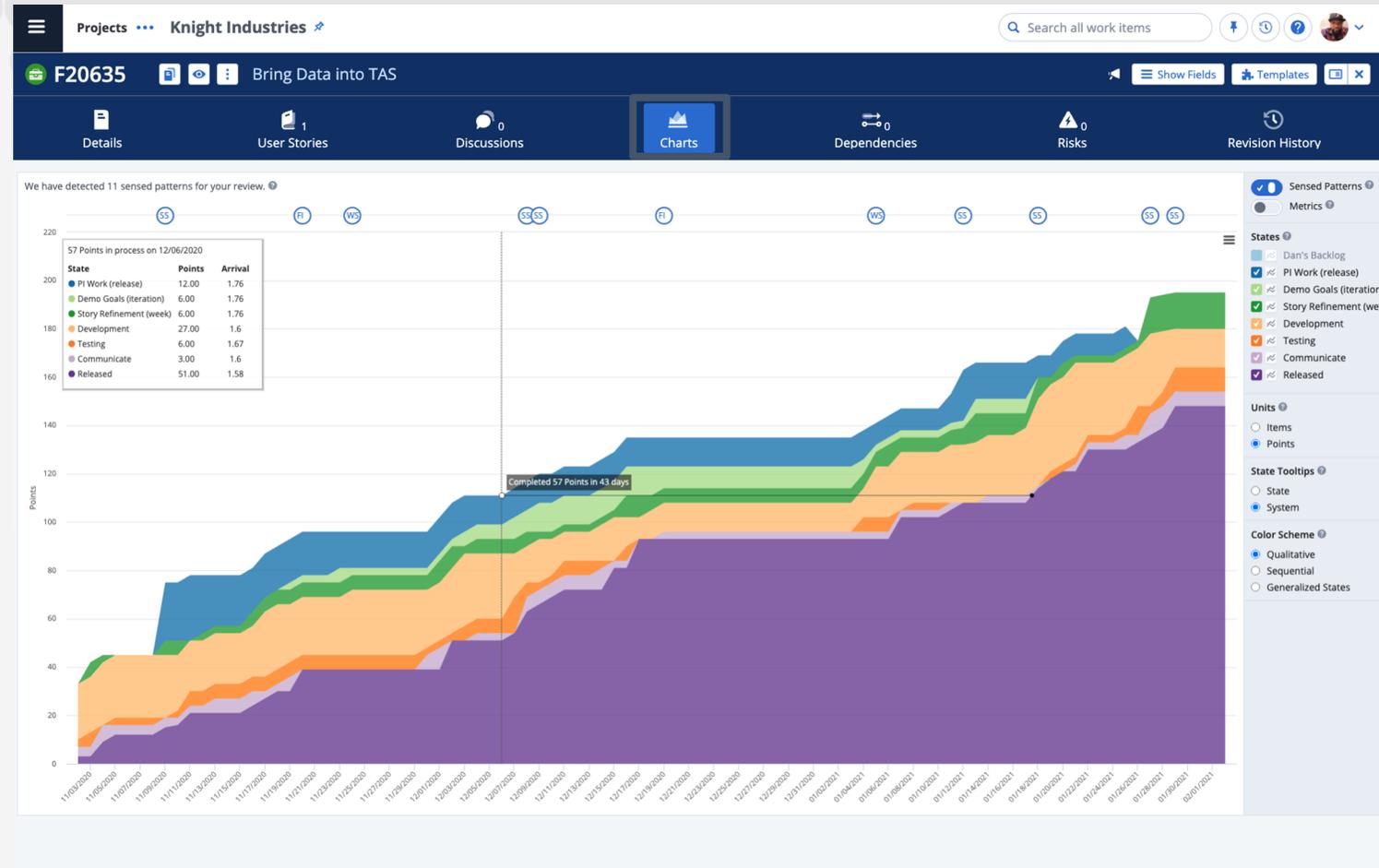


# Vertical Analytics - Visualizing Flow Within Portfolio Items

**Leading indicator of success:**  
**Visibility into the flow of execution for  
higher level portfolio items.**

## Key Features:

- Portfolio Level CFD Report
  - Visualize the overall activity levels within a portfolio item
  - Identify bottlenecks
  - Track scope growth



# Vertical Analytics - Optimizing how teams work

**Leading indicator of success:**  
**Leverage your data to identify patterns,  
improve team performance and reduce  
delivery bottlenecks**

## Key Features:

- Bring team board cycle time capability to the Portfolio Kanban board
  - Can measure progress at all levels of portfolio items with the same flexibility of the team board
- Identify friction in the flow of work across the Portfolio

The screenshot displays the Rally Business Banking (Portfolio) Kanban board. The interface includes a top navigation bar with 'Rally' logo, 'Business Banking (Portfolio)', and tabs for 'Home', 'Plan', 'Track', 'Quality', 'Portfolio', and 'Reports'. A search bar for work items is present. Below the navigation, there are filters for 'Portfolio Item' (Feature) and 'Saved Views' (Select or Add Saved and Shared Views). The main area shows a 'Portfolio Kanban' view with a 'Cycle Time' filter. A date range is set from 4/18/2021 to 5/19/2022. There are checkboxes for 'Hide Summary' and 'Hide Artifact Detail'. The primary data table is titled 'Business Banking (Portfolio) Summary (Propose, Discover, Develop, Validate, Internal Release, Open Beta, GA, Done) in Days'. It has 15 columns: Cycle Time, Time In States, In Blocked, In Ready, Non Value Add, Value Add, SFE, Propose, Discover, Develop, Validate, Internal Release, Open Beta, and GA. The table shows various metrics for 'Totals', 'Averages', 'Medians', and 'Counts' across different states. Below this is another table titled 'Business Banking (Portfolio) Artifact Detail (6) in Days' with columns for Formatted ID, Name, Work Item Type, Cycle Time, Time In States, SFE, Value Add, Non Value Add, In Blocked, In Ready, Propose, Discover, Develop, Validate, Internal Release, Open Beta, and GA. The artifact details table lists items like 'Knowledgebase', 'Purchase confirmation settings in profile', 'Network detection and analysis', 'Archive packing slips', 'Share all customer reviews', and 'Order history available'. A '25 per page' dropdown and navigation arrows are at the bottom.

	Cycle Time	Time In States	In Blocked	In Ready	Non Value Add	Value Add	SFE	Propose	Discover	Develop	Validate	Internal Release	Open Beta	GA
Totals	0.00	0.00	0.00	0.00	0.00	0.00	0.00	--	--	--	--	--	--	--
Averages	0.00	0.00	0.00	0.00	0.00	0.00	0.00	--	--	--	--	--	--	--
Medians	0.00	0.00	0.00	0.00	0.00	0.00	0.00	--	--	--	--	--	--	--
Counts	0	0	0	0	0	0	0	--	--	--	--	--	--	--
Totals Blocked	--	--	--	--	--	--	--	--	--	--	--	--	--	--
Averages Blo...	--	--	--	--	--	--	--	--	--	--	--	--	--	--
Medians Bloc...	--	--	--	--	--	--	--	--	--	--	--	--	--	--
Counts Block...	--	--	--	--	--	--	--	--	--	--	--	--	--	--
Totals Ready	--	--	--	--	--	--	--	--	--	--	--	--	--	--
Averages Rea...	--	--	--	--	--	--	--	--	--	--	--	--	--	--
Medians Ready	--	--	--	--	--	--	--	--	--	--	--	--	--	--
Counts Ready	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Formatted ID	Name	Work Item Type	Cycle Time	Time In States	SFE	Value Add	Non Value Add	In Blocked	In Ready	Propose	Discover	Develop	Validate	Internal Release	Open Beta	GA
F7	Knowledgebase	Portfolio I...	0.00	0.00	0.00	0.00	0.00	0.00	0.00	--	--	--	--	--	--	--
F66	Purchase confirmation settings in profile	Portfolio I...	0.00	0.00	0.00	0.00	0.00	0.00	0.00	--	--	--	--	--	--	--
F9	Network detection and analysis	Portfolio I...	0.00	0.00	0.00	0.00	0.00	0.00	0.00	--	--	--	--	--	--	--
F12	Archive packing slips	Portfolio I...	0.00	0.00	0.00	0.00	0.00	0.00	0.00	--	--	--	--	--	--	--
F64	Share all customer reviews	Portfolio I...	0.00	0.00	0.00	0.00	0.00	0.00	0.00	--	--	--	--	--	--	--
F69	Order history available	Portfolio I...	0.00	0.00	0.00	0.00	0.00	0.00	0.00	--	--	--	--	--	--	--

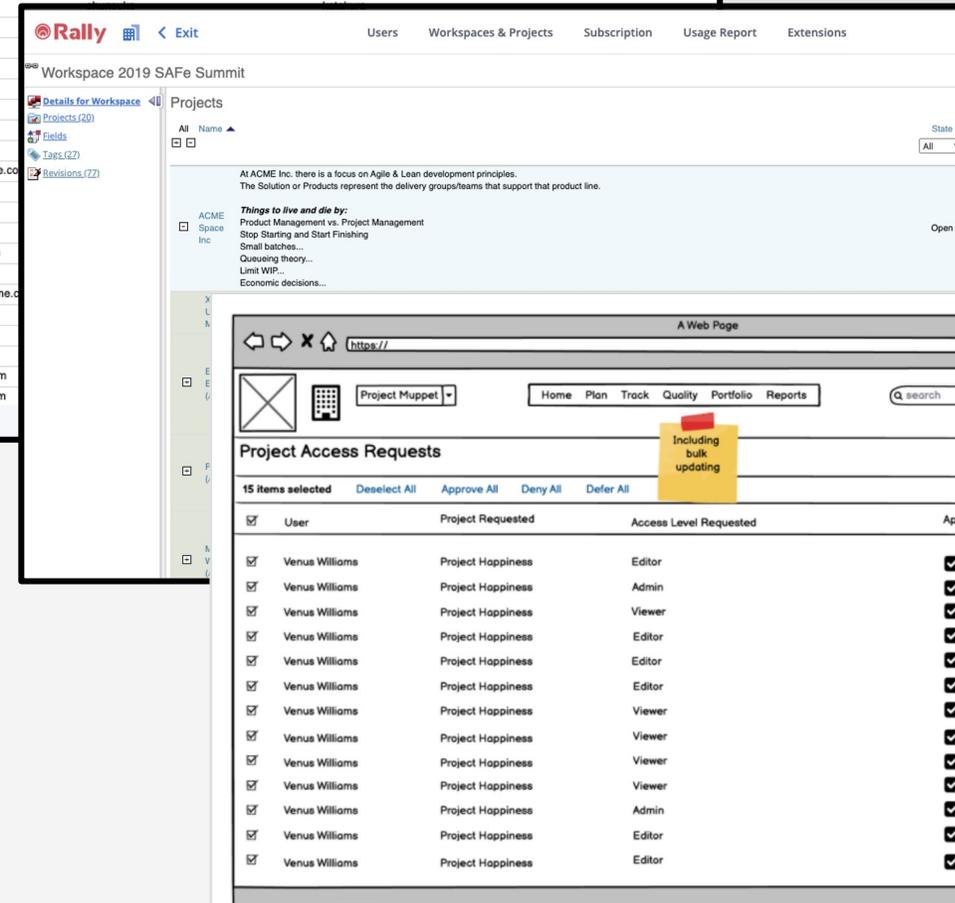
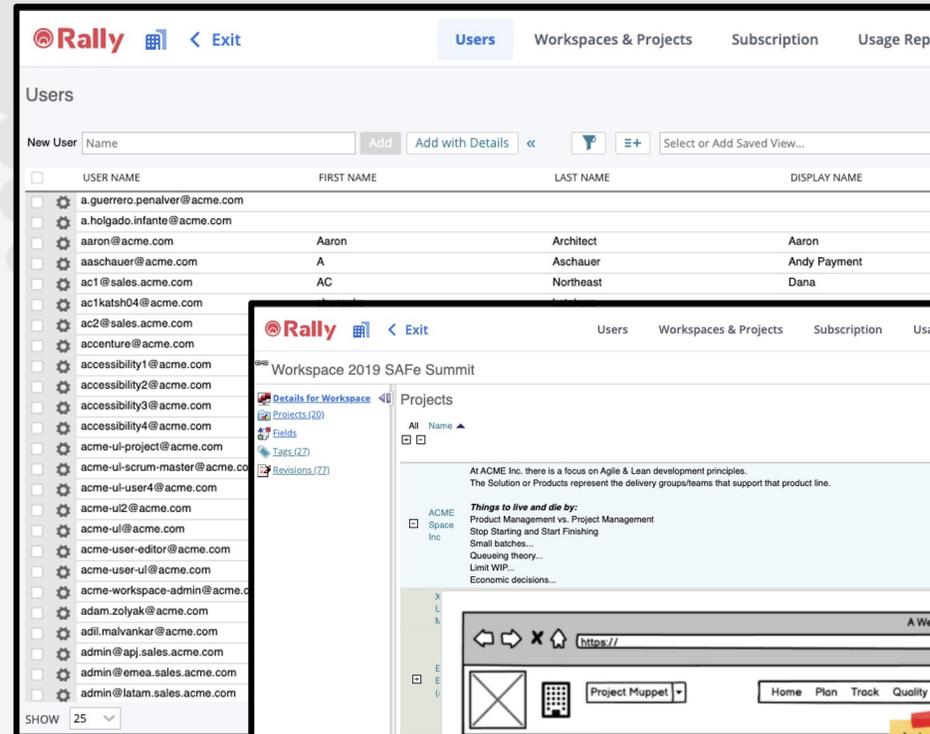
# What's next: Enterprise customers need an Enterprise admin expr.\*

**Leading indicator of success:**  
Improved administration capabilities for users, data and custom pages. For your entire organization.

Problems to solve related to this goal:

- Top customer pain for large subscriptions in these areas:
  - Bulk Editing
  - Revamped permission and role models
- Updated UI

\*Research on new user experience continuing as underlying technology updated – incremental roll outs through 2023



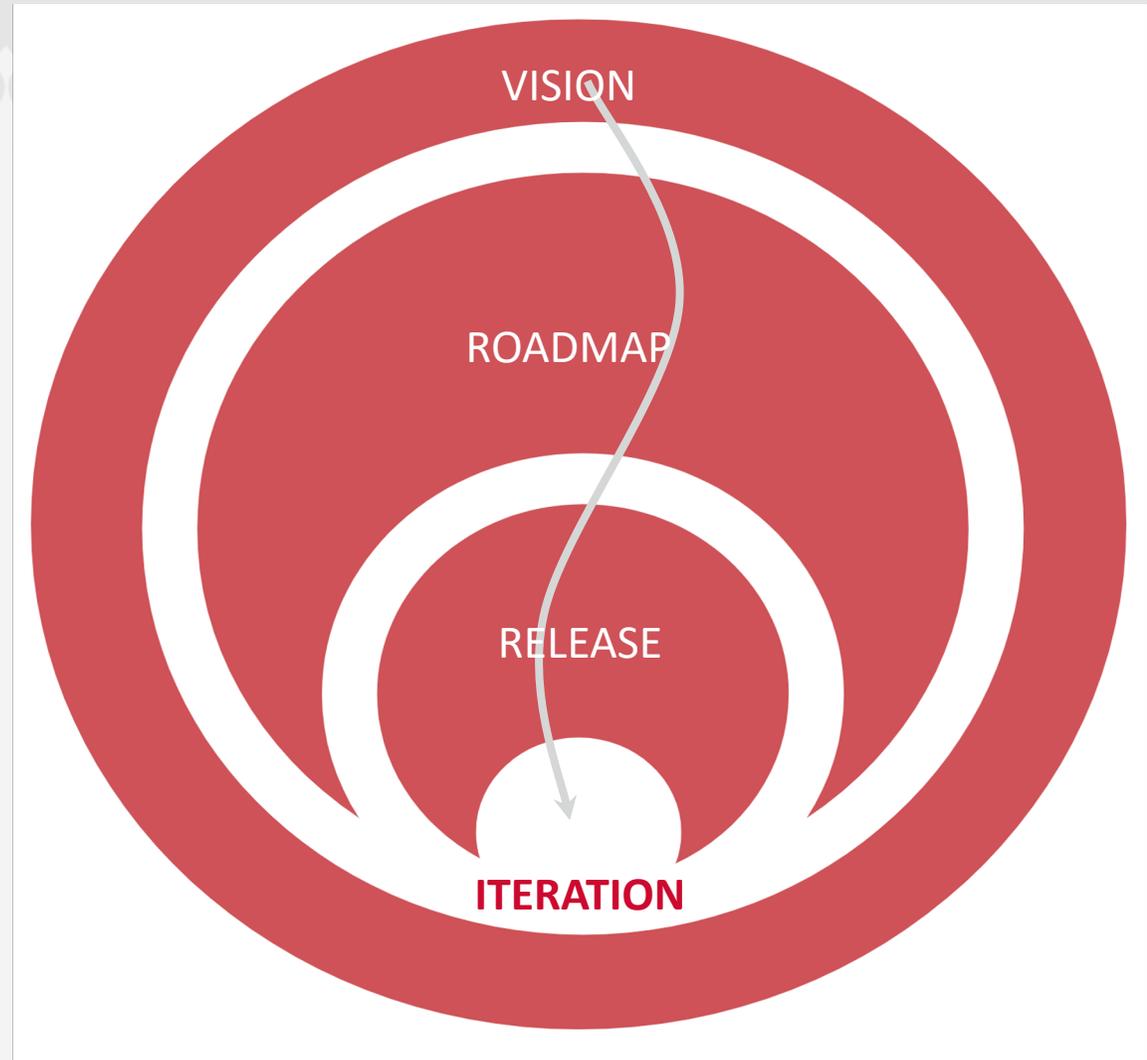
## ***What's next: Updating the planning & tracking expr. (Embracing the Onion)\****

**Leading indicator of success:**  
Improved planning capabilities for users and enterprise customers - for the entire organization

### Key Features:

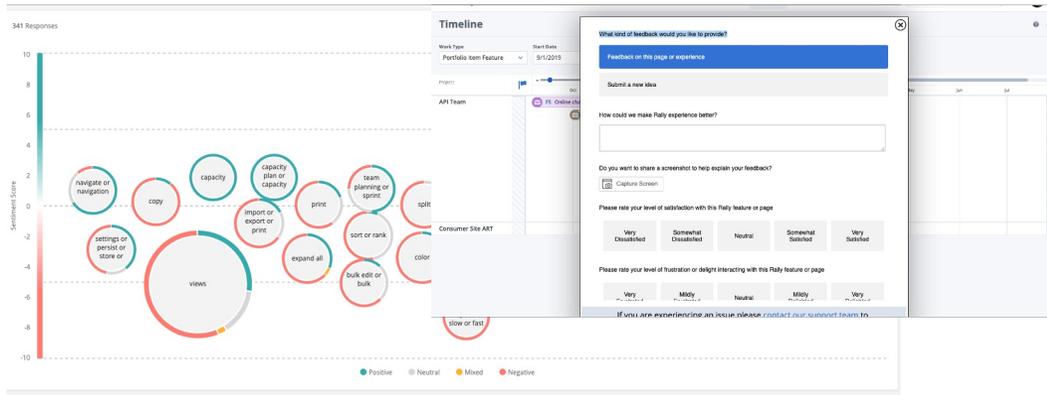
- Revamp Rally's planning experience end to end for streamlining Agile work management functions
- Fully connect the portfolio level to the team level
- Updated UI

\*Research and initial work in progress



# Connect with Us

- Join our [user community](#)
- Reach out to us with questions: [rally.product@broadcom.com](mailto:rally.product@broadcom.com)
- Engage with us weekly at our **Rally Office Hours**  
Information on days & time are listed in our [Newsletter](#), the [user community](#) and at [learn.broadcom.com/rally-office-hours](https://learn.broadcom.com/rally-office-hours)



## Rally Software Settings

Community Home | Discussion 16.6K | Library 488 | Blogs 33 | Events 1 | Members 426

### Welcome to the Rally Software Community!

This is where Rally Software users and product experts connect to share questions, ideas and feedback. Here you will find the right people and tools to help you with every stage of your Rally Software journey, whether you are just getting started, need help, or want to make the most of your Rally Software investment. We're glad you've joined us!



- Submit feedback from the app
- Your feedback helps us make a better experience for all customers
- All feedback is reviewed and analyzed us to help us identify trends and areas of opportunity

# Questions?



# Thank You For Attending regoUniversity

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- 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



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### Website

[www.regouniversity.com](http://www.regouniversity.com)