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ValueOps Solutions in action - Real life customer stories

Your Guide:
Sonja Furneaux

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ValueOps

Clarity
Rally Software

BROADCOM
SOFTWARE

Part I: Introduction

There's nothing better than real-life stories to help figure out how a solution might help your organization. One could be sitting next to you



Introductions

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



Sonja Furneaux

Title: Sr. Solution Engineer



- “Work and Resource Management” Industry since 1999 with prior T&A, Financial, & Integration background
(Clarity Pic from @15 years ago)
- High Competence in VSM, DPM, SPM, RPM, Six Sigma, PSA, NPD, and all things Financial from Contractor Management to Capitalization to TCO (ITFM) to Benefit Realization for all delivery execution methodologies including but not limited to Scaled Agile, ITIL, SDLC, CWM, Lean, M&A, and Transformation Management (Basically I’m a geek)
- What I am most proud of:
 - Partnership with ValueOps Stakeholders to achieve business objectives
 - Helping ValueOps clients architect transformation with elegant Clarity design
 - Led (past tense) Monthly Clarity Seminar Series for Clarity Product Management
- My mission - Enable the Enablers

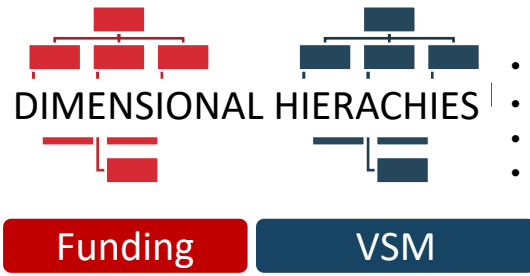
Agenda

- Introduction
- A note on Customer Case studies
- Transforming Customer
 - Profile and Solution Use Case Objectives
 - Solution Configuration Diagram
 - Lessons Learned through adoption
 - Q&A
- Kitchen Sink Customer
 - Profile and Solution Use Case Objectives
 - Solution Configuration Diagram
 - Lessons Learned through adoption
 - Q&A
- Final questions

Transforming Company Profile

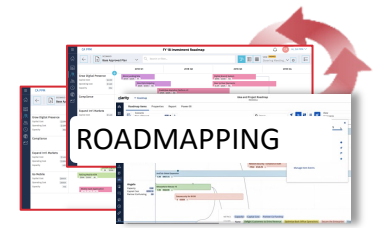
- Company Profile
 - Healthcare Industry – cannot say more or they would be identifiable
 - Company Size: Over 20,000 employees in multiple locations
 - Private, Non-profit
- Solution Profile
 - Bi-model organization transforming to VSM
- Use Cases
 - Annual Planning
 - Financial Forecasting – Manual excel processes
 - Initiative Prioritization – Both Project prioritization and PI Planning
 - Delivery Management – Traditional Program/Projects moving to Value Stream Mgmt.

Transforming Customer Solution Diagram



- Portfolio Transparency
- Value Analysis (\$)
- Financial Analysis (\$)
- Capability Analysis

- Funding/AOP (\$) Roadmaps
- Project Prioritization Roadmaps
- Capabilities Roadmaps
- Delivery Roadmaps



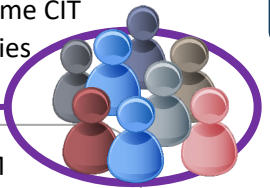
Keeping Business Case process manual until Lean Canvas transformation

Business Case

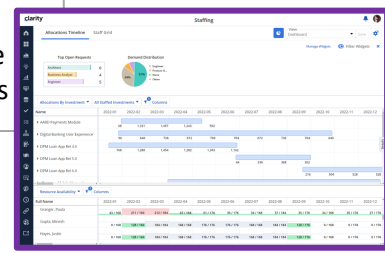
Traditional Project practice • Project capitalization supported • Transformation continues •

CIT
Programs & Value Streams

- Blueprint Differentiation but same CIT
- Value Stream/Program Properties
- AOP Financials (\$) for both



Only VSM Staffing for FTE Allocation and % Capitalization for TEAM Forecasting
Note - Future plans to migrate to Clarity TEAMS



- Central Allocation Management
- Ensure Team Forecast
- Maintain Project Resource Mgmt.

Resources (Rally Project field)

Cost Rate Matrix

Basic Setup

- Central Integration Resources (SSO, Workday)
- HR and Contractor details
- Financial Profile
- Blended Internal Rates w/ managed contractor rates

CIT Capabilities

CIT Epics



- Integrated in from Rally
- Manually related to appropriate Value Stream
- Points & Delivery information inform decisions

RALLY

- PI & Capacity Planning
- Scope Elaboration & Agile Delivery
- WIP/Delivery transparency cross systems

Capabilities

Epic

Feature

Story

Task

Agile Release Train

Team A

Team B

Team C

Agile Release Train

Team X

Team Y

Agile Release Train

Team 1

Team 2

- Jira Team Delivery integrated in using Rally connector
- Continuing to scale practice for improved delivery

JIRA

Project

Epic

Story

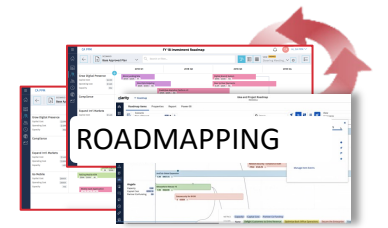
Task

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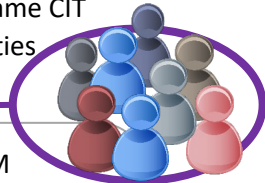


Keeping Business Case process manual until Lean Canvas transformation

Business Case

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CIT
Capabilities

CIT
Epics

Connector

Connector

RALLY

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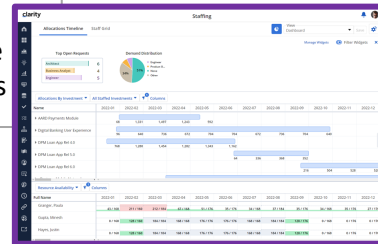
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Team 2

- Traditional Project practice
- Project capitalization supported
- Transformation continues

Investment Projects

Only VSM Staffing for FTE Allocation and % Capitalization for TEAM Forecasting
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Project

Epic

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Lessons Learned Through Adoption

- CIT definition was important
 - Combined Value Stream & Program CIT was strategic
- Finance is not the impediment to transformation
 - Able to meet, understand capabilities, and determined Team Forecasting easily
- Hierarchies are “really powerful”
 - Upgrading to 16.0.3 already for new financials
- Clarity / Rally connecter
 - Quickly mirrored desired Rally Portfolio Item detail
 - Furthered transformation by alleviating Rally groups not part of delivery
 - Clarity eliminated often calls for variant Team Forecast spreadsheets

Kitchen Sink Company Profile

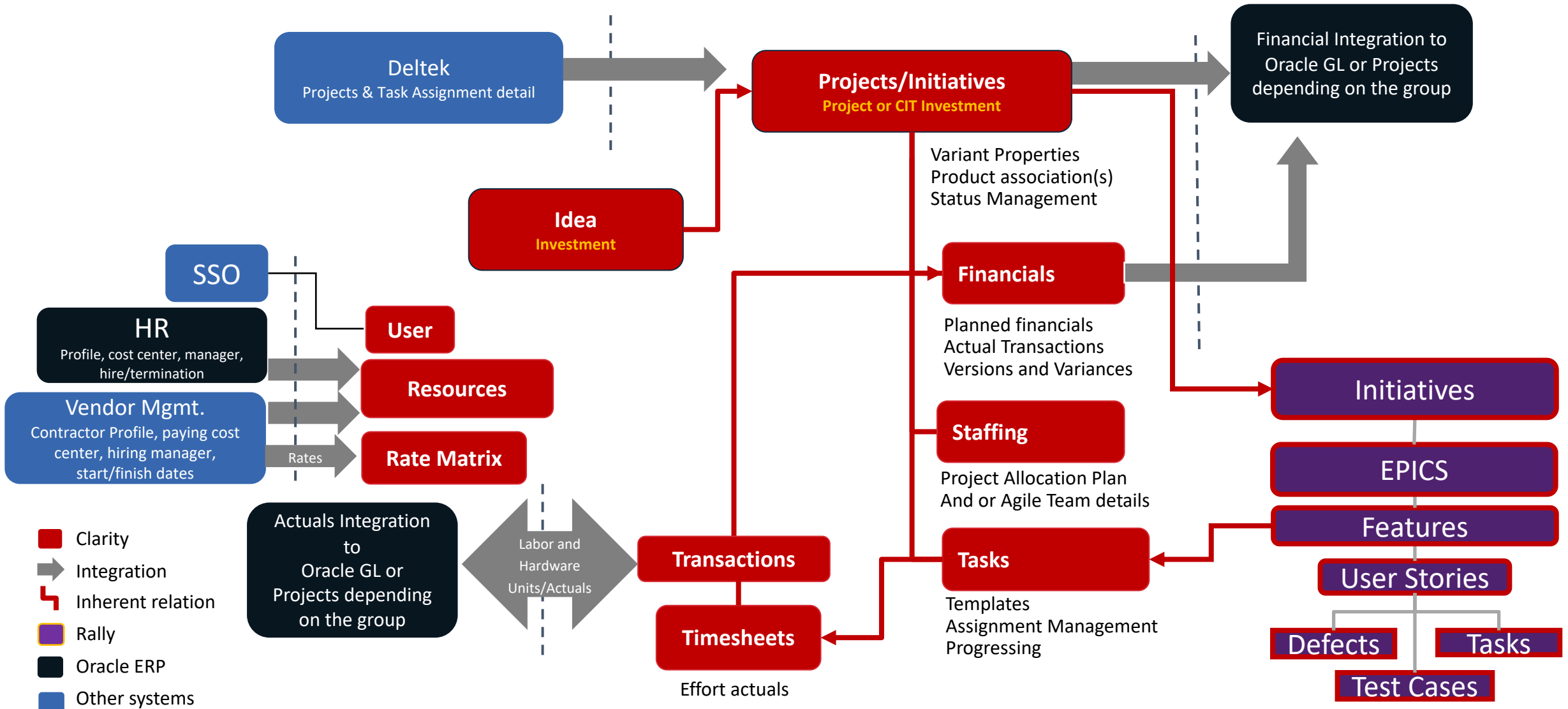
Public Multi-billion dollar company over 150,000 employees globally

Distinctive IT/Engineering groups with variant Solution Profiles & Use Cases

Common Use Cases

- Central Resource (Internal/External) repository for Allocation & Capacity planning
- Central Register of potential and inflight work
- Integrations with HR and Financial ERP system and SSO authentication
- Government Contracting Division – Professional Services:
 - Deltek Integration pulling in resource detail to then do Full financial Forecasting and governance to then feed into Oracle for Billing
- New Product Development
 - Milestone Phase Gating and Financial Forecasts
 - Hardware Cost Tracking for Pass thru to Oracle
- Digital Product Management
 - Register of products and product initiatives
 - Financial and people allocation on investments
 - Integrated Agile delivery with ValueOps (Clarity/Rally)
- Federated IT: Traditional Project Management
 - Annual Planning/Budgeting and Project prioritization
 - Status Tracking and Delivery with Time Management
- Central IT Finance group
 - Financial communication of both Capital Actuals and Showback

Kitchen Sink Customer Diagram



Lessons Learned Through Adoption

- How you integrate with agile makes or breaks your adoption
 - Features as tasks although fits with not yet agile thinking it inhibits both solutions
- Milestone baselining is a great way to manage stage gate, especially now with Roadmaps
- Align with business user's direction not their current state
- Clarity should never be in maintenance mode – iterative configuration is key
- Ways around “Pushing Rope” (How to break out of solution stagnation)
 - Business Case webinars
 - Use case pilots in production environment
 - Volunteered Transparency

Questions?



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- Click on **Report PDU's**
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- Class Provider = **Rego Consulting**
- Class Name = **regoUniversity**
- Course **Description**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**



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Phone

888.813.0444



Email

info@regoconsulting.com



Website

www.regouniversity.com