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**rego**University

SAN DIEGO • 2023

# How to use Rally to support your Program Increment

**Your Guide:  
Jeff Barschaw**

# Part I: Introduction



# Agenda

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- Introduction
- PI Planning Preparation with Rally
- Leveraging Rally's Capacity Plan for Multiple PI Plans

# Introductions

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

# Learning Objectives

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When we are complete you will be able to...

- Configure Rally to ensure your ART is prepared for a PI Planning event
- Track your ART as it progresses toward a state of readiness using Rally
- Explain how Rally Capacity Plans can enable better PI Planning for your ART

# Part 2: Leveraging Rally to Track PI Readiness

# PI Readiness Feature



**Rally** Consumer Site (ART) Home Plan Track Quality **Portfolio** Reports

**Portfolio Items** Portfolio Item: Feature Saved Views: Select or Add Saved and Shared Views

Search Work Items + Add New Show 1 Filter Show Fields 🔗

<input type="checkbox"/>	Rank ↑	ID	Name	Release	State	Project	Involved Roles	Owner	Tags
<input type="checkbox"/>	1	F103	2023 PI 5 Readiness	2023 PI 4	Defining	Consumer Site (ART)		RTE	PI Planning Readiness
<input type="checkbox"/>		US308	Planning scope and context	2023 PI 4	--	Consumer Site (ART)	Architect,Business Owners,Engineering,Executive,Pro... Management	RTE	Organizational readiness
<input type="checkbox"/>		US315	Business alignment	2023 PI 4	--	Consumer Site (ART)	Business Owners,Product Management	RTE	Organizational readiness
<input type="checkbox"/>		US311	Agile Teams (SMs/TCs, POs)	2023 PI 4	--	Consumer Site (ART)	Product Owner,Scrum Master,Team	RTE	Organizational readiness
<input type="checkbox"/>		US323	Executive briefing	2023 PI 4	--	Consumer Site (ART)	Executive	RTE	Content readiness
<input type="checkbox"/>		US316	Product vision briefings	2023 PI 4	--	Consumer Site (ART)	Product Management	RTE	Content readiness
<input type="checkbox"/>		US324	Architecture vision briefings	2023 PI 4	--	Consumer Site (ART)	Architect	RTE	Content readiness
<input type="checkbox"/>		US325	Locations	2023 PI 4	--	Consumer Site (ART)	Architect,Business Owners,Engineering,Product Management,Product Owner,Release Train Engineer,Scrum Master,Team	RTE	Logistics readiness
<input type="checkbox"/>		US320	Technology and tooling	2023 PI 4	--	Consumer Site (ART)	Architect,Business Owners,Engineering,Product Management,Product Owner,Release Train Engineer,Scrum Master,Team	RTE	Logistics readiness
<input type="checkbox"/>		US326	Communication channels	2023 PI 4	--	Consumer Site (ART)	Architect,Business Owners,Engineering,Product Management,Product Owner,Release Train Engineer,Scrum Master,Team	RTE	Logistics readiness

# PI Readiness Advantages

- Leveraging the ALM tool to codify preparation steps
- The previous PIs Readiness Feature can be copied to the next PI
- Inspect & Adapt can then Add or Modify the next PI Plan
- Produces consistency in PI Preparation steps





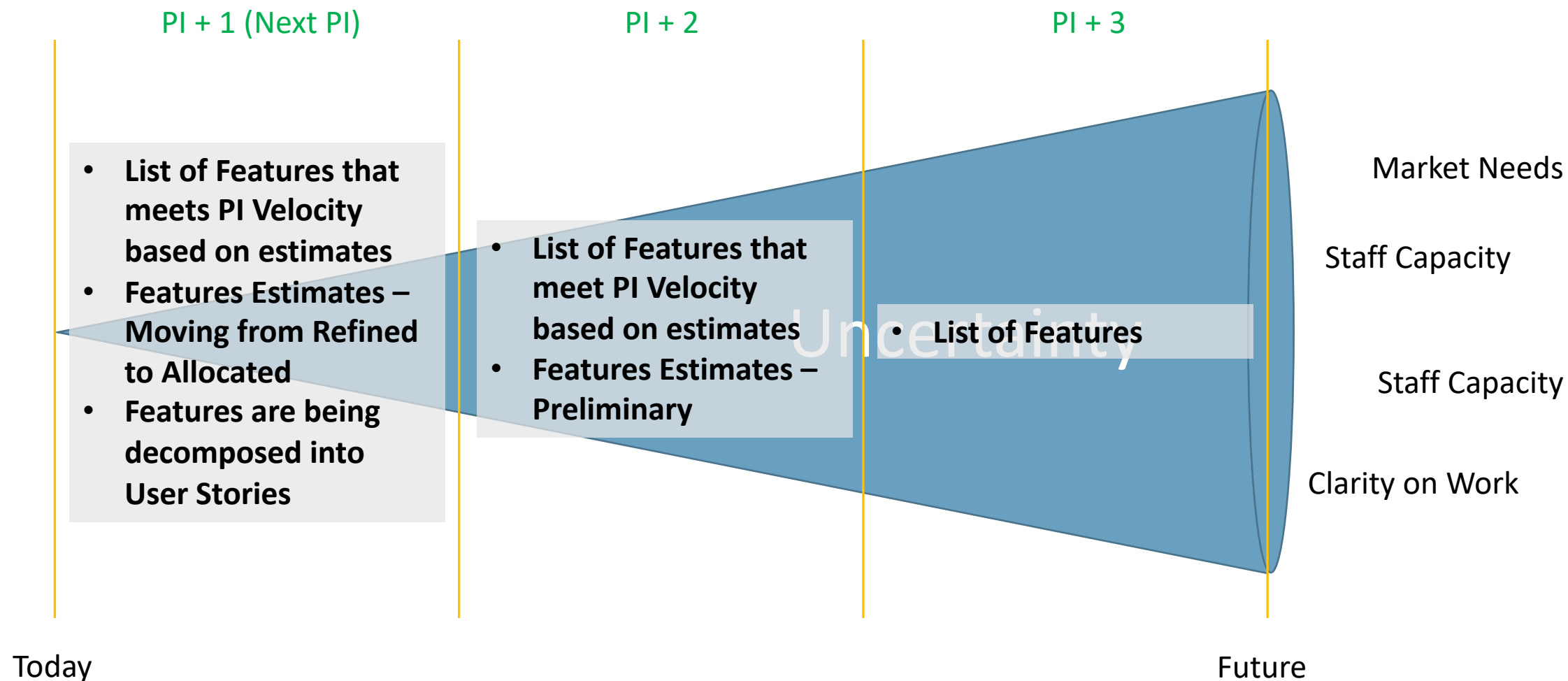
# Part 3: Rally's Capacity Plans

# Rally Capacity Plan

- Capacity Plans provide the ability to perform what-if analysis on Releases
  - Create multiple Release plans for the same Release
  - Determine which one is most favorable
  - Publish that plan updates all the artifacts
- In SAFe, we leverage Release to represent Planning Intervals
- Leveraging this, we can create Plan for 2-3 future Planning Intervals

# Capacity Plan View – Creating PI Plans

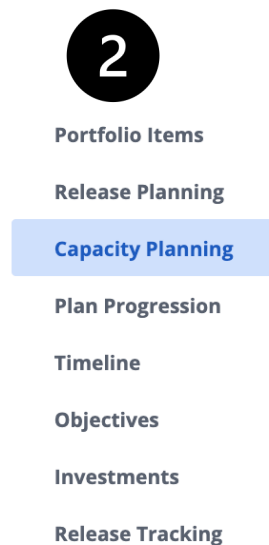
It is recommended to leverage multiple Rally Capacity Plans to multiple PI Plans:



# Rally Capacity Plans



1. Portfolio
2. Capacity Planning
3. Add New
4. Required Fields



**New Capacity Plan** ×

Name \*

Portfolio Item Type \*  
Feature ▼

Release \*  
Select an item... ▼

Span Releases

[Cancel](#) [Create](#)

A form titled 'New Capacity Plan' with a close button (X). It contains three required fields: 'Name \*' (text input), 'Portfolio Item Type \*' (dropdown menu with 'Feature' selected), and 'Release \*' (dropdown menu with 'Select an item...' selected). There is also an unchecked checkbox for 'Span Releases'. At the bottom right, there are 'Cancel' and 'Create' buttons.



# Add Teams

1

ID

2

Project Breakdown

3

Add / Remove Project(s) to Plan

4

1. Select Capacity Plan ID
2. Project Breakdown
3. Add / Remove Project(s)
4. Select Teams

Add / Remove Project(s) to Plan

×

Search All Projects...

Hold down the SHIFT key when selecting a project to select or deselect all child projects.

- Enterprise (3 descendants selected)
- Online Store (VS) (3 descendants selected)
- Consumer Site (ART) (3 descendants selected)
  - Fulfillment Team
  - Payment Team
  - Shopping Team
  - Platform (ART)
  - Reseller Site (ART)

# Add Features

1

Features

2

Add Features

3

1. Features
2. Add Features
3. Select Features

## Add Features to Plan

Search Work Items [Show Filters](#) [Show Fields](#) Total Work Items: 65

<input type="checkbox"/>	ID	Name	Parent	Project
<input type="checkbox"/>	F31	Auto social links	E8: Build read-write API for handling orders	Consumer Site (ART)
<input type="checkbox"/>	F33	Security layer for read-write API	E8: Build read-write API for handling orders	Consumer Site (ART)
<input type="checkbox"/>	F32	Error checking of profiles	E8: Build read-write API for handling orders	Consumer Site (ART)
<input type="checkbox"/>	F56	Share all customer reviews	E11: MV mobile online shopping site	Consumer Site (ART)
<input type="checkbox"/>	F86	Order Status 4.0	E14: Provide customer service portal for pickup	Consumer Site (ART)
<input type="checkbox"/>	F55	Single product purchase click	E11: MV mobile online shopping site	Consumer Site (ART)
<input type="checkbox"/>	F53	Mobile shopping Cart	E11: MV mobile online shopping site	Consumer Site (ART)
<input type="checkbox"/>	F49	Realtime notifications	E1: Integrate social into shopping experience	Consumer Site (ART)
<input type="checkbox"/>	F54	Allow users to disassociate suggestions	E11: MV mobile online shopping site	Consumer Site (ART)
<input type="checkbox"/>	F57	Revamp homepage to be mobile ready	E11: MV mobile online shopping site	Consumer Site (ART)
<input type="checkbox"/>	F58	Purchase confirmation settings in profile	E11: MV mobile online shopping site	Consumer Site (ART)

25 per page Page # 1 2 3 Next

0 Changes [Cancel](#) [Add to Plan](#)

# PI Plan (PI + 3)

Only a list of the Features that approaches the PI Velocity is needed

Project Breakdown **Features** Revision History

Show Filters Show Fields Add Features

Rank ↑↓	ID	Name	Planned Project Assignment	Project	Dependencies	Points Rollup	Points Estimated ↑↓
⚙️	F31	Auto social links	Unassigned ⚠️	Consumer Site (ART)	0	0	10 🧥
⚙️	F32	Error checking of profiles	Unassigned ⚠️	Consumer Site (ART)	0	0	30 🧥
⚙️	F33	Security layer for read-write API	Unassigned ⚠️	Consumer Site (ART)	0	0	50 🧥

Name	Points / Capacity
Fulfillment Team	0 / 0 ⚠️
Payment Team	0 / 0 ⚠️
Shopping Team	0 / 0 ⚠️

It is not necessary to assign teams just yet

Estimate

👤 Allocated	—
★ Refined	—
🧥 Preliminary	10 ✓

Preliminary is the T-Shirt Size of Feature

# PI Plan (PI + 2)

Portfolio Item Type: Feature | Release: 2022 PI2 | Features: 3 Assigned 2 Unassigned

Points Rollup: 10 0% | Points Estimated: 70 5% Remaining: 60 5% | Points Capacity: 1200 base Remaining: 1130 94%

Project Breakdown: Features | Revision History

Show Filters | Show Fields | Add Features

Rank	ID	Name	Planned Project Assignment	Project	Dependencies	Points Rollup	Points Estimated
	F4	Extended Email-to-case integration	Fulfillment Team	Consumer Site (ART)	1	10	30
	F31	Auto social links	Payment Team	Consumer Site (ART)	0	0	10
	F32	Error checking of profiles	Unassigned	Consumer Site (ART)	0	0	30
	F33	Security layer for read-write API	Unassigned	Consumer Site (ART)	0	0	50
	F37	Outbound SMS messages for support case updates	Shopping Team	Consumer Site (ART)	0	0	30

Name	Points / Capacity
Fulfillment Team	30 / 350
Payment Team	10 / 400
Shopping Team	30 / 450

Team Assignments may have started

There might be some User Story point rollups

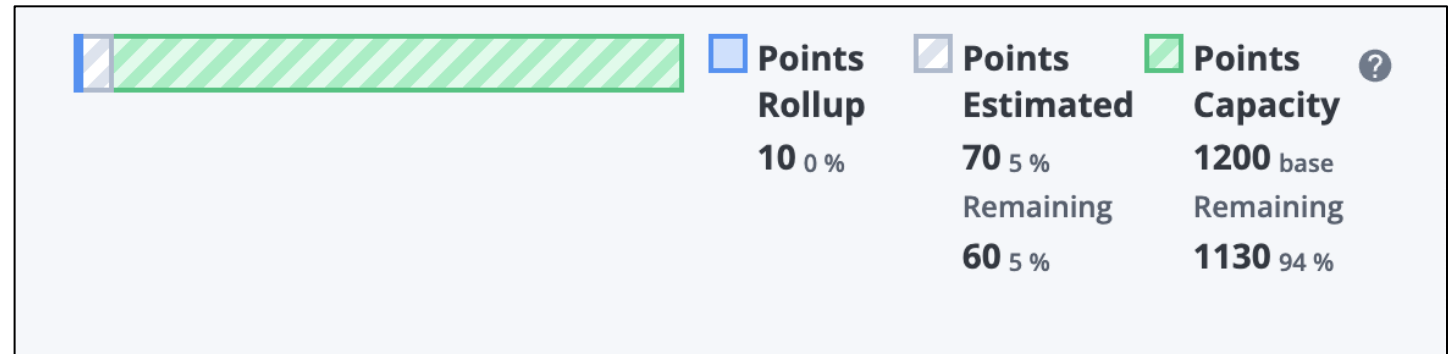
Preliminary Remains T-Shirt Size

Velocity from the most recent PI are added



# Status Bar

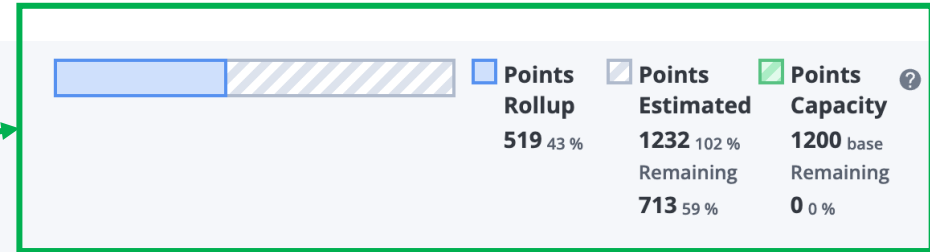
- Capacity is the number entered as “capacity” for the team (or the sum thereof for the full plan).
- Points estimated is the sum of the points estimated for the work items that are assigned
- Points rollup is the actual Plan Estimate sum for the work items.



# Next PI Plan (PI + 1)

Portfolio Item Type Release Features  
 Feature 2022 PI1 23 Assigned 2 Unassigned

Make sure the Allocated Estimates below Points Capacity



Project Breakdown **Features** Revision History

Show Filters Show Fields

Rank ↑↓	ID	Name	Planned Project Assignment	Project	Dependencies	Points Rollup	Points Estimated ↑↓
⚙️	F5	Purchase single product └ Allocation └ Allocation	2 Fulfillment Team Payment Team	Consumer Site (ART)	1	50	50
⚙️	F6	Product purchase confirmation	Shopping Team	Consumer Site (ART)	0	50	50
⚙️	F7	Search for products	Fulfillment Team	Consumer Site (ART)	0	10	55
		Provide link to twitter so users can					

Add Features

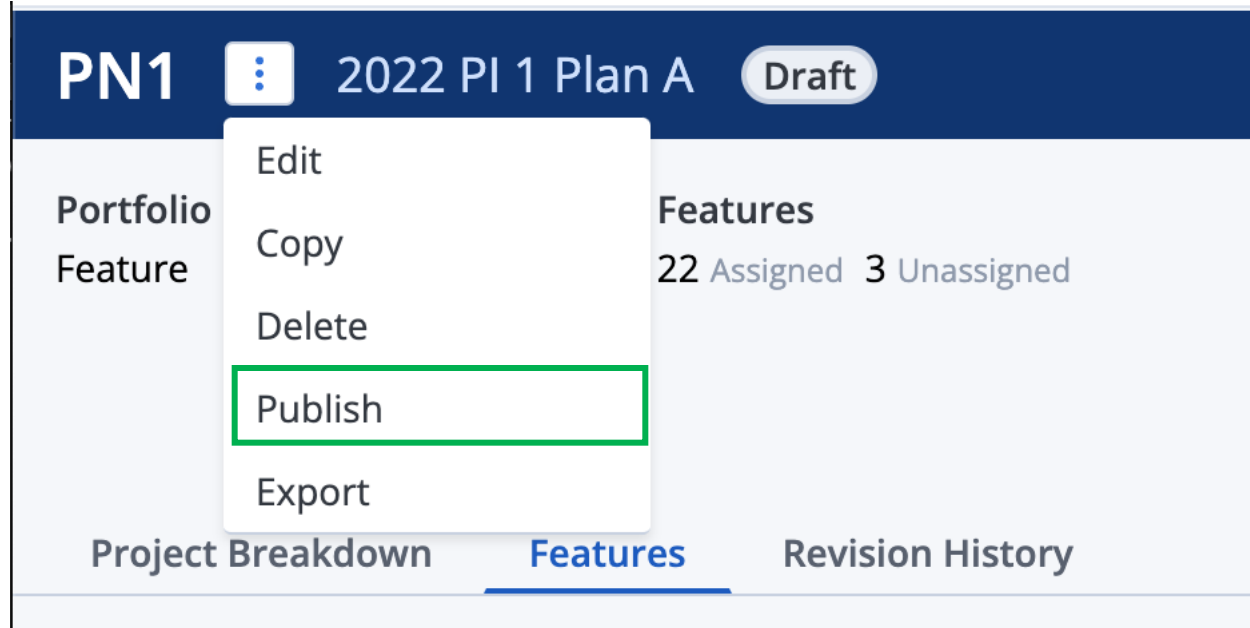
Name	Points / Capacity
Fulfillment Team	345 / 350
Payment Team	417 / 400 ⚠️
Shopping Team	470 / 450 ⚠️

You can split the Allocations between teams

As PI approaches, updating from Refined to Allocated Estimates

There are teams overallocated

# Publish the Plan



Once all Estimates are Allocated, the Point Estimate is below Point Capacity and you are satisfied with the plan, it can be Published

# Learning Objectives

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## What we have learned...

- Use Rally to ensure each ART has a preparation plan & track for each Planning Interval
  - Leveraging the ALM tool to codify preparation steps
  - The previous PIs Readiness Feature can be copied to the next PI
  - Inspect & Adapt can then Add or Modify the next PI Plan
  - Produces consistency in PI Preparation steps
- Leverage Rally Capacity Plans to identify content for multiple PI in the future
  - Provide Leadership and stakeholders a long-term view of when work is scheduled
  - Spreads the planning efforts over longer periods of time
  - Better visibility of impacts when work is not completed



# Questions?



# Surveys

Please take a few moments to fill out the class survey.  
Your feedback is extremely important for future events.



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- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Provider = **Rego Consulting**
- Class Name = **regoUniversity**
- Course **Description**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**



Let us know how we can improve!  
Don't forget to fill out the class survey.



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