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SAN DIEGO • 2023

How to Leverage Value Stream Metrics

Your Guides:

Heather Kanser and Lisamarie Manso

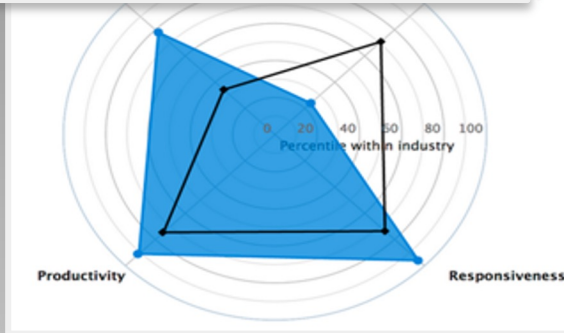
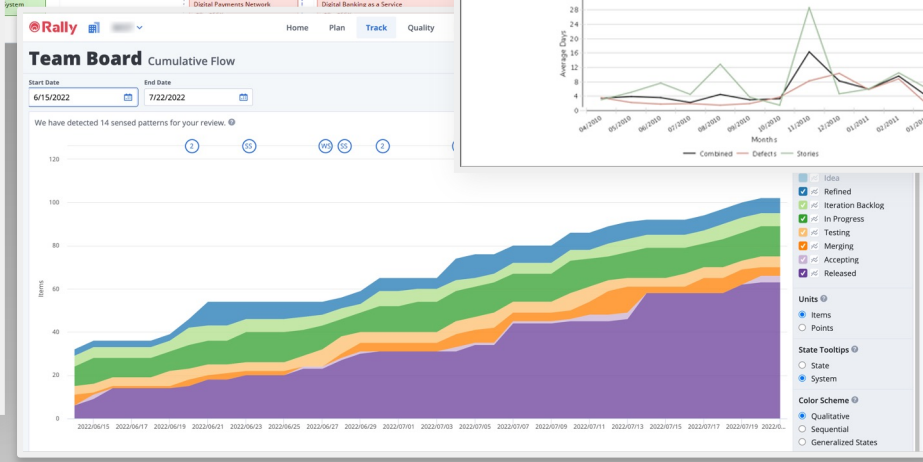
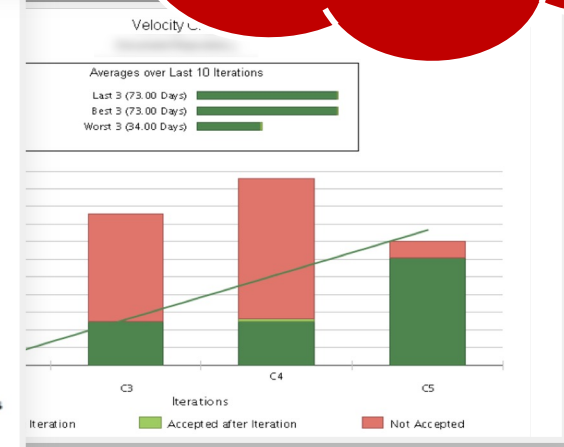
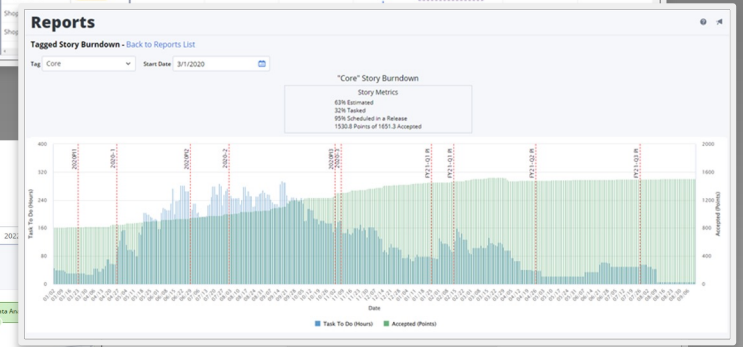
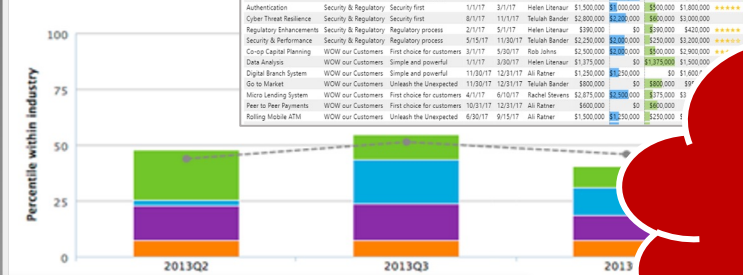
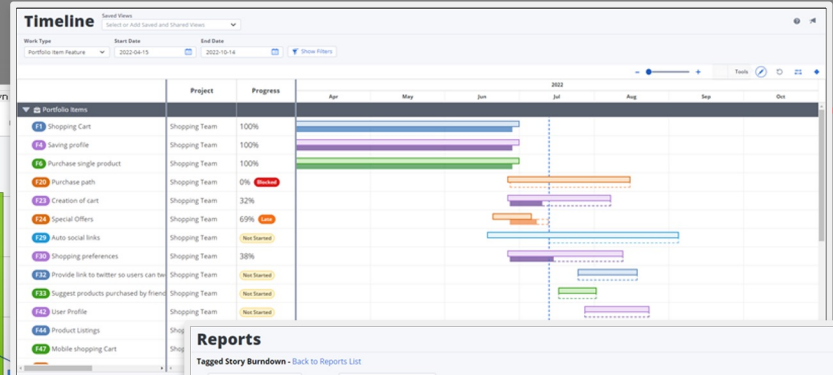
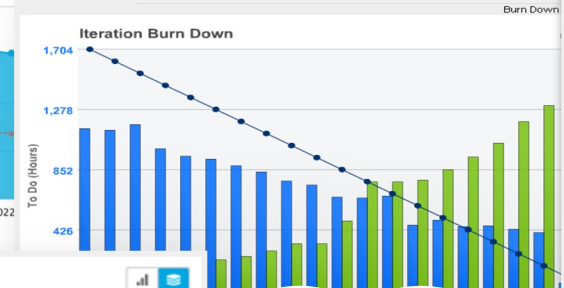
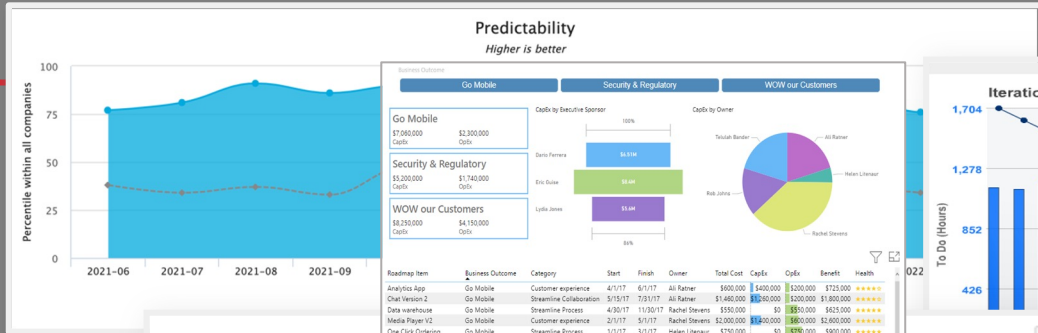
Introductions



Lisamarie Manso,
Field CTO, Value Stream Management



Heather Kanser,
Agile Strategist, Value Stream Management



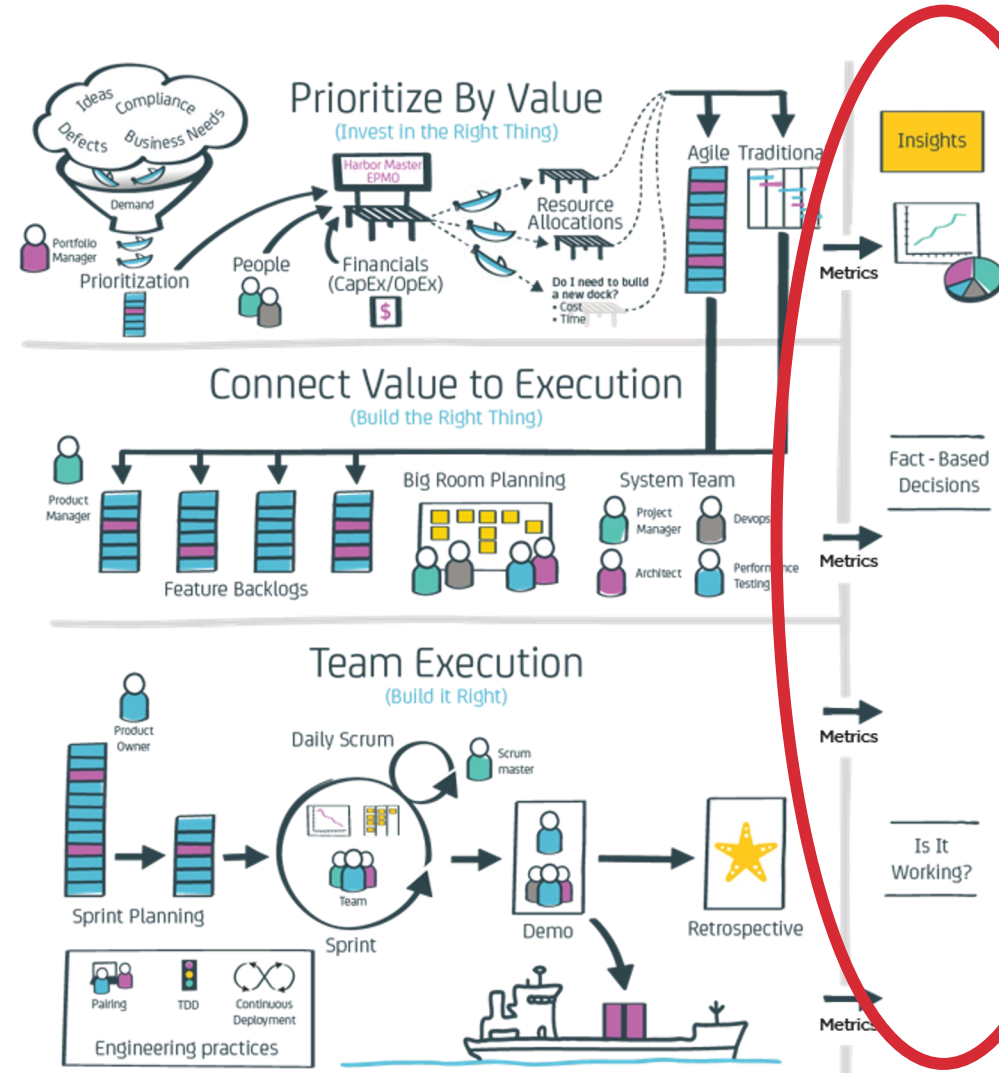
Metrics at Every Level

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

Connect the value to execution to build the right things

Align team execution to build it right

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



Steering the Business With Metrics

People, Money and Business Value

Strategy and OKRs

Value Stream Investment

Objectives and Key Results

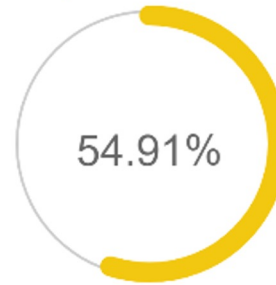
Value Stream: Business Bank Engagement

Product: Digital Banking Application

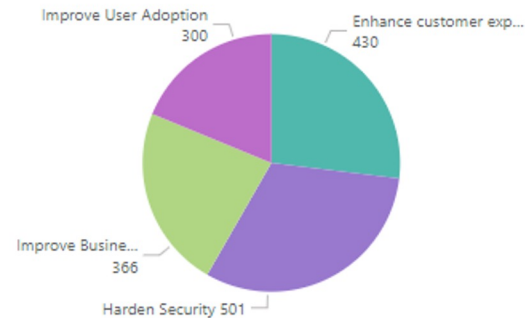
Objective	Key Results	% Attainment	Status
Improve Business User Support	Complete Self Serve portal V2.0	30%	In Progress
Improve User Adoption	Complete self service B2B portal enhancements	70%	In Progress
Improve Business User Support	Convert in person to online support time by 50%	20%	In Progress
Harden Security	Detect all Cloud Based automated attacks	99%	In Progress
Harden Security	Implement disruptionware processes to prevent emerging threats	50%	In Progress
Enhance customer experience	Improved NPS score by 4points	42%	In Progress
Enhance customer experience	Improved sales funnel conversion metrics by 10%	45%	In Progress
Harden Security	Mitigate Insider Risks created by Work From Home	75%	In Progress
Improve Business User Support	Reduce MTTR by 30%	40%	Partially Achieved
Enhance customer experience	Reduced Bank touch time by 30% by Q4FY21	50%	Partially Achieved

Supporting Epics	Lifecycle	Storypoints	Delivery Timeframe
Automatic Deal Structuring and Decisioning	Analyzing	100	2023-P1
Build read-write API for handling loan applications	Backlog	15	2023-P2
Commercial Credit Analysis	Analyzing	15	2023-P2
Configuration Options	Analyzing	15	2023-P2
Consumer Portal	Done	6	2023-P1
Credit Score Highlighting	Reviewing	15	2023-P3
Credit Scoring	Implementing	40	2023-P1
Digital Banking User Experience	Implementing	200	2023-P1
Digital Loan App Content	Funnel	100	2023-P2
Total		1597	

Key Result Attainment

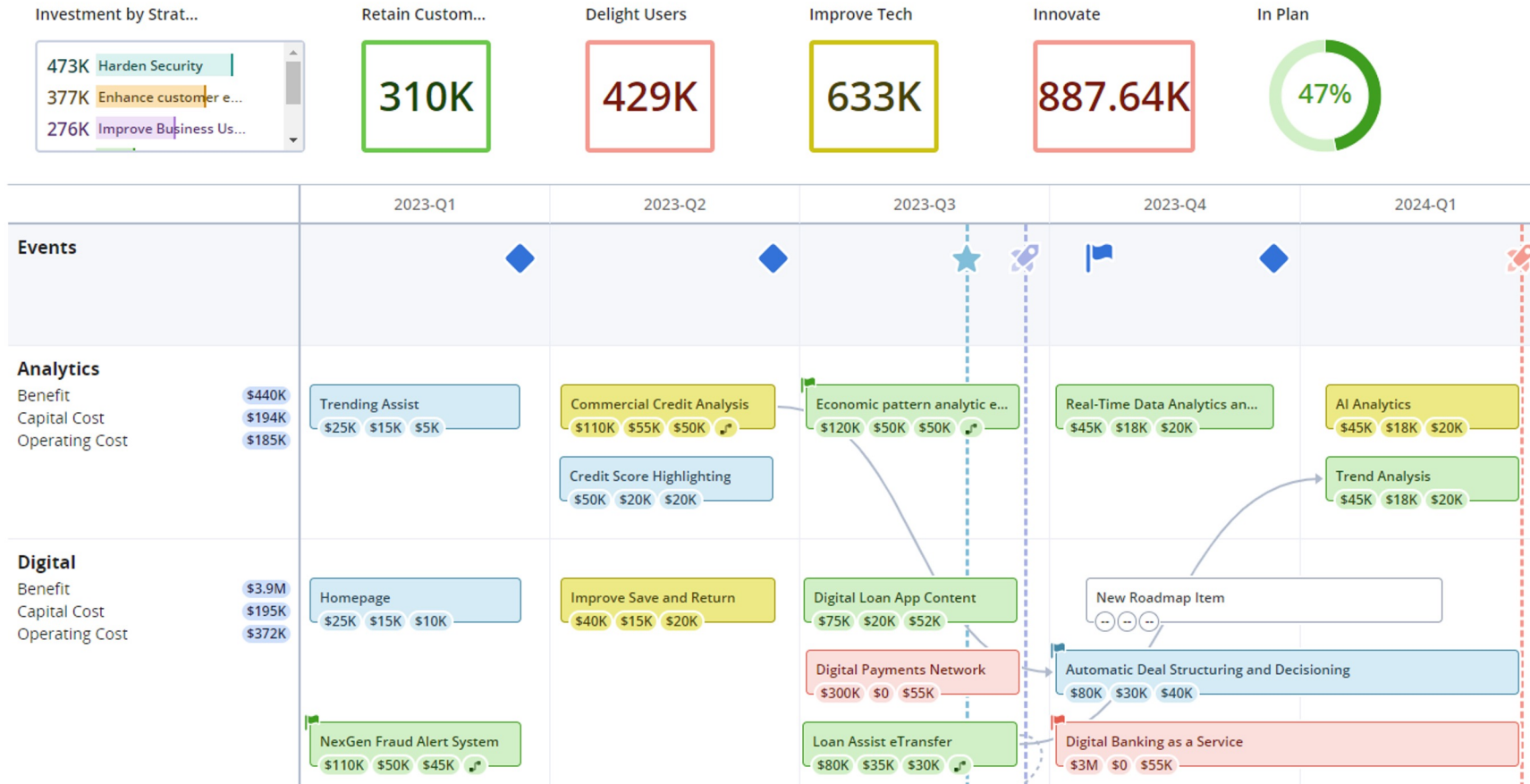


Storypoints by Objective



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

Roadmap Planning

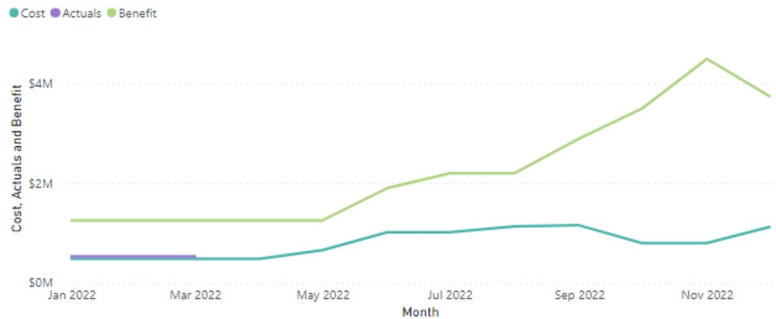


- What are the investment priorities?
- How much are we investing in the big rocks to drive our strategy?

Financials and Guardrails

Value Stream Investment

Value Stream Financials



\$9.6M
2022 Plan

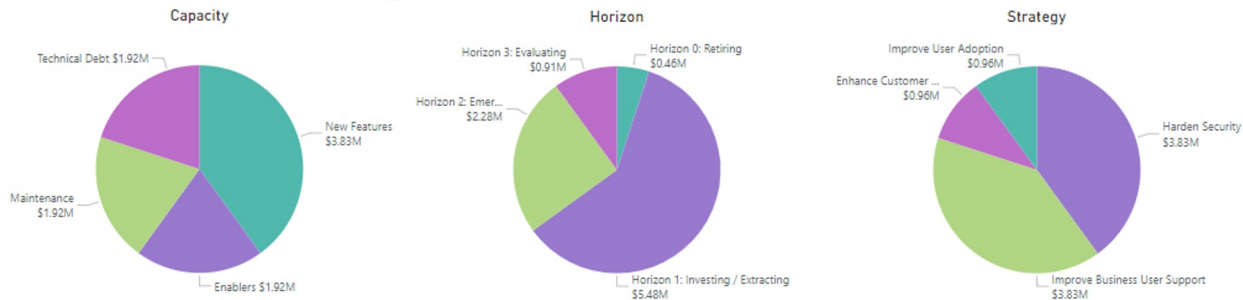
\$27.2M
Benefit

184%
ROI

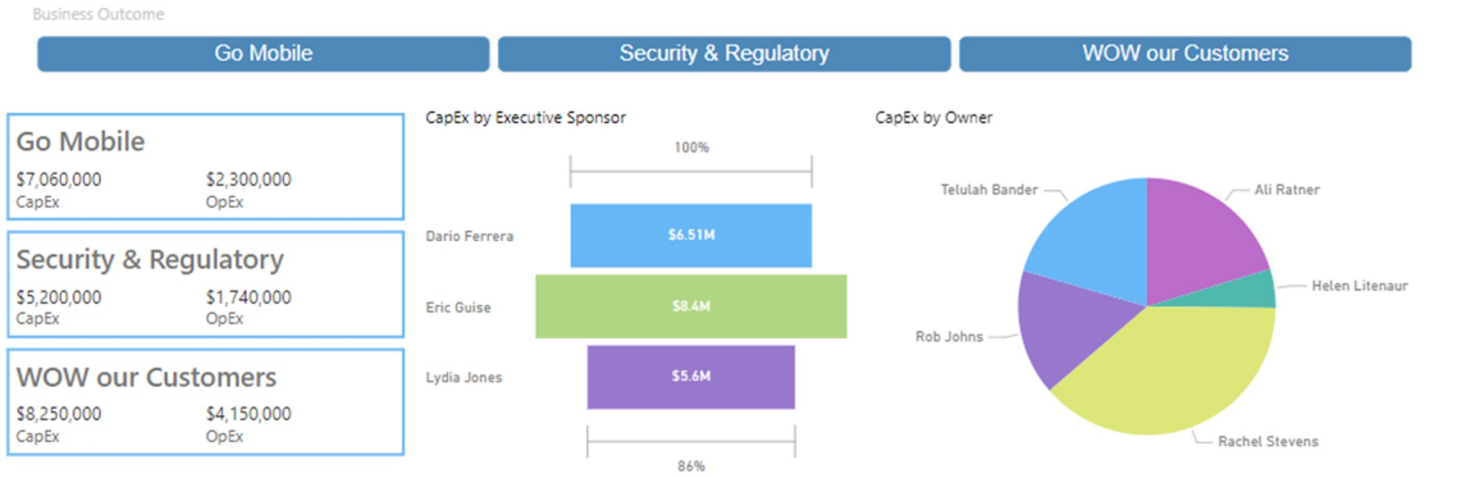
Quarter Trans Class	2022-Q1		2022-Q2		2022-Q3		2022-Q4	
	Cost	Actuals	Cost	Actuals	Cost	Actuals	Cost	Actuals
External Labor	\$75,000	\$82,500	\$385,000	\$925,000	\$325,000			
Hardware	\$330,000	\$363,000	\$610,000	\$750,000	\$675,000			
Internal Labor	\$570,000	\$627,000	\$680,000	\$900,000	\$900,000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

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

Guardrails: Planned Investment per Category



Capex / Opex Financial Reporting



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

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

Capex / Opex Financial Reporting



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

Value Stream Business Value



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

Portfolio Epic: NexGen Fraud Alert System

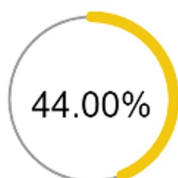
Lean Business Case: **What problem are we solving?**
- Maintain and Improve Consumer Trust in online and mobile banking through improved Fraud Detection and Prevention.

Portfolio Lifecycle: Implementing
Delivery Timeframe: 2021-P2

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

Delivery Progress

% Complete



\$1.08M

Planned Cost

\$475K

Expended Cost

08/26/21

Eng Planned Finish

XXL

T Shirt Size

300

T Shirt Storypoints

290

Engineering Est

119

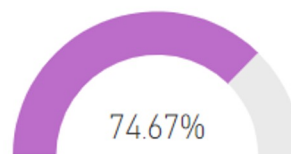
Accepted Storyp...

32

Accepted Stories

Business Value

% Attainment



\$5M

Benefit

342%

ROI

Strategic Theme: Harden Security

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

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

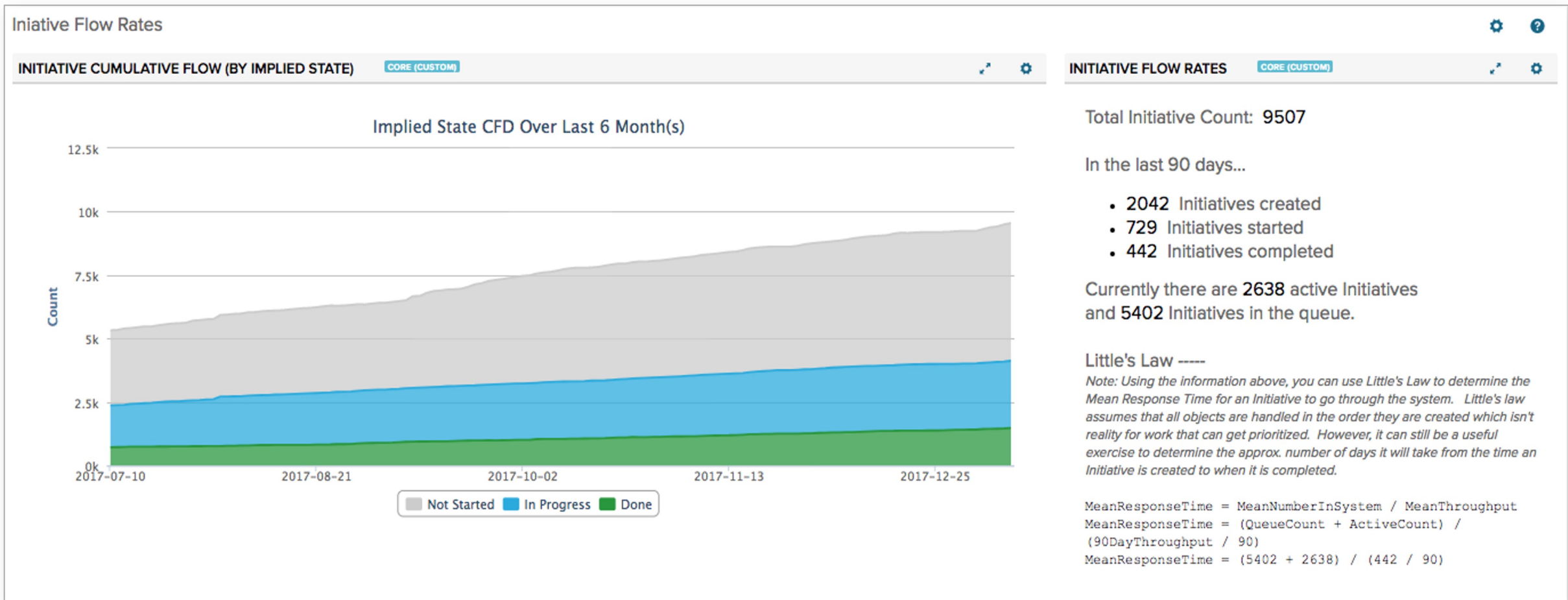
Provides a clear line of sight into:

- Business Value
- Delivery Progress
- Financial Costs

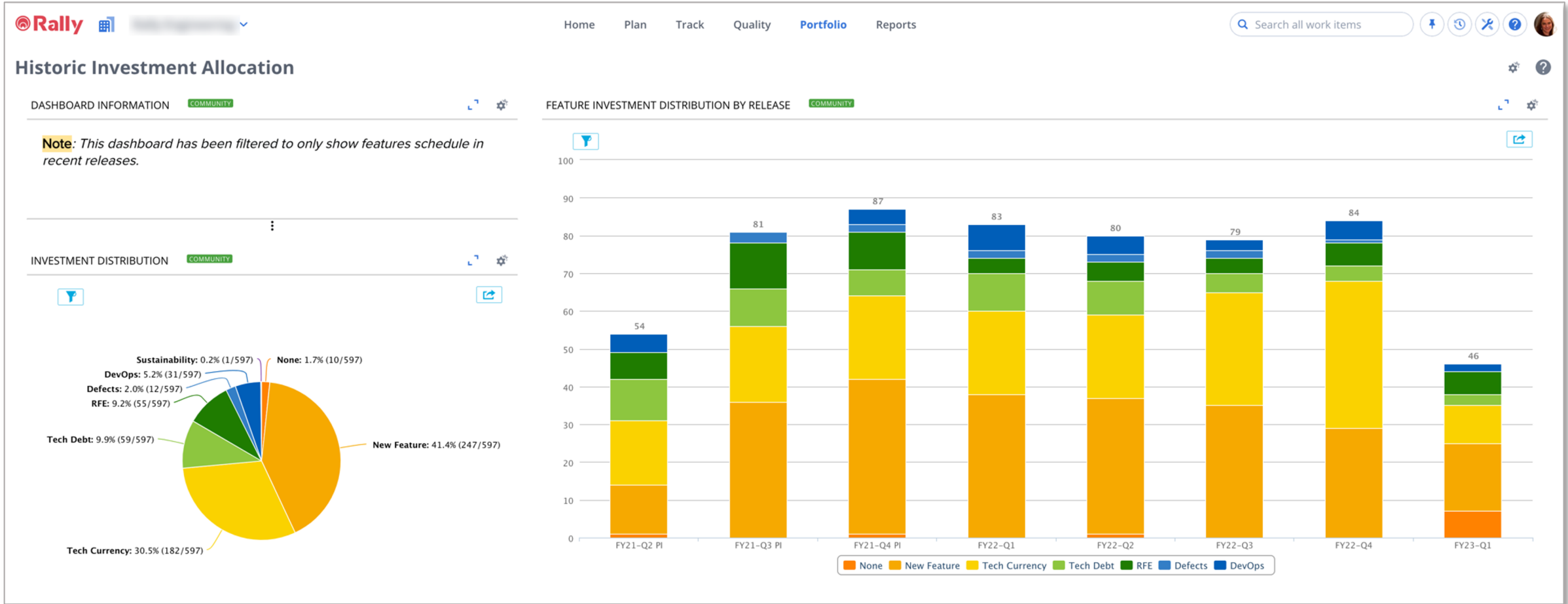
Executing the Strategy

Data Driven Continuous Improvement

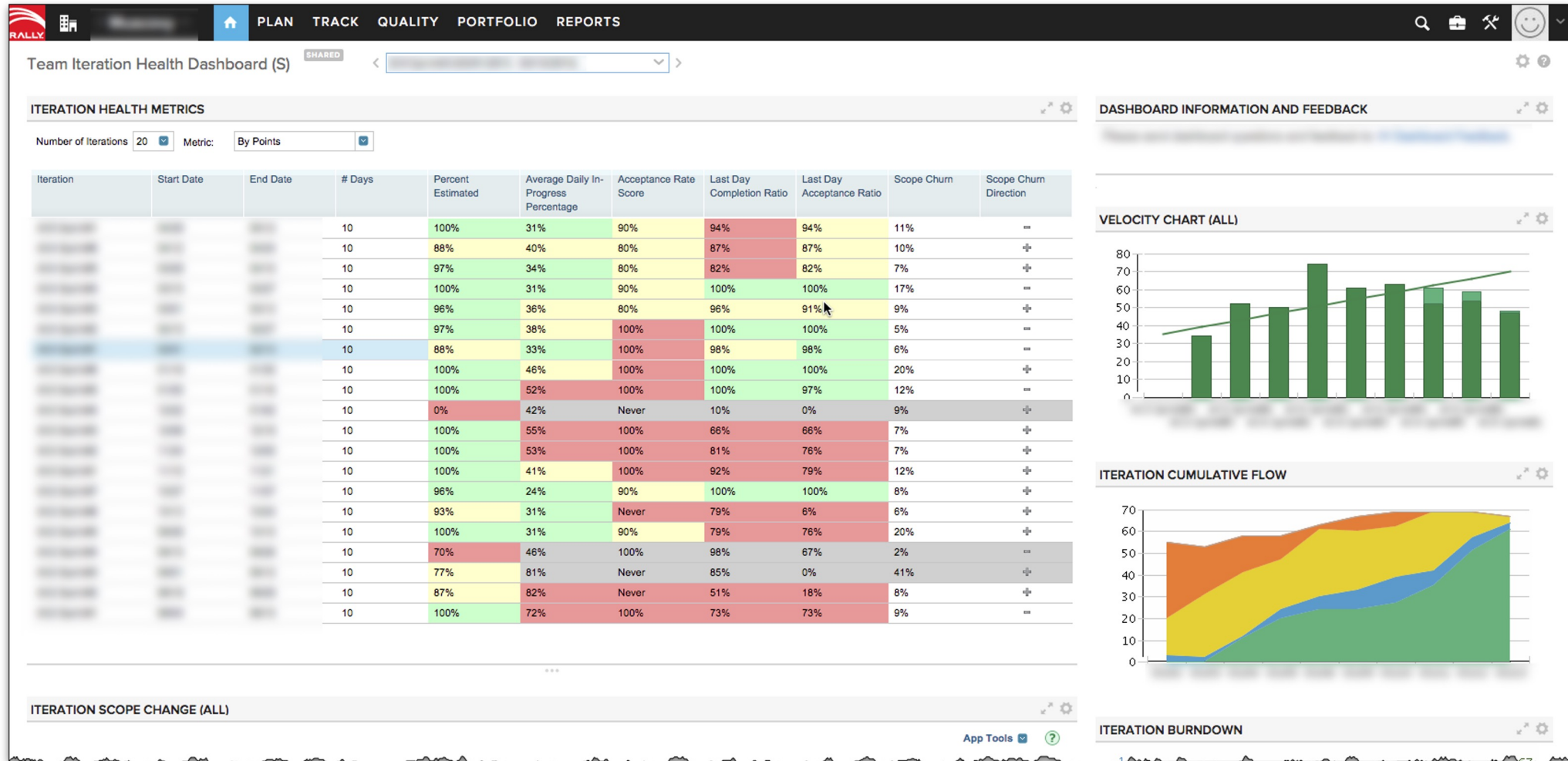
How Does Strategic Work Flow Through the System?



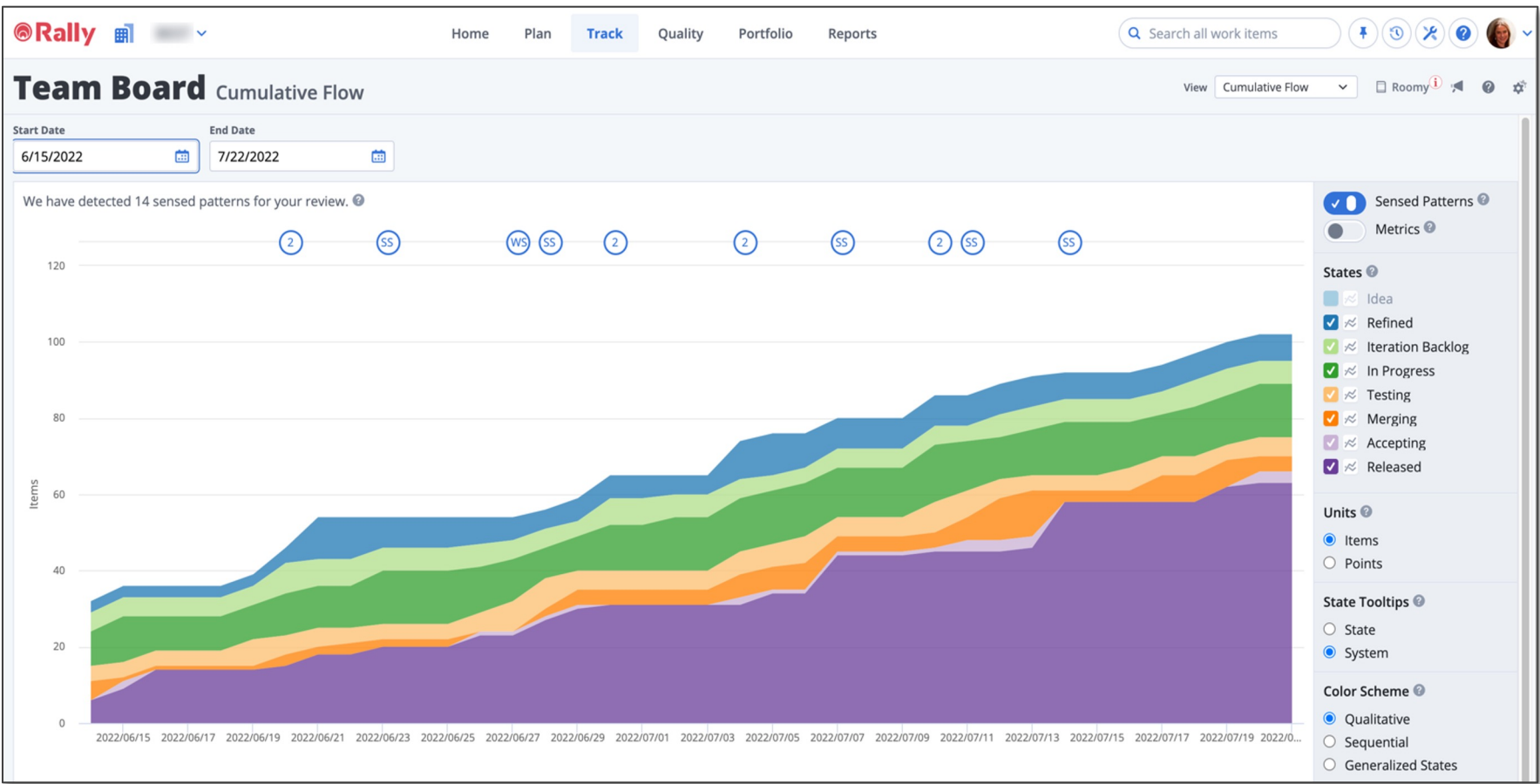
Are We Executing Our Investment Strategy?



Team Agile Fundamentals



Rally Cumulative Flow Diagram With Smart Analytics



Stair Step [X]

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

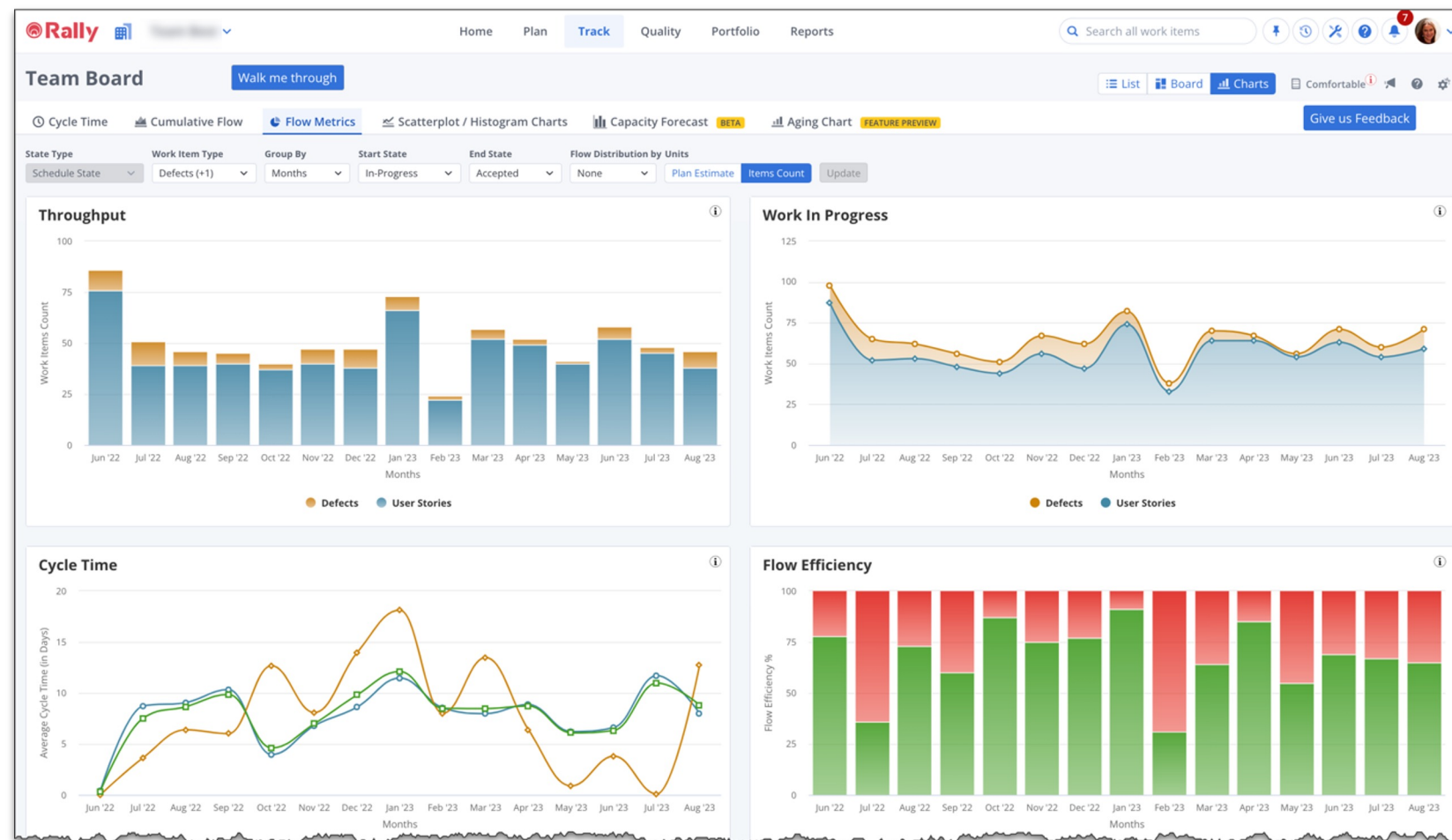
Insight: This CFD is expressing stepped flat lines that suggest work is being batched rather than continuously flowing.

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

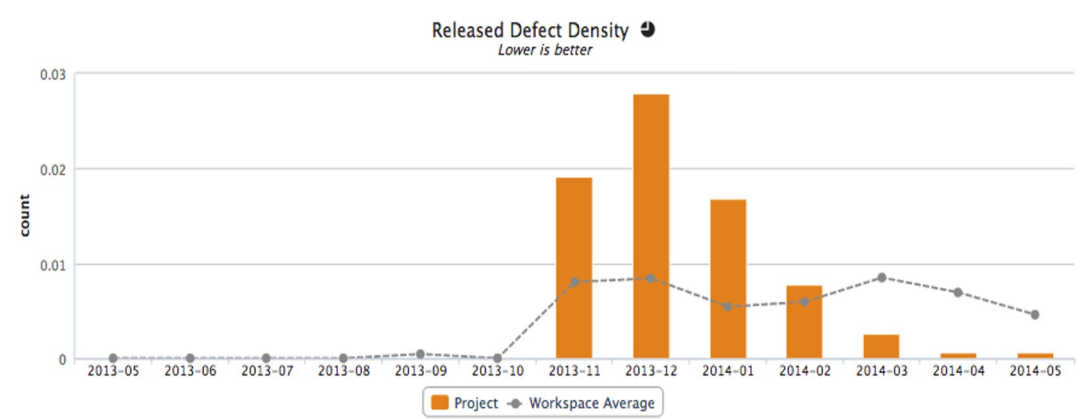
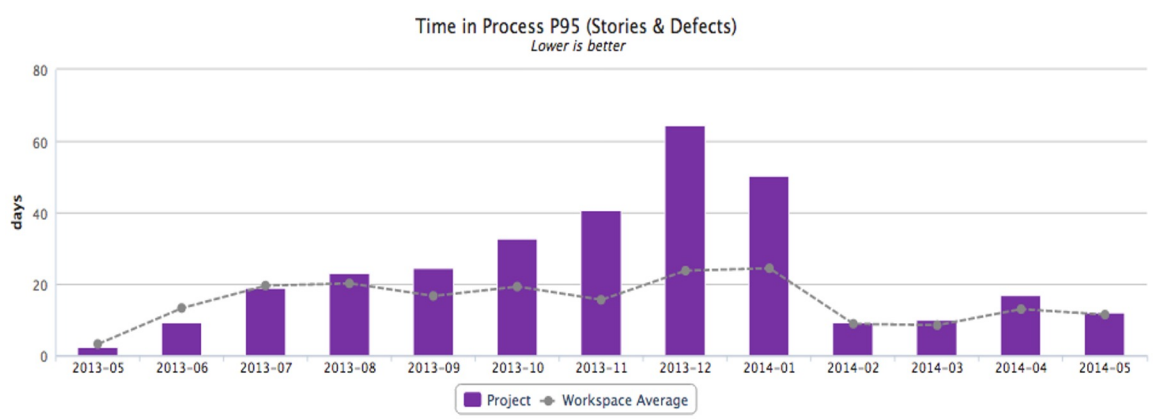
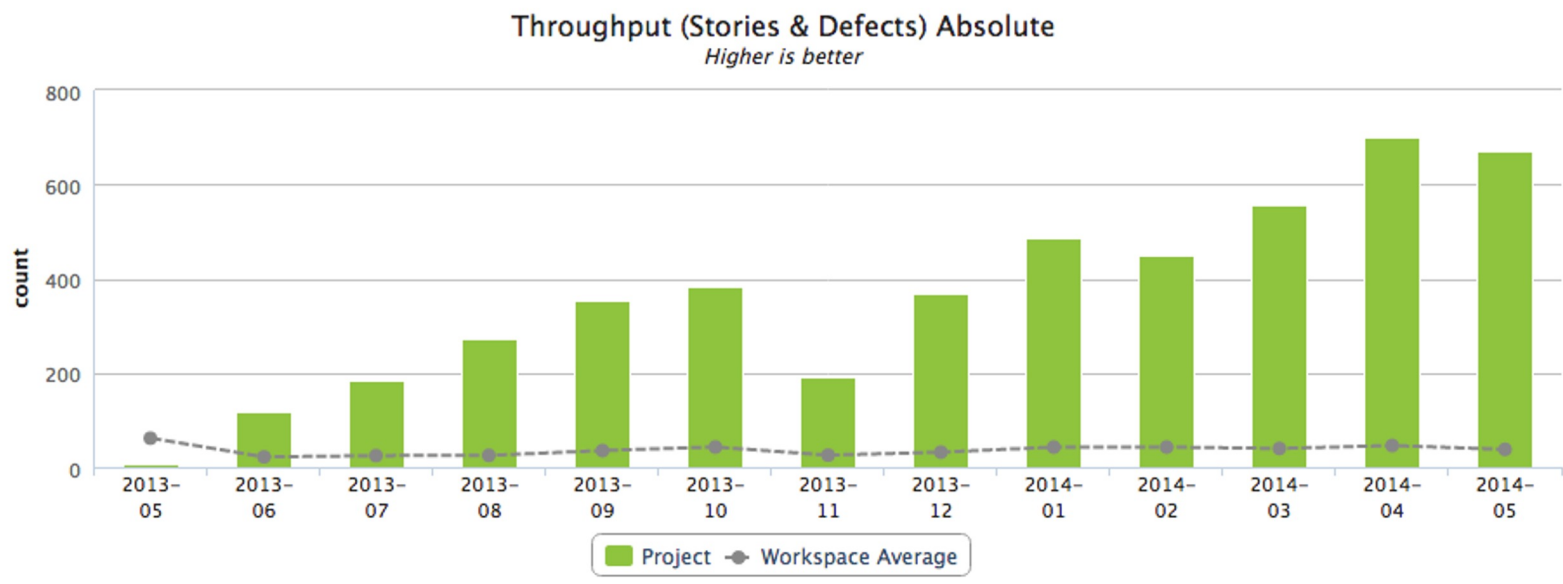
[Hide Guidance](#)

Flow Metrics

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



Enterprise Actionable Insights Example



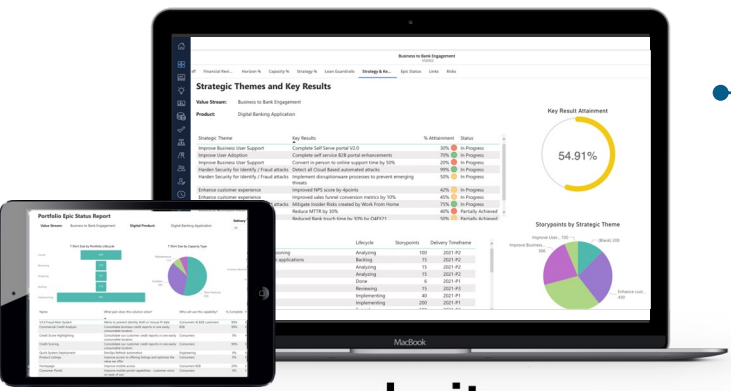
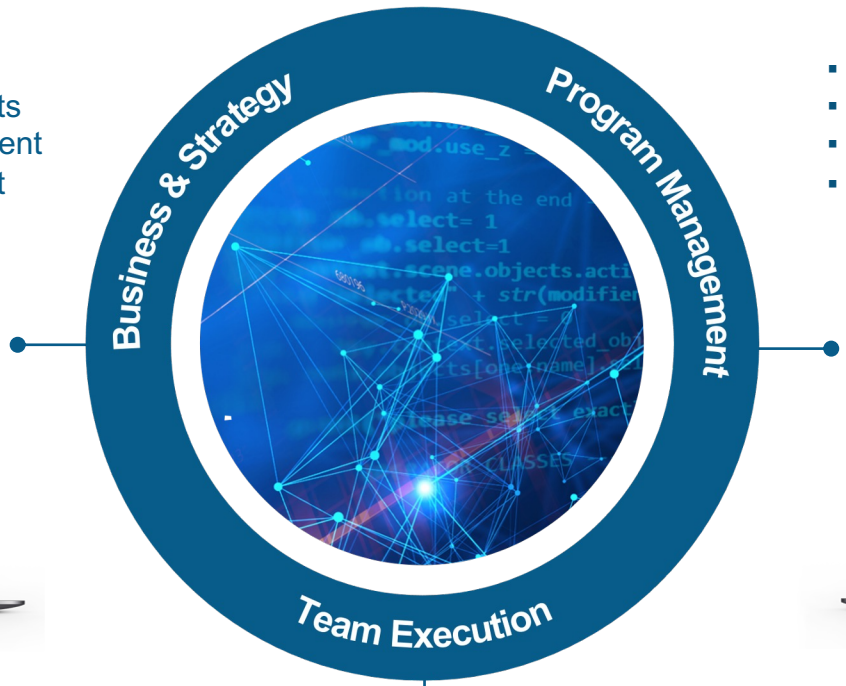
Value Stream Metrics Across the Whole Ecosystem

End to End Visibility into the Delivery of Value

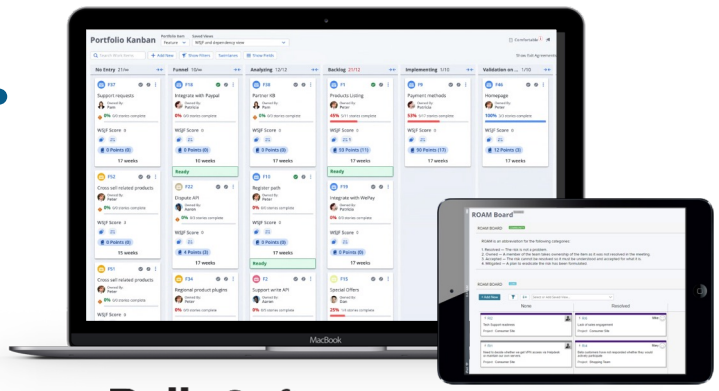
Broadcom ValueOps Solution

- Investment Strategy
- Innovation Roadmaps
- Demand Management
- Funding Decisions
- Financials Reporting
- Business Agreements
- Resource Management
- Project Management

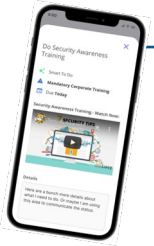
- PI Planning & Tracking
- Dependency & Risk Mgt
- Capacity Planning
- Execution Roadmaps
- Quality Management
- Release Tracking
- Efficiency Metrics
- Enterprise Visibility



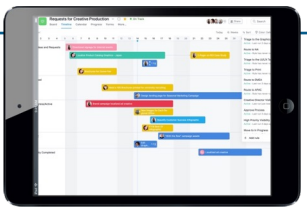
clarity



Rally Software®



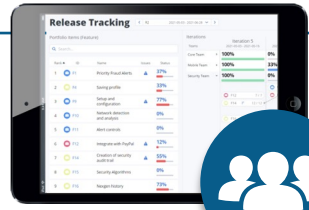
Collaborative Work



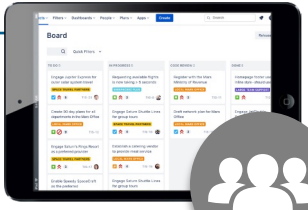
Project Management



ValueOps ConnectALL*
* Integrates third party tools to ValueOps



Rally Teams



Other Teams

ValueOps Insights



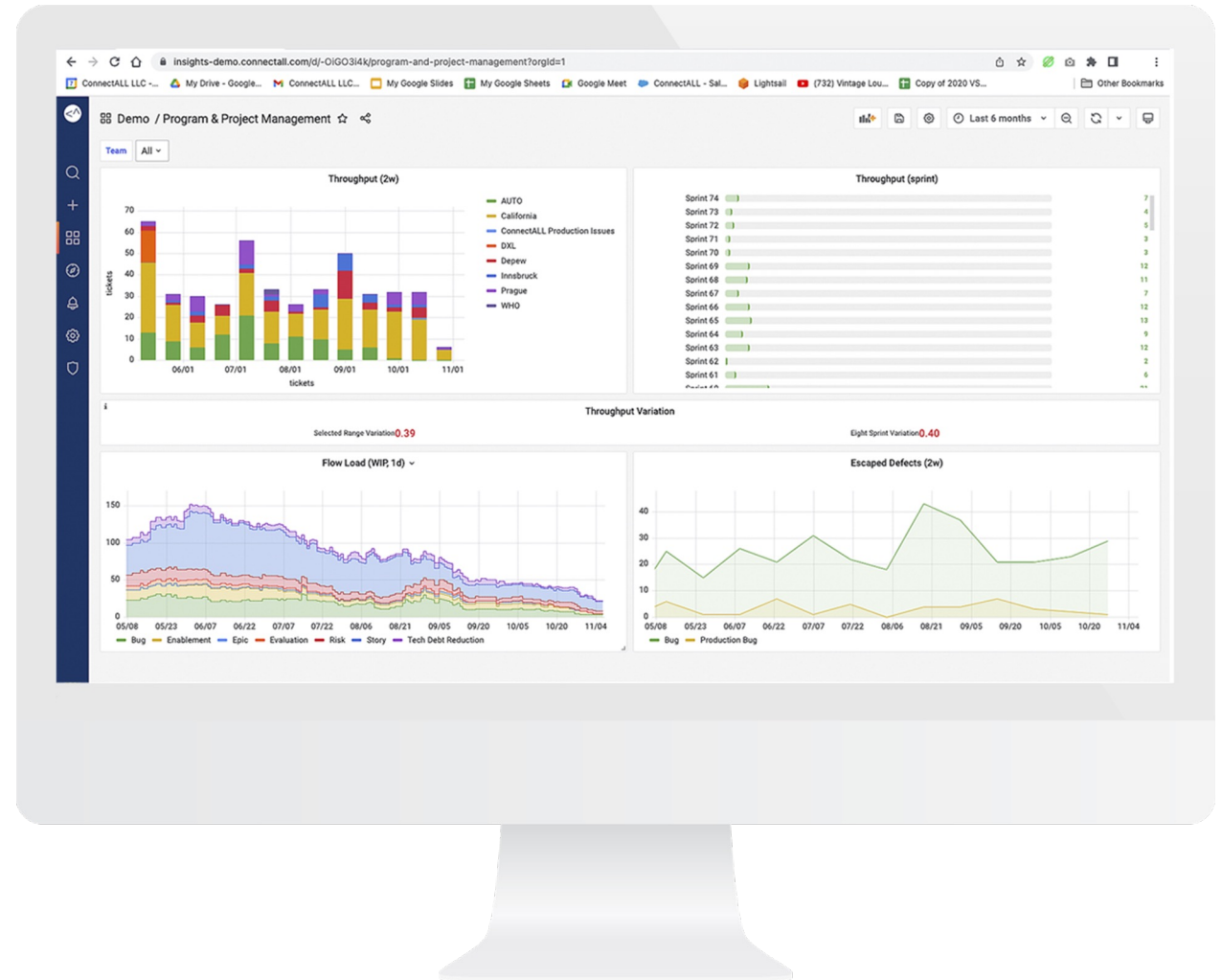
Capture, normalize, and aggregate data across various tools in the value stream.



Quickly identify waste and inefficiencies



Predictive analytics to aid in making timely business decisions in order to pivot priorities and activities to align with shifting strategies



Metrics Approach

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

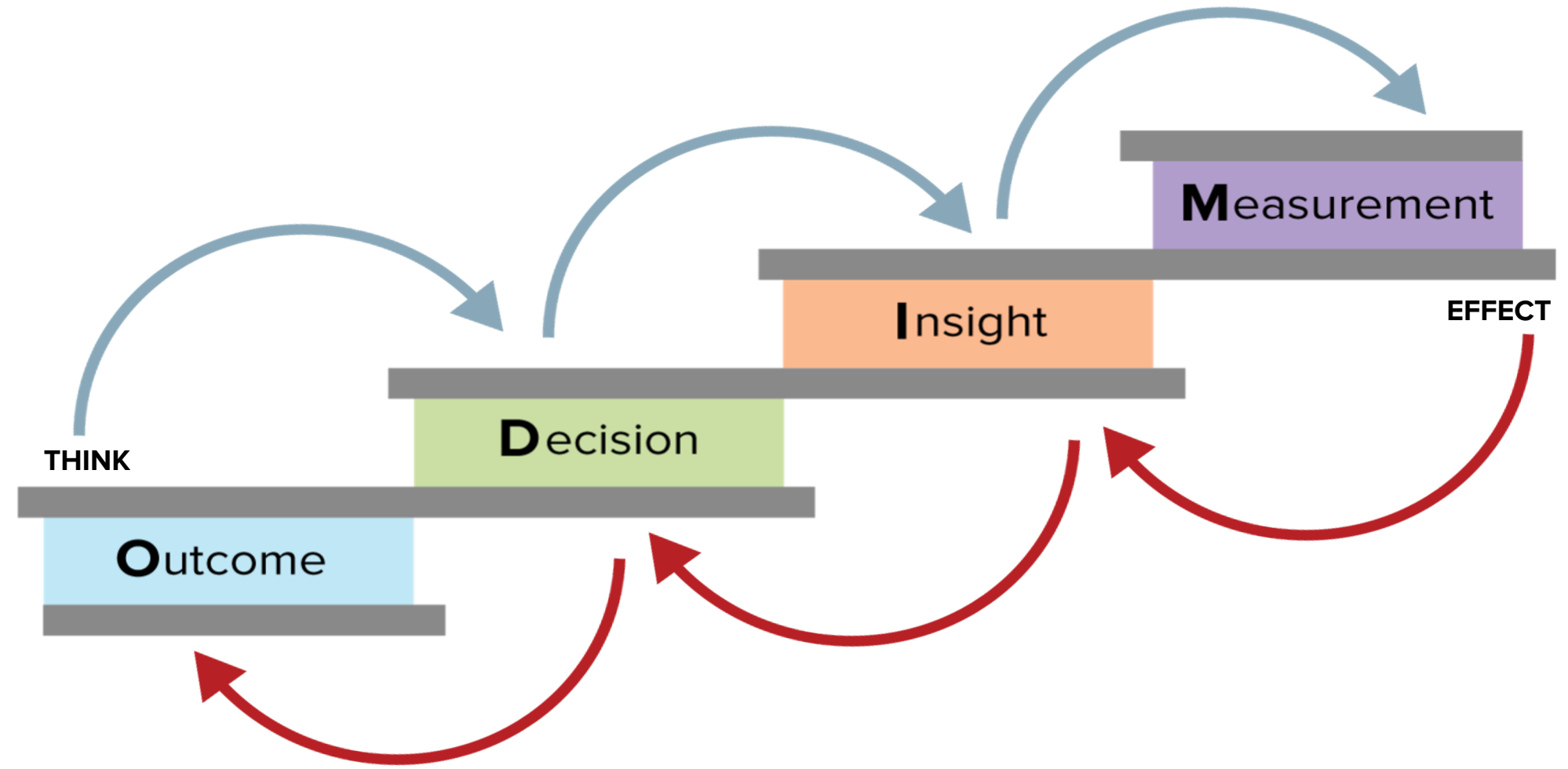
**How well are we
doing Agile?**



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



Metrics Support Desired Outcomes



Metrics Traps

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



Resources

Agile Analytics for
Digital Transformation
Educational Webinar
Series



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Mastering Agile Analytics to
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and Product Managers every
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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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