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SAN DIEGO · 2023

Clarity and Agile Integration:
Bi-Modal IT

Your Guides:
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Part I:
Introduction

Are you struggling with implementing Agile tools in your organization in addition to Clarity? This class will review best practices for implementing agile tools in conjunction with Clarity - living in a Bi-Modal world. We will discuss how Clarity can be used to govern both types of work and teams and how Agile tools should interface into Clarity.

Introductions

- Take 5 Minutes

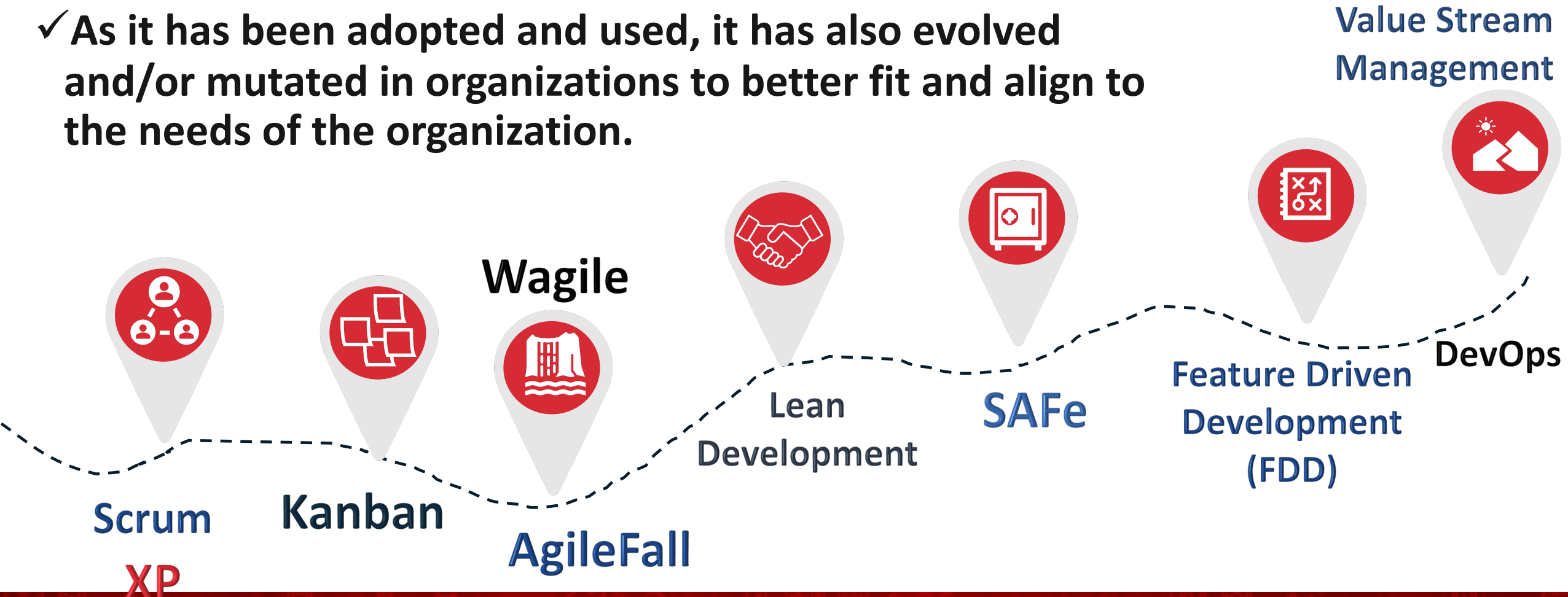- Turn to a Person Near You

- Introduce Yourself

- Business Cards

Agenda

- An Agile Revolution and Evolution
- Integrations
- Consolidations
- Transformation
- Personas
- Connectors

An Agile Revolution and Evolution

✓ **Agile Development approaches were introduced more than 20 years ago!**

✓ **As it has been adopted and used, it has also evolved and/or mutated in organizations to better fit and align to the needs of the organization.**

Value Stream Management

Wagile

Scrum

XP

Kanban

AgileFall

Lean Development

SAFe

Feature Driven Development (FDD)

DevOps

Agile doesn't always mean Organizational Agility

Disparate Tools

+

Inconsistent Approaches

+

Cultural Conflicts

Manual Intervention
Hand-Created Excel Reports
More Financial Oversite
Lack of Visibility into Resources/Capacity
Inaccurate Planning Capacity

General Reasons for Connecting your PPM and Agile Tools

Reporting/Transparency
- Decision-makers want a "one-stop-shop" for monitoring investments

Financial
- Provide Clarity with Time Tracking information from Agile tools

Time Tracking
- Avoid duplicate time-entry

Resource Management
- Generate an understanding of how people are utilized

Agnostic Work Management
- Gain insight and consistency no matter what delivery methods are used

But One Size Does NOT Fit All

Here at Rego, we meet you where you are on your Journey. If you are looking for simple tool integration or more organizational transformation, we are here to help
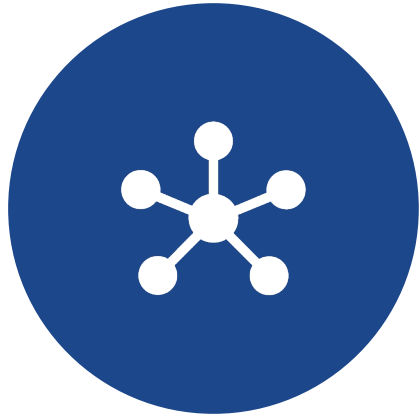
You are Here

We Meet You where YOU are

Question:
Where are you?

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Three General Approaches:
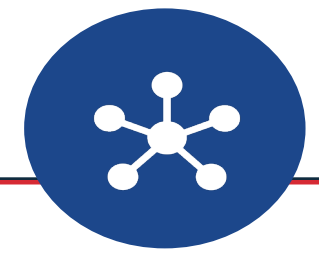
INTEGRATE

CONSOLIDATE

TRANSFORM

Integration Approach:

Rego's Most Basic Approach – All about System-to-System integration

INTEGRATE

- **Is a GOOD fit if you:**
  - Have Mature Tools and Processes
  - Have come to agreements with Finance on needs and expectations
  - Need tool to tool integration (Clarity to your Agile tool) for information and updates

- **Isn't for Organizations who need:**
  - More consolidated Data and reports
  - Need coaching or organizational change help
  - Need to normalize data across lots of Agile and PPM tools

Consolidation Approach:

CONSOLIDATE

Rego's Intermediary Solution: Besides integration, we help with data consolidation and normalization

- **Is a GOOD fit if you:**
  - Are maturing your methodologies
  - Have come to some agreements with Finance on needs and expectations
  - Need tool to tool integration (Clarity to your Agile tool) for information and updates
  - Want to normalize data and remove manual intervention between systems

- **Isn't for Organizations who need:**
  - Transformational Help
  - Need coaching or organizational change help
  - Just want tool to tool integration

Transformation Approach:

TRANSFORM

Rego's Most Advanced Approach, we help you transform your development

- **Is a GOOD fit if you:**
  - Have Leadership Buy in
  - Have Commitment from Finance
  - Want Transformational Coaching
  - Want help with reporting and consolidated outputs

- **Isn't for Organizations who:**
  - Want Tool to tool basic integration
  - Still need Finance to buy in or Leadership support
  - Don't want to change approaches

Three General Approaches:
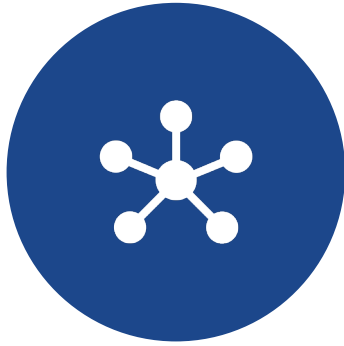
INTEGRATE

Agile and PPM Tools Focus

CONSOLIDATE

Agile and PPM Tools + Data/Content Normalization

TRANSFORM

Agile and PPM Tools + Data/Content Normalization + Coaching and Transformation
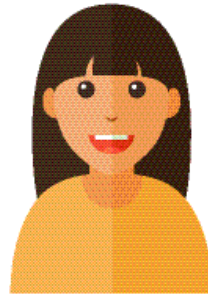
Impacted Personas

And How Rego Transformation Targets Success

Rego's Persona-Based Approach:

With HUNDREDs of clients and decades of experience, we map toward personas to drive value and focused impact. Besides the Agile teams, we align workshops to personas to keep all impacted parties invested in change.
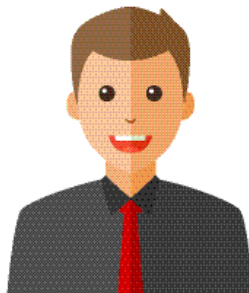
Finance

Product Owner(s)

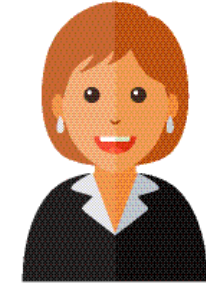**Product Manager(s)**

Leadership/ Sponsors

Project Management Office

Leadership/Sponsor   Finance

What's In It For Me:

- ✓ Increased Visibility
- ✓ Trusted Data and Updated
- ✓ Comprehensive Reporting
- ✓ True Insights into Resource and Team Capacity
- ✓ Speed and Agility

- ✓ Capex/Opex Data
- ✓ Auditable Transactions
- ✓ Summary and Detailed Financial Information

Product Manager(s)   Product Owner(s)

What's In It For Me:

✓ Ability to consolidate features regardless of source
✓ Ability to plan based on roadmaps, Pi's, or timeboxes
✓ Take advantage of capacity for planning
✓ Communicate a trusted Roadmap

✓ Ability to set accurate and insightful capacity constraints
✓ Ability to manage teams autonomously but still give controlled insights
✓ Capability to work better with teams
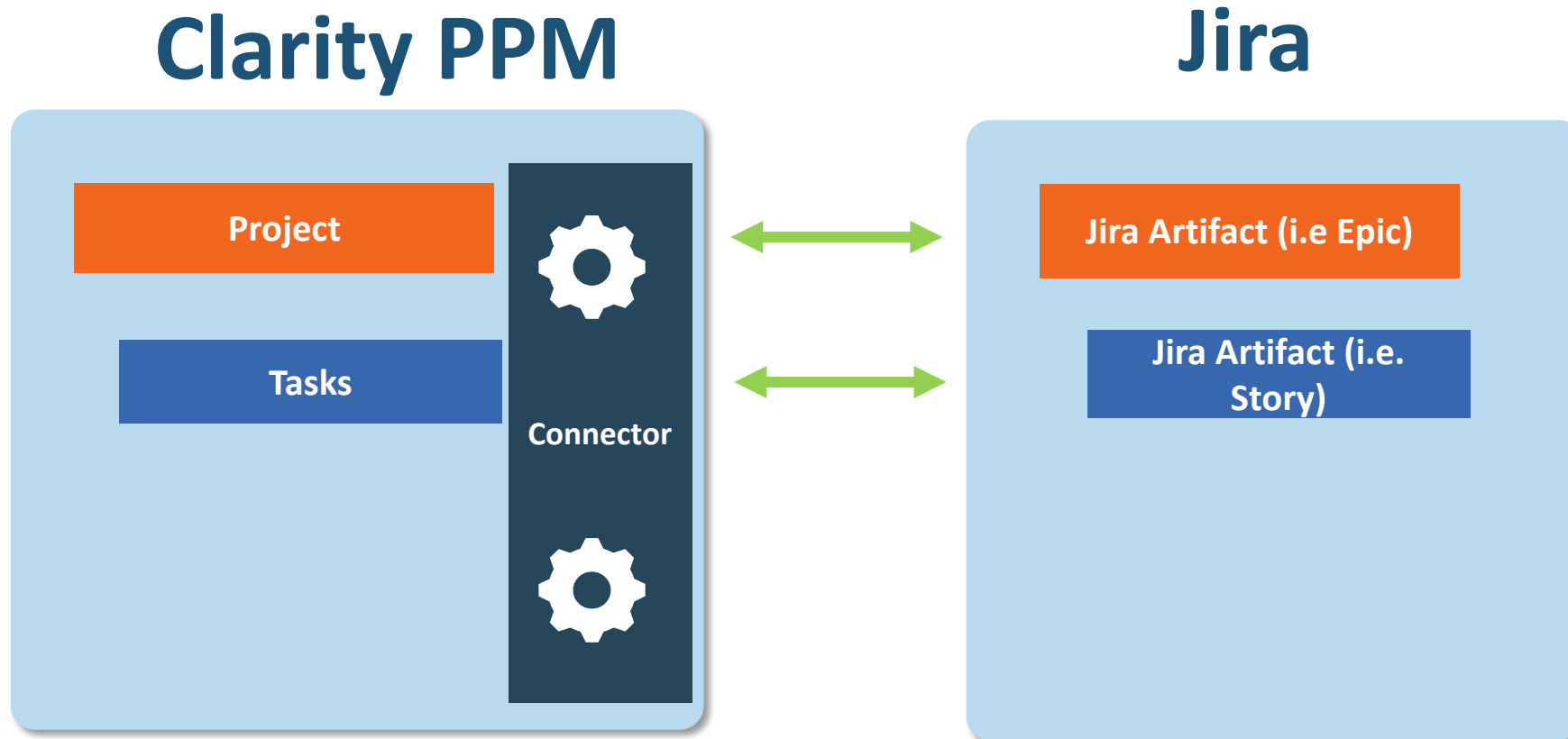
Project Management Office
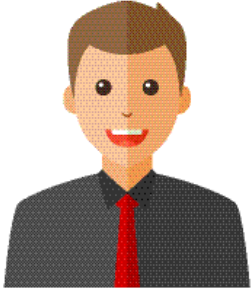
What's In It For Me:

- ✓ Consistent Processes
- ✓ Automation of Data without manual intervention
- ✓ Consolidated Reports and Outputs
- ✓ Trusted Insights
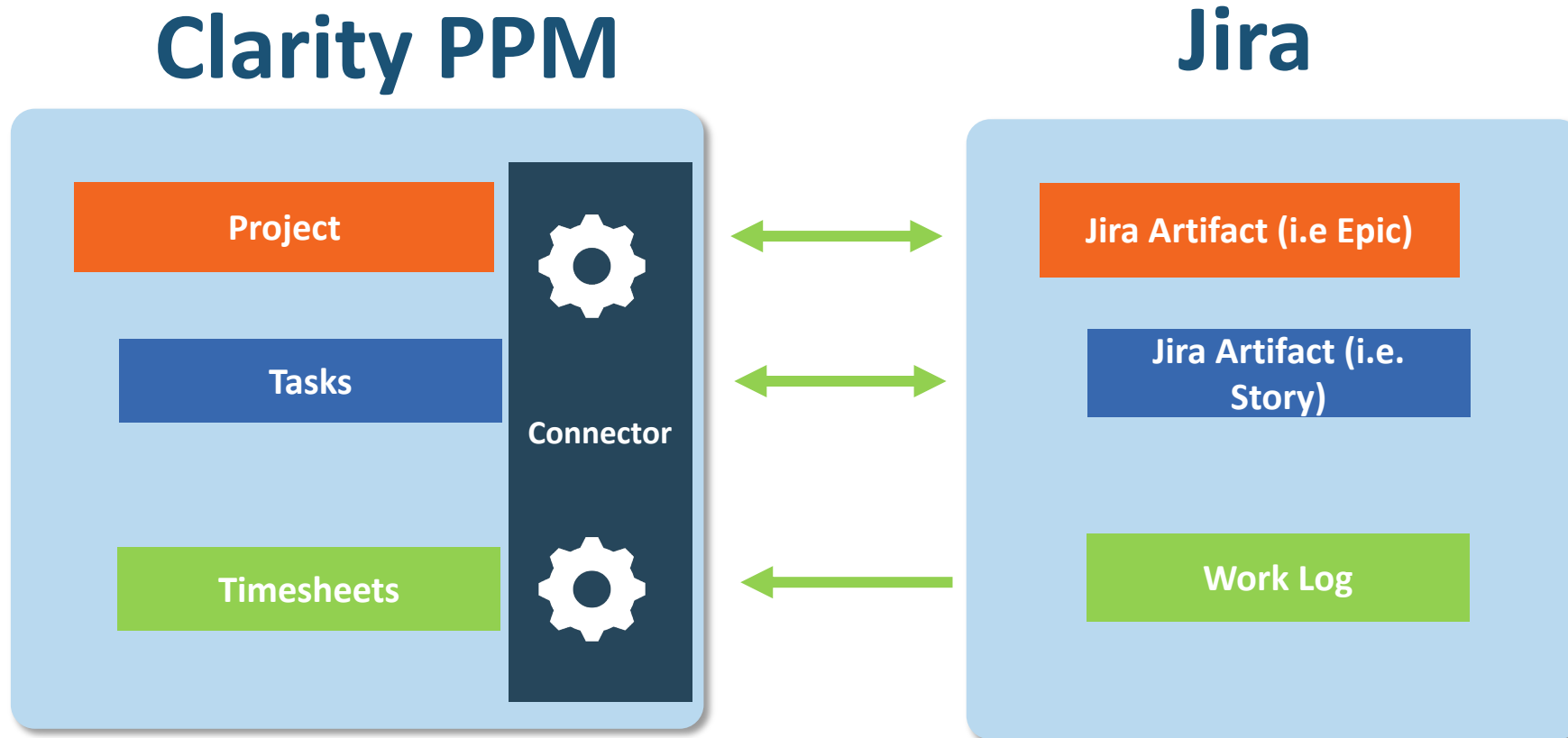- ✓ Metrics to elevate organization
- ✓ Process insight

TOOL PROFILE Examples

JIRA INTEGRATION

Standard Approach – Standard integration of Jira and Clarity

Clarity PPM

Project

Dev Tasks (capex)

Time imported as an aggregation of the feature as a time entry

Connector

Jira

Fix Versions

Tasks (all tickets except bugs)

Tasks (bugs)

Actual Hours logged
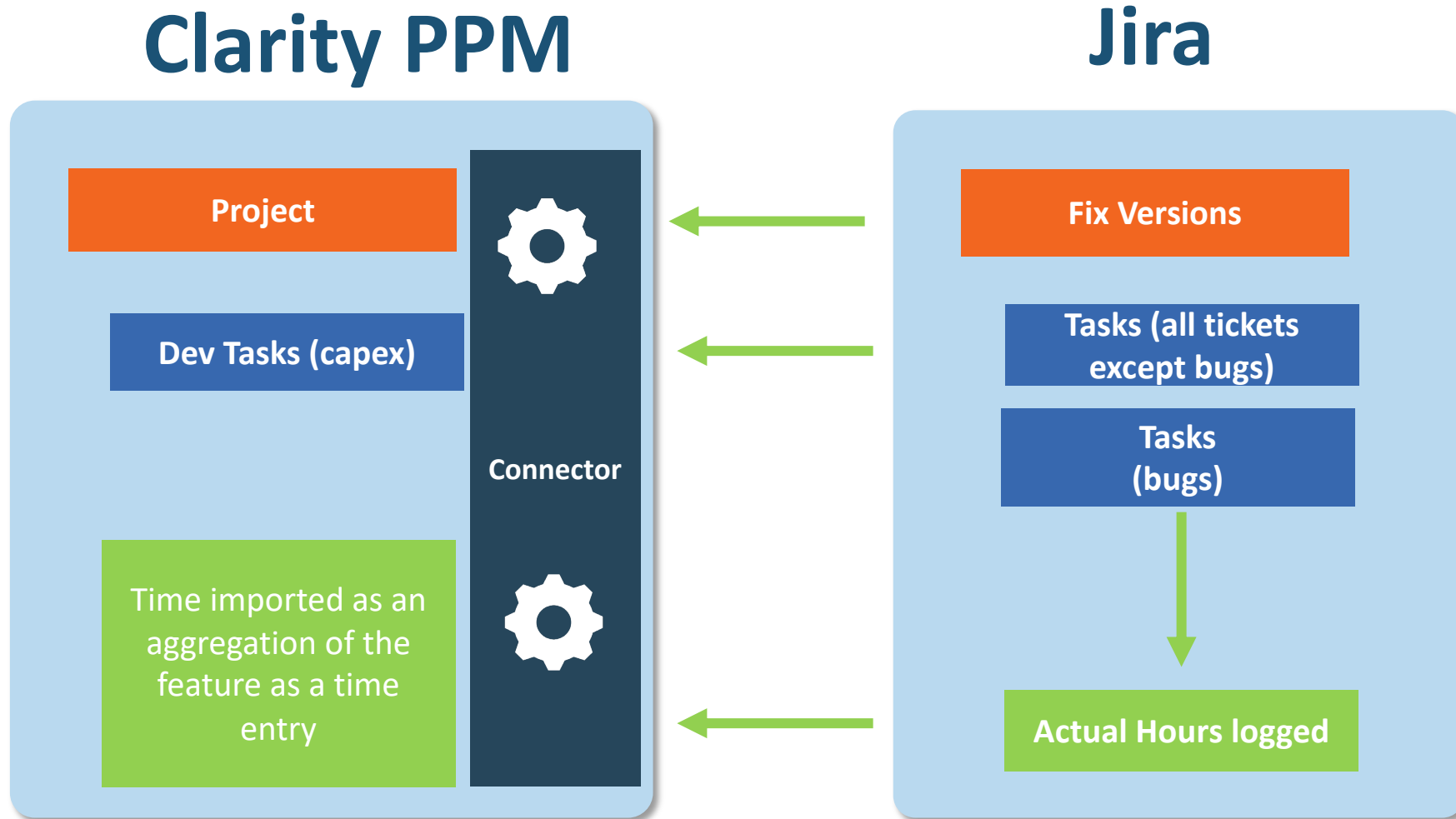
RALLY INTEGRATION

Clarity to Rally – Standard Integration

Clarity PPM

RALLY

Project	→	Initiative
Tasks	←	Features
Connector		
Timesheets	←	Tasks
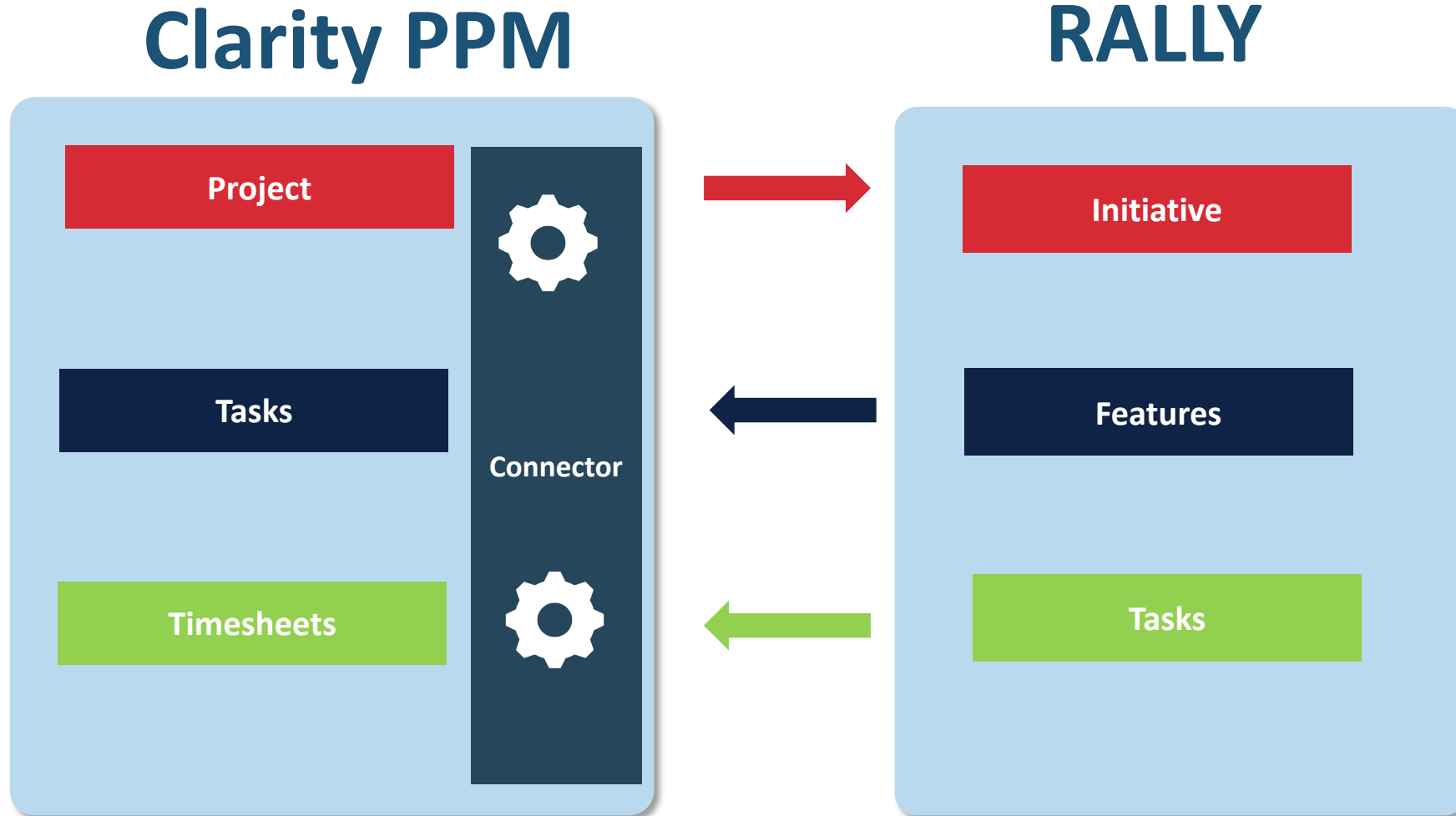
Clarity to Rally – Tailored Approach with multiple methods
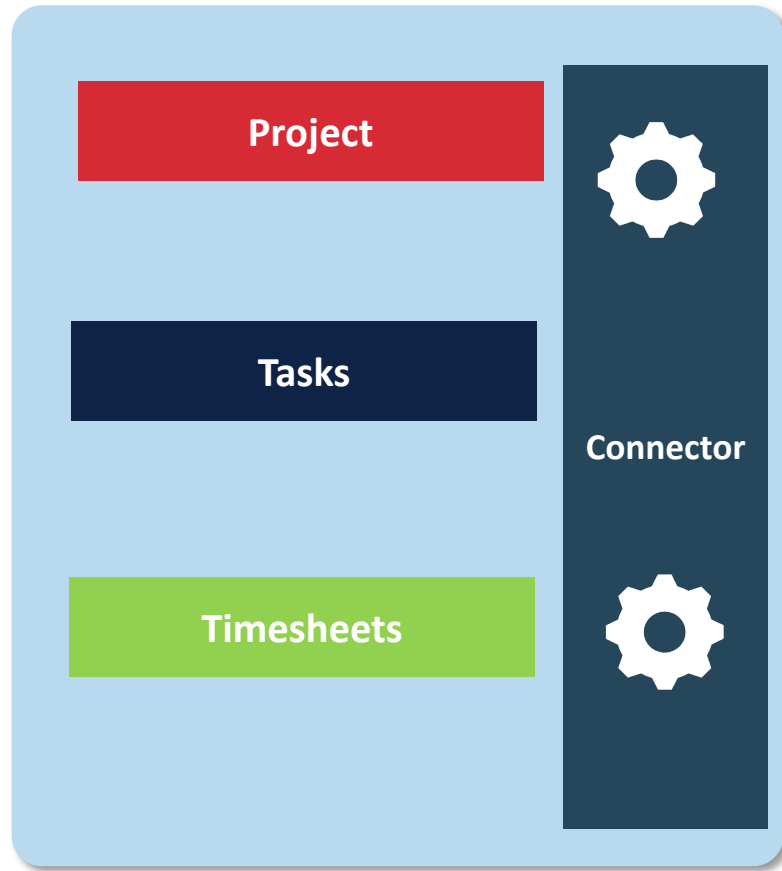
Jira integration with Rally in the middle -

Broadcom ValueOps Solution

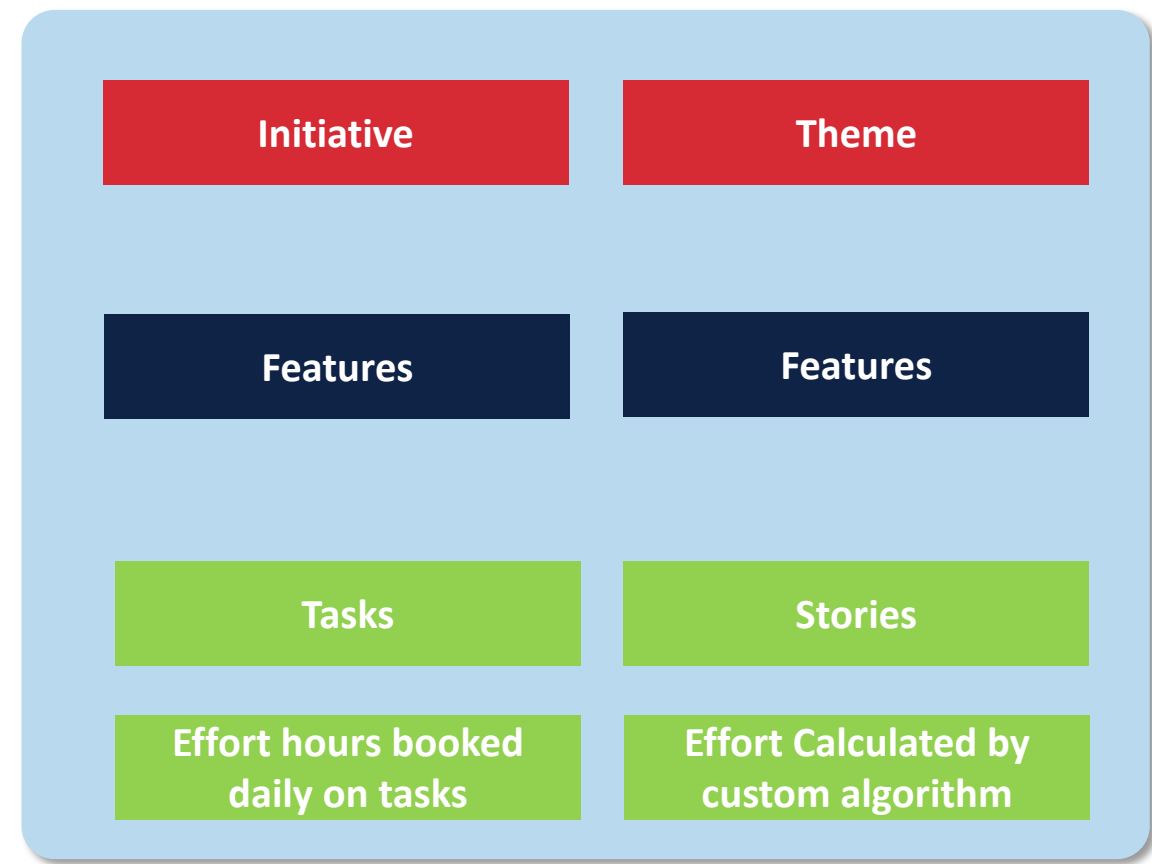| BUSINESS STRATEGY & PRODUCT PORTFOLIO	• Product Portfolio Management • Investment Strategy • Budgeting/Funding/Software Capitalization • Strategic Roadmaps • Objectives, Outcomes and OKRs	**Clarity**
PROGRAM MANAGEMENT	• PI Planning & Tracking • Dependency & Risk Management • Capacity Planning & Delivery Prioritization • Value Stream Management • Quality Management	**Rally/ Clarity**
TEAM EXECUTION	• Dev Process: SAFe, Scrum, Kanban, … • Execution of Work (e.g. features & stories) • Integration with DevOps Applications	**Clarity** **Rally** **JIRA Software**

Rally + Jira Integration Solution Options

Conceptual Overview

| Basic Integration Implementation	• Less than 200 projects in Rally • 50 Rally projects per connector instance • Designed to connect one Jira instance per connector instance • Support synching defects, tasks, stories, test cases and base level portfolio items (Epics/Features)	**Rally WIC Connector**
Enterprise Integration Implementation	• Ideal for more than 200 Rally Projects • Designed to Scale to 3000 Rally projects • Designed to connect to multiple Jira instance • Supports synching defects, tasks, stories, test cases, Portfolio Items, Iterations	**Rally Adapter for Jira**

The Rally Adapter for Jira detailed

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.
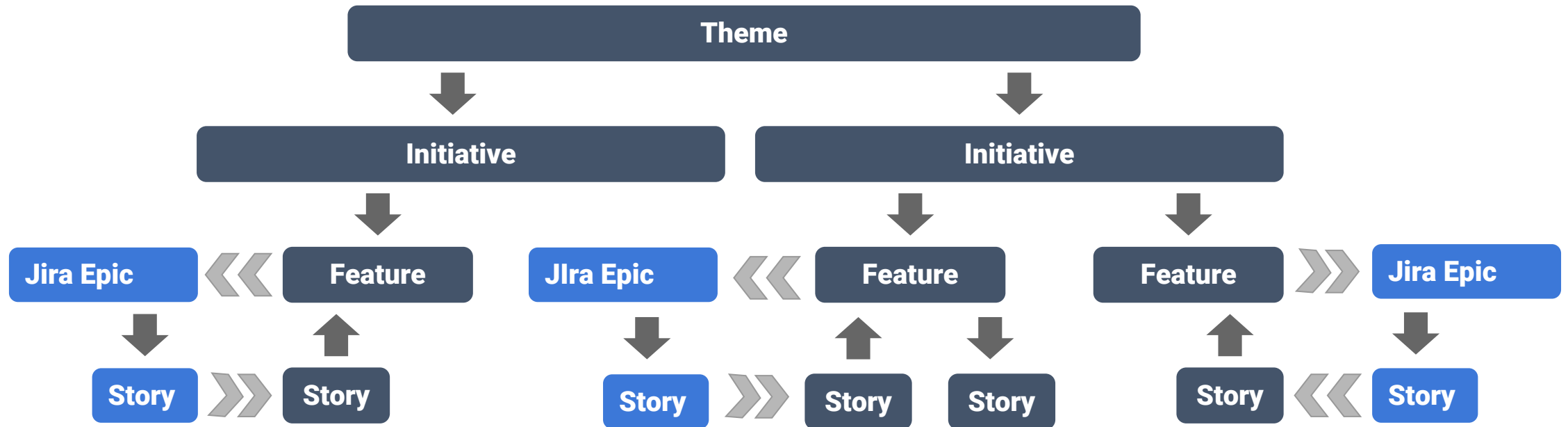
Recommended Workflow

- **Create/originate Features in Rally** that are synced into JIRA Epics.

- Epic updates may flow back from JIRA to Rally if there is some execution team refinement of feature data expected.
  - *While not required, ideally features **should** be originated in Rally if that is where planning is taking place.*

- In some scenarios, the execution teams want to clone a feature, or break a feature into multiple features in JIRA.
  - If this scenario is prevalent, then Features/Epics may originate in both systems.

- Depending on where the execution teams like to break down their features/epics, **Stories** can originate in JIRA or Rally.

- If stories only originate in JIRA, there is likely not value in syncing stories or updates from Rally to JIRA, so a unidirectional sync is recommended.
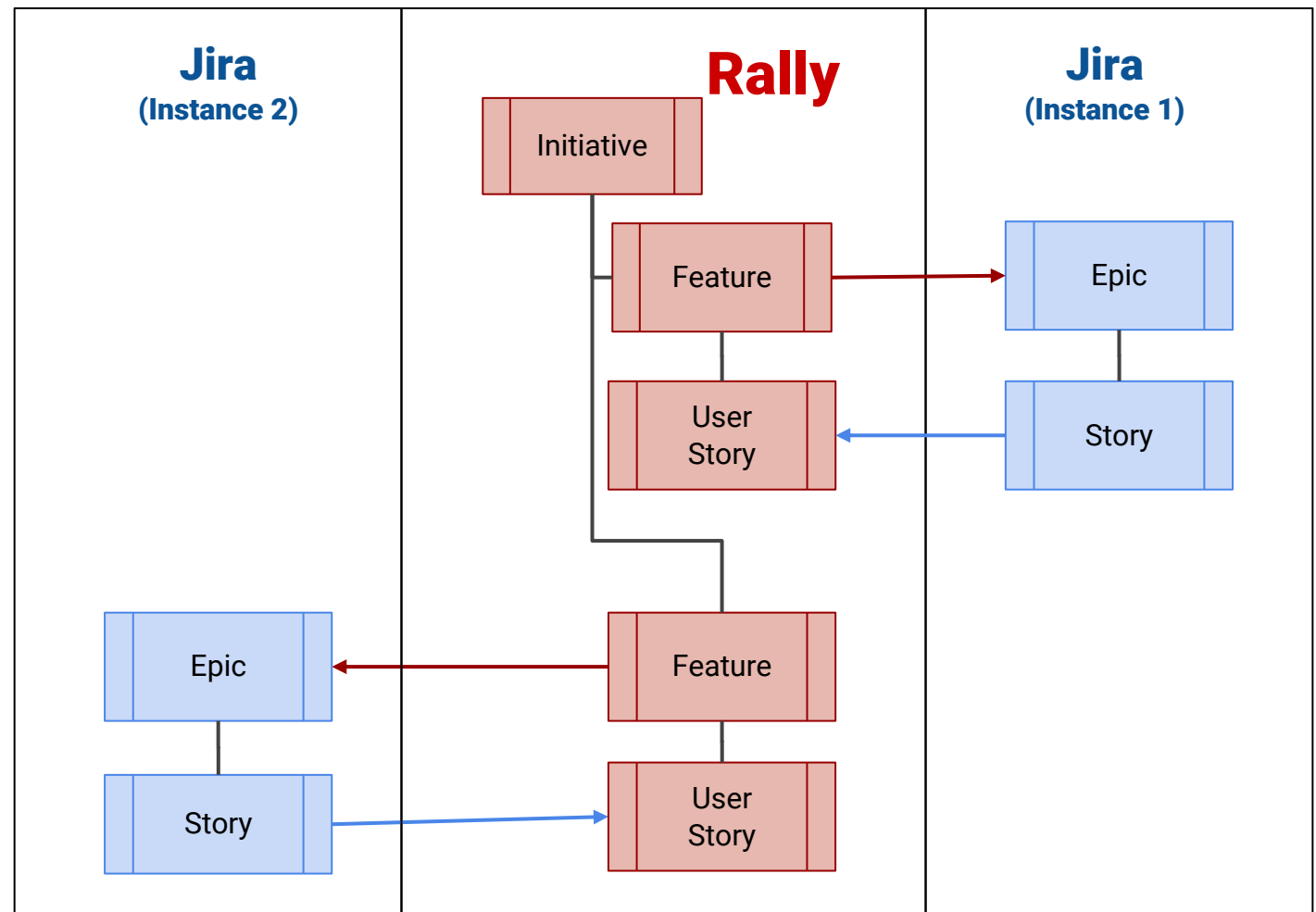
Questions?

Surveys

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

Thank You For Attending Rego University

Instructions for PMI credits

- Access your account at pmi.org
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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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