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Metrics that Matter: Turning Data Into Value Realization

Your Guides:

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Introduction

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Activity Doesn’t Equal Impact

The Problem

Teams track story points, velocity, and features delivered but struggle to demonstrate real business value to stakeholders.

What Stakeholders Want

Executive leadership cares about customer satisfaction, revenue impact, and competitive advantage - not just output metrics.

The Solution

Rally + Insights provides frameworks to move from effort reporting to measurable value realization.

Effort ≠ Value: Why tracking work is not enough?

- Stakeholders care about outcomes, not just outputs
- Customer Satisfaction
- Benefit Realization
- Today’s focus: moving from effort reporting to value realization with Rally + Insights

Moving Toward Value Realization

1. Drive Outcomes with OKRs
2. Prioritize Work for Maximum Value
3. Match Plans with Delivery Capacity
4. Measure Outcome Confidence and Value Realization
5. Making It Actionable

Step 1: Drive Outcomes with OKRs

- Define business success before starting work
- Connect objectives directly to delivery
- Create alignment from executives to teams
- Make outcomes visible and measurable

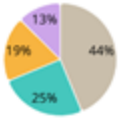
Objectives

New from Template

Search...

View: Default View

Owner



Low Confidence

High Fulfillment

Avg. Fulfillment

0.52

Watch List

Select all Deselect all

Objective: Sta...	ID	Name	Type	Owner	Start	Target
	OB00000001	Enhance Customer Experience	Value Stream	Andersson, Peter	Jul 1, 2023	Jan 28, 202

Key Result: Name	ID
Improve Digital Banking CX Score	KR00000001
Improved NPS score by 4 points	KR000000
Improved sales funnel conversion metrics by 10%	KR000000
Prioritize 2 new customer experience focused epics for this fiscal year	KR000000
Reduced Bank touch time by 30%	KR000000

OB00000002	Increase Revenue From Digital Channels	
OB00000003	Increase Process Automation	
OB00000004	Improve Customer Satisfaction Through Innovation	
OB00000005	Improve User Adoption	
OB00000006	Harden Security	

Rally — Golden Horizon Banking Organization (Parents, Children) — Menu — Search all work items

Objectives

Objective: Business Objective — Saved Views: Select or Add Saved and Shared Views

Search Objectives — + Add New — Show Filters — Show Fields — Total Objectives: 6

Rank	ID	Name	Key Results	Target Date	Confidence Score	Associated Work
1	BO6	Improve Customer Satisfaction Through Innovation	0	2025-10-08 11:59 PM ...	70%	0
2	BO5	Increase Customer Engagement	0	2025-06-11 11:59 PM ...	60%	0
	PO3	Improve the Customer Onboarding Process	0	2025-04-02 11:59 PM ...	90%	3
	TO4	Convert Paper Applications to Digital	4	2025-06-03 11:59 PM ...	30%	0
	PO2	Improve Customer Mobile Banking Engagement	0	2025-03-05 11:59 PM ...	80%	4
	TO3	Enhance the Mobile Banking Experience	3	2025-05-07 11:59 PM ...	90%	1
	TO2	Increase customer engagement	3	2024-08-18 11:59 PM ...	90%	1
3	BO4	Enhance Cybersecurity	0	2024-12-08 11:59 PM ...	80%	1
4	BO3	Increase Process Automation	0	2024-12-08 11:59 PM ...	50%	0
5	BO2	Increase Revenue From Digital Channels	0	2024-12-08 11:59 PM ...	80%	1
6	BO1	Improve the Digital Customer Experience	0	2024-12-08 11:59 PM ...	70%	1

1 Achieve a rating of at least 4.5 stars for the mobile app within 6 months

Current 3

Final Target 5

60%

Update Actuals

2 Launch at least 3 new mobile app features within 6 months

Current 3

Final Target 3

100%

Update Actuals

TO13 Improve customer satisfaction

Overview Data | Key Results 3 | Associated Work 2 | Discussions 0 | Revision History

Associated Work

Saved Views: Select or Add Saved and Shared Views

Search Work Items | Link Existing | Show Filters | Show Fields

Total Work Items: 2

ID	Name	Release	State	Percent Done By Story Plan Estimate	Percent Done By Story Count	Project
F4	Integrations with CTMS	FY 25 Q2	Imple...	33% 7/21 points complete	20% 1/5 stor	Mobile Team
F16	Protocol Deviation Prediction	FY 25 Q2	Imple...	50% 11/22 points complete	50% 3/6 stor	Core Team

Step 2: Prioritize Work for Maximum Value

Framework-Driven Prioritization

Use objective prioritization methods like WSJF (Weighted Shortest Job First) or Value vs. Effort matrices to build backlogs that maximize business value rather than personal preferences or loudest voices.

Strategic Alignment Transparency

Create clear visibility into why specific work items are prioritized by showing direct connections to strategic objectives. This transparency builds stakeholder confidence and reduces priority debates.

Continuous Re-prioritization

Business needs shift rapidly in today's market. Implement regular prioritization reviews that allow teams to adapt quickly while maintaining focus on highest-value initiatives.

Effective prioritization requires discipline and consistent application of objective criteria. Teams that master value-based prioritization deliver 40% more business impact than those using ad-hoc methods.

Projects By Total | **Features** | Alignment | Progress | Revision History

Add Features | Show Filters | Show Fields | Hide Removed

ık	ID	Name	Planned Project Assignment	Value Score
	F6	Realtime notifications	Mobile Team	20
	F15	Security Algorithms	Mobile Team	14
	F25	Premier fraud alert program	Core Team	10
	F7	Capacity Analysis	Core Team	9
	F1	Priority Fraud Alerts	2	8
		Allocation	API Team	
		Allocation	Architecture Team	
	F10	Network detection and analysis	Public Safety Program	8
	F12	Integrate with PayPal	2	7
		Allocation	Architecture Team	
		Allocation	External Transfers Team	

Time Criticality
13

User/Business Value
1

RR/OE Value
8

Job Size
20

Step 3: Match Plans with Delivery Capacity

Align Value with Capacity

Match your highest-value priorities with actual team capacity. Overcommitting leads to delayed deliveries and eroded stakeholder trust.

Scenario Planning

Run "what-if" scenarios to understand the impact of capacity changes, scope adjustments, or timeline modifications on value delivery.

Stakeholder Alignment

Set realistic delivery expectations based on data-driven capacity analysis rather than wishful thinking or external pressure.

Capacity Planning Best Practices

- Use historical velocity data for realistic estimates
- Account for planned time off and holidays
- Include buffer time for unplanned work and support
- Consider skill-based capacity constraints, not just headcount

Common Planning Pitfalls

- Assuming 100% team utilization is achievable
- Ignoring dependencies between teams or initiatives
- Planning without considering technical debt impact
- Failing to account for ramp-up time for new resources

Roadmaps

Business Banking Engagement Roadmap RD00013

Roadmap Items | Highlights | Hierarchy | Conversations | Properties

Scenario: Default Scenario POR

Manage | Save As

Search...

Default Scenario POR

Participatory Budget Team 1

Search...

View: Solution Roadmap

Save

2024-Q2 | 2024-Q3 | 2024-Q4 | 2025-Q1

Digital Loan App Content — Not In Plan

Knowledgebase — Not In Plan

Loan Calculator Tool — 32% Not In Plan

Digital Banking User Experience — 22.58% Not In Plan

Homepage — 0% Not In Plan

Improve Save and Return — Not In Plan

Improve User Adoption

% Done by Story Count 0%

Loan Assist eTransfer — 0% Not In Plan

Harden Security

% Done by Story Count 17.84%

AI Security Scorecard — Not In Plan

Fraud Network Analysis — Not In Plan

Credit Scoring — 0% Not In Plan

Real-Time Data Analytics and Reporting — Not In Plan

Configuration Options — In Plan

Economic pattern analytic engine — In Plan

Integrate with AAPI Gateway — 0% Not In Plan

NexGen Fraud Alert System — 53.52% In Plan

Improve User Adoption

Details

Summarize

Legend

PN1 | FY25 Q3 | Draft | FY 25 Q3

Portfolio Item Type: Features — 21 Assigned, 22 Unassigned

Points: Complete 93 7 % | Rollup 366 29 % | Estimated 1113 89 % | Breakdown

Capacity 1245 base

Projects By Total | Features | Alignment | Progress | Revision History

Add / Remove Project(s) to Plan

Project Name	Features		Complete	Rollup	Estimated	Capacity
API Team	5		6 1 %	27 7 %	270 79 %	340
Architecture Team	2		0 —	13 26 %	33 66 %	50
Core Team	4	1	52 21 %	168 70 %	300 125 %	240
External Compliance Team	2		3 5 %	16 26 %	35 58 %	60
Internal Compliance Team	1		0 —	10 10 %	100 100 %	100
Mobile Team	4		24 20 %	99 83 %	200 166 %	120
Security Team	3					
Shared Service ART	1					

Velocity (Points) Forecast

70% Probability of Completing Between 338 and 474 Points

Number of simulations

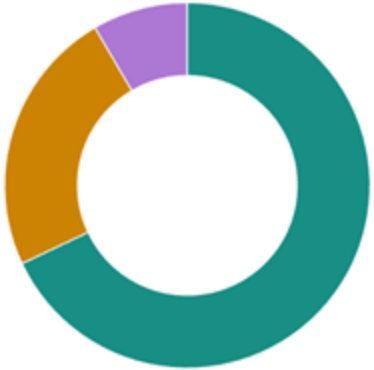
Completed points

Projects By Total | Features | **Alignment** | Progress | Revision History

Align to: Portfolio Item Strategic Theme

Alignment Value: Estimated

Percentage of Capacity Plan



890 Total Points

ID	Portfolio Item Strategic Theme	% of plan	Estimated
S1	Digital Banking	68%	605
S3	Risk Mitigation	24%	210
	None	8%	75

Step 4: Measure Outcome Confidence & Value Realization

Outcomes > Outputs

Completing Work ≠ Achieving Outcomes

Shipping features is just the beginning. Real value comes from user adoption, behavior change, and measurable business impact that follows delivery.

Leading Indicators Predict Value

Track early signals like user adoption rates, NPS scores, and performance metrics that predict long-term business value before it's fully realized.

Connect Delivery to Business Results

Establish clear causal relationships between delivered features and measurable business outcomes through careful attribution and analysis.

Report Impact, Not Just Activity

Shift executive reporting from velocity and burndown charts to customer value metrics and business outcome achievement.

Outcomes

~Customer Growth

50%

No Future Target Defined

~NPS

79%

No Future Target Defined

~Customer Growth Confidence Metrics

Charts | Tiles

Daily Active Users

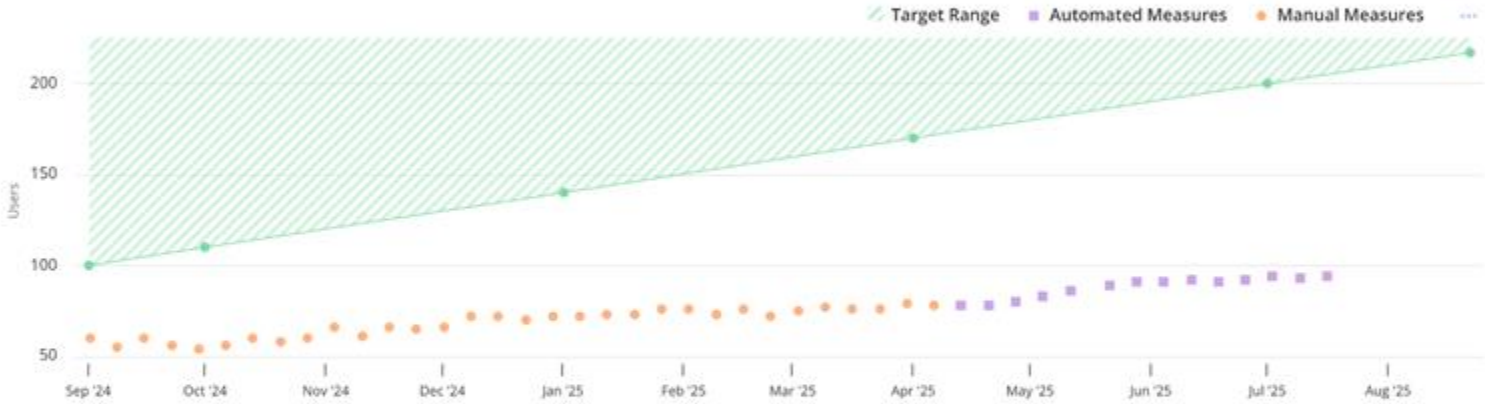
Next Target:

Greater than or equal to: 230

By This Date: 10/1/2025

Probability: 15%

Last Measure	Metric Weighting
94 on 7/16/2025	40%



Stickiness

Next Target:

Greater than or equal to: 71

By This Date: 10/1/2025

Probability: 85%

Last Measure	Metric Weighting
71.4	20%

Making It Actionable

Start with Outcomes, Not Activity

Begin every planning cycle by defining clear, measurable business outcomes. Let these outcomes drive all downstream prioritization and planning decisions.

Prioritize with Objective Methods

Implement value-based prioritization frameworks that remove subjectivity and political influence from backlog decisions. Make prioritization criteria transparent and consistent.

Plan Capacity Realistically

Base delivery commitments on historical data and realistic capacity assessment. Include buffers for unplanned work and avoid overcommitting team capacity.

Measure and Communicate Value

Track leading indicators of value realization and communicate business impact alongside delivery progress. Make value achievement as visible as velocity metrics.

Lessons to Gain Value

Organization Directive

Value realization requires clear organizational commitment and leadership support. Without top-down mandate for outcome-focused measurement, teams default to activity tracking. Executive sponsorship and consistent messaging are essential for transformation success.

Measurable Data

What gets measured gets managed. Establish concrete metrics for business outcomes before starting delivery work. Define success criteria that stakeholders understand and care about. Metrics must be actionable and tied to business strategy.

Data Quality

Poor data quality undermines value measurement credibility. Invest in data infrastructure and governance to ensure metrics are accurate, timely, and trustworthy. Clean data enables confident decision-making and stakeholder buy-in.

Value Realization

The ultimate goal is demonstrable business impact that justifies investment in product development. Connect delivery activities to customer outcomes and financial results. Make value realization visible and celebrate outcome achievement.

Questions?