



Velocity Over Volume: The Portfolio Leader's Playbook for the AI Era

Your Guides:
Matthew Gorbsky
Head of Product, Rally

Sponsored by
ValueOps
by Broadcom

Clarity
by Broadcom

Rally
by Broadcom

ConnectALL
by Broadcom

Insights
by Broadcom

Agenda

- Today's Tax
- What's Changed
- Removing the Tax
- The Old Rules Are Now Broken
- Funding the Future
- The New AI Playbook

Today's Tax

- Project and program reporting has always been a core PMO function and challenge
- AI is increasing the volume of data that must now be accounted for
 - More work being done
 - Token spend
 - Planning and tracking pace is increasing

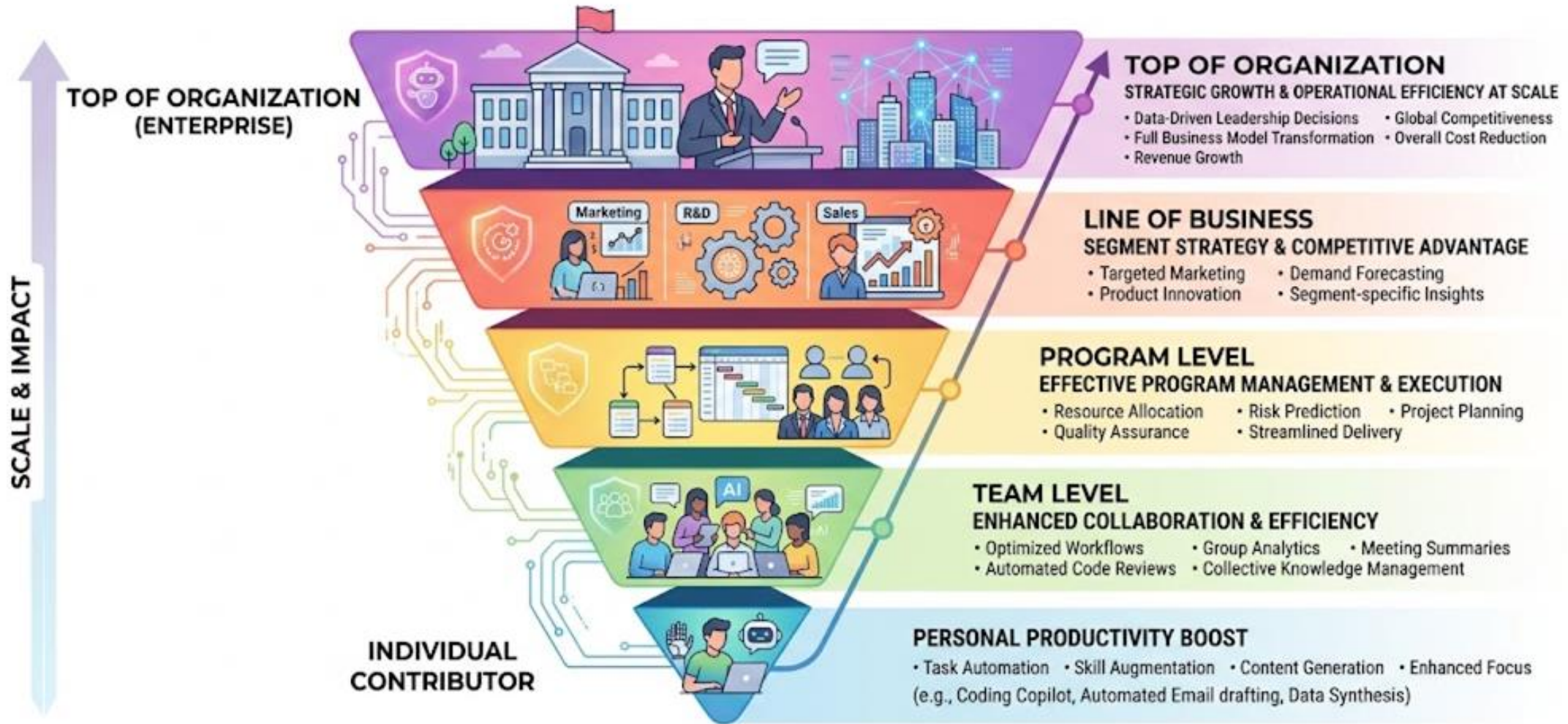
Date: October 6, 2025

Subject: Welcome to Cursor

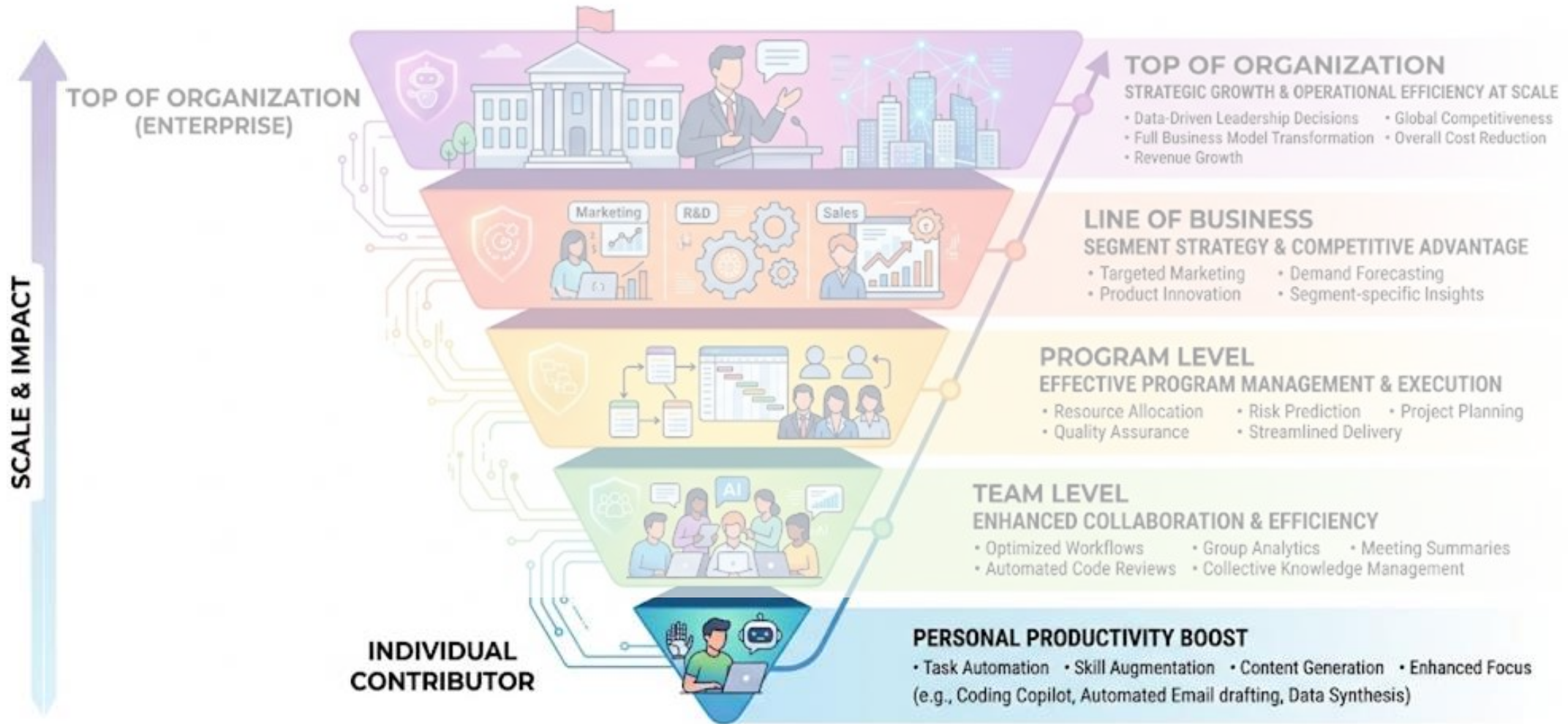


What's Changed?

5

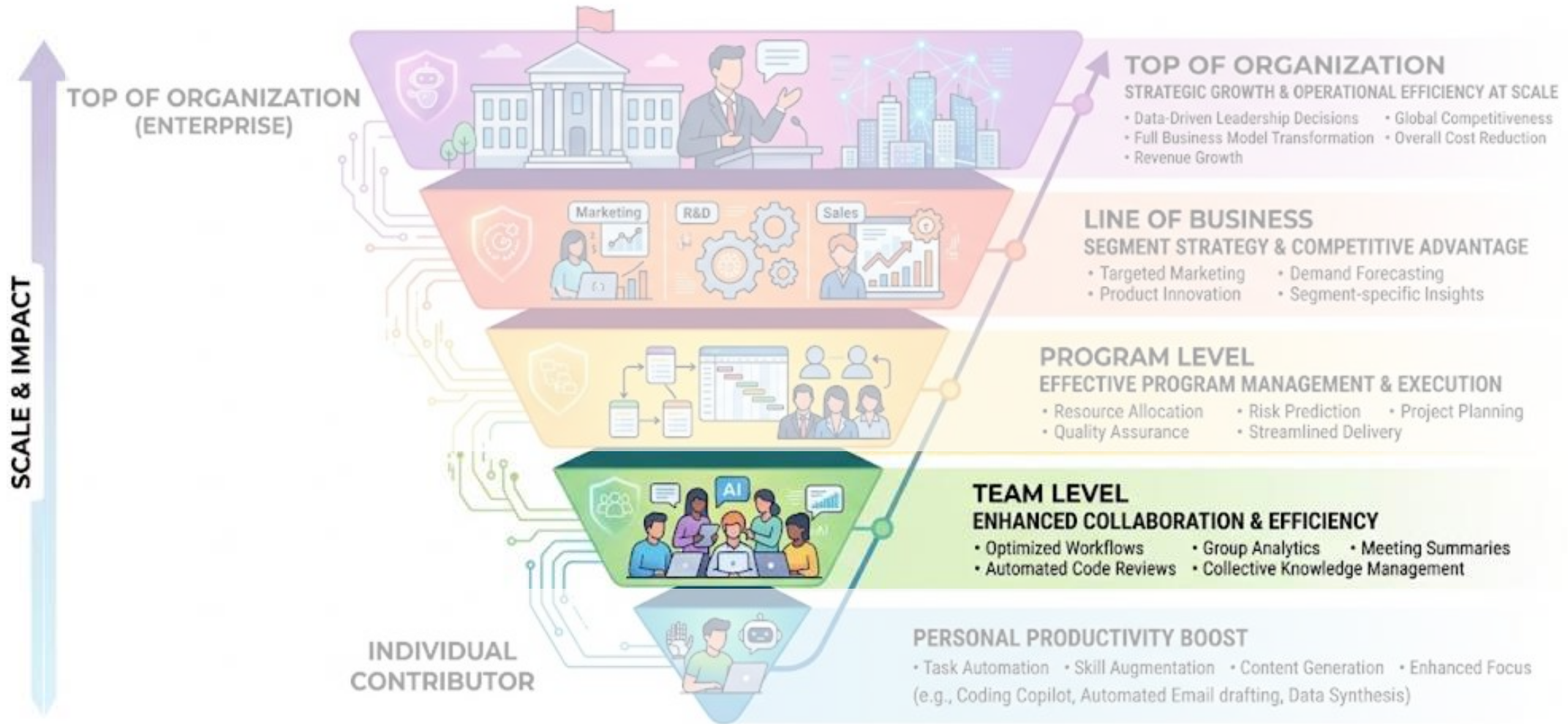


What's Changed?



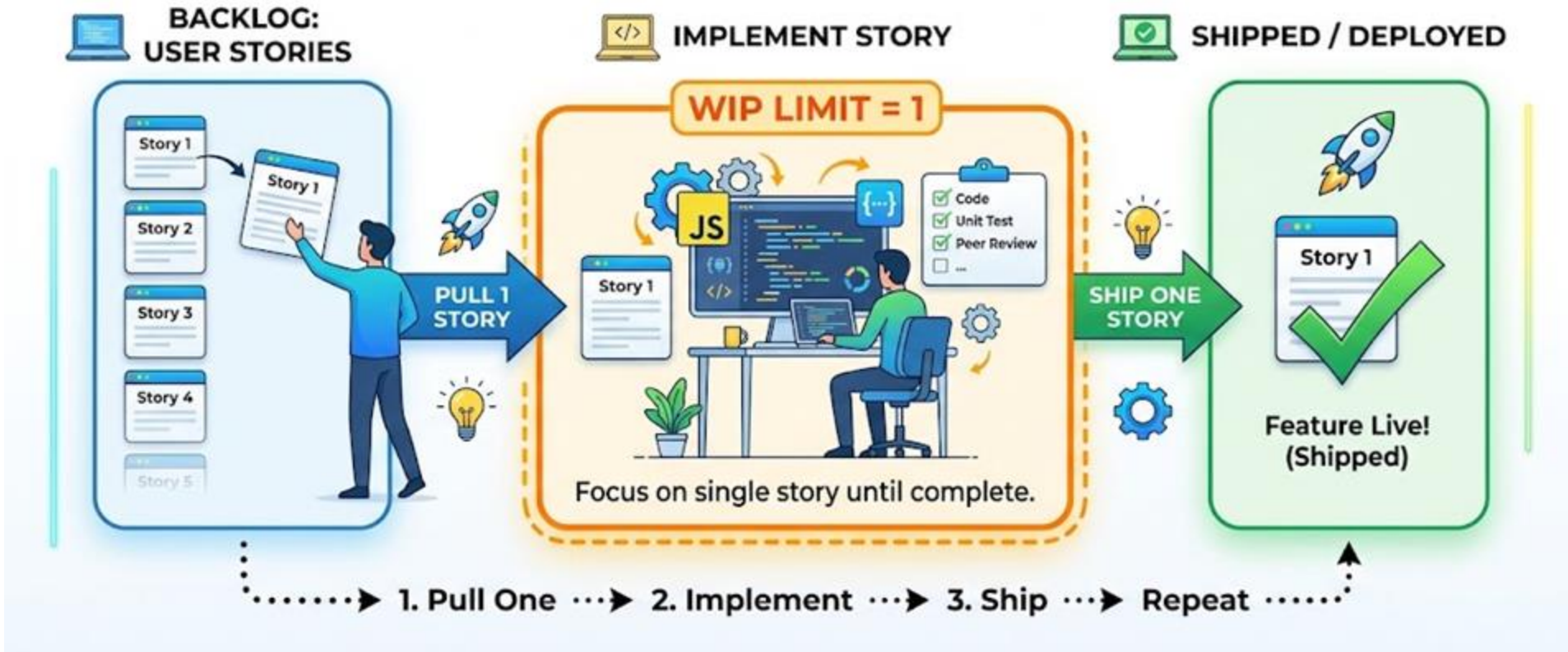
What's Changed?

7



What's Changed?

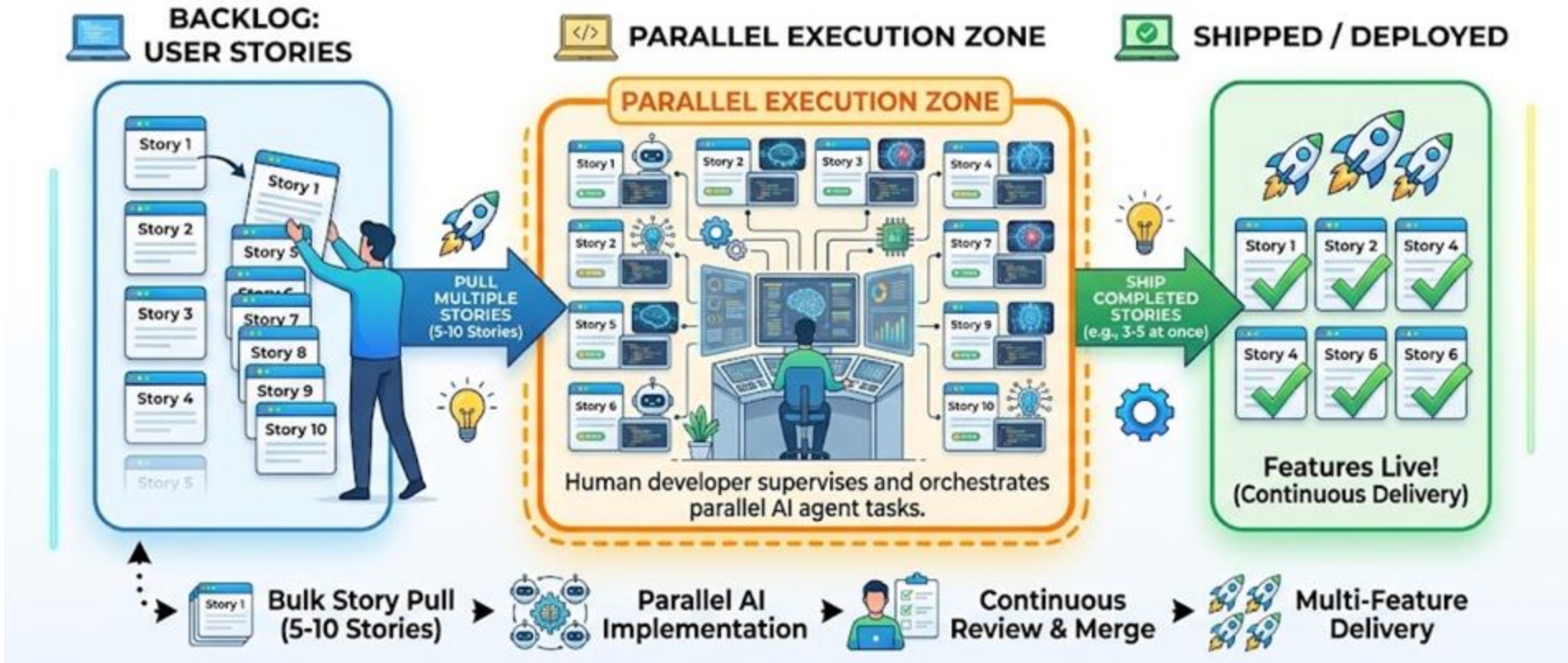
DEVELOPER WORKFLOW: SINGLE USER STORY PROGRESSION (WIP OF 1)



What's Changed?

9

PARALLEL DEVELOPER WORKFLOW: AI-AUGMENTED CONCURRENT TASK MANAGEMENT



But... There are challenges

Adoption is Scattered

- Same tool. Same rollout date.
- Some teams' velocity jumped, several multiples over baseline
- Others stayed completely flat
- Not a skill gap. Not the tool.

Faster Engine, Same Workflow

- Teams that jumped changed how they worked, not just what tool they used
- Teams that stayed flat kept processes built for human-typed code
- Process changes needed to unlock innovation benefits

Adoption isn't free. It has to be funded.

- Teams that changed process borrowed capacity
- Teams that stayed flat were never given the room

"We Don't Have Time to Stop for Gas"

Removing the Tax

4 Things to Automate:

Status

Reports & Data
Collection

Risks

Risks &
Dependencies

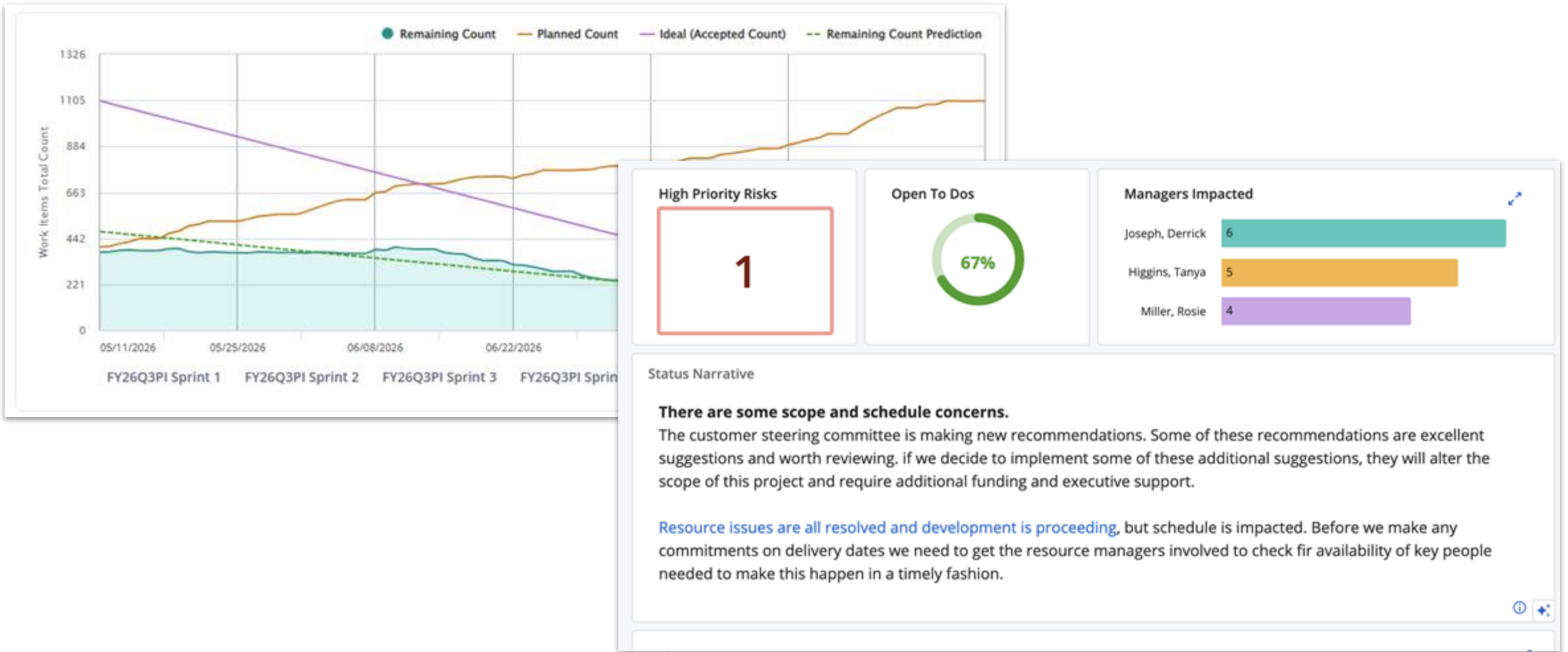
Governance

System-Level
Governance

Backlogs

Backlog Readiness
and Refinement

Automate Status Reporting



Automating Risks and Dependencies

Delivery Confidence					
Summary		Detailed	Recalculate	Delivery Confidence Help	
25% of Remaining Work is in Low Risk Range		Weighted Delivery Confidence 3% High Risk		Milestone Progress 230 / 333	Days Remaining 35
Project Name	Confidence and Risk	Milestone Work	Competing Work	Beyond Target Date Work	Unplanned Work
> Rally Engineering	94% Low Risk	0 / 1 1 Remaining	2 Items	0 Items	0 Items
> just4luck!	>99% Low Risk	0 / 1 1 Remaining	0 Items	0 Items	0 Items
> CoLoRs 🌈 🎨	0% High Risk	38 / 59 21 Remaining	23 Items	2 Items	0 Items
> What's Up Doc 📄	0% High Risk	25 / 44 19 Remaining	63 Items	4 Items	1 Item
> No Goats No Glory 🐐	<1% High Risk	61 / 86 25 Remaining	287 Items	0 Items	1 Item
> Rally DevOps	1% High Risk	18 / 32 14 Remaining	286 Items	0 Items	2 Items
REDACTED	Complete	17 / 17 0 Remaining	0 Items	0 Items	0 Items
> Rally UX Team	>99% Low Risk	15 / 16 1 Remaining	2 Items	0 Items	0 Items
> Fighting Trash Pandas	0% High Risk	56 / 70 14 Remaining	219 Items	1 Item	4 Items

Automating Governance

The screenshot displays the AIRWOLF SPACE Workstream interface. On the left, a sidebar lists various tools: My Space, Search workstreams..., All Workstreams (6), Recent (0), Poem Generator, Team Sprint Work Summary, Investment to Work Align..., Document Analysis Workflow, Data Quality Assessment, and Investment Health Check. The main workspace is titled 'Workstream' and shows a workflow diagram with three steps:

- INPUT: Workstream Inputs** (Inputs required for starting a new run)
 - Team / Project *: Fighting Trash Pandas
 - Sprint / Iteration *: FY26Q4P1 Sprint 2 (Current)
 - Run Workstream button
- LLM CALL: Fetch Sprint Artifacts from Rally** (Ready)
 - Prompt / Config
- LLM CALL: Generate End-of-Sprint Presentatio...** (Ready)
 - Prompt / Config
- SHOW OUTPUT: End of Sprint Presentation Summary** (Ready)
 - HTML Output: {{sprint_presentation_html}}
 - Inspect button

The workflow is connected by arrows indicating the flow from input to the first LLM call, then to the second LLM call, and finally to the output display.

Automating Backlogs

Theme Break Down Assistant for: TH2937

Automated Coaching Insights Engine

Portfolio Item #1

Overview
Develop an automated engine that identifies team anti-patterns (e.g., over-planning, long cycle times) and provides proactive coaching recommendations within the Rally UI.

Business Value
Empowers Scrum Masters and RTEs to focus their coaching efforts where they are needed most, improving overall organizational predictability and flow.

Acceptance Criteria

- Define logic for identifying 5 common team anti-patterns based on Rally historical data.
- MVP: Display coaching alerts on the Team Dashboard.
- Define metrics to measure the reduction in identified anti-patterns over time.

Success Metrics
Reduction in average cycle time by 10% for teams utilizing the insights engine within 6 months.

Dependencies
Requires completion of Flow Metrics services (S609).

Owners(s)
Product Management, Data Science Team.

Scope not included
Integration with external HR or performance management tools.

Future Considerations
AI-driven personalized coaching plans.

Customers
Early adopter programs at Global Enterprises.

Cross-Workspace Performance Benchmarking

Portfolio Item #2

Overview
Enable executives and leaders to compare team performance metrics (Velocity, Flow, Quality) across different workspaces within the same subscription.

Business Value
Provides a holistic view of organizational health and allows for the identification of top-performing patterns to be shared across the enterprise.

Acceptance Criteria

- Create cross-workspace rollup report for Velocity and Cycle Time.
- Implement security controls to ensure data privacy between workspaces where required.

Help me break down TH2937 into Portfolio Items

The Theme TH2937: **Insightful Work Management** focuses on providing holistic insights and guidance at all levels of the organization. It aims to enable better decision-making by aggregating data across the value stream, leveraging flow metrics, and identifying team anti-patterns. Currently, several initiatives are already tracking under this Theme:

- ValueOps Services POC** (S662)
- Advanced Analytics Services Deployed** in FedRAMP (S634) and EMEA (S717)
- Flow Metrics & CFD** for Project Hierarchy (S609) and Portfolio Items (S620)
- Team & Program Dashboard** (S822)
- Predictive Planning Tools** (S377)

To further decompose this Theme and fill the remaining strategic gaps, I will generate a preview of four new initiatives focused on automated coaching, cross-workspace benchmarking, strategic alignment, and external data integration.

Ask me how to create children with AI assistant

You can upload up to 5 files

You are interacting with a generative AI service. AI generated output may contain errors and unexpected results. Do not include any personal data or confidential data in your prompts and carefully review output before use.

Build F113 Story Breakdown

2 of 2 To-dos Completed

Planning Document -- Created **F113_Planning.md** with the full breakdown including acceptance criteria, architecture overview, task details, dependencies, risks, test data requirements, definition of done, and sprint sequencing.

Rally Stories -- All 10 user stories created under F113 in the Global Banking project:

Story	Rally ID	Description	Estimate
1	US249	Define Integration API Contract and Data Model	3 pts
2	US250	Build Integration Layer Service Scaffold	3 pts
3	US251	Implement Payment Rail Inbound Adapter	5 pts
4	US252	Implement Screening Engine Outbound Adapter	5 pts
5	US253	Implement Screening Result Routing Logic	5 pts
6	US254	Implement Resilience and Failover Handling	5 pts
7	US255	Implement Security and Data Integrity Controls	5 pts
8	US256	Implement Observability and Monitoring	3 pts
9	US257	End-to-End Integration Tests and SLA Validation	5 pts
10	US258	Pilot Transaction Validation and Documentation	3 pts
Total			42 pts

Recommended sprint sequencing:

- Sprint 1: US249-US251 (contract, scaffold, inbound adapter)
- Sprint 2: US252-US253 (outbound adapter, routing logic)
- Sprint 3: US254-US256 (resilience, security, observability)
- Sprint 4: US257-US258 (integration testing, pilot, documentation)

Set US249 to in progress and begin creating tasks

Worked for 28s

Done. Here's what was updated in Rally:

US249 - Define Integration API Contract and Data Model is now In-Progress.

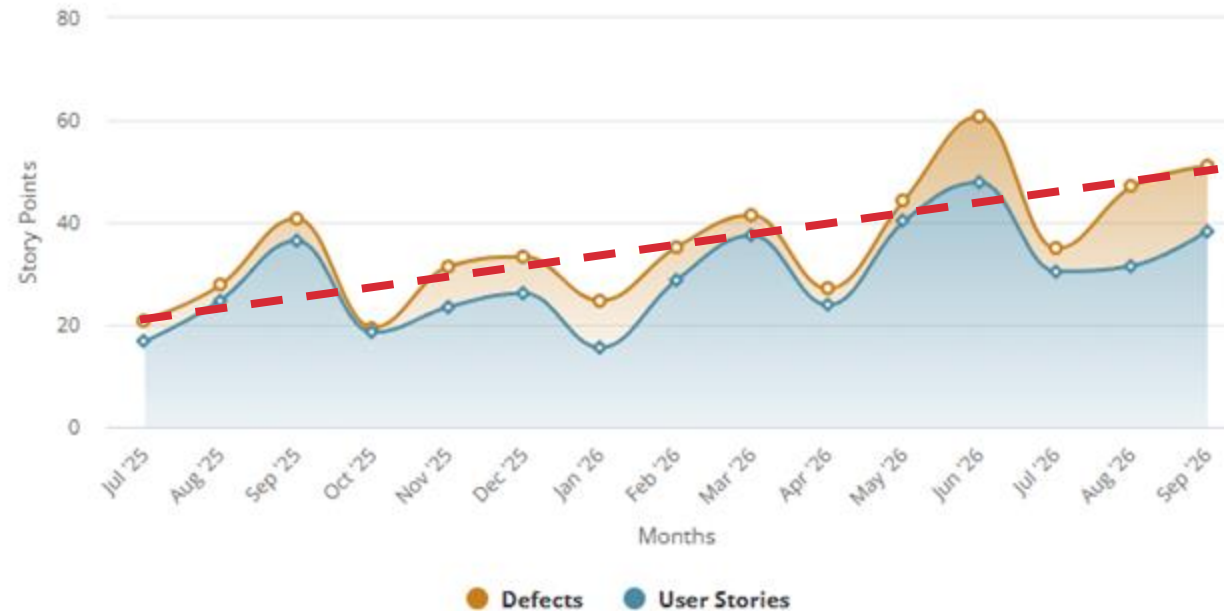
Five tasks were created under it:

#	Task
1	Define Integration API Contract and Data Model
2	Build Integration Layer Service Scaffold
3	Implement Payment Rail Inbound Adapter
4	Implement Screening Engine Outbound Adapter
5	Implement Screening Result Routing Logic

Send follow-up

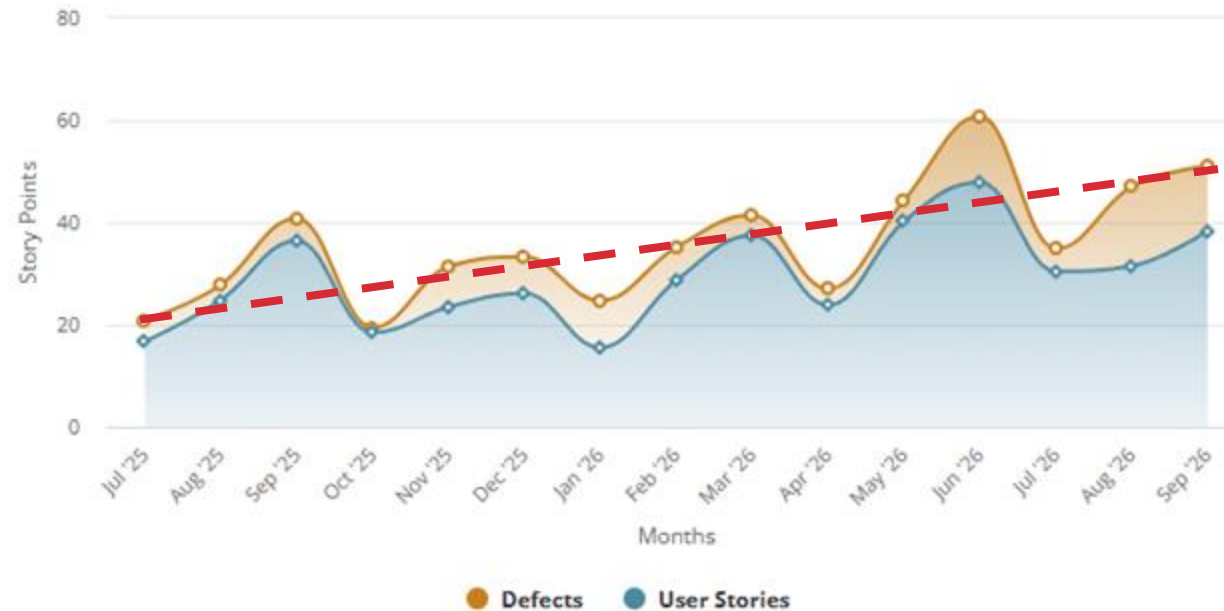
The Old Rules Are Now Broken

Work In Progress

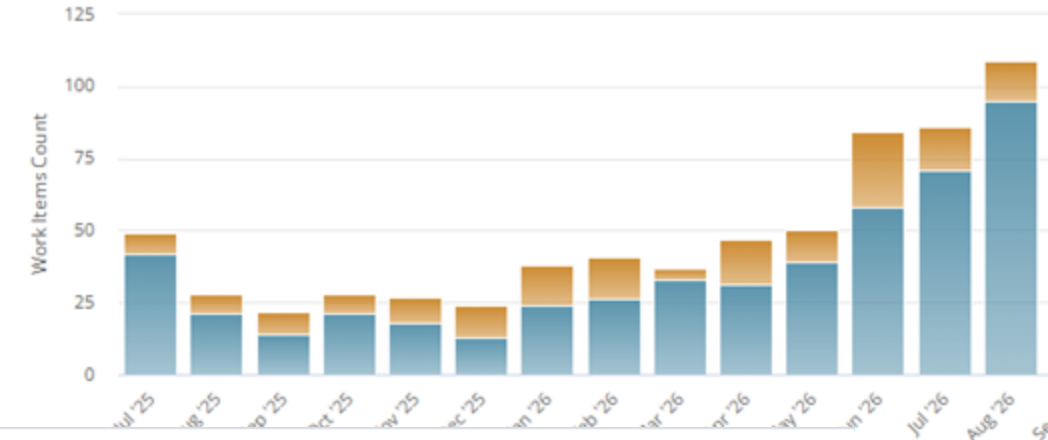


The Old Rules Are Now Broken

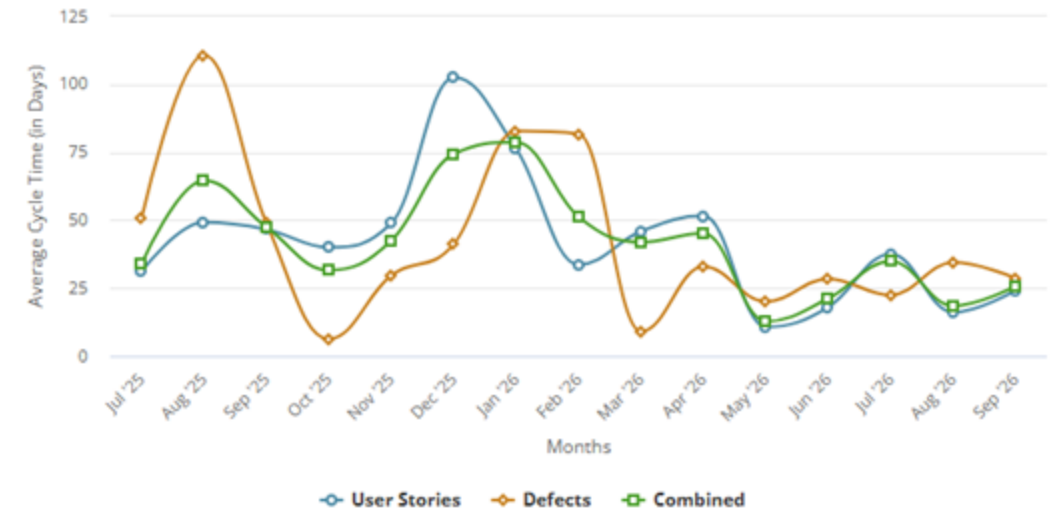
Work In Progress



Throughput



Lead Time

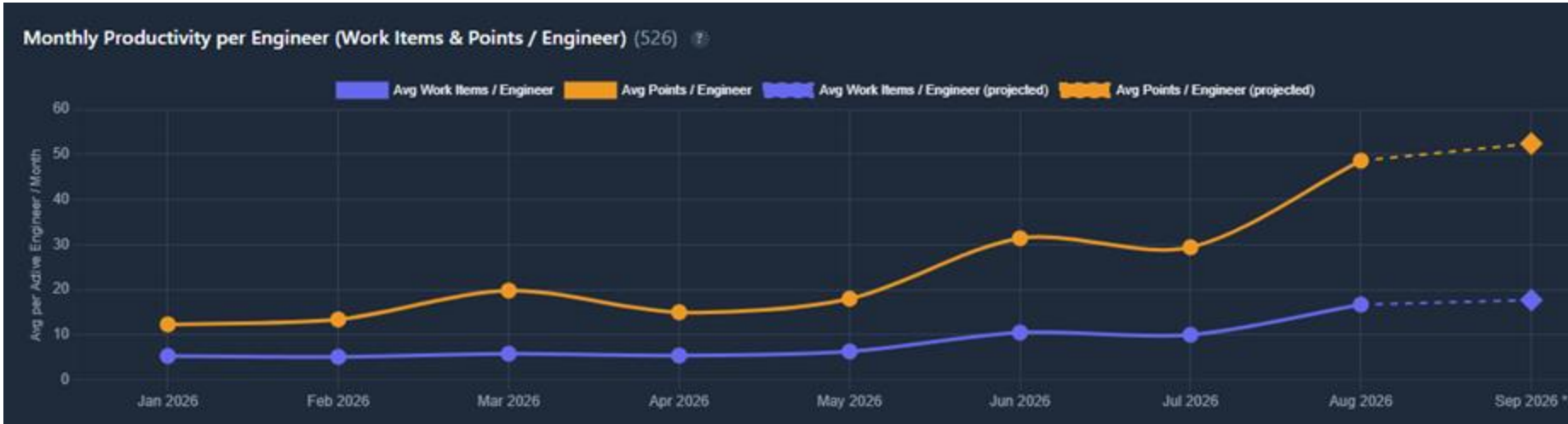


What did these teams do differently?

1. Slowed down to absorb the process change
2. Focused on tooling and mindset shifts that enabled parallelization of work



Funding the Future



EST. AI SPEND ?

\$17167.61

+166.1% vs FY26-Q3 PI

\$14286.07 of it on completed work

\$2228.20 on defects

\$14939.40 on stories



The New AI Playbook

- 1: Automate Status and Data Collection
- 2: Put Token Spend Next to Labor Cost
- 3: Automate Portfolio Alignment and Breakdown
- 4: Protect Capacity for Experimentation
- 5: Set Clear Goals — The One Thing That Doesn't Automate

Velocity Over Volume

The biggest risk with AI is going really fast in the wrong direction

ValueOps Aligns Strategy AND Execution

ValueOps Provides:

- Frictionless Cost Accounting
- Tokenomics
- Strategic Alignment
- Capacity Planning & Forecasting
- Productivity Metrics that Matter
- Infrastructure Portfolio Management

Questions?



Survey



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



Elevate Your Professional Expertise with Rego University Certifications

Rego is excited to continue our **certification programs**, designed to enhance your expertise in Clarity administration, leadership, and technical skills. These certifications provide hands-on experience and knowledge to excel in your career.



Certification Requirements:

✓ **Completion:** 12 units per certification track

✓ **Eligibility:** Open to all Rego University attendees



Important Reminder:

To have your certification **credits tracked**, ensure you **complete the class surveys in the app** after each session. This step is critical for certification progress.

Thank You For Attending Rego University

Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certifications**
- 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.



Phone

888.813.0444



Email

info@regoconsulting.com



Website

www.regouniversity.com