

**RALLY IS
A PILLAR OF
VALUE STREAM
MANAGEMENT**



EXECUTIVE SUMMARY

Rally acts as a hub that helps teams around the world

- plan,
- prioritize,
- manage,
- track,
- and continuously improve their work so they can deliver the value that their customers need with speed, quality, and efficiency.

Rally has the unique ability to aggregate data and provide visibility into the status of cross-team dependencies and risk, which provides stakeholders the insight required for data-driven decisions that drive and impact change.

In Value Stream Management, the objective is to deliver value to the customer. To do so, organizations must gain end-to-end visibility of the flow of value from idea to delivery. Rally helps organizations break down operational silos and creates connections between a variety of processes, teams, and tools in a way that provides an unparalleled view of your workflows. Rally is available on-premise or in the cloud, supporting your organization and teams everywhere possible.

Rally gives business leaders answers that value streams require.

01

Prioritization of product strategy related to execution



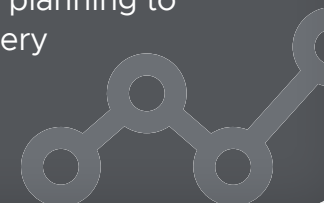
02

How product capabilities relate to execution outcomes



03

Visualizing how capabilities progress from planning to delivery



04

Identifying opportunities to optimize flow





PRIORITIZATION OF PRODUCT STRATEGY RELATED TO DEVELOPMENT FOR **VALUE STREAM MANAGEMENT**

Product strategy can't be executed well if data is stuck in silos and teams are all using disconnected tools. Rally acts as a central hub that unifies your enterprise. You get direct access to your data in a way that makes it possible to plan, execute, and adapt strategies across your entire organization.

Because Rally provides the context you need to better understand your data, you can deliver more value, faster, to your customers. Rally also gives you the power to tell decision-making stories through that data in a way that drives and impacts change.





UNDERSTANDING HOW PRODUCT CAPABILITIES RELATE TO **DEVELOPMENT OUTCOMES**

Clear goals and check-in points help ensure that you're not wasting resources on unwanted features or things that don't immediately add value.

Rally helps you track productivity and project quality in a way that ensures teams are informed, engaged, and happy. And, Rally gives you the information you need to pivot quickly when the need arises.





VISUALIZING HOW CAPABILITIES PROGRESS FROM **PLANNING TO DELIVERY**

When you tie strategy to execution, you eliminate waste in your organization.

Rally gives you the ability to tie user stories to features in a way that eliminates the guesswork.





IDENTIFY OPPORTUNITIES TO OPTIMIZE FLOW

The data Rally collects gives you everything you need to create finely-tuned workflows that are intuitive to your teams. You can eliminate bottlenecks, ensure you've got the right people on the right tasks, and adapt as needed. This way you're always pointing in the right direction.

Value streams depend on Rally to make complex processes visible and create necessary connections between the processes, teams and tools. With Rally as a pillar to Value Stream Management, the business can quickly pivot based on data driven intelligence.



VALUE STREAM MANAGEMENT

Value Stream Management is a management technique combined with a set of technologies that focuses on increasing the flow of business value from customer request to customer delivery.

In Value Stream Management, Business leaders strive to define customer value through effective strategies and products while Development leaders execute in the most efficient way possible.

Enterprises adopting Value Stream Management recognize the eagerness all levels have to gain business insights and the need to give all stakeholders a common understanding of the strategy, product, and execution throughout the entire lifecycle. Stakeholders have the confidence to communicate decision-making stories through data which can make all the difference in their ability to drive and impact change quickly and confidently.

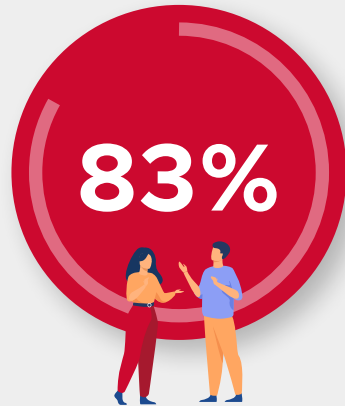
Why should stakeholders care about value stream management – what’s in it for them?



VALUE STREAM MANAGEMENT AND DIGITAL TRANSFORMATION REMAINS **A CHALLENGE**

Business Leaders

80% of companies report that they still have organizational silos...



correlate these silos with reduced customer value and product ROI

Delivery Leaders

96% of companies have digital transformation initiatives...



are still challenged with poor product visibility and delivery inefficiency

Enterprise VSM Benefits

42% of companies believe they currently have "value streams"...



state they either benefit or would benefit from VSM capabilities

Source: Dimensional Research, Value Streams are Accelerating Digital Transformation: A Global Survey of Executives and IT Leaders. October 2021

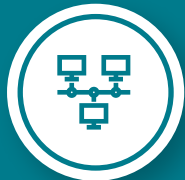
VALUE STREAM MANAGEMENT GREATLY DEPENDS ON **END-TO-END VISIBILITY**



The objective of Value Stream Management is to deliver value to the customer. To do so, **organizations must gain end-to-end visibility of the flow of value from idea to delivery.**



To achieve Value Stream Management, organizations must **break down operational silos and create connections between a variety of processes, teams, and tools.**



Rally is in a unique position to break down silos and create connections across global teams giving end-to-end visibility. **Only Rally can aggregate data and provide end-to-end visibility** into the status of cross team dependencies and risks that's required for Value Stream Management.



For a deeper understanding of agile benefits, principles and practices, you can refer to:



**The Business Case for
a New Way to Work**



**5 Steps to Maturing and
Transforming Enterprise Agility**

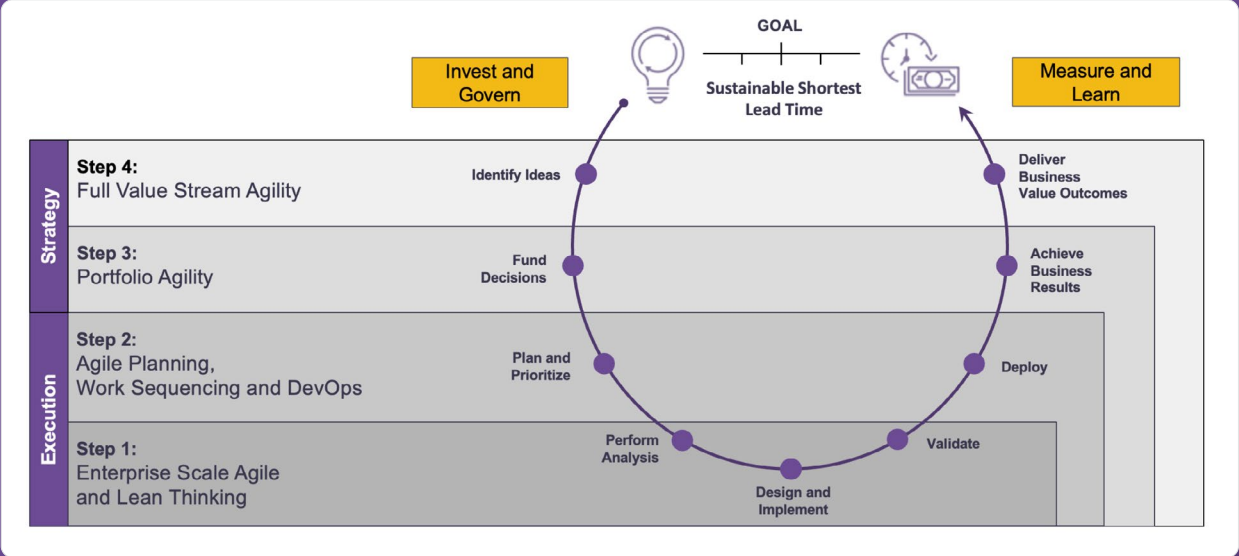
RALLY FOR **VALUE STREAM MANAGEMENT**

Rally is an industry leading enterprise agility solution that is purpose-built to be the foundation for companies embracing digital transformation while aggregating global team data that's necessary for Value Stream Management. For six consecutive years, Rally has been a leader in Gartner's magic quadrant for Enterprise Agile Planning Tools.

Rally is a hub for global teams to plan, prioritize, manage, track, and continuously improve their work so they can deliver the value that their customers need with speed, quality, and efficiency.

Rally's unique ability to aggregate data and provide visibility into the status of cross team dependencies and risk gives stakeholders the insight required for data driven decision making that drive and impact change.

Enterprise Agility is a set of proven principles and practices designed to ensure companies prioritize customer satisfaction and collaboration. The data from Rally and the feedback loops from Agile methodologies allows organizations to adapt not only quickly but also confidently. Therefore, an Agile organization can quickly and confidently adapt to its business environment based on feedback from direct stakeholders (e.g., customers) and changes in market demands.



Value Stream Management: Concept to Cash



RALLY FOR ENTERPRISE VALUE STREAM MANAGEMENT

Rally empowers enterprise agile teams to optimize their business processes, deliver strategy with clear and decisive commitments, and quickly adapt to capitalize on new opportunities. Rally provides the capability to manage and steer delivery as it happens by aggregating and neatly presenting data from global teams. The data coming from Rally inspires commitment.

Rally contributes to Value Stream Management by allowing business leaders to answer tough questions such as:

01



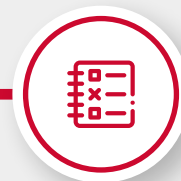
Prioritization of product strategy
related to execution

02



How product capabilities relate to
execution outcomes

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Visualize how capabilities progress
from planning to delivery

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Identifying opportunities to
optimize flow

Value streams depend on Rally to make complex processes visible and create necessary connections between the processes, teams and tools. With Rally as a pillar to Value Stream Management, the business can quickly pivot based on data driven intelligence.

For a deeper understanding of the importance of Value Stream Management for Agile, refer to this guide:



Resource:
5 Steps to Value Stream Management for Agile & Development Leaders



PRIORITIZATION OF PRODUCT STRATEGY RELATED TO DEVELOPMENT FOR VALUE STREAM MANAGEMENT

When a company implements successful value streams, it changes the focus of leadership.

It goes from optimizing individual tools, teams, and departments to optimizing the flow of value across the entire company's products and services, starting with the prioritization of product strategy through to development.

Product strategies begin with selecting the best ideas that solve key problems and provide new opportunities. By organizing at a product level, organizations create stable and customer-centric value streams and measure outcomes instead of project activities. This is a critical part of ValueOps Value Stream Management.

Those ideas must be documented in a solution that enables prioritization and facilitates the creation of achievable, bite-sized chunks of work that enable global development teams to deliver on the capabilities. Rally's portfolio-level features set the stage for enterprise-wide, purpose-driven plans.

A product strategy can't be properly executed when teams are working in silos and working with disconnected tools. With disconnected tools, you have to manually piece the data together, which is costly, inaccurate and error prone. Because the time needed to piece the data together to create a picture of status, it's outdated and doesn't represent the present state.

There is no room for becoming sidetracked and misinformed. Teams must be a strategic engine of product excellence.

PRIORITIZATION OF PRODUCT STRATEGY RELATED TO DEVELOPMENT FOR VALUE STREAM MANAGEMENT (cont.)

When a plan is created and tracked across multiple teams and release trains, there is reduced waste and increased focus on the capabilities that provide the right customer value.

This is at the core of Rally. Rally serves as a central hub to unify the enterprise. Hundreds of global teams collaborate, plan, prioritize and track work on a synchronized cadence. Teams can visualize their work in the form of lists, boards or timeline views, and more importantly—teams understand how their day-to-day work aligns to the greater goals of the business.

Rally provides direct insight into strategies and objectives so that valuable work can be planned and executed, while providing transparency into the real-time status of the work across the entire organization. Rally extends agile practices beyond the team by uniting the enterprise, allowing for planning, adjusting and tracking across multiple teams and agile release trains. Rally connects context to data so that organizations can deliver the most value to their customers quickly. Rally empowers and enables people to bring data to every conversation to make intelligent decisions both big and small.

When the data presents insights that inform decision making, stakeholders can confidently prioritize product strategy related to development.

The organizations who adopt value stream management reach **a state of evolution that celebrates survival of the fastest.**

Watch How

Key Rally Functionality to Support Prioritization of Product Strategy Related to Development for Value Stream Management

- OBJECTIVES AND KEY RESULTS (OKRs)
- CAPACITY FORECAST
- PORTFOLIO ITEM CYCLE TIME
- CAPACITY PLANNING
- PORTFOLIO TIMELINE
- PLAN PROGRESSION
- PORTFOLIO ITEMS
- PORTFOLIO LEVEL REPORT

Learn about these charts on page 17



UNDERSTANDING HOW PRODUCT CAPABILITIES RELATE TO **DEVELOPMENT OUTCOMES**

Projects that follow Agile principles using Rally Software have clear goals and check-in points. Time is not wasted on unwanted features or anything else that doesn't obviously and immediately add value.

When Rally is used as a company-wide Agile management system of record to support productivity, project quality and responsiveness on a macro and micro level, teams are informed, engaged and happy. Leaders are empowered to quickly pivot with data driven information and confidently speak publicly about a company's future.

Rally has the **trust, maturity and capability** to funnel **data that's critical to guide your value streams.**

Watch How

Key Rally Functionality to Support **How Product Capabilities Relate to Development Outcomes** for Value Stream Management

- PORTFOLIO KANBAN
- RISK DASHBOARD
- PLAN PROGRESSION
- MILESTONE REPORTS
- RELEASE TRACKING
- TEAM PLANNING

Learn about these charts on page 17



VISUALIZE HOW PRODUCT CAPABILITIES PROGRESS FROM **PLANNING TO DELIVERY**

When strategy isn't directly tied to execution you end up in a situation where you may focus on the wrong feature during your sprints. As an example, at one company, the teams were only working on technical debt but saying it was new strategy work. This was much worse than working on the wrong feature. As your product line grows and the number of features you have increases, focusing your teams in the wrong place can lead to a lot of wasted money and effort, and you risk creating a disconnect between your product and users.

Team planning can help you make informed tradeoff decisions with product owners based on user stories, historical data, and details like team availability (this helps you avoid trying to work on a feature now with a team that won't be available for months). By tying strategy to execution, you're eliminating waste. You're focusing on the parts that make the most sense to both product owners and your users because you're using data to back up your decisions.

Rally directly ties user stories to features to help you avoid guessing. You have a better sense of the work that needs to be done and can focus on the features that bring more customer value.

Rally lets you sense and steer during delivery. You can easily view progress and track the scope of changes as things move through the pipeline. You have a clear view of what's been added, removed, or completed to have the right conversations and steer progress accordingly.

You can also get a holistic view of what is going across the entire Value Stream thanks to integrations with the DevOps tools that you're using, like GitHub and Jira. Get unparalleled access to historical data, too. You can access all the data from past projects, to gain a strong sense of what's working, what's worked before, and even gaining an understanding of why it's proven so effective.

Watch How

Visualizing and tracking the progress of a release helps you **understand the progress of a release through each stage of production**. In turn, it helps ensure that the **release is progressing in the right direction** and that **any risks associated with the release are identified and managed**.

Key Rally Functionality to support **Visualizing How Product Capabilities Progress from Planning to Delivery**



PLAN PROGRESSION



RELEASE TRACKING



VALUEOPS INTEGRATIONS

Learn about these charts on page 17



IDENTIFY OPPORTUNITIES TO **OPTIMIZE FLOW**

There is always room to optimize any process. It doesn't matter how effective something currently is or if it's been successful for years, there are ways to make it better. But, if you don't have access to the data you need to discover what needs work, you risk continuing on a less efficient path.

Rally captures all the data that you have available and presents it to you in a way that makes it easy to find areas where you can optimize workflow.

There are a few reasons you want to optimize flow. First, you want to make sure that you're working as efficiently as possible. Bottlenecks can cause you to miss deadlines or release dates, but if you don't know where they are, fixing them can be a challenge.

Similarly, what worked once isn't necessarily going to work a second time. You want to make sure that you're always optimizing and trying new things. You want to be able to look at data and understand your workflow for each team you work with to create the ideal approach for everyone.

Rally helps make this possible by providing you with all the analytics you and your teams need to understand your workflow.

Watch How

You gain access to information that can help you understand **whether you're attempting too much work per sprint or just enough**, you can see data that helps you better understand **which teams do what kind of work best**, and you'll be able to see **where things are slowing down**.

Key Rally Functionality to Support **Opportunities to Optimize Flow**



FLOW METRICS



CYCLE TIME REPORTS



DASHBOARD REPORT

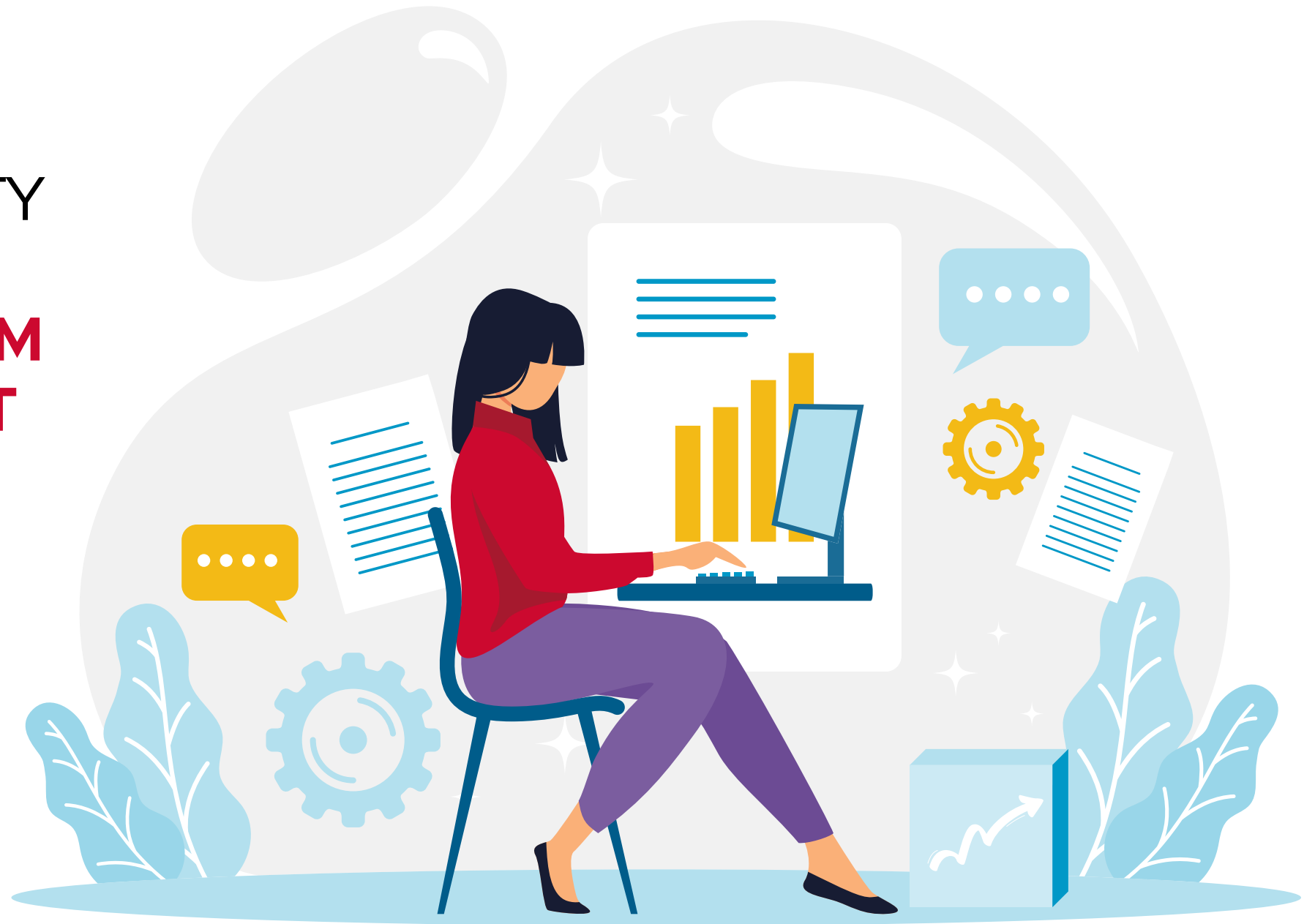


PORTFOLIO
KANBAN BOARD

Learn about these charts on page 17



KEY RALLY FUNCTIONALITY **TO SUPPORT VALUE STREAM MANAGEMENT**

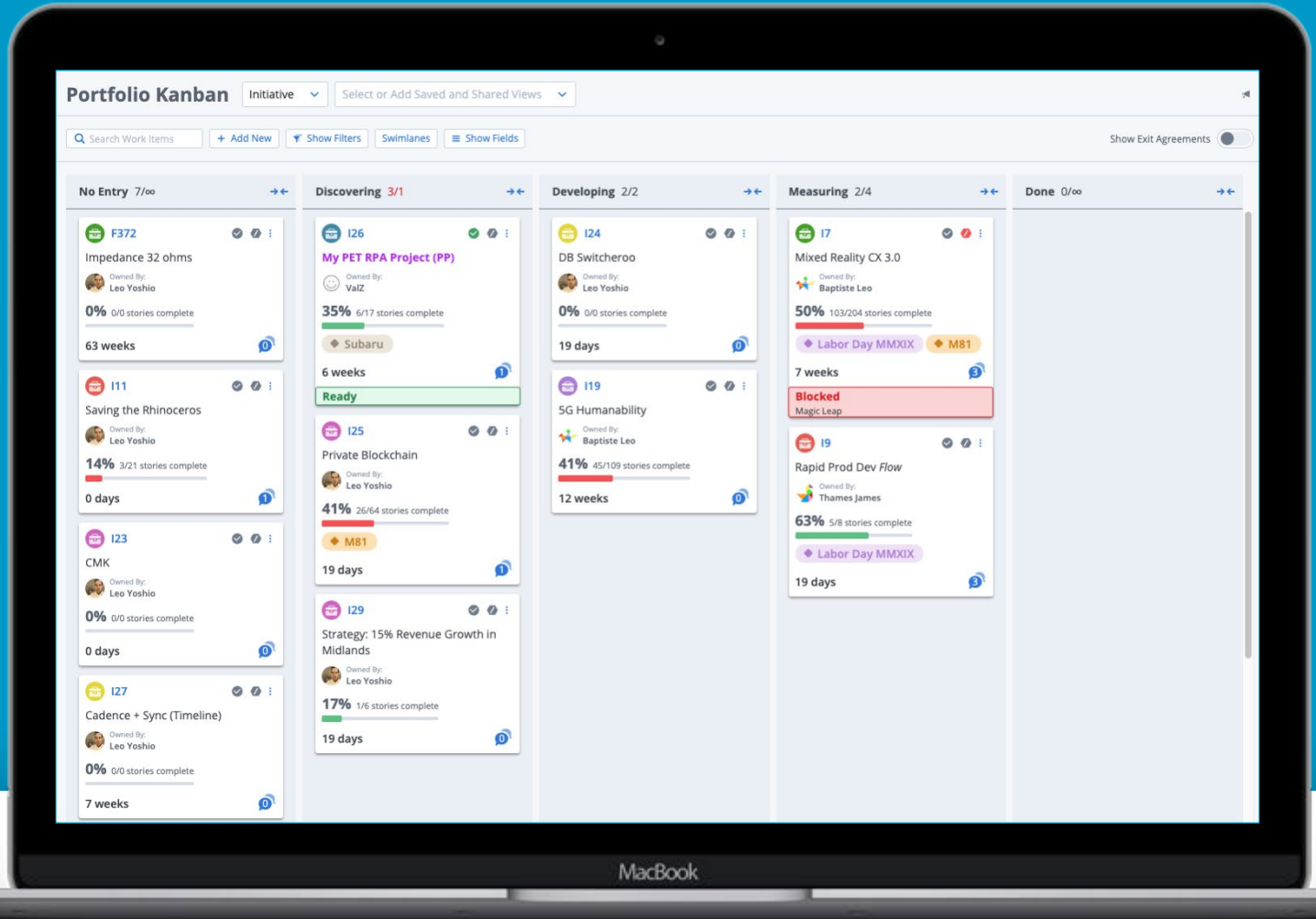


Portfolio Kanban Board

VISUALIZE VALUE FLOW FROM
PLANNING TO DELIVERY

The Portfolio Kanban Board gives us a visualization of Epics/Features from ideation through to completion.

- Stakeholders can see where the work is, in the process.
- See where bottlenecks slow the flow of value
- Monitor Work-In-Progress (WIP) for better flow



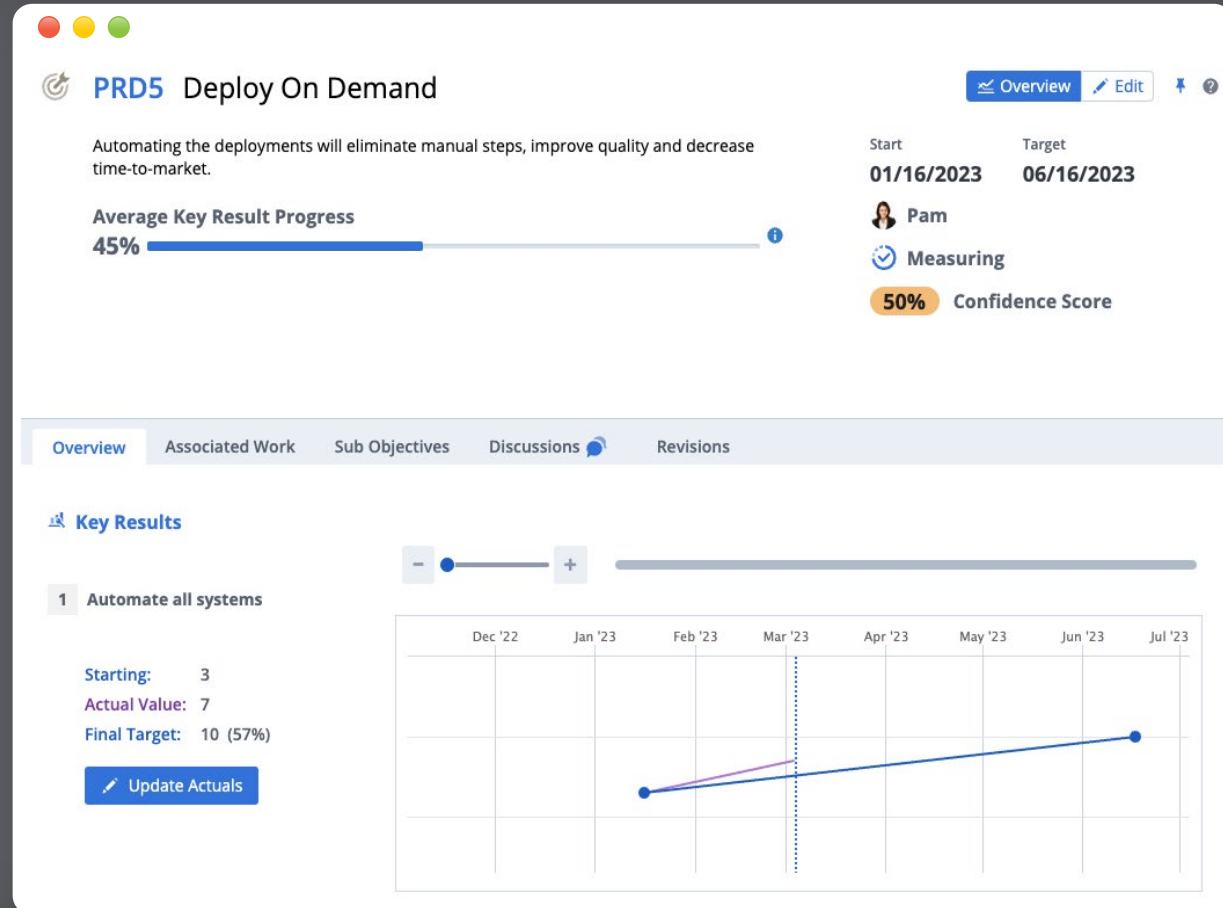
Objectives & Key Results (OKRs)

ALIGN WORK FOR BETTER DECISION
MAKING, CLARITY AND FOCUS

Use the Objectives and Key Results (OKRs) feature in Rally to provide a goal-setting framework for your organization and teams to align around the same goals. This alignment creates clarity and focus, and helps ensure that the **most important work is being done**.

OKRs are aspirational in nature and help to focus your teams on the “why” behind the goals you set.

Your organization can customize the way that you track OKRs by creating an alignment with your objectives. You can associate each objective level with a different level of work by associating each level with a portfolio item type in Rally. **Aligning the actual work to be done (output) to an objective** helps team members at all levels understand the business outcomes that the organization is striving to achieve.

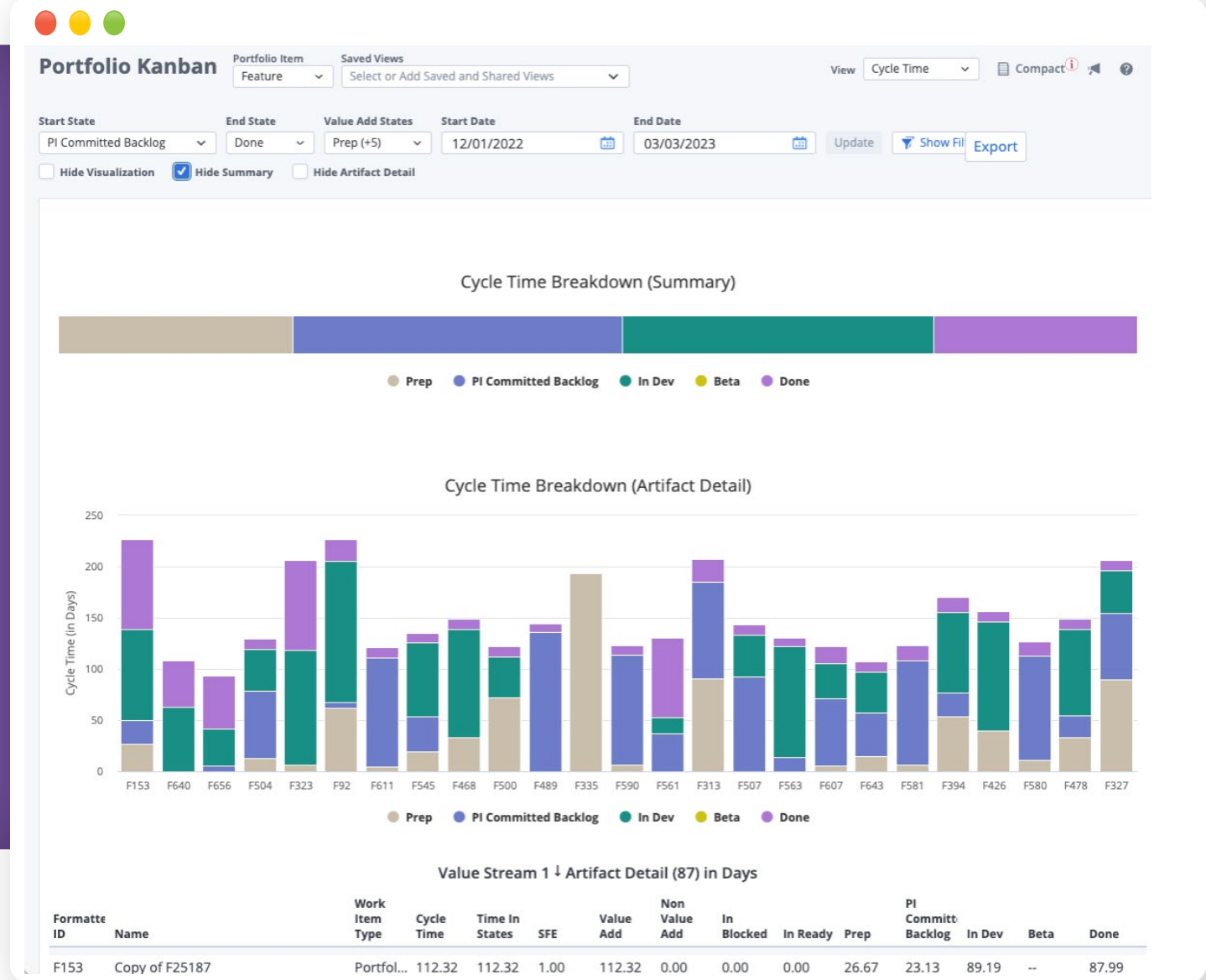


New! Portfolio Items Cycle Time

IMPROVE FORECASTING

The Cycle Time chart helps you use historical information to estimate how long it might take for work to pass through your defined states to completion.

The cycle time analysis chart includes flow efficiency calculations so you can determine **where to make efficiency improvements in your process.**

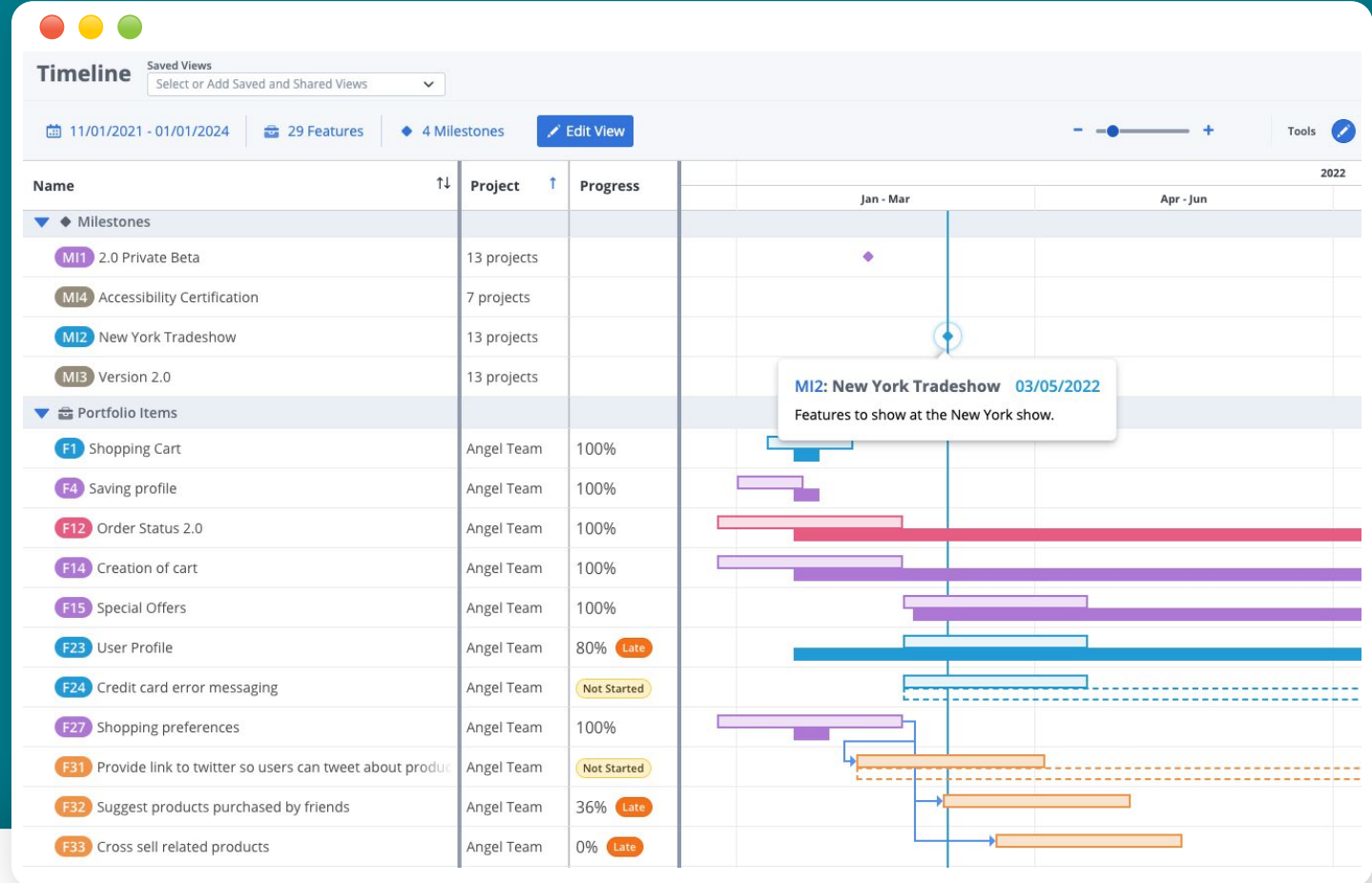


Portfolio Timeline

VISUALIZE SCHEDULING ACROSS THE VALUE STREAM

The **Portfolio Timeline** allows you to **plan and visualize a timeline for execution**.

- Create your plan and check it against your timeframe.
- See the whole plan including **dependencies and milestones**.
- Use the **Edit** function to adjust the plan to synchronize dependencies and meet milestones.
- **See progress** of work execution. Quickly see if work is on time, at risk, or late compared to the plan.
- **Advanced filters** and **saved-shared views** allow each user to focus on what's important to them.

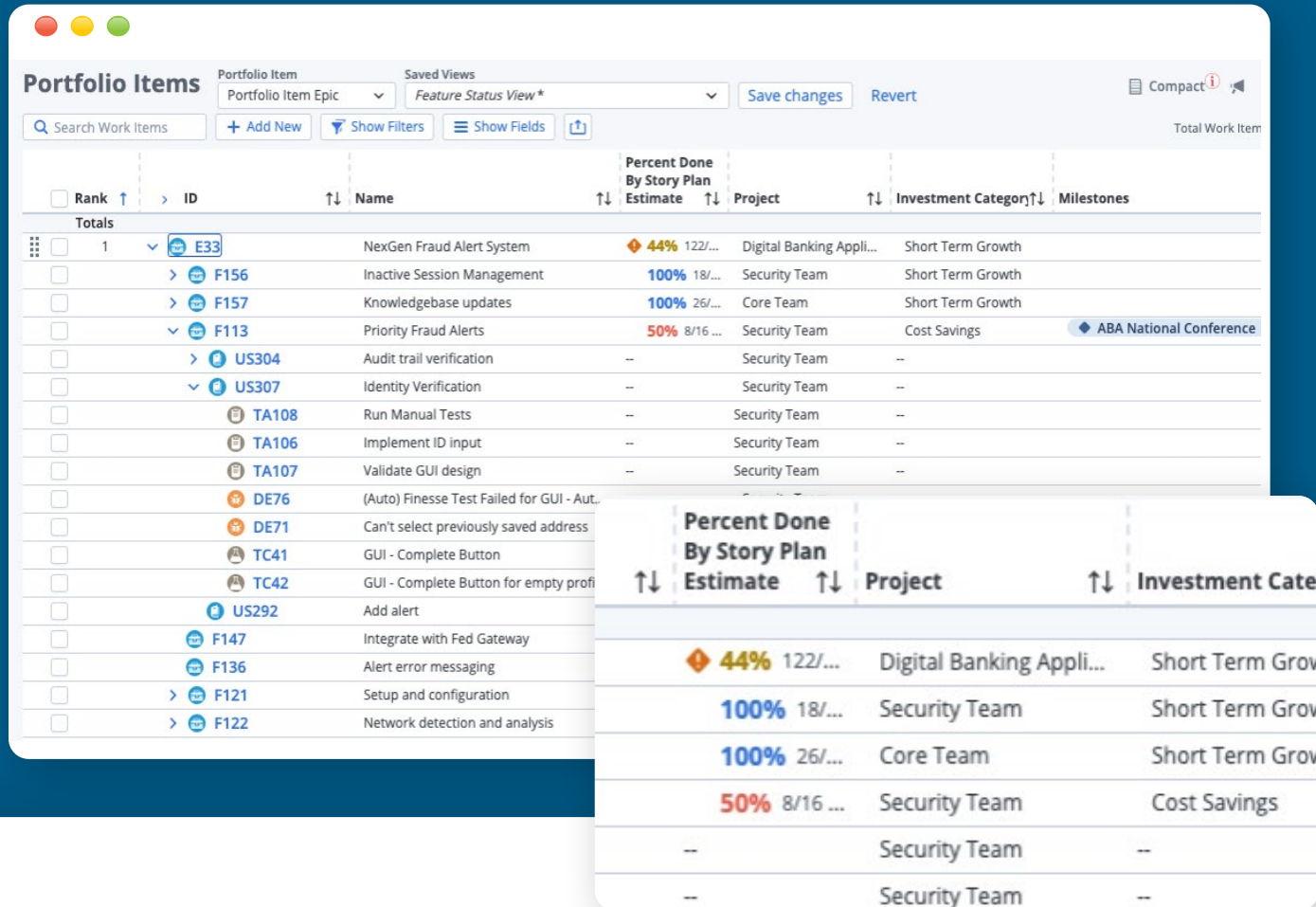


Portfolio Items

PRIORITIZATION AND CONNECT
BUSINESS NEEDS TO ACTUAL WORK

Providing **alignment** of execution to what matters most to our business.

- The **Portfolio Items** page provides **end-to-end** views of business initiatives down to the actual stories, tasks, test case, and defects for execution.
- See all related work in one simple view.
- Stakeholders understand what work is aligned to their initiative.
- **Teams align their work** and see how their work aligns to initiatives.



The screenshot displays the 'Portfolio Items' interface in Rally. At the top, there are filters for 'Portfolio Item' (set to 'Portfolio Item Epic') and 'Saved Views' (set to 'Feature Status View*'). Below these are buttons for 'Add New', 'Show Filters', 'Show Fields', and 'Save changes'. A search bar labeled 'Search Work Items' is also present. The main table lists work items with columns for Rank, ID, Name, Percent Done By Story Plan Estimate, Project, Investment Category, and Milestones. A zoomed-in detail view is overlaid on the right, showing a subset of the table data.

Rank	ID	Name	Percent Done By Story Plan Estimate	Project	Investment Category	Milestones
Totals						
1	E33	NexGen Fraud Alert System	44% 122/...	Digital Banking Appli...	Short Term Growth	
	F156	Inactive Session Management	100% 18/...	Security Team	Short Term Growth	
	F157	Knowledgebase updates	100% 26/...	Core Team	Short Term Growth	
	F113	Priority Fraud Alerts	50% 8/16 ...	Security Team	Cost Savings	ABA National Conference
	US304	Audit trail verification	--	Security Team	--	
	US307	Identity Verification	--	Security Team	--	
	TA108	Run Manual Tests	--	Security Team	--	
	TA106	Implement ID input	--	Security Team	--	
	TA107	Validate GUI design	--	Security Team	--	
	DE76	(Auto) Finesse Test Failed for GUI - Aut.	--			
	DE71	Can't select previously saved address	--			
	TC41	GUI - Complete Button	--			
	TC42	GUI - Complete Button for empty profi	--			
	US292	Add alert	--			
	F147	Integrate with Fed Gateway	--			
	F136	Alert error messaging	--			
	F121	Setup and configuration	--			
	F122	Network detection and analysis	--			

Percent Done By Story Plan Estimate	Project	Investment Category
44% 122/...	Digital Banking Appli...	Short Term Grov
100% 18/...	Security Team	Short Term Grov
100% 26/...	Core Team	Short Term Grov
50% 8/16 ...	Security Team	Cost Savings
--	Security Team	--
--	Security Team	--

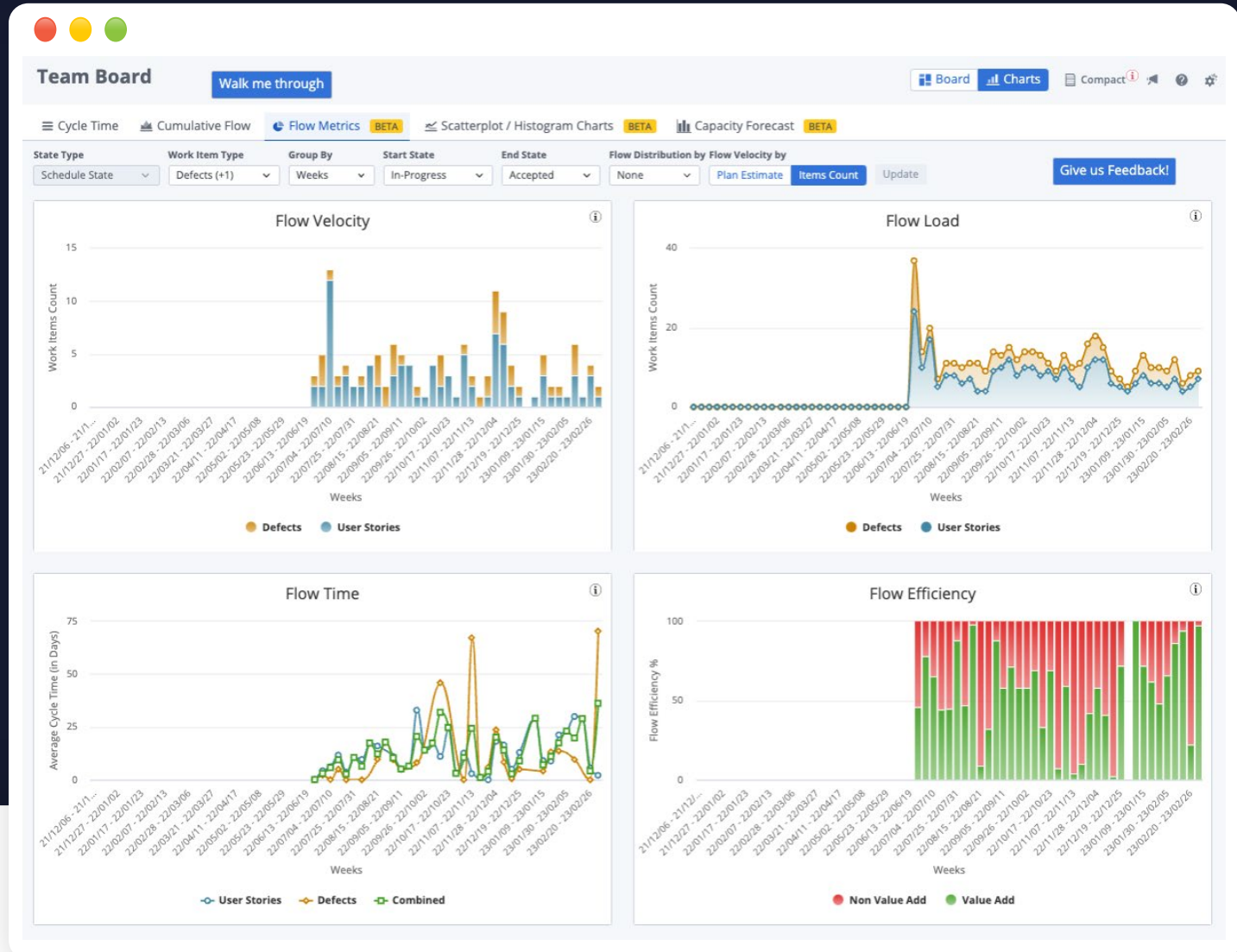
New! Flow Metrics

MEASURE FLOW FOR CONTINUED IMPROVEMENT

These metrics are designed to provide a view into the efficiency and predictability of the team and their deliverables. Reducing waste and reaching unimpeded flow, increases value delivered and predictability.

Charts include:

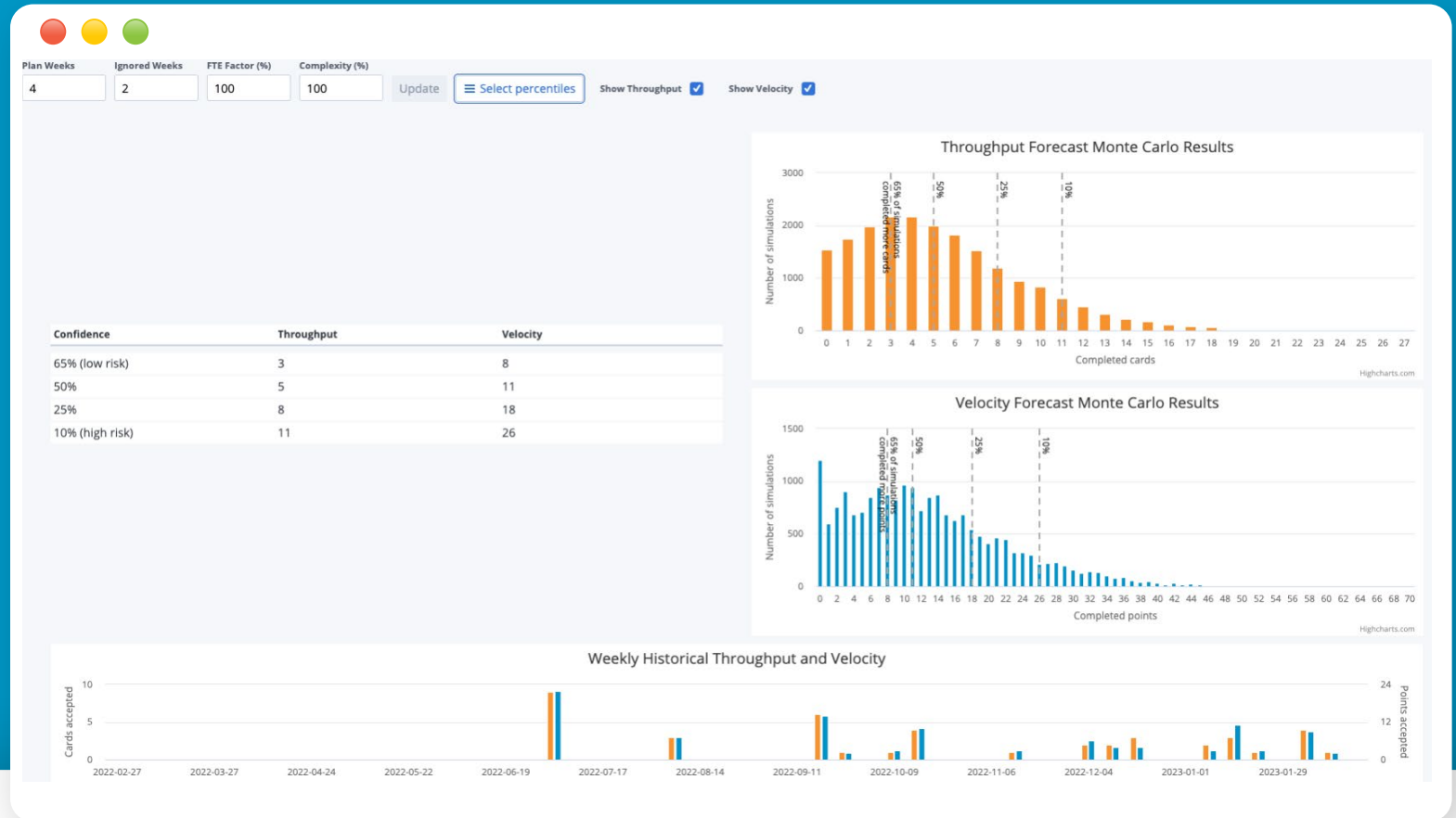
- Flow Velocity / Throughput
- Flow Load
- Flow Time
- Flow Efficiency
- Flow Predictability



New! Capacity Forecast

UNDERSTAND YOUR CAPACITY BASED ON REAL DATA

Capacity Forecast metrics give teams the data they need to **balance risk and predictability**, for planning future quarters or PIs. Visualize the probability of delivering items/points based on the team's historical data.

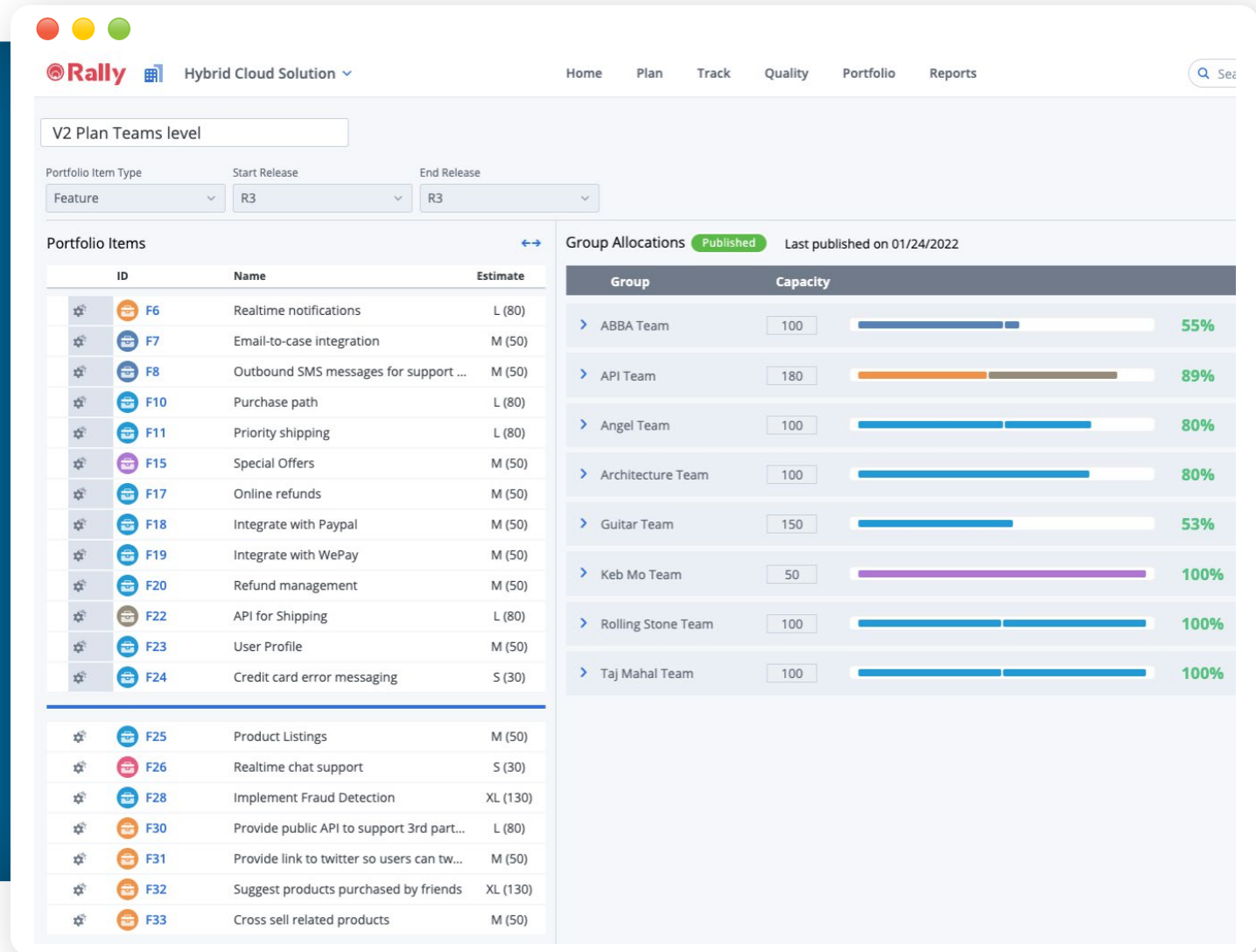


Capacity Planning

REALISTIC PLANNING FOR A QUARTER / PI

Capacity Planning allows leaders to use develop realistic plans for a quarter or PI in support of priority business initiatives.

- “**What-if**” scenarios that optimize business value (demand) with team capacity (supply).
- Visualization of both **demand** (features) and **supply** (teams) in a single view.
- Provides an **objective** view of **too much demand** versus **not enough capacity**.
- Facilitates meaningful **above/below-the-line** discussions between business and engineering.



Risk Dashboard

IDENTIFY AND MANAGE RISKS

Rally provides the single source-of-truth for everything impacting the delivery of value.

Create your own dashboards like the **Risk Dashboard**.

- Keep Risks visible throughout execution.
- **Associate** stories, features and defects to Risks to understand the impact.
- Understand the state and activities around the risk.
- Risk owners can track the progress and ensure steps are being taken to resolve each risk.

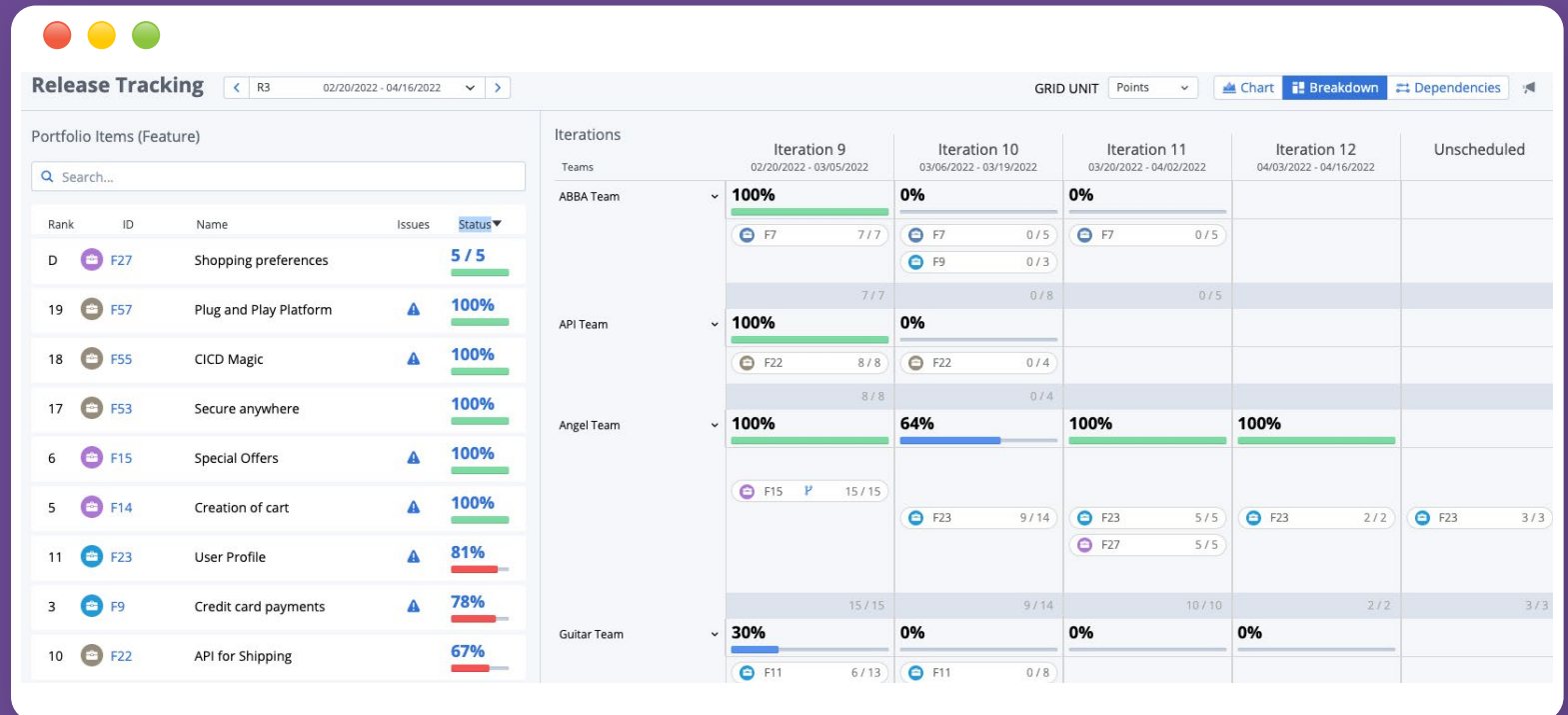
The screenshot displays the Rally Risk Dashboard interface. On the left, under 'USER INSTRUCTIONS', it explains the ROAM model and lists four risk categories: Resolved, Owned, Accepted, and Mitigated, each with a brief description. Below this, a 'Steps' section lists four actions: 1. Add a risk, 2. Attach the risk to all affected work items, 3. Add an owner, and 4. Update state as appropriate. The main area, titled 'ROAM RISKS', shows a Kanban board with five columns: None, Resolved, Owned, Accepted, and Mitigated. Each column contains risk cards with IDs (e.g., RI6, RI4, RI1, RI10, RI8, RI9, RI7, RI3, RI2, RI5) and descriptions of the risks. For example, RI10 is 'Data Deletion Requests delayed' in the Accepted column, and RI8 is 'Dependency on another team to deliver on their functionality/Timeline discussion' in the Mitigated column. The interface includes standard UI elements like search bars, filters, and a 'New Risk' button.

Release Tracking

PI / QUARTER TRACKING AT SCALE
(PROGRAM BOARD)

The **Release Tracking** page allows for visibility across all the teams during planning and execution for a **quarter or PI**.

- **Which teams** are working on the features for the PI, and **when**.
- During planning, check **dependencies** for proper sequencing.
- See **unscheduled and unplanned** work.
- **Highlight issues** across all teams.
- Quickly see work that's **at risk** or **late**.
- **Get the big picture**, or use **one click** to see which teams are working on a specific feature.

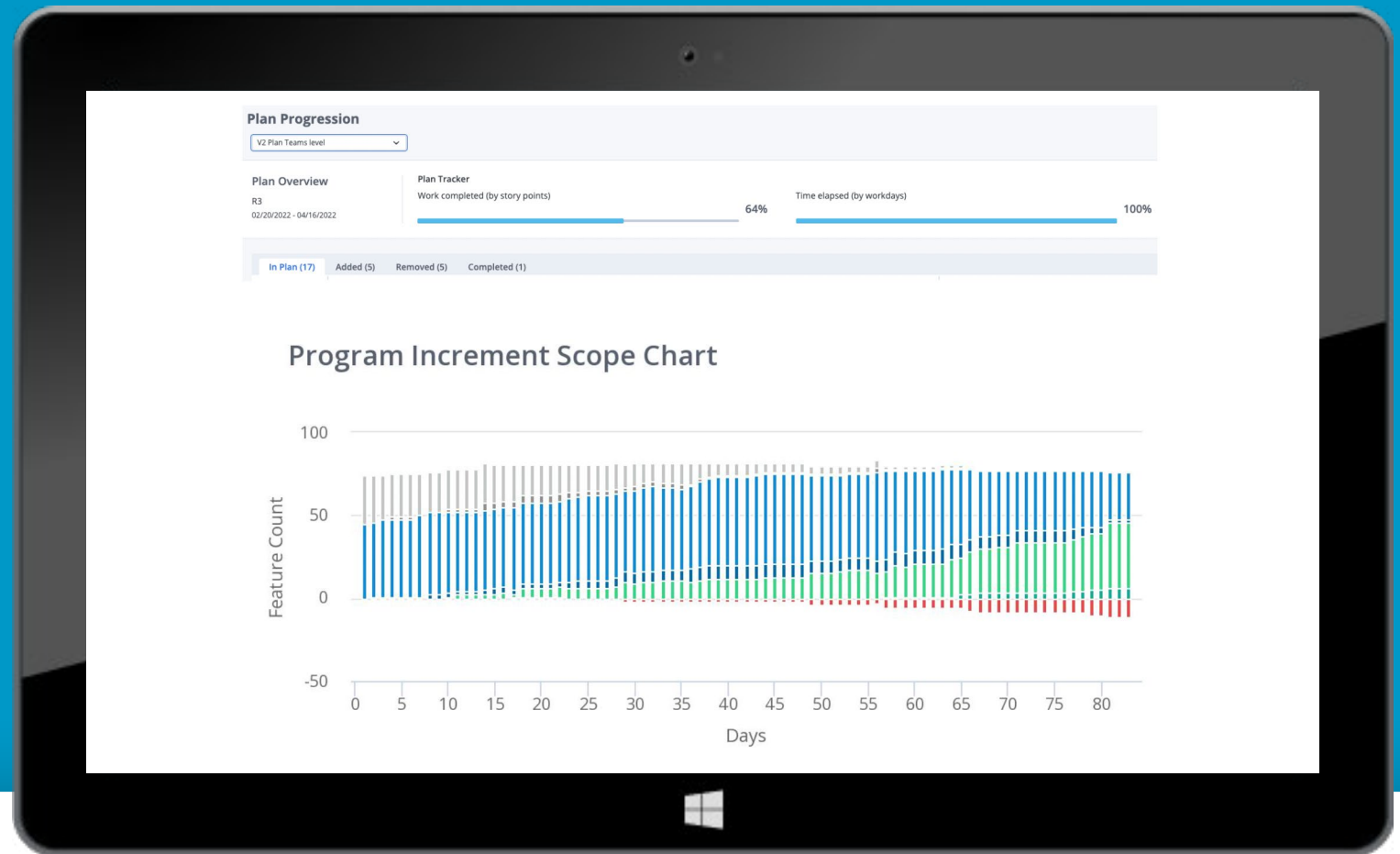


Plan Progression

SEE THE IMPACT OF CHANGE ON THE PLAN

Baseline (publish) your plan for the quarter or PI and track changes to the plan.

- Track progress of the work for the quarter or PI.
- See the work items that are in the **baseline, added, removed and completed**.
- Facilitate conversations. Identify the impact of too much change/churn.



Custom Reporting

DATA FOR REPORTING AND COMMUNICATION

Build dashboards to highlight data and provide insights that are relevant and compelling and to various roles up and down the value stream.

