

# Rally Portfolio Manager Implementation Workshop

Align your business strategy with execution



Enterprise-Proven Agility

This two-day workshop helps you plan and track your portfolio in Rally. We'll set up the necessary feedback loops between business and development by connecting your Rally project data with new portfolio items that we'll create. These connections will enable you to keep development resources aligned with the portfolio's strategic allocations and investment priorities.

## Map User Story Hierarchies to Portfolio Items

We will begin the workshop with a health check and a review of your current project and user story hierarchies in preparation for mapping them to portfolio items. We will then tie current portfolio data to existing information in Rally, so that planning and execution data will display accurately and clearly.

## Monitor On-Going Progress Toward Investment Goals

Next, we'll work with you to build dashboards, views and reports to monitor ongoing progress toward portfolio items and investment goals.

## Capture Value and Risk on Portfolio Items

Once Rally is configured, we will teach your portfolio leadership group how to use and understand Rally's data visualization capabilities. You will learn how to:

- Capture value and risk on portfolio items
- Rank portfolio investments based on value
- Manage work in progress and steer initiatives based on real-time data
- Interpret project status

## Choose and Customize Workshop Components

We can customize this workshop to include:

- Retrospecting on Rally Portfolio Manager usage, reports and value
- Promoting and implementing the portfolio management process with Agile and non-Agile teams and product owners
- Preparing for and facilitating the next portfolio planning and steering event with reports, metrics and custom visualizations

## Building the Right Structure in Rally

We'll build the right structure in Rally as we progress, answering the following questions to guide us:

- What is the current portfolio planning process?
- Which portfolio items should we create and track in Rally?
- Do these portfolio items align with existing stories tracked in Rally?
- What improvements might we suggest to our product owners to enable better tracking of portfolio items?
- Given all we have learned, how do we now think we will map portfolio items to our existing Rally data?
- After the mapping of the data, how do we see progress on portfolio items?
- What reports and dashboards should we create and share to track progress against our timeline?
- What are our next steps?

## About Rally

Rally is the recognized leader in Agile application lifecycle management (ALM). We are dedicated to helping organizations embrace Agile and Lean development practices that increase the pace of innovation and improve product quality. According to a study by QSM Associates, software-driven companies that rely on Rally's Agile ALM products and services are 50% faster to market and 25% more productive than industry averages. The company's experienced services group, including training through [Agile University](#), guides companies through the organizational change required to become innovative, Agile businesses. Together, Rally's Agile ALM platform and its leading Kanban-based project collaboration tool, [AgileZen](#), support more than 10,400 corporate customers, 146,000 projects and 132,000 users in 98 countries. For more information, visit [www.rallydev.com](http://www.rallydev.com).