



Factors to Consider When Selecting a Digital Business and Agile Management Solution

The modern enterprise is under significant pressure from disruptive competitors, shareholders, and discerning customers to create innovative solutions and rewarding customer experiences. At the same time, companies must achieve their business goals and financial targets. Because of these factors, the way we work—whether supporting product development and developer operations or general knowledge work—is rapidly changing. Companies need bold, new ways to work that allow for rapid innovation, testing, and alignment to customer needs, while also meeting internal company goals. Digital Business and Agile Management solutions have the promise to enable companies to work in innovative new ways thanks to transparent insights which better align an organization to achieve superior efficiency and value throughout the entire enterprise.

Unfortunately, many teams look to existing internal tools to help them achieve business agility. Often, these are overly developer-centric platforms, such as Atlassian Jira and Atlassian Jira Align. If your team is considering investing in Jira and Jira Align (formerly AgileCraft), you should consider the following five factors before moving forward:

1. Does the solution *support the way you work or want to work*?
2. Does the solution *support detailed project and portfolio costing and financial management*?
3. Can the solution *prioritize, plan, and optimize work items and resources*?
4. Does the solution *prioritize and align your work to overall company goals and strategy*?
5. Can the solution *provide a 360-degree view of your work, projects, and portfolios*?

After interviewing 25 active users of Atlassian Jira and Jira Align, Apprize360 found that Broadcom’s Digital Business and Agile Management, ValueOps solution, comprised of industry leading Clarity and Rally Software, meets all five of these solution selection criteria. Together, Rally and Clarity allow companies to effectively transition from a traditional project and programs process to modern, customer-centric ways of working.

The five factors to consider when selecting a ValueOps solution include:

1. Does the solution support the way you work or want to work? Does the solution support multiple Agile frameworks and ways of working, or does the solution force the company to work within specific confines?

Many vendors force customers to use a specific framework, often creating more work and cost by forcing companies to work within the confines of a restrictive and unfamiliar methodology that does not meet the needs of the customer company.

Rally and Clarity were built to use frameworks that best meet your needs, whether that is adopting SAFe, LeSS, Kanban, Scrum, PRINCE2, or traditional methods. Broadcom’s ValueOps solution was structured around the idea that work must be organized and prioritized according to an organizational model adopted by a company’s management. Both Rally and Clarity were built for the way people and organizations plan and work today and how they are evolving their work execution from project to product.

Clarity supports any investment type you wish to define while giving business executives the insights required to report on the performance of those investments. In addition, Rally can work exactly how your company works today, leveraging popular Agile frameworks and giving you the ability to roll up data across teams for consistent and effective reporting, even if teams continue to use Jira as their agile execution tool. The combined Broadcom solution has significant flexibility to leverage both traditional and Agile methods of working to support the unique needs and models of the modern enterprise.

Jira customers report struggling with the platform to support a hybrid solution of traditional and Agile methods. According to a project manager at a U.S.-based Fortune 500 financial services company:

“The bottom line is that it is NOT feasible to do agile and waterfall together or any mixed project management methodologies in the plain Jira Software.”

	Atlassian Jira + Jira Align	Broadcom ValueOps (Clarity + Rally)
Agile & Digital Business Management	<ul style="list-style-type: none"> ▪ Supports Agile methods, including LeSS, SAFe, and Disciplined Agile Delivery (DAD). 	<ul style="list-style-type: none"> ▪ Clarity supports a native integration with Rally for Agile development, including SAFe, LeSS, PRINCE2, and DAD as well as hybrid work methodologies. ▪ Rally enables teams to use whatever Agile methodology they prefer, without losing the ability to roll metrics up across teams to the program level.

2. **Does the solution support detailed project and portfolio cost and financial management?** *Does the solution support detailed project costing and financial management, accounting for different resource rates, and multiple currencies, and does it support external management of vendors as part of the platform?*

With the move toward Agile planning and execution, business executives need to manage capital and operational expenditures across self-organizing teams spread all over the world in near real time. As plans evolve, it's hard to keep track of what's going on and what the future holds. Having a platform that can manage all the complexities of a project's cost and financial components is critical.

Clarity is unique in the fact that you no longer have to fund projects. You can define your own assets such as products, platforms, and capabilities. You can also define your own work units, including release trains, releases, and epics. Each of these items can be allocated funding and headcount. A hierarchy integrates this all together. Clarity also allows project, product, and finance teams to work within a familiar Excel grid layout and grouping functions. This allows users to sort line items by cost type or transaction class, be able to drill into the underlying expenses with a click, and navigate through planned, actual, and forecasted amounts with quick views. Actual spending is always up to date, showing you the remaining budget in real time.

Interviewed customers reported that the Atlassian combined solution lacks detailed project costing and financial management, especially at the task, resource, and project levels. According to a scrum master from a North American insurance company:

"We really struggled with using Jira to track, manage, and analyze costs related to our Agile projects. When it came to project planning, it was very basic and did not give us the ability to forecast actual costs at the level of detail we needed. There was very little flexibility to support complex projects with resources that had different rate matrices. It felt very restrictive, and we needed to just use an external costing tool in the end, which did not integrate with Jira at all."

	Atlassian Jira + Jira Align	Broadcom Clarity + Rally
Project Budgeting & Financial Management	<ul style="list-style-type: none"> ▪ Supports a field to capture a budget on each work item with the field allowing access and ability to be updated by anyone without changing control. ▪ With Jira Align's single-field approach, planning spending with year-over-year comparisons is not possible. ▪ Supports a single "bucket" for budgeting, CapEx, OpEx, and actuals; fields are fully editable by the user with no logic for business processes. ▪ No time-phased budgets, no budget approval process, no fiscal periods, and no drill-down into actuals. ▪ Other missing critical features: <ul style="list-style-type: none"> ○ No actuals or transactions ○ No costing rates ○ No support for creation of a financial forecast ○ No support for submission of a budget ○ No charge-back allocations 	<ul style="list-style-type: none"> ▪ Clarity supports a proper cost plan to define a forecast by fiscal period and by class of expenditure (labor, travel, etc.). ▪ Budget Submission Process: Creates an approved budget with proper change controls. ▪ Fiscal Period Control: This enables you to see spending by fiscal period, quarter, or year as well as period-to-period comparisons providing insights into team productivity. ▪ Vendor and Contract Management: Clarity vendor dashboards provide visibility into vendor headcount, actuals, and allocation amounts across the resource pool. ▪ Charge-back Allocations: Clarity allocates percentage splits at the overall project or individual task levels. ▪ Cost and Rate Management: Clarity can maintain multiple rate matrices that establish billing and cost rates for labor, expenses, materials, and equipment in multiple currencies.

3. **Does the solution prioritize, plan, and optimize work items and resources?** *Does the solution allow for capacity planning as well as support resource contouring, optimizing to both over- and under-utilized resources?*

Capacity Planning provides you with transparency to see how your highest business priorities stack up against the capacity of your teams—helping you balance work allocations and team delivery. Leaders get realistic options for optimizing value while accounting for teams' actual capacity—taking the emotions out of it. Rally allows users to prioritize tasks and projects based on resources and capacity. With Clarity, you can filter available resources and investments down to the department or team level to match supply and demand across the enterprise. At the same time, you can find the right resources for the right task with Clarity's ability to allocate resources based on the required skill and experience. Once you find the right people, you can allocate specific percentages of their workload.

Customers report that Jira's solutions lack the depth and breadth with supporting enterprise resource management to support Agile projects. According to an IT director of a global datacenter provider undergoing a major datacenter renovation project:

“We found that when we needed to place over a hundred different resources on a project, each with their own rate and differing skill and experience levels, this became a very manual process with Jira. The planning and allocation process took us over a week to do manually in Jira and then required significant oversight if there were any changes to resource availability or schedules. There also was no concept of an individual calendar for individual availability. Jira assumed everyone works seven hours day, five days a week.”

	Atlassian Jira + Jira Align	Broadcom Clarity + Rally
Hierarchy & Organizational Structure	<ul style="list-style-type: none"> Jira Align has only one hierarchy – If used, the single hierarchy is used to manage the departmental hierarchy. It cannot be used to align work to strategy, program, or other use cases. 	<ul style="list-style-type: none"> Rally and Clarity leverage multi-level work hierarchies, supporting a full hierarchy of organizational elements. You can manage from the top level of your organization to divisions to departments to teams, down to 10 levels of an organization. Clarity supports formal association of resources, projects, and all other investments (epics, products, etc.) to the owning department. Rally supports configurable organizational levels that map to each business’ unique team, program, and portfolio structure.
Ordinal Data Model	<ul style="list-style-type: none"> No ordinal data model 	<ul style="list-style-type: none"> Rally supports parent-child relationships, which creation of hierarchical relationships between work items while dependencies (predecessors and successors) support an ordinal relationship in which one user story is dependent upon the completion of another user story. The standardization of the Rally data model enables companies to seamlessly roll up data and get consistent visibility into their teams.
Resource OBS <i>(Organizational Breakdown Structure)</i>	<ul style="list-style-type: none"> Because of its single hierarchy, if teams from multiple organizations need to be organized together, the hierarchy will need to be used for that, and the other uses for work management are ignored. 	<ul style="list-style-type: none"> Resources are organized in logical resource organizations independent of the department they belong to. One product team could be located in multiple GEOs and belong to multiple departments.
Capacity Planning	<ul style="list-style-type: none"> No concept of resource planning or understanding of ‘when’ you need people No time-phased resource planning for people or teams and no support for time-phased capacity planning for investments 	<ul style="list-style-type: none"> Supports PI Planning with full support for resource and capacity planning based on time-phased availability and capacity “What-If” Scenarios: Effectively model releases without changing artifacts and execution data for teams and projects.
Resource Management	<ul style="list-style-type: none"> No workload plan for individual resources, lacking accounting for holidays, vacations, or PTO No skill- or experience-based resource planning or management capabilities 	<ul style="list-style-type: none"> Dynamic resource management, resource allocation, and skill-based resource management based on capacity

4. Does the solution prioritize and align your work to overall company goals and strategy? Can the solution align projects and portfolios to company business goals and strategy?

One of the most important tools for a product manager is a product roadmap. Product roadmaps need to align to your product strategy as well as show why your work is relevant to your stakeholders’ strategy. A roadmap should be a visualization of your strategy and the “why” behind what you are building. For modern businesses, a roadmap is an essential bridge between the people steering the strategy and the people doing the work.

Clarity and Rally both support “roadmapping,” which is a powerful planning tool that enables product managers to develop and communicate long-term product plans to business managers, engineers, and other stakeholders. It also helps them align planned work to the following strategies: overall product strategy, customer impact, business strategy, and execution strategy. There are no limits to the number or types of roadmaps that can be created in the Clarity system. This can also be aligned with Agile execution roadmaps in Rally. Each strategic roadmap in Clarity includes multiple views, including a timeline view, a board view, and a grid view. The user can toggle from one view to the next to access the information they need and easily save personalized views (“picklists”) that they can return to as needed. In addition, users can look at information from both long-term and short-term perspectives with the combined solution, course correcting and updating as necessary as their work evolves forward toward completion.

According to a DevOps manager at a U.S.-based cloud monitoring company, Jira Align’s roadmap has significant limitations when it comes to resource management:

“You cannot see items side by side. For example, if I want to see a specific feature in Q3 of this year and a second new planned feature for Q4 on the same row, I cannot see that. In addition, there are no visual dependencies shown in the roadmap. This makes the Jira Align roadmap highly unusable by project managers and leadership staff.”

	Atlassian Jira + Jira Align	Broadcom Clarity + Rally
Roadmapping	<ul style="list-style-type: none"> Jira Align has a roadmap that displays one roadmap item per row, with up to six columns to the left of each row. Unable to see items side by side Does not support visual dependencies 	<ul style="list-style-type: none"> Clarity Strategic Roadmaps show multiple quarters side by side, enabling users to help stakeholders visualize the work being delivered in Q1, Q2, Q3, etc. Rally Execution Roadmaps show the work being delivered in each quarter (or PI) and align with the higher-level strategic roadmap(s). Grouped roadmap items with dependencies visible Visually show epics and features delivered over time

5. **Can the solution provide a 360-degree view of your work, projects, and portfolios? Is the product a single solution with real-time data on work items, teams, and funds to help business executives achieve successful outcomes?**

Enterprises need to clearly align top-level strategies with resources, requirements, and schedules—throughout the innovation lifecycle. This requires rich reporting and what-if analysis to evaluate the impact of project changes, reporting and dashboards that can be tailored by role, and fast and current tracking of actual versus planned costs.

Clarity supports easily configurable and shareable dashboards that leverage true business intelligence to support actionable business insights as well as provide insights into digital outcomes. Clarity provides deep performance KPIs, indicators of status, schedule, alignment, and risk across projects in an organization. Clarity reports also provide insight into schedule, cost, effort, risks, and issues in managing the projects. Several reports present status report information for monitoring project progress, while others offer analysis of staffing issues and comparisons of project plan performance compared to baseline.

Rally provides all members of the program team, from executive to developer, with a real-time view into the status of all work items, from an individual sprint to an overall program and portfolio status views. This helps teams, scrum masters, program managers, and executives track the Agile metrics that matter most to the business and provide the most value to customers. Rally also provides a view of cross-team dependencies and risks in order to ensure visibility and accountability as a plan is being executed. Risks can be tracked over time, with tasks assigned to team members to ensure that proper steps are being taken to resolve and mitigate them.

In addition, data can be rolled up from Rally to Clarity, so no matter where your interest lies, you can use either tool to focus in on the data that is most important to you, whether that is from an execution or a business agility perspective.

According to Jira Align customers, custom reporting, dashboards, and out-of-the-box reports for productivity and detailed project management are severely lacking in Jira Align. According to a DevOps manager from an international financial services firm:

“Jira Align does not support team-level work productivity insights or metrics, especially KPIs for completed work and outcomes...important metrics like team improvement rate and velocity acceleration are not supported. This prevents me from being able to report to leadership on our productivity and outcomes effectively.”

	Atlassian Jira + Jira Align	Broadcom Clarity + Rally
Insights & Analysis	<ul style="list-style-type: none"> Supports specific OOTB metrics, analytics, and custom reporting optimized for the portfolio—not the work item or project Dashboard analysis of portfolio health Other dashboards: <ul style="list-style-type: none"> Balance investment risk Analyze return by strategy or earned value 	<ul style="list-style-type: none"> Portlets and Dashboards: Interactive visualizations and portlets, including personalized portlets that are shareable with other users, stakeholders, and executives. Dashboards can be created to support specific management business objectives. Reporting: Role-based reporting and ad hoc and custom reports. Includes self-service reporting with extensive out-of-the-box and user-defined metrics. Out-of-the-Box Actionable Metrics: Leverages integrated reporting and analytics to produce actionable insights aligned with business objectives and company KPIs. Project Earned Value report displays the earned value information of a project by period and in total. The KPIs by Project Type report lists projects, which are grouped by project type. Cross-team dependency and risk mapping, sequencing, and tracking

Conclusion and Findings

Apprize360 interviewed over 25 current and former users of Atlassian Jira and Jira Align to identify user-perceived strengths and weaknesses. Interviews and our internal assessment focused on Jira Align’s ability to meet each of the five selection factors outlined above. In our assessment, we found that Rally Software plus Clarity met all five selection factors and provided capabilities to meet the modern enterprise’s project and portfolio management needs above Jira and Jira Align.

Full Functionality (90%-100%)	Partial Functionality (51%-89%)	Moderate Functionality (25%-50%)	Missing Significant Functionality (1%-24%)	No Feature or Capability Present (0%)
●	▣	◐	◑	○

Feature & Functionality Assessment	ValueOps Clarity + Rally	Jira + Jira Align
Data Model & Organizational Hierarchy Architectural platform that supports configurable organizational levels and an ordinal data model	●	◐
Breadth of Project & Portfolio Management Complete capabilities to plan, create, and manage agile projects, including: <ul style="list-style-type: none"> ▪ Cross-team dependencies and task/project risk management ▪ “What-if” Scenario Planning: Budget impact of proposed projects assigned a target portfolio budget ▪ Portfolio Optimization: Scenario comparison, portfolio dependency analysis, and identification of investments that are best aligned to key goals ▪ Advanced Decision Support: Strategic goals, maps projects to corporate objectives, and classifies/scores projects 	●	●
Resource & Capacity Management Automated resource selection based on availability, capacity, and skill level with capacity management and resource reservations	●	◐
Cost & Financial Management Budgeting, planning, and forecasting with resource management tied into financial management	●	◐
Advanced Analytics & Reporting Ability to create ad hoc, shareable dashboards and actionable insights without custom or SQL scripting as well to analyze individual and team performance	●	◐
Collaboration In-application communication, collaboration, and document management, project workspaces, and team activity feeds	●	◐
Use Case & Persona “Accelerators” Support for persona accelerators, such as PMO and NPD, and use cases, such as EVM and Application Portfolio Management	●	○
Enterprise Scalability & Security High-performing architecture with options for on-premise or multi-tenant deployment and strong enterprise security certifications, including ISO 27001, SOC-2, and FISMA ATO, NIST 800-53r4	●	◐
Workflow and Automations No-code, OOTB workflows for automations	●	◑
Native Test Case Management Ability to create and manage standard and custom test cases directly from user stories and epics and manage test results in one location	●	○