1 About This Guide
This document is intended for Product Managers using Rally Product Manager. The term Product Manager refers to anyone in your organization in charge of staying in touch with customer needs and of prioritizing product features.

Depending on how your product group is organized, the actual title may vary from product manager, product owner, business ambassador, business analyst, project lead, product marketing manager, and maybe others.

2 Introduction

Rally Product Manager is designed to help Product Managers working with agile development teams deliver a continuous flow of customer value onto the release backlog.

2.1 About Agile Product Management

As agile software development becomes mainstream with more and more development teams accelerating their delivery of software releases, the strategic role of Product Managers is becoming a key component to a company’s success. When Product Managers can assess that the features they select for their next release will bring value to their customers, the guessing game ends and customer satisfaction drastically increases.

Agile software development brings new challenges to Product Managers:

- Shorter development cycles mean less availability to talk to customers
- Frequent prioritization means high expectations that Product Managers know their customers’ needs well
- Heightened visibility means more time spent communicating status to all stakeholders

For more information on how agile software development affects product managers, view the How Product Management Must Change to Enable the Agile Enterprise webinar on www.rallydev.com.

2.2 The Rally Solution for Agile Product Management

The Rally solution for agile product management includes Rally Product Manager and Rally Enterprise as well as training and coaching for the agile Product Manager.

Product Managers use Rally Enterprise to manage the product, prioritize release and iteration backlogs, document user stories and acceptance criteria, schedule user stories into short iterations and track development progress.

Rally Product Manager maximizes the value of user stories tracked in Rally Enterprise by monitoring customer needs from all customer-facing groups within your organization, such as sales and customer support. Product Managers create features and score them based on the number of customers requesting the feature, as well as other parameters.

The table below summarizes the tool used for each agile product management task. Note that an Agile Team is ideally 5 to 10 team members including one product manager (often refer to as the product owner).
<table>
<thead>
<tr>
<th>Task</th>
<th>Recommended Tool</th>
<th>User</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document product strategy</td>
<td>MS Office or other</td>
<td>Product Manager</td>
</tr>
<tr>
<td>Create product roadmap</td>
<td>MS Office or other</td>
<td>Product Manager</td>
</tr>
<tr>
<td>Collect customer feedback</td>
<td>Rally Product Manager</td>
<td>Product Manager</td>
</tr>
<tr>
<td>Identify backlog candidates</td>
<td>Rally Product Manager</td>
<td>Product Manager</td>
</tr>
<tr>
<td>Manage backlogs</td>
<td>Rally Enterprise</td>
<td>Product Manager</td>
</tr>
<tr>
<td>Plan releases</td>
<td>Rally Enterprise</td>
<td>Agile Team</td>
</tr>
<tr>
<td>Plan iterations</td>
<td>Rally Enterprise</td>
<td>Agile Team</td>
</tr>
<tr>
<td>Track iteration progress</td>
<td>Rally Enterprise</td>
<td>Agile Team</td>
</tr>
<tr>
<td>Track release progress in detail</td>
<td>Rally Enterprise</td>
<td>Agile Team</td>
</tr>
<tr>
<td>Track release progress at a high level</td>
<td>Rally Product Manager</td>
<td>Execs, sales, support, marketing, services</td>
</tr>
</tbody>
</table>

If your development team has not yet adopted Rally Enterprise, *Product Managers* can start using Rally *Product Manager* to understand customer needs. Once your development teams adopt Rally Enterprise, *Product Managers* can populate release backlogs in Rally with customer-driven user stories directly from Salesforce and provide visibility into the development status to non-development stakeholders.

### 2.3 Rally Product Manager Collaborative Approach

*Rally Product Manager* is unique in its leverage of Customer Relationship Management (CRM) systems. Customer data such as customer profile, acquired and projected revenues are invaluable to assess the value of feature requests submitted by customers.

By integrating CRM and Agile Lifecycle Management, *Rally Product Manager* brings unprecedented visibility into the status of releases and individual customer feedback. This closed-loop feedback between customers and development eradicates the development “black box” syndrome and builds customer trust in your organization’s ability to deliver valuable software.

This version of Rally Product Manager is built on the Salesforce Force.com on-demand platform which provides *Product Managers* valuable product management capabilities such as email notifications, custom reports and dashboards, custom attributes on features, and workflow customization, not to mention the low-cost easy deployment aspects of a Software-As-A-Service (SaaS) solution.
2.3.1 Usage Pattern

Although its name may indicate Rally Product Manager is only for Product Managers, many other constituents participate in driving the backlog input of products, and almost everyone in your organization can benefit from viewing the development status of releases.

Rally Product Manager automates these activities in the following ways (status values used below are for demonstration purposes. You can customize which status values you want to use):

On an ongoing basis:
- Anyone in discussions with customers creates customer Feedback
- As Feedback is submitted, Product Managers receive an email
- Either upon reception of the email or on a regular basis, Product Managers reviews the Feedback, set the Feedback status to Incomplete, Rejected, or Reviewed
- Submitters of incomplete Feedback receive an email notifying them to complete their feedback submission before triage can occur
- As common feedback emerge, Product Managers create features, organize them by category and by product, and score them using 4 values: user value, strategy value, competition value and revenues value. Newly created Features have a Requested status
- Product Managers associate Feedback to new or existing Features, Product Managers promote high score Features to Backlog Candidates, change their status to Planned and the status of the associated Feedback to Planned

As the release planning date approaches:
- Product Managers reviews the Total Value of each Feature and sets the Feature Rank and Priority, and mark Features as Backlog Candidates
- Product Managers adds the Backlog Candidates to Rally to add them to the release backlog

During release planning:
- The Agile Team estimates stories in the release backlog. In Rally, each story should display a Planned Estimate value
- NOTE: this step is important for the Rally Product Manager Release Dashboard to display meaningful feature status progress indicators to the rest of the organization
- Product Managers remove from the Backlog Candidate any Features added to the release backlog in Rally but not ultimately scheduled for the release

As the development release is under way:
- Anyone interested in the release status views the Release Dashboard
- Product Managers start preparing for the next release (see On an ongoing basis above)

Once the release is delivered:
- Product Managers updates the status of Features and Feedback that have been implemented, respectively to Implemented, and Delivered
- Product Managers update Features that were delivered to no longer be Backlog Candidates

And a new short release cycle starts…..

2.3.2 User Interface

The table below details the respective audience and usage for each Rally Product Manager tab.

<table>
<thead>
<tr>
<th>Tab</th>
<th>Usage</th>
<th>Audience</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
<td>Dashboards</td>
<td>Product Managers</td>
</tr>
<tr>
<td>About Rally Product</td>
<td>Overview, setup guide, user guide, demo</td>
<td>Product Managers</td>
</tr>
<tr>
<td></td>
<td>and support contact.</td>
<td></td>
</tr>
</tbody>
</table>

3 Rally Product Manager Workflows

Rally Product Manager values are divided in three workflows:

- **Centralize Customer Feedback**: For Product Managers to collect customer input received by anyone in contact with customers. This capability improves Product Managers productivity by raising visibility into all incoming customer input and saves time reviewing customer input by centralizing all input in one area.

- **Prioritize Development Backlogs**: For Product Managers to objectively score features based on competitive advantage, alignment with product strategy, number of customer requests, and forecasted sales revenues. This capability provides Product Managers an objective feature prioritization process to truly deliver customer value in software releases.

- **Communicate Development Status**: For non-development stakeholders to gain visibility into the development status of releases and individual feedback provided by customers. This capability ensures the information communicated to customers by the rest of the organizations accurately reflects the development status and saves Product Managers time managing customer expectations.

In each section, we present the workflow, the intended users and how to use Rally Product Manager to execute the workflow.

### 3.1 Centralize Customer Feedback
To ensure that most customer input is channeled to product management, Rally Product Manager provides a way for anyone in contact with customers to submit customer feedback directly from their respective application.

Rally Product Manager provides an alternative to tracking customer feedback in disparate alternatives, such as spreadsheets, post-its, ad-hoc and disconnected systems, and documents. By providing a single location for Product Managers to review customer feedback collected by anyone in their organization who has direct contact with customers, Rally Product Manager saves Product Managers a tremendous amount of time and allows them to stay well connected with the voice of their customers.

3.1.1 Users

Users of this capability include anyone within your organization who is in contact with customers. In most organizations these users could include team members from:

- Engineering
- Product Management
- Executives
- Marketing
- Sales
- Support
- Professional Services (Consultants, Trainers, etc.)

3.1.2 Workflows

Collecting Feedback from a Sales Opportunity

When missing functionality is impacting a sale, the account representative can alert Product Managers from the sales Opportunity tracked in Salesforce.

1. Select the Salesforce Sales application
2. From the Opportunities tab, open an Opportunity
3. Click New Feedback
4. Enter the Feedback Summary
5. Enter Detail regarding the Feedback
6. Enter a description of the Value provided by addressing the Feedback
7. Select the Product affected by the Feedback
8. Select the Importance value of addressing this feedback
9. Click Save

Collecting Feedback from Existing Users

Anyone in your organization who is in frequent discussions with customers can report customer feedback from the Contact page in Salesforce.

1. Select the Salesforce Sales application
2. Click on the Contacts tab
3. Open an Contact
4. Click New Feedback
5. Enter the Feedback Summary
6. Enter Detail regarding the Feedback
7. Enter a description of the Value provided by addressing the Feedback
8. Select the Importance value of addressing this feedback
9. Select the Product affected by the Feedback
10. Click Save
Creating Customer Feedback from Support Cases

Customer support receives bugs and suggestions reports. Support representatives can submit customer feedback from a Case.

1. Select the Salesforce Call Center application
2. From the Cases tab, open a Case
3. Click New Feedback
4. Update the Feedback Summary and Detail from the case subject and description values
5. Enter a description of the Value provided by addressing the Feedback
6. Select the Importance value of addressing this feedback
7. Select the Product affected by the Feedback
8. Click Save

Tip
Encourage everyone to fill in the Value field as it represents the missing business value.

Documenting Market Feedback

Product Managers can track Feedback collected from discussions with partners or competitors or from research in their market, in the same central place where all customer feedback is stored.

1. Select the Salesforce Rally Product Manager application
2. From the Feedback tab, click New
3. Enter the Feedback Summary
4. Enter Detail regarding the Feedback
5. Enter a description of the Value provided by addressing the Feedback
6. Select the Importance value of addressing this Feedback
7. Select the Product affected by the Feedback
8. If a feature that tracks this Feedback already exists, set the Feature field to the feature
9. Click Save

Tip
To select a Feature, you have 3 choices:
1/ enter the actual feature name in the Feedback Feature field
2/ click the feature selector (?) and select a Feature from the list.
3/ enter a string that includes one or many wild chars (**) to locate a subset of features to select from (ex: enter admin*user, or enter *, or enter admin*)

Importing Feedback from Other Applications

Product Managers can import Feedback stored in CSV fields from other applications.

1. From the Salesforce top menu, click Setup
2. On the left hand side, under Administration Setup, expand Data Management
3. Select Import Custom Objects
4. Read the Steps to Import Custom Objects
5. Click Start the Import Wizard!
If you want to maintain the original creation dates and submitters of feedback upon import, contact Salesforce support to have them make those system fields temporarily writable by the import wizard.

### 3.2 Prioritize Development Backlogs

*Product Managers* are responsible for determining the highest value features for the Agile Team to implement. The value of software releases is directly related to *Product Managers* ability to identify the features that will bring the most value to their customers.

*Rally Product Manager* provides a triage sandbox for *Product Managers* to identify features before communicating the highest value requests to development. This capability allows *Product Managers* to prioritize features based on objective parameters such as number of customer requests and expected sales revenues attached to the feature. Additional parameters such as competitive value and alignment to the product strategy are also supported.

When using *Rally Product Manager* with Rally Enterprise – Rally’s Agile Lifecycle Management (ALM) solution, *Product Managers* can accelerate the release planning process by creating user stories from *Rally Product Manager*.

#### 3.2.1 Users

The primary users for this workflow are people in charge of defining the release content of software releases.

This role can be played by people with the following titles:

- *Product Owner*
- *Product Manager*
- *Development Manager*
- *Business Ambassador*
- *Architect*
- *Business Analyst*

#### 3.2.2 Workflows

From the data collected in the Centralize Customer Feedback workflow, *Product Managers* create features that represent common feedback. Features are assessed based on competitive advantage, alignment with the overall product strategy, revenues attached to the feature and the number of customer feedback items. The highest value features are marked as Backlog Candidates before being added to the Agile Team backlog.

**Create Features**

1. Select the Salesforce *Rally Product Manager* application
2. From the *Features* tab, click *New*
3. Enter a Name
4. Enter a Description
5. Select a Category and the Product
6. Click *Save*
Consider naming Features by prefixing them with their matching Category to help others (support, product marketing) associate Feedback with their matching Feature. Ex: a support representative entering customer feedback can enter Admin* in the Feature field for the Feedback and pick the most appropriate Feature from the list of Admin Features.

If you are migrating to Rally Product Manager from another tool and wish to import Features, the Importing Overview documentation at https://na1.salesforce.com/help/doc/en/importing.htm provides an overview for importing data. Also, refer to the tip sheet at https://na1.salesforce.com/help/doc/en/salesforce_import_cheatsheet.pdf

Customers who previously adopted Agile Product Manager should be able to migrate their data to Rally Product Manager following the documentation above.

Aggregate Customer Feedback into Features
To assess the user value of each Feature, Product Managers aggregate multiple Feedback items into the Feature. You can perform this step from the Feedback or from the Feature.

From a Feedback item:
1. Select the Salesforce Rally Product Manager application
2. From the Feedback tab, open a Feedback item
3. Click Edit
4. Select a Feature
5. Click Save

From a Feature:
1. From the Features tab, open a Feature
2. Click Select Feedback
3. Select the Feedback items to aggregate to the Feature
4. Click Done

Score Features
To plan and prioritize product releases objectively requires capturing some notion of feature value. Rally Product Manager provides score parameters to evaluate each feature as objectively as possible.

1. Select the Salesforce Rally Product Manager application
2. From the Features tab, select a Feature.
3. In the Scoring & Prioritization section, select a value (5 is high, 1 is low) in each Value field:
   a. User Value: level of satisfaction from existing users. Review the Feedback item associated to the Feature to set this value. The larger the number of Feedback items reported, the more customers will gain value from the Feature.
   b. Competition Value: level to which this requirement, if fulfilled, improves your current competitive position. Does this requirement help close the competitive gap, or help you build on your competitive lead?
c. **Strategy Value**: Use extent to which this Feature aligns with your strategic product and key company objectives

d. **Revenue Value**: potential sales revenues associated with building the feature. Set this value based on the value shown in the Feature Revenues field, which reports the sum of all opportunities tied to the Feature. As a sales representative enters customer feedback from Opportunities, Rally Product Manager keeps track of the Opportunity amount (defined by the Opportunity field specified in the Rally Product Manager setup).

4. Click **Save**
5. Review the **Total Value Score** field that sums all four **Values** above.
6. Click **Edit**
7. Set the **Priority** and optionally the **Rank**. Setting the Feature Rank will set the Rally story rank.

**Tip**

To ensure you are viewing the latest opportunity revenue information in the Feature Revenues field, open a Backlog Candidate (or a Feature) and click **Update Revenues**.

### Prepare your Backlog

If you are like most software teams, you likely will have more Features than your Agile Team has capacity to implement in a release. To quickly locate the subset of Features to implement, you assign these Features to a Backlog Candidate. Backlog Candidates are staging area for Product Managers to list those customer-driven Features to add to the Agile Team various backlogs, one backlog per Agile Team.

1. Select the Salesforce Rally Product Manager application
2. From the **Backlog Candidates**, click **New**
3. Enter a Name and a Description
4. Click **Select Features**
5. Select those features that are candidates for the release backlog
6. Click **Done**

You can also add an individual Feature to a Backlog Candidate:

1. From the **Features** tab, open a Feature
2. Click **Edit**
3. By the Backlog Candidate field, click the lookup icon
4. Select an existing Backlog Candidate
5. Click **Save**

**Tip**

Name your Backlog Candidate after your Rally projects, so that each Agile Team can populate their specific backlog. Optionally, to keep a history of which customer-driven features were implemented in which release, name your Backlog Candidate with a reference to your next release (ex: “API Team v3”)

**Tip**

Once user stories have been created in Rally from a Backlog Candidate, you have 2 options:
1/ if you make no release reference in your Backlog Candidates names, from the Backlog Candidate, select **Select Features**, un-select all Features and click **Done**
2/ if you make release reference, create a new Backlog Candidate for each release
Create Rally User Stories from Backlog Candidates

If you are using Rally Product Manager in combination with Rally Enterprise, you can add Backlog Candidate Features to Rally, saving yourself time at manually entering stories in Rally.

1. Select the Salesforce Rally Product Manager application
2. From the Backlog Candidates, open a Backlog Candidate
3. In the Rally section, select the Rally project in which to create user stories
4. If the release has not yet been created in Rally, select <Product Backlog> as the Rally release. Otherwise, select a specific Rally release
5. Click Add to Rally. All Features marked as Backlog Candidates are added to Rally as user stories
6. Each story displays the following information:

<table>
<thead>
<tr>
<th>Story field</th>
<th>Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Feature Name</td>
</tr>
<tr>
<td>Description</td>
<td>Feature Description</td>
</tr>
<tr>
<td>Owner</td>
<td>Rally Product Manager</td>
</tr>
<tr>
<td>Project</td>
<td>Rally Project selected in Salesforce</td>
</tr>
<tr>
<td>State</td>
<td>&lt;default value for new user stories&gt;</td>
</tr>
<tr>
<td>Package</td>
<td>Any Feature field selected in the Rally Story Fields RPM setup or &lt;blank&gt;</td>
</tr>
<tr>
<td>Release</td>
<td>Rally Release selected in Salesforce or &lt;blank&gt; if &lt;Product Backlog&gt; was selected</td>
</tr>
<tr>
<td>Rank</td>
<td>Feature Rank (be aware that if your Rally subscription uses the Drag and Drop Ranking method, the Rank will be updated as soon as the story is relocated in a Rally Backlog page)</td>
</tr>
</tbody>
</table>

Custom Fields

| Requesting Customers | Concatenated list of Salesforce Accounts linked to the Feedback associated to the Feature from which the story is created |
| Number of Requests   | Number of Feedback associated with the Feature |
| Score                | Feature Total Score |
| Salesforce Feature   | URL to the Feature in Salesforce |

Create a Rally User Story from a Feature

You can also create a user story from an individual Feature:

1. Select the Salesforce Rally Product Manager application
2. From the Features tab, open a Feature
3. Open the Rally section
4. Click View Status
5. Select a Rally Project and a Rally Release (or <Product Backlog>)
6. Click Add to Rally.

Associate a Feature to an Existing Rally User Story

If you were already using Rally Enterprise by the time you adopted Rally Product Manager, you may already have user stories in Rally. You can associate a Feature to an existing Rally user story to display the customers’ information and feature score in Rally.

1. Select the Salesforce Rally Product Manager application
2. From the Features tab, open a Feature
3. In the Associate to Existing Rally Story section, click Select Project
4. Select whether you want to search **by ID**, **by Name** or **By Name & Description**
   a. When searching by ID, enter the numeric part of the Rally ID (ex: 123)
   b. To locate all stories in a project, simply leave the search field blank.

5. Click **Search**

6. Locate the user story and click **Associate**

7. View the Rally story in the section above

### 3.2.3 Update Customer Information in Rally

Typically, after you added a Feature to a Rally Backlog, more Feedback may be aggregated to the Feature as customers continue to report their need for the Feature. To ensure the Agile Team is viewing the most current list of requesting customers in Rally:

1. Select the Salesforce **Rally Product Manager** application
2. From the **Backlog Candidates** tab, open a Backlog Candidate
3. Click **Update Rally**

This updates the Requesting Customers, Number of Requests and Score custom fields for each story created from these Backlog Candidate Features. Note that this does not update any additional user story field as the source of record for each requirement development implements is the Rally story.

### 3.2.4 Viewing the Latest Revenue Information

Typically, after you added a Feature to a Rally Backlog, more Feedback may be aggregated to the Feature. Some of those Feedback items may be linked to Opportunities, so before you identify a Feature as a Backlog Candidate, you want to update the Feature Revenues field:

1. Select the Salesforce **Rally Product Manager** application
2. From the **Features** tab, open a Feature
3. Click **Update Revenues**

This updates the Revenues field with the sum of all Opportunities amounts (as defined by the Opportunity value field specified during setup in the RPM Setup Revenue Source window) across all Feedback aggregated to the Feature.

To update the revenues on multiple Features:

1. From the **Backlog Candidates** tab, open a Backlog Candidate
2. Click **Update Revenues**

This updates the Revenues field for all Features in the Backlog Candidates and all features not assigned to any Backlog Candidate.

### 3.2.5 Prioritization Reports & Graphs

At any time, **Product Managers** can access feature prioritization reports to quickly review the latest customer feedback trends and make business-wise decisions on release priorities.

The Reports tab and the Dashboards tab in **Rally Product Manager** provide predefined reports that can be of great assistance in prioritizing features:

- Feature by Feedback
- Feature by Value
- Feature by Revenues
- Etc…
3.3 Update Customer Feedback Status

As sales and customer support talk to customers, they will want to update them on the status of their reported Feedback, so it is important for product managers to maintain the status field of Feedback up to date with development progress. The steps below refer to the status values provided out of the box in Rally Product Manager. These values can be customized to your needs.

3.3.1 Users

The primary user for this capability is the person in charge of defining the release content of software releases.

This role can be played by people with the following titles:
- Product Owner
- Product Manager
- Development Manager
- Business Ambassador
- Product Marketing Manager
- Architect
- Business Analyst

3.3.2 Workflows

As features representing customer feedback migrate to being Backlog Candidates, the feature status should be set to ‘Planned’ and the associated feedback status to ‘Planned’.

1. Select the Salesforce Rally Product Manager application
2. From Backlog Candidates, open a Backlog Candidate
3. Click Update Status
4. Click Select All to select all features or hand select a subset of features
5. Select ‘Planned’ for feature status and ‘Planned’ for Feedback status
6. Click Set Status
7. Click Done

You can also update the Feedback status from an individual Feature:

1. From the Features tab, open a Feature
2. Click Update Feedback Status
3. Click Select All
4. Select the status to set for all selected Feedback
5. Click Set Status
6. Click Done

Once the release is delivered by development, the same steps should be followed to set the feature status to ‘Implemented’ and the associated feedback status to ‘Addressed’.

3.4 View Development Status

As development works on a release, customers and internal stakeholders outside of the development team are often in the dark on the release content and its progress towards delivery.

Rally Product Manager provides visibility into the Rally status of development release and individual user stories in Salesforce. By equipping your organization to answer customer request for feedback
updates, Rally Product Manager enables these extended team members to manage customer expectations, keep customers satisfaction high, and focus Product Managers at driving successful products.

Rally Product Manager establishes a close feedback loop between the submitter of customer feedback and the development team addressing the feedback so that the submitter can follow the actual progress of the feedback.

3.4.1 Users
This capability is beneficial to all those who either reported customer feedback or needs to communicate release progress. They may include these titles:

- Customer Support
- Sales Representative
- Executives
- Marketing
- Professional Services
- Business Development / Partner Relationship Manager

3.4.2 Workflows

View Feedback Status

1. Select the Salesforce Sales application
2. Open an Account, Contact, or Opportunity
3. Scroll down to the Feedback section
4. The Status column displays the Feedback status.
5. If the status is set to Planned or Addressed:
   a. Edit the Feedback
   b. Scroll down to Development Status section
   c. Click View Rally Status
   d. The development status is displayed as well as the release in which the feedback is planned or addressed

Customer support benefits from this visibility from the Cases tab in their Call Center application.

View Release Status

1. From the Release Dashboard tab, select a Rally Project and a Rally Release
2. Click View Rally Status
3. The Rally release name, status, end date, and theme are displayed
4. "Total Size" summarizes the Rally release Planned Estimate in Planning Units (ex: points) as defined in the Rally Workspace Units settings.
   a. This column provides a relative number against which to compare individual story Size.
5. The list of stories included in the selected release and project is displayed.
   a. Stories grayed out are stories that are children of stories included in the release and are only displayed to provide context
6. For each story, any Salesforce user views the following information:

<table>
<thead>
<tr>
<th>Header</th>
<th>Content</th>
<th>Additional information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Rally story name</td>
<td></td>
</tr>
<tr>
<td>ID</td>
<td>Rally story ID</td>
<td>Hyperlinked to Rally story details for users licensed to Rally</td>
</tr>
<tr>
<td>Team</td>
<td>Rally project where story is located</td>
<td>Project may represent a development team or a product</td>
</tr>
</tbody>
</table>
Instruct non-development stakeholders to communicate the release date as a targeted date (not a committed date).

### 3.5 Inform Customers When Their Suggestions are Addressed

When customer feedback is addressed in a release, submitters of feedback receive an email informing them to communicate the good news to their customers.

#### 3.5.1 Users

The primary user for this capability is the person who submitted feedback on behalf of a customer.

This role can be played by people with the following titles:

- Sales
- Support

#### 3.5.2 Workflows

When the status of Feedback changes to Addressed, an email is sent to the original submitter of the Feedback. The email content provided by Rally Product Manager is as follows by default and can be edited to match your needs:

<table>
<thead>
<tr>
<th>Release</th>
<th>Rally release in which story is scheduled</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Rally story scheduled state.</td>
</tr>
<tr>
<td></td>
<td>If the story has children, the rolled up state is displayed</td>
</tr>
<tr>
<td>Size</td>
<td>Planned Estimate for the story</td>
</tr>
<tr>
<td></td>
<td>If the story has children, the Size is calculated over children stories that are included in the release</td>
</tr>
<tr>
<td>% Done</td>
<td>Progress indicator for the story</td>
</tr>
<tr>
<td></td>
<td>For a story without children stories: 0% or 100% (a story is 0% done until it is accepted)</td>
</tr>
</tbody>
</table>
|         | For a story with children stories: calculated as the sum of Planned Estimate values of Accepted children stories scheduled in the specified release divided by the Planned Estimate value for the parent story.

**Tip**

<table>
<thead>
<tr>
<th>Release</th>
<th>Rally release in which story is scheduled</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Rally story scheduled state.</td>
</tr>
<tr>
<td></td>
<td>If the story has children, the rolled up state is displayed</td>
</tr>
<tr>
<td>Size</td>
<td>Planned Estimate for the story</td>
</tr>
<tr>
<td></td>
<td>If the story has children, the Size is calculated over children stories that are included in the release</td>
</tr>
<tr>
<td>% Done</td>
<td>Progress indicator for the story</td>
</tr>
<tr>
<td></td>
<td>For a story without children stories: 0% or 100% (a story is 0% done until it is accepted)</td>
</tr>
</tbody>
</table>
|         | For a story with children stories: calculated as the sum of Planned Estimate values of Accepted children stories scheduled in the specified release divided by the Planned Estimate value for the parent story.
When a Feedback submitted from support case is addressed, if you use Rally Support Manager in combination with Rally Product Manager, the case can be included in Release Announcements created in Rally Support Manager, by linking the case to the Rally story shown in the Feedback Development Status section.

1. From the Cases tab, open a Case
2. Scroll down to the Feedback section
3. Open the Feedback marked as Addressed
4. Scroll down to the Development Status section and click View Rally Status
5. Take note of the story ID (ex: S123)
6. Open the Rally Association section (available if you have Rally Support Manager installed)
7. Click Select Project
8. Enter the story ID recorded above and click Search
9. Click Associate to associate the story to the case.

4 Getting Started

Rally Product Manager requires some setup by a Salesforce administrator to connect it to your Rally subscription and to appropriately setup visibility for each user group. Setup steps that required Salesforce administrative permissions are detailed in the Setup Guide and must be performed before any other customization steps described in this section.

Other customization steps are accomplished by Product Managers themselves. Those include:
- Defining which products you will manage with Rally Product Manager
- Defining which prefix to use (if any) for Rally user stories created from Rally Product Manager
- Defining which opportunity field to use to define the Feature Revenues field
- Defining how to set the Rally user story Package field when creating new user stories

4.1.1 Configuring Rally Product Manager

Before benefiting from Rally Product Manager, you must define how you want to manage feedback and features

1. Define Products
   a. From the Dev Products tab, click New
   b. Enter a product name and a description
c. Repeat for all products

2. Define the Rally User Story Package Mapping
   a. From the RPM Setup tab, click the Setup object (ex: RS0000)
   b. Click Rally Story Fields
   c. Define how to populate the package field of Rally user stories created from Rally Product Manager.
   d. We recommend you select the Feature Category field to populate the Rally Package field, unless you added a Feature custom field you prefer to use to populate user stories package values

Tip
Make sure all Category values are listed as Package values in Rally.

3. Define Feature Revenue Source
   a. From the RPM Setup tab, click the Setup object (ex: RS0000)
   b. Click Revenue Source
   c. Select the Opportunity field to use as Feature Revenue. The Feature Revenue field is intended to display the potential revenue associated with a feature.

Tip
You can choose any Opportunity standard field (ex: Amount, Expected Amount) at first, but you eventually will want to define a opportunity custom field of type Formula to discount opportunities that are no longer active and define your own formula between a combination of existing standard and custom Opportunity fields.

4. Define Rally User Story Name Prefix
   a. From the RPM Setup tab, click the Setup object (ex: RS0000)
   b. In the Rally Settings section, enter a prefix in the Rally Story Prefix field.
   c. The name of all user stories created from Rally Product Manager will be prefixed with the defined prefix.

5. Update Feedback and Feature Status
   a. If you wish to use other status values that those provided upon installation, contact your Salesforce administrator to follow steps in Setup Guide.

6. Define Feature Categories
   a. Send your Salesforce administrator the list of product-specific categories (s)he should use to complete the step in Setup Guide.

4.1.2 Educating Feedback Submitters
The value of Rally Product Manager is directly proportional to the quality of customer feedback collected by your sales and support groups. The more diligent your sales and support groups are when entering customer feedback in Rally Product Manager, the more product features address true customer needs, the more business value your software provides to your customers.

Plan to spend time educating sales in their crucial role in the Centralize Customer Feedback workflow.

5 Customizing Rally Product Manager
5.1 Customization Overview

<table>
<thead>
<tr>
<th>Available customizations</th>
<th>Customizations not current possible</th>
<th>Potential use</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>Edit field labels</td>
<td>Adapting Feature scores and values</td>
</tr>
<tr>
<td>Result pages</td>
<td></td>
<td>Add additional fields to view</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Change the column order</td>
</tr>
<tr>
<td>Features</td>
<td>Update and add status values</td>
<td>Modify default Feature status values</td>
</tr>
<tr>
<td></td>
<td>Update and add Category values</td>
<td>Add more granularity than 1 thru 5. Note that changing score values from integer to text will invalidate the Total Value Score field. Limit customization to adding more integer value</td>
</tr>
<tr>
<td></td>
<td>Update and add Score values</td>
<td>Add custom fields</td>
</tr>
<tr>
<td></td>
<td>Add custom fields</td>
<td>Categorize Features</td>
</tr>
<tr>
<td>Feedback</td>
<td>Update and add status values</td>
<td>Modify default Feedback status values</td>
</tr>
<tr>
<td></td>
<td>Update and add Importance values</td>
<td>Add custom fields</td>
</tr>
<tr>
<td></td>
<td>Add custom fields</td>
<td>Categorize Feedback</td>
</tr>
<tr>
<td>Email notifications</td>
<td>Create and modify email templates</td>
<td>Adapt email communication to your needs</td>
</tr>
<tr>
<td></td>
<td>Create and modify email alerts</td>
<td>Add specific email notifications</td>
</tr>
<tr>
<td></td>
<td>Create and modify workflows</td>
<td>Trigger email notifications based on field value changes</td>
</tr>
<tr>
<td>Reports</td>
<td>Create and modify reports</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Create and modify dashboards</td>
<td></td>
</tr>
</tbody>
</table>

5.2 Feature Categories

Rally Product Manager provides a set of default values to categorize Features. As part of the setup, your Salesforce administrator will update the default set of categories based on your input. You can also request from your Salesforce administrator to add custom fields to organize your Features.

5.3 Feedback and Feature Status

Rally Product Manager provides a set of default values to show status on Feedback and on Features. You can request your Salesforce administrator to update these values to match your needs.

5.4 Email Notifications

Rally Product Manager makes use of Salesforce.com Workflows to accelerate communication when it matters most.
Rally Product Manager helps product managers gain immediate visibility into customer feedback as soon as they are reported by customer-facing groups, such as sales and support.

- When a Feedback is submitted, the Product Managers will receive a formatted email to alert them of the customer feedback received. They can quickly respond to the feedback if the functionality is already implemented for instance.

Rally Product Manager accelerates the communication back to the customer who provided feedback by alerting the sales or support submitter when the customer feedback they submitted has been addressed in a release.

- When a Feedback is addressed, the Submitter who entered the feedback will receive a formatted email that they can customize and forward to the requesting customer.

Rally Product Manager prevents stale feedback by quickly alerting a feedback submitter when the feedback they submitted is not detailed enough for product managers to assess.

- When a Feedback is incomplete, the Submitter who entered the feedback will receive a formatted email to alert them that the feedback cannot be reviewed until more information is provided rather than having the Feedback sit in a queue forever.

Rally Product Manager uses standard Salesforce email templates to generate email notifications. You can customize the provided email template to meet your needs. You can also extend Rally Product Manager by creating your own workflows to generate other notifications (ex: Feedback status changes for instance).

For additional help on workflows, see the Salesforce online help.

Rally Product Manager leverages Salesforce customizable templates for email notifications. These templates which can include text, merge fields, and attached files, allow you to send customized communications. The email template below is used to generate emails to inform sales that their customer suggestion has been implemented.
Your Salesforce administrator can edit these email templates to follow your communication style, and include the information you want to share with your customers.

For additional help on email templates, see the Salesforce online help on this topic.

### 5.5 Reports

**Rally Product Manager** provides a set of default prioritization reports.

You can also create new reports and dashboards as Salesforce.com provides sophisticated reporting and dashboard capabilities.

1. Select the Salesforce **Rally Product Manager** application
2. From the **Reports** tab, select the Rally Product Manager folder and click **Go**
3. Click on any report name
4. Scroll down to the bottom to view the report graph
5. Click **Export Details** to export the report to CSV

Use the following links to find in-depth information on custom reports and dashboards:


### 5.6 Feature Revenues

One of the unique features of **Rally Product Manager** is the ability to leverage sales revenues information to score features. As part of the setup your Salesforce administrator will do is to define which Opportunity field to use as the source of Feature revenues.

You may want to request from your Salesforce administrator to create an Opportunity custom field to not account for inactive opportunities. Your Salesforce administrator can use the formula editor to include an conditional statement to only report the opportunity value when the opportunity is still valid.

### 5.7 User Story Creation
Rally Product Manager provides preference settings on how you want to create user stories in Rally from Rally Product Manager. You can define a user story name prefix and how the Package field for the stories is pre-populated. These settings are available from the RPM Setup tab.

6 Glossary

This document uses the following definitions of key terms:

Feedback – Product feedback received from various customer-facing sources (sales, marketing, support). Typically such feedback is received as enhancement requests or suggestions.

Dev Product – A generalization to mean external product for customers or an internal IT system that is updated on a regular basis by a development team.

Backlog Candidate – A group of Features that are candidates for a development release.

Features – A representation of customer feedback. A Feature can be linked to one and only one Rally user story.