

The Rally Report: Building a Communications Product That Became Organizational Infrastructure

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The Problem

In 2020, Rally Health — a consumer-centric digital health company within the UnitedHealth Group (UHG) enterprise — had a communication gap that was starting to cost it credibility with the people who mattered most.

Rally was doing significant product work: launching features, running clinical programs, expanding into new populations, and measuring outcomes across a complex portfolio of consumer health products. But the enterprise leadership at UHG and Optum — the organizations that funded and depended on Rally's success — had limited, inconsistent visibility into that work. Information was fragmented across teams, formats, and meetings. When Rally's CEO and Director of Product wanted to change that, they came to my team with a request that was, characteristically, open-ended: put together “some kind of report or slide deck or something” that showed Rally's work in context.

That ambiguity was intentional, and I treated it that way. Before designing anything, I spent time understanding what the audience actually needed, what existing artifacts were trying — and failing — to do, and what a sustainable communication system would look like, not just a one-time deliverable.

The Strategic Choices

Defining the audience and their needs

The primary audience was UHG and Optum enterprise leadership: senior executives with broad organizational responsibility and limited time. They needed enough context to understand Rally's work, ask informed questions, and make decisions — but not so much detail that the report became another artifact they forwarded without reading.

A secondary audience quickly emerged: Rally's own internal teams. Product strategy leads, customer insights managers, client activation teams — people who needed to stay current with work happening outside their immediate purview and use that information in their own conversations and deliverables. Designing for both audiences simultaneously shaped almost every decision I made.

Choosing a framework: The 4 R's

The most important structural choice was organizing the report around what we called the 4 R's of Product Development: Research, Roadmaps, Releases, and Results. This wasn't just a mnemonic — it was a deliberate argument about how Rally's work should be understood.

Research grounded everything in market intelligence and consumer insight, signaling that Rally's decisions were evidence-based. *Roadmaps* showed what was coming and why it was prioritized. *Releases* documented what had shipped and for whom. *Results* connected the work to outcomes, using the Balanced Scorecard framework Rally had adopted to measure progress against consumer, financial, enterprise, and technology objectives.

This sequence mattered. It told a story: we listen to the market, we plan deliberately, we ship consistently, and we measure what we do. That narrative was as important as any individual piece of content within it.

Typing content to the Balanced Scorecard

One of the more consequential decisions was connecting every product initiative in the report to the specific Balanced Scorecard (BSC) metrics it was designed to move. This required working closely with product teams to understand not just what they were building, but why — and translating that into language enterprise leadership could evaluate against organizational goals.

The BSC framework Rally used spanned five themes: *Financials* (sustain and grow), *People* (equal and empower), *Enterprise* (impact and create value), *Consumer* (open doors and engage), and *Technology* (protect and innovate). Each theme had defined objectives and measurable indicators. By mapping product work to these themes explicitly, the Rally Report stopped being a status update and became a strategic accountability document.

The Execution

The Rally Report launched as a monthly publication, with each edition covering a rolling three-month window of product activity. I owned the end-to-end process: setting the content calendar, coordinating with product teams to gather initiative details, writing and editing the narrative framing, designing the document structure, and managing distribution.

Each edition included an executive overview explaining what was new that month, a 2021 Preview section during planning cycles, product initiative tables organized by portfolio, and results sections connecting recent launches to BSC metrics. The format was intentionally consistent — readers could orient quickly, find what they needed, and build familiarity with Rally’s work over time.

What looked like a slide deck to the outside was, in practice, a structured content operation. I developed templates, established a contributor workflow across a dozen product teams, and created version control processes to ensure accuracy before each distribution. The inaugural edition earned an unequivocal response from Rally’s CEO: “It’s absolutely perfect.”

The Impact

The Rally Report’s most significant outcome wasn’t the praise it received — it was the way it changed how the organization functioned.

Within a few months of launch, the report had become embedded infrastructure. Rally’s Product Strategy team began using it as the primary source for their corporate Monthly Business Review (MBR) artifact, eliminating the need to compile and verify initiative details with individual product owners. Customer Insights used it as a reference document when analyzing NPS swings. Client Activation used it to prepare for conversations with product leadership about implementation priorities. Business Operations used it to understand work happening outside their line of sight.

That was by design. I knew from the start that the effort required to produce a monthly publication of this scope would only be justifiable if it delivered value well beyond the CEO’s original request. Because I understood the operating ecosystem, I deliberately and easily extended its reach: expanding the distribution list to include internal teams, building in cross-references and navigation links so they could quickly find what was relevant to them, and adding a Rally Report launch and walkthrough to an all-hands agenda so every stakeholder understood what it was, how it was structured, and when to expect it. The enterprise executive audience was the content focus; the broader organizational utility was the return on that investment. That’s the standard I hold internal communications to: not whether people read it, but whether they use it.

“The Rally Report helps me stay up to date with the most important things we have worked on across the company — things that I don’t always have visibility into from my area of the business and definitely don’t get the one click down view that the Rally Report gives.”

— Rally Business Operations

“We use the Rally Report to provide information about product releases in the Rally Portfolio Monthly Update rather than having to compile and verify the information with individual product owners.”

— Rally Product Strategy

“It’s a solid mix of operational and strategic updates.”

— Optum Behavioral Health VP

What This Project Taught Me

The Rally Report started as an ambiguous request and became a communication system that outlasted my tenure in the role. That arc reflects something I believe deeply about internal communications work: the goal is never the artifact. The goal is the organizational behavior the artifact enables.

Building the Rally Report required me to do the things that I think distinguish strong internal communicators from capable writers: understanding the political and relational context well enough to design for it, earning trust with product teams who were skeptical about whether a communications deliverable would represent their work accurately, and maintaining consistency month after month in an environment where priorities shifted constantly.

It also required me to think like an editor, a strategist, and a project manager simultaneously — to hold the narrative thread while managing contributors, deadlines, and a reader base with genuinely different needs.