



**CEC Wrap:**  
*Making Agile Work*  
Key Points from a  
CIO Executive Council Webcast



## Making Agile Work – Key Points from the Webcast: The Wrap

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Nearly every CIO and IT leader today is managing some level of digital disruption within the IT organization, especially as businesses evolve into technology- and data-drive enterprises. As the CIO of GE stated in a [recent interview in CIO.com](#): "IT is no longer just a function. It's a skillset that every employee in the company must possess."

The way companies manage the investment, innovation, development and delivery of technology is changing, and the development and delivery of IT cannot belong solely to the IT organization anymore. Agile development is probably the most literal example of multi-functional cross-enterprise involvement in the development of technology. It is also a great vehicle for breaking down those silos and letting IT and the business work much more closely together.

[CIO Executive Council](#) recently presented a virtual session on the topic of agile development that featured CIOs who are making agile work within their IT and business organizations. The session was hosted by **Martha Heller**, President of Heller Search Associates and *CIO.com* columnist and blogger, and included: **Sudhakar Gorti**, CIO at Environmental Data Resources, **Derek Plunkett**, AVP, RPS IS Application Development at **John Hancock** Retirement Plan Services and **Raj Singh** CIO at FordDirect.

The following is a summary of key points made during the Webcast, which can be viewed and listened to in its entirety by clicking here: [Making Agile Work](#).

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**Martha:** *Why don't we begin with a brief overview of your experience and journey towards agile development?*

**Sudhakar Gorti (SG), CIO at Environmental Data Resources:**

EDR, known as Environmental Data Resources is a market leader in commercial property due diligence market. Any commercial properties that transact in the US, 90-plus percent of those transactions go through our systems and we provide absolutely any kind of data that is needed for a lender to make a decision. A lender is often primarily a bank.

When it comes to Agile development methodology, we went from absolutely a

hardcore waterfall company to Agile in 18 months. Our overall general journey has kind of its pluses and minus, but overall the experience has been very good. As we do a deep dive into different questions, I will throw out more details, but my take looking back now, I'm very happy we did it.

Are there good lessons for us? Yes. Are there pains that we can continue to improve? Yes. We have a lot of opportunity for further improvement. It is less about technology, less about tools like Martha said. It is more about mindset, more about culture, more about people and their passion.

**Derek Plunkett**, *AVP, RPS IS Application Development at **John Hancock**, Retirement Plan Services:*

Our division of John Hancock manages US-based retirement plans, so 401(k), union plans, we have \$135 billion in assets and over 1,800 employees in our division based out of Boston, Massachusetts.

Similar to SG, we were solely a waterfall shop. About two and a half years ago, we started our transformation to Agile. It took us 18-24 months to complete that transformation. I could not agree more that this is not about technology. It's really about the people and especially the culture, just changing the way people are thinking about getting their work down and shifting from a mindset of individual roles and tasks and responsibilities to one that's more based on outcomes and collective team goals.

**Raj Singh**, *CIO at FordDirect:*

FordDirect is a joint venture with the Ford Motor Company and Ford dealers. We are there to provide digital solutions and products to both Ford Motor Company and to the dealers.

I think Agile is a discipline and it's a process that allows all the stakeholders to participate in the delivery process. In this particular case, accountability stays with both IT and the business partners all along the journey. The first conversation focused on how do we change the way we approach Agile?" We talked about looking at some project as a proof of concept (POC) and understanding the value. We introduced some of the training, and two or three products and POCs.

When we look at the value, it was enormous. The outcomes of those two POCs were great. Today, we have more than 60 or 65% of the projects running in Agile.

This is a great, great flexible process of executing the projects. Everything we do is look through the IT lenses. So there's no better time than now to think of processes which can be more innovative, more flexible, and can help business achieve the business value.

### Words of Wisdom on Agile Initiatives

“When it comes to Agile development...it is less about technology. It is more about mindset, more about culture, more about people and their passion.”

- **Sudhakar Gorti**, CIO at *Environmental Data Resources*

“It's really about the people and especially the culture - just changing the way people are thinking about getting their work done and shifting from a mindset of individual roles and tasks and responsibilities to one that's more based on outcomes and collective team goals.”

- **Derek Plunkett**, AVP, RPS IS Application Development at *John Hancock Retirement Plan Services*

“Everything we do looks through the IT lenses. So, there's no better time than now to think of processes which can be more innovative, more flexible, and can help business achieve the business value.”

- **Raj Singh**, CIO at *FordDirect*

**Martha:** *It is one thing to start with a nice little flexible, off the beaten path project, but scaling it to cover a variety of development projects is a different animal. How did you do that? What's your experience with scaling Agile so that it's more comprehensive in your organization?*

**Sudhakar Gorti:**

I think building the right expectations with business and the existing management team is very critical. The journey may not be very smooth and everything won't be successful. It is also important to transparently communicate everything back to the business.

The biggest challenge for an organization is defining the minimum viable product (MVP that a customer can touch, feel, play with, and experience and provide real comments on, while overcoming the challenging aspect. We went back to the business. They basically made changes and went through some training and learning in the organization as a whole

**Derek Plunkett:**

We recently really started to look into a scaled Agile framework and applying the same principles to our overall portfolio management to use for individual Agile teams: looking at our projects, ranking them based on how much value they deliver to our organization, looking at those individual initiatives and figuring out which ones make the most sense. The result was shifting some and starting others based on the ever-changing priorities within our organization in our industry.

**Martha:**

*What advice do you have on managing the conflicting requirements between senior management's need for control and the business need for predictable status updates? Agile changes everything, but how do you get business stakeholders ready for that and IT managers to start behaving very differently than they have in the past?*

**Derek Plunkett:**

The beauty, I think, of Agile is you start to break down the IT versus business. So the project teams are given, at least in our organization, a higher level goal. You still have your budgeting, but right from the start, when they take on a piece of work, they're working together to shift to both a high-level timeline and a budget that was given out and really focuses on that whole MVP piece. Along the way, that team collectively makes decisions around more detailed requirements, hits both at date and budget.

So in our experience, we've become much more predictable. We don't try and define the hundred detailed requirements that make up a project or initiative that our senior management in that level is looking for. We set that high level budget, that high level scope and the team made up again of IT and business resources right from the start is really focused on hitting that. They make decisions and manage decisions around scope along the way.

IT managers and their role is one area where we experienced the most change and I think our folks struggled the most with. They shifted from a command and control management style, where every day they're meeting with their teams and developers and QA analysts and other resources that report to them, helping them prioritize their work, making decisions on what they should work

on and when. That completely changes in Agile because that responsibility is turned over to the team. They shifted over to enabling the teams and enabling the resources.

**Martha:** *Do really have to revamp your entire IT development team and rebrand them to become a different animal, or do you take what you have and take a more subtle transition to an Agile team? Did you work with the team you have or do you have to do some retraining?*

**Raj Singh:** I don't think we did an overhaul of the entire organization. What we had to do was to introduce the results, like scrum master. Actually in some cases, we looked at some of the existing business analysts and we actually trained them into the new roles.

What you've got to understand for Agile first and foremost is the change. Change is never easy for people who are sitting back in the old style. So, what initially I had to do was to demonstrate a simulated involvement. I started this by personally attending 60-70% of the staff meetings every day. We also took a very *soft-landing* approach to Agile rather than a crash-landing approach by taking a handful of projects and then demonstrating value.

**Martha:** *When you interview or hire somebody new for your development team, what are you looking for? How do you assess whether or not they're going to be successful in your organization?*

**Raj Singh:** The first thing we look at is their ability to be flexible and adapt and deliver at the pace which we are trying to set the tone. If you compare between the SDLC (systems development lifecycle) and Agile, the one common difference is that in Agile we are continuously evolving, working and delivering. We are looking at the values and going back and starting again.

The one fundamental difference between the old and new is that we now look for someone with that ability and the flexibility to quickly move at the pace that we are trying to set the tone for the organization.

**Sudhakar Gorti:** We went through the same exercises. But in addition to that we also look at our existing staff and what is their ability to learn a new technology stack. A tech stack is very critical when you are trying to do job development. We are going

through this product lifecycle where we are refactoring a 25-year old code base. There is no documentation, nothing.

Helping the current staff move into a new tech stack is actually causing a lot of upside and creating a lot of high potential for having the right conversations when we actually sit down and meet with business.

Also, we try to make sure that everybody we interview is adaptable, they are flexible, and they are willing to embrace change - because change is constant. But, their willingness to unlearn what they already know and learn something new is the core of Agile development for us.

**Martha:** *When you staffed up for Agile, how much did you rely on consultants who were really experts in Agile in order to get the program off the ground?*

**Derek Plunkett:**

We relied pretty heavily initially on them to help us really plan out the transformation we were about to go through. We also had some coaches on the ground with our teams from a consulting firm. What we were looking for was just that, people to coach these teams.

We knew we had good people that understood our business and understood our systems, but needed to understand how they needed to change on a day-to-day basis and change the way that they work. The coaches were a huge element in helping people understand and walking them through it, and meeting with people that were transitioning into scrum master and into product owner roles and just really helping them change the way they did their work and how they looked at getting their work done.

On the hiring front, you're looking for people who have the core skills, the development and testing skills, and the experience. We started to shift a little bit more of our focus to looking for people who had experience in Agile shops, or had experience with automated testing and continuous delivery - things that our longer-tenured folks did not have experience in to help round out our teams.

We still have some consultants that are here, after a little more than two years. But, in the meantime, we've also developed some of our own coaches, so we don't rely on them as heavily as we once did. They really help us from falling back into bad habits and really also trying to take our Agile transformation to the next level, applying it to how we manage our entire portfolio, and looking to introduce DevOps and things like that.

**Martha:** *What kind of development projects is Agile best suited to? Can the Agile methodology, for example, be applied to ERP development, specifically SAP? Or, is it best suited for custom development projects?*

**Raj Singh:**

This question truly is near and dear to me and I will tell you why. I've done ERP for more than 10-12 years. Out of that, 8 or 9 years is with SAP. So, you can carve out the development work from within SAP or an ERP to do as an Agile.

But, if you're just starting on the Agile journey, my strong recommendation is start with the small. Start with those that have clearly defined outcomes and that have a clearly-defined level of success - definitely a project that has defined roles and responsibilities. Also, the most important thing is to have a strong project champion fueling Agile.

**Martha:** *What kind of metrics are you using to measure the business value of an Agile process versus a traditional waterfall approach?*

**Derek Plunkett:**

We shifted metrics like reliability and sustainability and tried to use those to report out to our key stakeholders. But, what we realized is a lot of the Agile metrics are really used for the team to look at themselves and figure out how to improve and how they can better predict their work. Our key stakeholders, however, are more interested in traditional metrics like: Are you going to deliver on time? What are you going to deliver and when are you going to deliver it?

So we evolved and segregated almost the two sets of metrics where the teams use their team measurements to continuously evaluate their productivity and how they can change and improve specifically; and we still try and report out the more standard or traditional time/budget metrics. At the end of the day, key stakeholders are still interested in when something is going to be delivered and how much it's going to cost.

**Sudhakar Gorti:**

Our metrics are more aligned with the roles and responsibilities of people. For example, how many times a particular issue has been opened in JIRA. I track that. This helps me understand who's writing what quality of code, how fast they're writing, what is the pace impacting, and if our business requirements are not clear. Those metrics are tied to individual roles, people and responsibilities.



We also report metrics to the business and those metrics are more high-level rollouts like: Will my project be on time? Will we be under budget? Every two weeks, having that conversation helps ensure that deviation is not too far.

**Raj Singh:**

We actually use a different Agile methodology within our ecosystem. We have scrums which are used mostly for new projects. The metrics for this are going to be the number of sprints; and the number of what we call story cards, like in use cases. We are resolving every two weeks.

We participate in calls globally, since we have people in different geographies and we use certain tools, Wiki and JIRA, to create some sort of dashboard, where we have a to-do list and work-to-be-done.

We track the number of enhancements going every week or every day and the number of operational issues closed every day; and have different metrics tracked at different levels, depending on what kind of work you do.

**Martha:**

*Agile doesn't sell itself. You really have to do some of the selling, especially to the business and stakeholder outside the IT organization. Can you talk through that?*

**Raj Singh:**

That's not only the most critical, but the most important step of the Agile execution. My belief was when I talked to business, I didn't talk to them about Agile or using non-Agile. I actually talked to them about the business value creation.

When I started using the vocabularies they understand, they kind of got along. I started talking to them about: How do we start delivering things faster? How do I start bringing value to your organization quicker than what you have historically done? But, it's a tradeoff. To do that, I need this from you. Once they start having those conversations, they start getting on board.

As I said earlier, we started with small POCs, proof of concept. We said, "Why don't we just look at two or three projects and see what they really deliver in terms of the value for the business?" Once they were a part of those two or three POCs, everything else was self-setting from there. They could see the value of how they were being engaged early in the game.

There was also room for what I call the 80/20 rule. They could actually mimic the requirement; it could be brought back and they could be involved in testing,

validating, and actually making changes on the fly. Focusing on the business value creation for the business partner will take you a long way.

**Sudhakar Gorti:**

Business was part of the process from day one. Before we officially made the decision, we shared the program's cons, benefits, upside, risk, and they were part of our team in making the decision. There was no concept of 'us vs them.' Business is part of the technology team. Technology is part of business. They have access to JIRA. They do UAT, they do testing, and they actually kind of build this on an ongoing basis. So they're an integral part of the technology development team.

**Martha:**

*Traditionally, teams love the autonomy and self-determination that comes with an Agile framework. And, senior leadership buys into shorter feedback loops and continuous delivery. But, how do you manage the "frozen middle" that may be reluctant to give up functional control of their direct reports?*

**Derek Plunkett:**

This is one of our biggest challenges. I touched on it earlier, the shift in the IT manager's role from the command and control reporting they typically were comfortable with to one of servant leadership. So what we tried to do with our organization is find roles for these folks that were more horizontal in nature and what I mean by that is that they really spanned across all of the teams.

So I have some of the folks that are in more of an architecture role that work across the teams, another person that's focused on our continuous delivery efforts, automated deployment, automated testing that really helped enable all the teams. So you have to find the right roles for these people and find a way to engage them. They certainly feel that they're losing their power and their control during this change because they're no longer directing their teams on a day-to-day basis and making these decisions.

It's really key to the adoption. These people are also influential people within the organization and they need to buy into it. I have other folks that shifted into my product owner role for some of our tech-heavy project teams. It's really about finding the right roles based on each individual skillsets and their desires.

**Raj Singh:**

I must admit, it's a cultural change that needs to be processed at all levels of the organization. We did offer some training, and looked at it in terms of what is in it for them. I also added what I called an incentive: Anyone who has not been part of the core Agile team and comes into Agile and demonstrates some success is

called out in a monthly newsletter with their pictures and what they have done. So, building some element of training, coaching, counseling and some incentive, that is the issue.

**Sudhakar Gorti:**

Business and the middle management teams and members were involved from the beginning from day one before we decided to go towards Agile. There was a very minimal set of stakeholders who bought into this journey and we were able to close that gap through monthly newsletters and personally having one-on-one talks with them to really understand what is it they are looking for or want to achieve through this whole process. Understanding that need and closing that gap basically gave us a homerun there.

**Martha:** *If you had one piece of advice to give a group of CIOs or development leaders who are embarking on Agile, what to tell them at the beginning stages or what to do or not do, what would that one thing be?*

**Sudhakar Gorti:**

Assess the capability and capacity of the organization to absorb change and drive change, constant change. Also, understand the capability and capacity of your organization across the board. Not just the stack but across the board, whether they are willing to change and have the capacity and capability for change.

**Derek Plunkett:**

Very similar. I would also say identify those change agents within the organization who can help you with this transformation.

**Raj Singh:**

What I would recommend them is to be consistent, disciplined and be collaborative. Create a culture of collaboration.

*Ana Hidalgo is a student at Regis College in Weston, MA and a member of CEC's Spring 2016 Intern Program.*

The [CIO Executive Council](#), an IDG Brand and a business unit of IDG Communications, was founded to serve the evolving, challenging and demanding role of the Chief Information Officer (CIO). Now in its eleventh year, the CEC has expanded its highly regarded leadership services beyond the realm of the CIO to include professional advisory services for any executive charged with strategic technology leadership.