

# ENTERPRISE AGILE TRANSFORMATION: A PRODUCT COMPANY'S SUCCESSFUL ADOPTION OF DISCIPLINED AGILE

Better Quality | Quicker Time to Market | Dependable Delivery

## OpenLink Financial

Building on their pioneering development of cross-asset trading and risk management products for energy and financial services companies, OpenLink offers a suite of solutions designed to meet the specific needs of clients within energy, commodities and financial services.

## Tom Marrapodi, VP Development

"Scott Ambler + Associates has made an important contribution in helping us to dramatically improve our development process, to increase transparency across the organization, and to achieve our vision of high quality software that meets the needs of our customers. The morale and effectiveness of our teams and their focus on producing high quality software is clearly better than prior to launching our agile initiative."

## Dave Shapiro, Sr. Director of Development

"OpenLink has gone through a complex transformation to agile using Disciplined Agile. Scott Ambler + Associates has been instrumental in helping us through some of the critical moments of our adoption providing pragmatic and contextual guidance along the way. Their expert advice and coaching techniques have made it possible for OpenLink to reach a mature point in our adoption and transformation as quickly as we have. We continue to turn to SA+A as we refine our strategy for the future as well as elevate our knowledge of Disciplined Agile."



## The Business Need

OpenLink has long been a market leader in providing software for asset trading and risk management. However, they recognized that they needed to modernize their development practices in order to stay competitive. It was felt that too much time was being spent on addressing quality issues rather than enhancing functionality and working on new products.

## The Solution

OpenLink engaged Scott Ambler + Associates (SA+A) to assess their current software development practices versus comparable software product companies and create a roadmap for adoption of agile and lean practices across the company. SA+A provided training, and coaching at both the team and organization level over a two year period.

## The Benefits

In a recent executive workshop, OpenLink's leadership team identified the following as obvious benefits realized since they moved to Disciplined Agile: a dramatic increase in productivity, lower defect counts, fewer customer escalated issues, greatly improved morale, greater visibility into status and health of all work, consistent vision and collaboration across all teams, and more dependable delivery.

## The Approach

### Assess the Organization and Teams

SA+A first spent three days assessing the existing processes at OpenLink and then produced a roadmap for transforming the organization from a traditional solution delivery approach to the Disciplined Agile model.

## Train the Executive Team, Product Management, and Delivery Teams

It is important to establish a common vision for why change is required and to establish a roadmap for that change that is supported by the executive leadership. Scott Ambler and Mark Lines conducted a Disciplined Agile Executive workshop to create a multi-year vision for moving the company towards agile and lean. A critical step was to also educate the Product Management team to ensure alignment of their vision with the execution of the delivery teams. SA+A then conducted a 3-day Disciplined Agile workshop for all team members for the two pilot projects.

## Pilot the Approach, Coach-the-coach, Transform the Organization

Two pilot project teams were assembled and worked closely to together to learn from each other's experiences. The first project was related to a new Spend Analytics product and the second was to create an Operations Dashboard. A coach-the-coach approach was used to facilitate knowledge transfer between SA+A's coach and OpenLink's internal agile coach. Simultaneously Mark Lines acted as their Transformation Coach to help to realign the entire organizational ecosystem to maximize the effectiveness of the agile teams.

## Design of Fit-for-Purpose "Agile Pod" Workspaces

Consistent with the Disciplined Agile goal of "Form the Work Environment" SA+A worked with the OpenLink facilities group to design three configurations of Agile Pods with sizes of 9 to 20 team members. Following the successful pilot of the new nine-person pod, a 33,000 square foot floor was completely redesigned with the new agile pods and new collaboration areas. As a result, the teams' collaboration increased dramatically and the need for booking and leaving the work area to conduct meetings virtually disappeared.



## Incrementally Scale Up

After the success of the two pilot projects, additional teams were incrementally kickstarted at the rate of approximately one team every two weeks. Within one year SA+A had helped OpenLink to kickstart 24 teams using the Agile and Lean lifecycles from the Disciplined Agile framework. Periodically over the next two years OpenLink had SA+A conduct health checks to help refine their processes, adopt new practices and address any issues that teams were still struggling with.

## Follow-up, "Sharpen the Blade"

SA+A returned to OpenLink to conduct a Disciplined Agile Master Class. This class provides customized advanced training for teams that have mastered the basics. SA+A still returns periodically to OpenLink to help refine and introduce new advanced practices both at the organization and the team level in the pursuit of agile and lean excellence. This long term support helps to ensure the sustainability of their agile initiative and its realized benefits.

### About Scott Ambler + Associates Inc.

Scott Ambler + Associates advises organizations to be more effective applying disciplined agile and lean processes within the context of your business. We combine strategic thinking with innovative technology and business acumen to achieve outstanding results for our clients.

### Contact Us

e-mail:  
[info@scottambler.com](mailto:info@scottambler.com)

Toll free: 1.855.485.2234

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