

The Business Agility Report

RAISING THE B.A.R. | 2ND EDITION, 2019



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TABLE OF CONTENTS

PREFACE.....3

KEY FINDINGS.....4

METHODOLOGY.....5

SURVEY DEMOGRAPHICS.....6

BUSINESS AGILITY MATURITY.....8

CHALLENGES ALONG THE JOURNEY.....15

BUSINESS AGILITY SUCCESSES 18

PREFACE BY STEVE DENNING

In a world of accelerating change, increasing complexity, rapidly changing technology, digitization and the internet, many organizations are still locked in the slow-moving, top-down, bureaucratic practices and processes of 20th century bureaucracy. They are finding it difficult to sense and respond to disruptive shifts in the marketplace. Their very capacity to survive, let alone thrive, is in question.

By contrast, organizations that are capable of delivering instant, intimate, frictionless value at scale to customers are creating a world in which people, insights and money interact quickly, easily and cheaply. For organizations that are able to adapt to change for their customers' benefit, the potential is enormous, and their future is bright. As a result, most firms now give high priority to becoming more agile.

The business agility movement began in earnest in software development in the aftermath of the Manifesto for Agile Software Development, issued in 2001. Since then, the movement has spread to the management of entire organizations, including the very largest and most valuable firms.

Yet a shift in management toward greater agility at the enterprise level poses major challenges for leadership. Entrenched business processes, practices, values and attitudes don't change easily or quickly. Firms are finding that Agile transformation journeys typically take place in terms of years, not weeks or months, with many setbacks as well as forward progress.

The "2019 Business Agility Report" is a valuable contribution to our understanding of how the Agile transformation journey looks and feels to those who are undertaking it. The self-reported findings of some 453 respondents in 274 organizations from around the world convey a vivid picture of both the opportunities and the challenges along the way.

The report illustrates the passion and intensity of those involved in the business agility movement. In particular, it points to their belief in the primacy of delivering value for customers (ahead of making money for the company or shareholders), a prioritization of outcomes ahead of outputs, the need to master "agile basics," the alignment of agile practices throughout the firm, and incentives for staff to act in the interests of the customer at all times.

Yet the report is also a sobering account of the obstacles along the way, particularly in larger organizations that suffer from risk-averse cultures, organizational silos, bureaucratic layers, workforce passivity, traditional mindsets and, above all, lack of strongly supportive leadership at the top.

Nevertheless, the report shows the respondents' strong belief that the focus on business agility is leading to enhanced customer and employee satisfaction, speed-to-market, market success, collaboration and communication, accountability, and improved ways of working.

Make no mistake, the business agility revolution is well under way. This report offers indispensable information on the current state of play.

Steve Denning
Author of *The Age of Agile*

KEY FINDINGS

Recently, 453 respondents from 274 companies around the world took part in the 2019 Business Agility Report. This rates their maturity and shares their insights, challenges and successes.

Continuing the theme from last year, the survey for the 2019 Report found that, while **most organizations rate their current business agility maturity relatively low, they have enthusiasm and hope for the future.** Many respondents report that they are **struggling with systemic leadership issues relating to trust, investment and culture** while **maintaining ongoing momentum in their business agility journey.**

Deeper analyses of the data, and comparison to the 2018 survey, confirmed **significant and encouraging benefits** for organizations reporting higher levels of business agility, including:



Increased revenue, market share and brand recognition



Faster turnaround times and higher-quality offerings



Improved relationships with their customers



Greater transparency and higher employee engagement

PREDICTIVE INDICATORS

The most exciting result was the discovery of **three key predictors** of business agility in both the 2018 and 2019 studies. That is, organizations who report higher ratings in these three characteristics also report higher overall business agility and associated benefits.



FUNDING MODELS

By funding business outcomes (rather than specific work outputs or projects), adaptive funding models and associated governance processes allow organizations to quickly and easily invest in new products or services as soon as market opportunities arise and, just as quickly, stop or change work that isn't delivering the expected business value.



VALUE STREAMS

By designing flexible work processes that are both efficient and customer-centric, value streams allow organizations to tightly integrate teams from across the organization in service of maximizing value creation for the customer.



RELENTLESS IMPROVEMENT

By encouraging a culture of learning and experimentation to thrive, organizations will continuously improve both what they do and (more importantly) how they do it, thus reducing costs, improving efficiency, and delivering greater value to customers.

METHODOLOGY

This study investigated organizational business agility maturity against the Domains of Business Agility, as well as examined overall benefits and challenges. The study was conducted through a voluntary online survey where respondents were asked a series of demographic questions about their organization and invited to share the top challenges and benefits they have seen to date. Finally, respondents self-assessed their organizational business agility maturity against 26 characteristics across five key areas (Customers, Relationships, Leadership, Operations and Individuals).

The survey data was anonymized for this report.

Respondents were asked to provide a rating from 1-10 for each characteristic; with **1-6 classified as low-moderate maturity** and **7-10 as high maturity**. In the context of each characteristic, the ratings were classified as either;



Pre-Crawl (1-2) - the organization mostly follows traditional processes. *"Practically speaking, the purpose of our company is to make money for the owners or shareholders, regardless of what is written on the mission statement."*



Crawl (3-4) - the organization is just getting started with business agility. *"Our strategic vision is clearly aligned to customer value, yet operational decisions tend to prioritize company profits."*



Walk (5-6) - the business agility basics are in place and more advanced methods are being explored. *"We have developed a clear vision of customer value which guides decisions at all levels of the organization and creates a culture of customer orientation."*



Run (7-8) - the organization has made significant strides towards business agility. *"There is strong alignment between what the shareholders, executives, team members and customers want."*



Fly (9-10) - the organization is a global business agility leader. *"Our organization's structure, policies and procedures incentivize our teams to act in the customer's best interests at all times. When there is a tradeoff between what is good for the customer and what is good for the company, we prioritize the customer."*

The percentage of Run or Fly (7+) levels can be considered a "favorable score" for each characteristic. Specific examples were given at each range to help respondents select a consistent rating.

Statistical analyses were then applied to validate the accuracy of the 2019 data, the comparison to 2018 data and affirm the findings for key hypotheses outlined in this report.

To see the questions, or to take the survey yourself, visit:
<https://agilityhealthradar.com/business-agility-survey/>

To learn more about the Domains of Business Agility, visit:
<https://businessagility.institute/learn/domains-of-business-agility/>

To learn more about the statistical methodology underpinning the results, visit Orchestrated:
<https://orchestrated.io/research/bar2019/>

SURVEY DEMOGRAPHICS

We surveyed a diverse range of organizations, representing 37 countries across 23 industries, and ranging in size from four to 400,000 employees. The only consistent factor between them is that they have all taken on the goal to become an “Agile” organization. Some have just started the journey, while others have been leaders for nearly a decade.

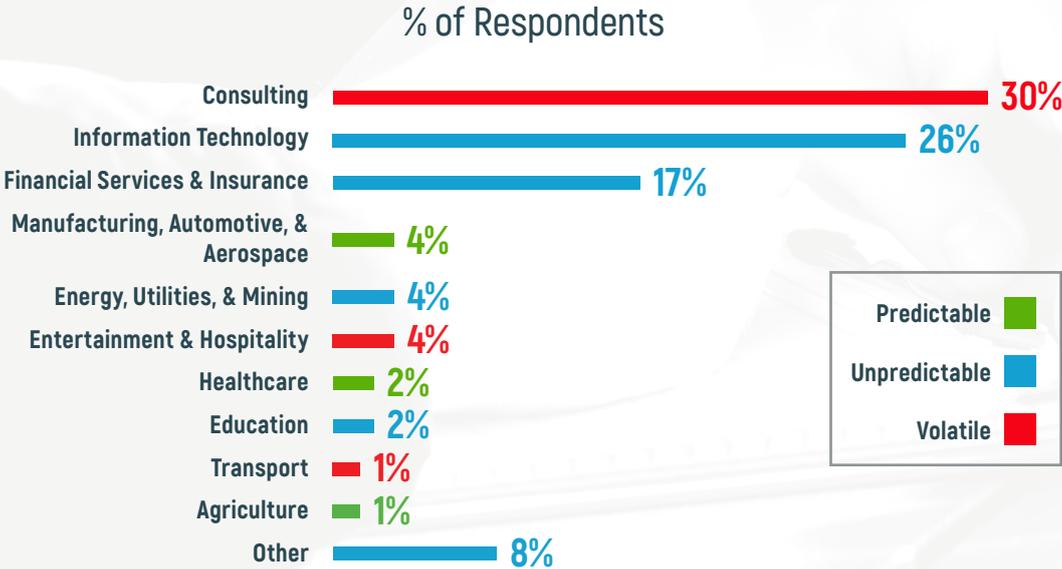
COMPANY SIZE

Respondents represent organizations of all sizes.



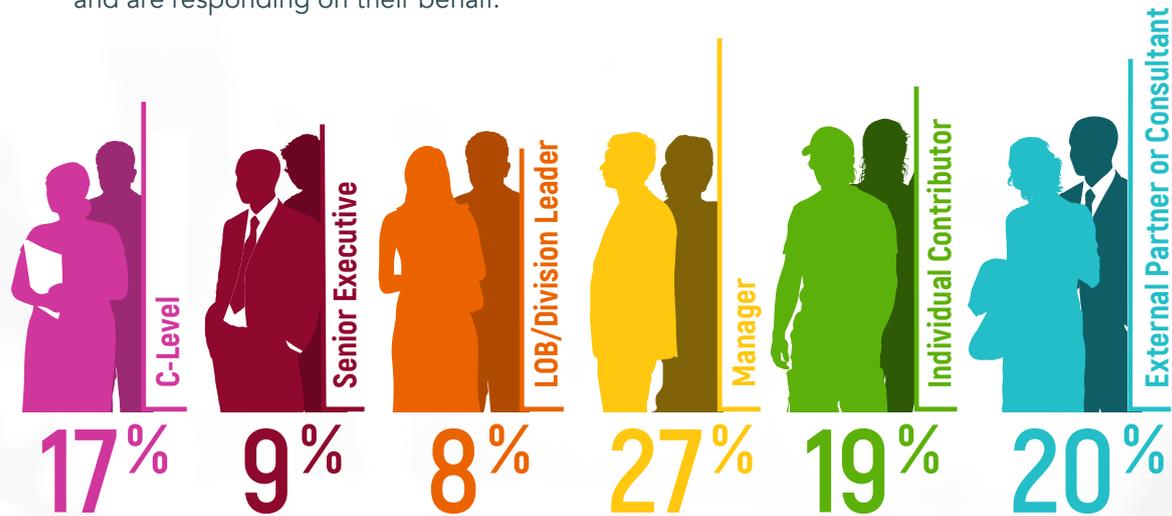
INDUSTRIES REPRESENTED

Thirty-five percent of respondents state that their industry is being disrupted or faces unpredictable market conditions. Only the Healthcare, Manufacturing and Agriculture industries report being predictable and stable today. Confidence in a company's ability to respond to changing market conditions is relatively low.



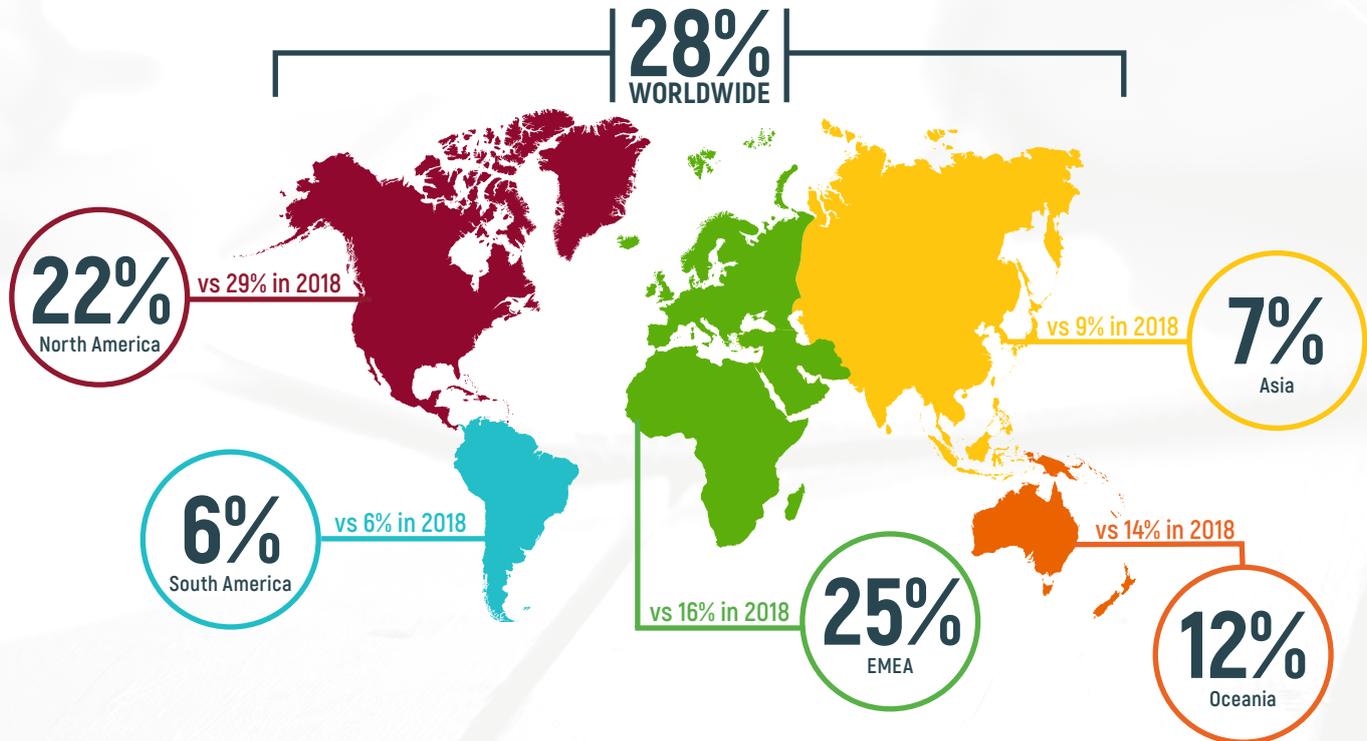
WHO'S RESPONDING

Individual contributors include Agile coaches and similar roles. External partners or consultants are not employed by the surveyed organization, but work closely with them and are responding on their behalf.



OPERATING REGIONS

Respondent companies operate in the following regions:



2019 VS. 2018

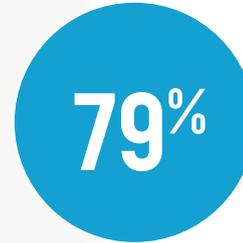
While there were more survey respondents overall, for the most part respondent demographics were similar to the 2018 Report. The most significant shift was an increase in respondents from outside North America – specifically Africa, Asia, and Eastern Europe. This shows that business agility is a global trend.

BUSINESS AGILITY MATURITY

We designed the survey's questions to gauge the business agility maturity of respondent organizations. The intent is to understand what organizations are doing, how they are performing, and overall global trends.



Average business agility maturity (Walking)

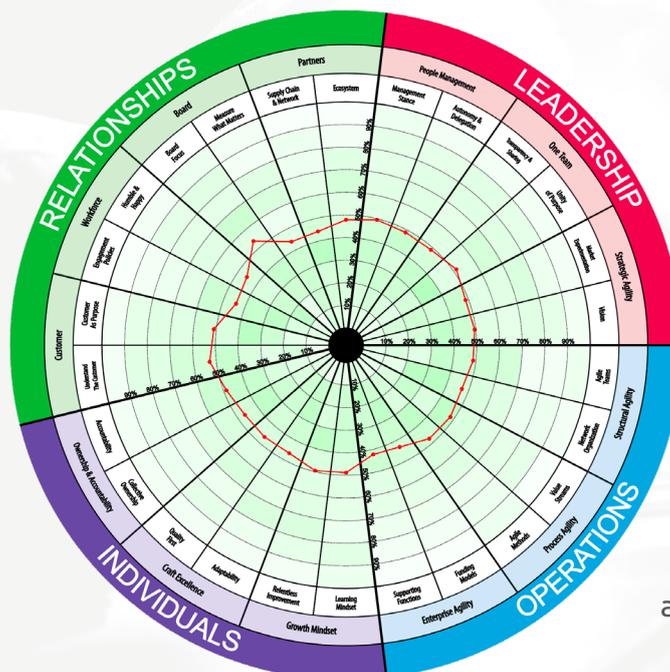


of companies have low business agility fluency (< 7)

Following on from 2018, organizations returning to the survey in 2019 have developed a greater understanding of their transformational journey and are therefore providing a more accurate, albeit lower, rating. The only characteristic that scored significantly higher in 2019 is Supporting Functions (1.0 point increase), with many organizations reporting expanding the scope of their business agility transformations across more divisions (such as Finance, Marketing or Sales).

No matter how we slice the data (whether by region, industry, company size or respondent), the average business agility maturity is well below the minimum "favorable" Run or Fly ratings (7.0+). Across all characteristics, the average maturity rating is between 4.1 (Supply Chain & Network) and 5.4 (Understand The Customer) – all within the Walking range.

Of particular note, three key predictors to overall business agility arise from organizations reporting Run or Fly ratings (7.0+) in the 2018 and 2019 studies. These organizations regularly report high ratings in the Funding Model, Value Stream, and Relentless Improvement characteristics.



Courtesy of
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 enabling business agility

DOMAINS OF BUSINESS AGILITY

Each of the five key areas of the survey (Customer, Relationships, Leadership, Operations and Individuals) are broken down into 13 domains of Business Agility, which are further broken down into 26 characteristics. In 2019, the top two domains, in terms of maturity, were Customer and One Team at 5.0 and 4.9, respectively. The standard deviation for all domains was between 2.4 and 2.7 points.

Domains of Business Agility vs. Maturity Ratings



BUSINESS AGILITY CHARACTERISTICS



Top 5 Competencies

Board Focus	55%
Understand The Customer	54%
Customer As Purpose	52%
Unity of Purpose	52%
Vision	51%



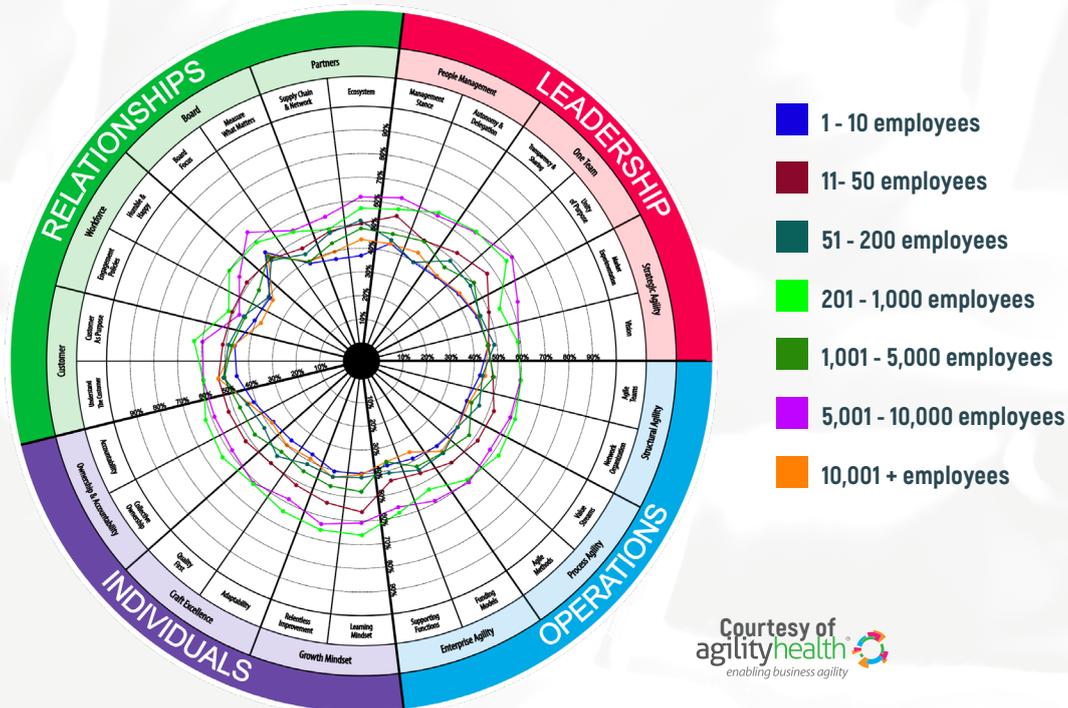
Lowest 5 Competencies

Supporting Functions	42%
Funding Models	43%
Engagement Policies	44%
Measure What Matters	45%
Supply Chain & Network	45%

COMPANY SIZE CORRELATES TO BUSINESS AGILITY

It should come as no surprise that small organizations have more agility than large ones. This plateaus at around 200 employees, with the maturity of larger organizations between 0.7 to 1.7 points lower. Smaller organizations outperform larger organizations in both "Value Streams" and "Collective Ownership" (an average of 29% improvement). Inversely, there is less than 4% variation between large and small organizations for each of Ecosystems, Market Experimentation and Accountability.

While large companies have other benefits, and in line with the trend from 2018, no respondent rated any large organization (above 10,000 employees) as Running or Flying (7.0 or above).



2019 VS. 2018

Compared to 2018, there is less variation between small and large companies. There was a 26% difference in 2018, whereas this year it is only 17%. This can be attributed to increasing maturity in respondents as they progress on their journey.

TOP 3 INDUSTRIES



Consulting



Retail, Entertainment & Hospitality



Information Technology

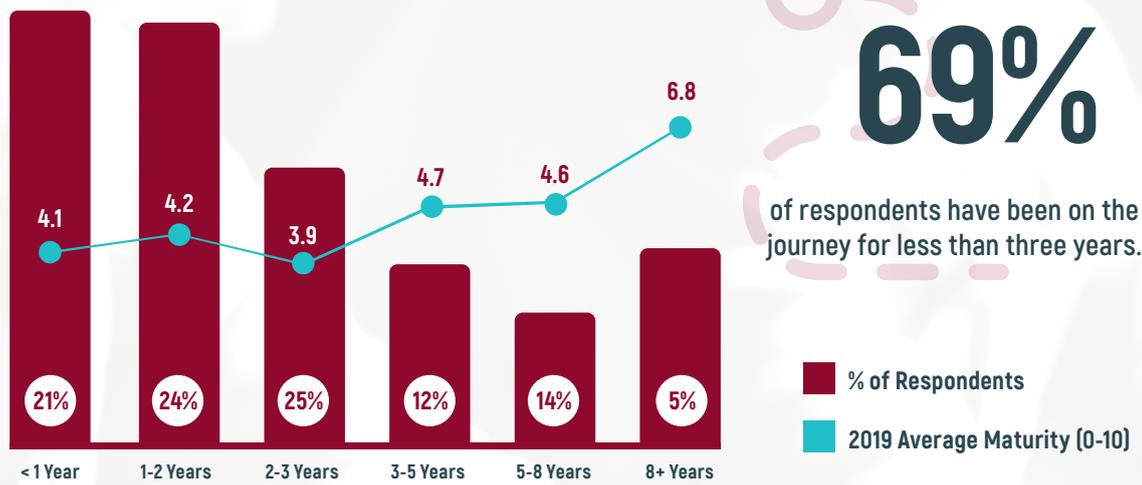
When examining the range of responses, Consulting companies have the highest median scores followed by Retail, Entertainment & Hospitality and Information Technology*. There is no meaningful variation when small (<50) companies are excluded from the analysis.

* We excluded industries with less than 10 responses, such as Education (6.0) and Transport (4.7)

2019 VS. 2018

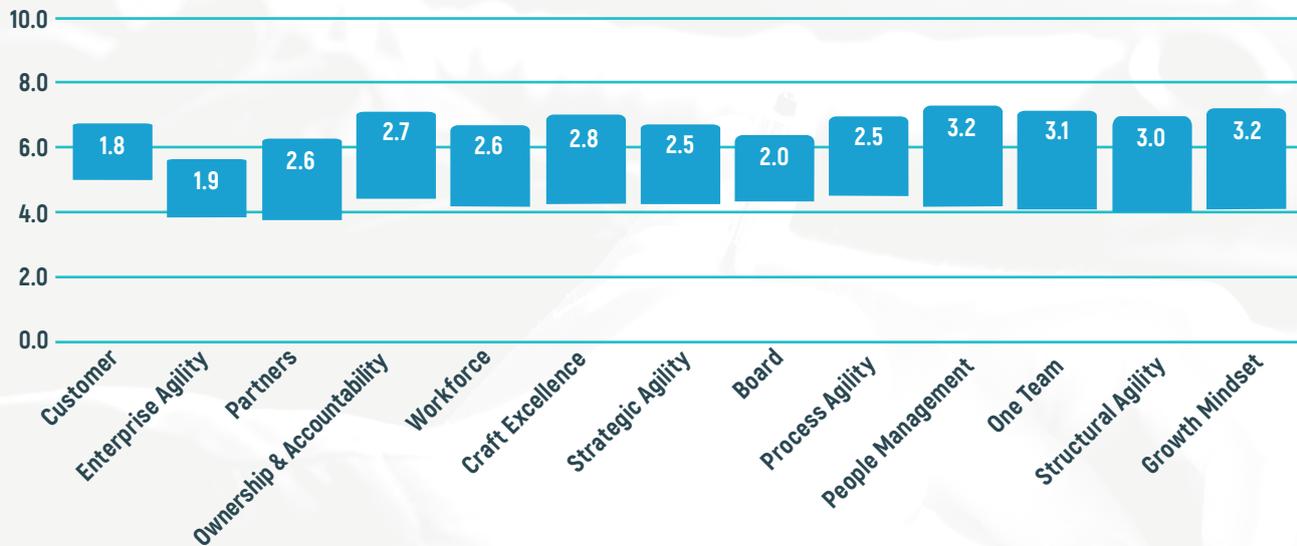
There has been a significant change compared to 2018, with Financial Services & Insurance companies dropping from an average of 4.3 maturity to 3.7. In addition, more industries have companies rated in the Run and Fly range (7.0+). Last year, only Consulting, Information Technology, and Financial Services rated 7.0+. This year sees Manufacturing, Automotive & Aerospace, Education, Retail, Entertainment & Hospitality, Healthcare and Transport also rating highly.

BUSINESS AGILITY JOURNEY



There is no significant variation in the upward trend when adjusting for company size or high-maturity organizations.

Point variation between companies on the journey for <1 year vs 8+ years



Some characteristics, like "Customer" or "Enterprise Agility," have a small variation regardless of how long the organization has been on the journey (less than 20% increase). Whereas others, like "Growth Mindset," "Structural Agility" and "One Team" improve dramatically (over 30%).

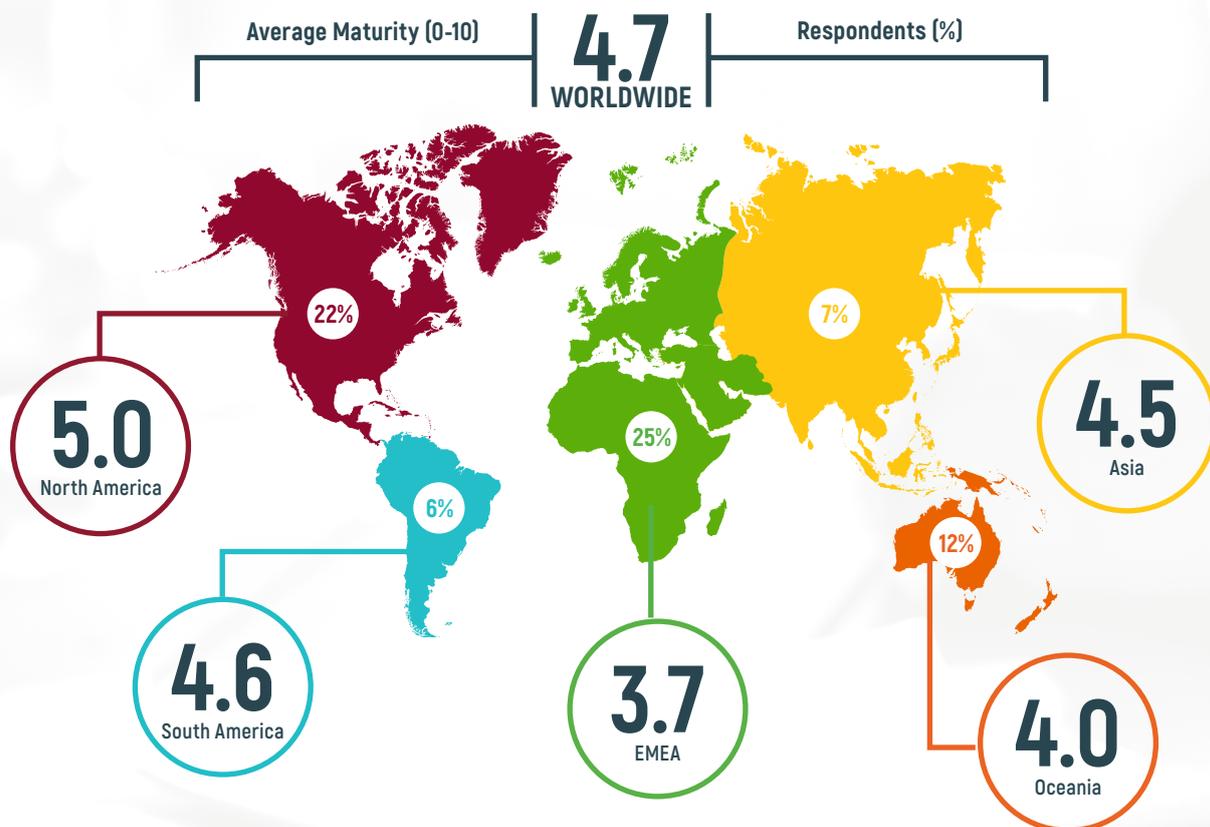
2019 VS. 2018

For companies that provided non-anonymous data in both 2018 and 2019, those that have been on the journey for 8+ years saw the biggest year-over-year improvement, whereas companies moving into their second year of transformation actually reported a decrease in business agility.

BUSINESS AGILITY AROUND THE WORLD

Despite appearing to show a significant variation, when correcting for company size, reporting role, and length of business agility journey, there was no significant statistical difference in the level of maturity across different geographic locations.

It was originally expected that North America and Europe would rate significantly higher than Asia and Oceania, but this is not the case.



PERCEPTION OF BUSINESS AGILITY



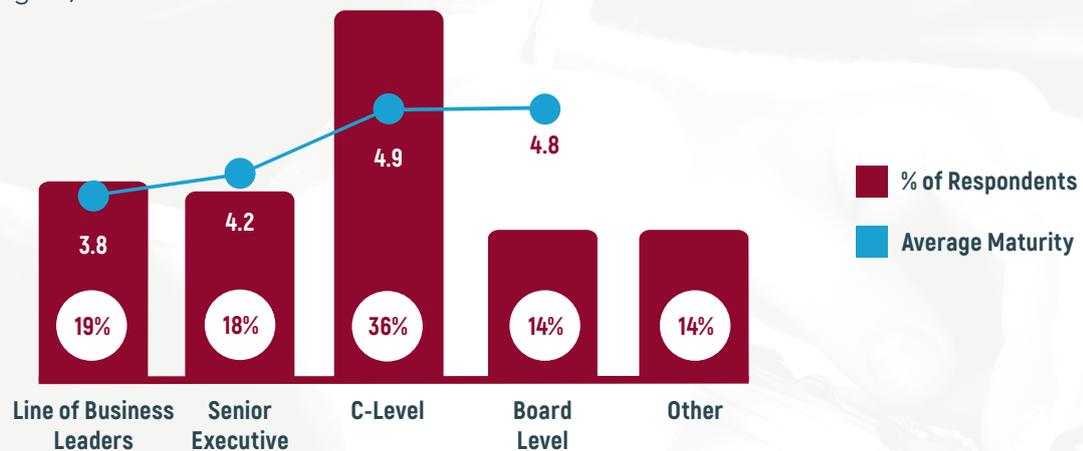
Respondents within the same organization give a wide variation in ratings depending on their position; within 1.5 points on average, with the largest variation between Individual Contributors and C-level respondents. External parties (Suppliers, Partners, External Coaches etc) generally gave less extreme ratings (both high and low) than employees.

2019 VS. 2018

There are significant variations from the 2018 survey data. Both Line of Business (LoB)/Divisional Managers and Individual Contributors rate their organizations lower (0.9 points and 1.1 points respectively), while External Partners rate their client organizations 0.5 points higher on average. Further research is required to understand why.

WHO'S LEADING THE TRANSFORMATION

Respondents rate business agility maturity significantly higher when the C-suite or Board of Directors lead the journey, compared to those led by a Line of Business (LoB) Leader (11% higher).



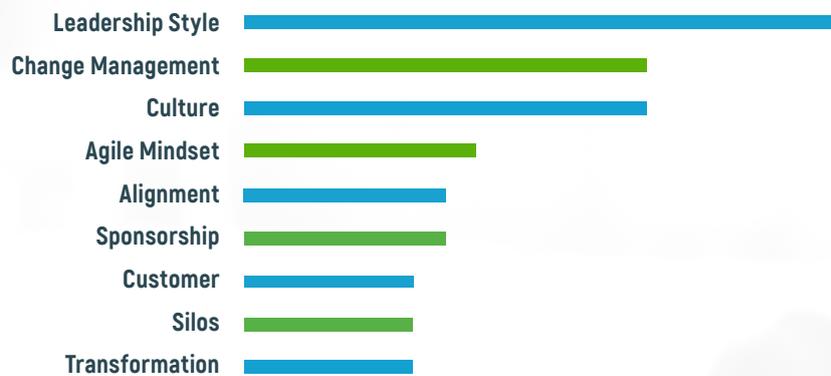
2019 VS. 2018

Compared to the 2018 report, the average maturity for LoB and Senior Executive-led transformations remains stable, while it has decreased for C-level- or Board-led transformations. This is mostly attributed to more respondent companies getting starting with their transformation.

CHALLENGES ALONG THE JOURNEY

All business agility journeys have their own challenges. We asked respondents to describe the **top challenges they are facing** and how they are addressing them. Several common themes emerged across all organizations. Compared to 2018, Leadership remains the top challenge, with Change Management and Culture increasing in importance to constitute the top-three challenges.

Top 10 Themes for Addressing Challenges Along the Journey



LEADERSHIP STYLE

Respondents indicated that, by a large margin, **leadership style is the biggest challenge to business agility adoption** faced by most organizations. Related to leadership, qualitative analysis revealed the challenges of lack of buy-in and insufficient support for the Agile implementation.

Industry practitioners suggest that with the right mindset and associated organizational support, a **leader sets the tone for the entire organization**. Yet often, the inverse is also true – in the absence of a motivating leader, the organization can stagnate.

In some organizations, leaders continue to use leadership styles and behaviors that are consistent with the legacy culture, and not the new culture that the organization is trying to instill. This sends a mixed message to the rest of the organization. Leaders should strive to be aware of how they are modeling the new culture and Agile mindset and be mindful of their leadership style to ensure that it is consistent with the goals that the business agility journey is trying to achieve.

“Our senior leadership lacks the understanding that it takes more than just tech teams ‘doing’ Agile.”

– BAI SURVEY RESPONDENT



Recommendation

Be mindful of your leadership style. From day one of your business agility journey, strive to model the new leadership styles and behaviors that are consistent with your organization's goals for transformation. How you show up as a leader will be noticed and will often be emulated by your workforce.

CHANGE MANAGEMENT

Respondents indicated that change management practices are an ongoing challenge to business agility. Specifically, the difficulties in moving away from established ways of working, and an inconsistent understanding of what business agility is, were identified in the qualitative analysis.

Industry practitioners suggest that many organizations start seeing positive results with business agility and then, for a variety of reasons, these organizations revert back to their old ways and the benefits erode.

It is suggested that this happens because organizations have not paid enough attention to classic change management principles to help enable the new culture and new ways of working. Organizations often mistakenly think that we are only talking about process, and underinvest in the enablement activities – like coaching – that are actually needed. Often there is misalignment or a lack of clarity about vision and goals. Communication is often neither clear, nor timely. In some organizations, instead of feeling like it is being invited to be an active participant in the change, the workforce feels that the change is being done to them.



Recommendation

Make change management a core competency for the workforce as a whole, instead of a specialty skill that only a few select specialists can perform.

“We struggle to properly staff [our transformation] with enough change agents to get any scale.”

- BAI SURVEY RESPONDENT

CULTURE

“[We have a] risk-averse culture [which forms] silos and layers of bureaucracy.”

- BAI SURVEY RESPONDENT

Respondents indicated that cultural challenges are an ongoing impediment to business agility. Related to culture, scaling and growth issues were identified in the qualitative analysis.

Industry practitioners suggest that organizational culture emerges over a long period of time. If the organization does not take conscious and deliberate steps to try to effect culture change, this is one reason why culture change often fails to stick – the organization has many decades of muscle memory that are causing it to act in certain ways in certain situations. The result is that, in most situations, the organization will soon revert back to the old sets of actions because not enough has been done to change the core belief systems that formed the current-state culture. When this happens, the legacy culture resists transformation and business outcomes are unlikely to be any different from before.



Recommendation

Recognize that increasing business agility and shifting culture requires ongoing support and attention from the leadership team. Culture is only formed by example: leaders should be visible in implementing the change, communicate continuously, offer support and be available to those that report to them.

AGILE MINDSET

Respondents indicated that establishing and supporting an agile mindset is a barrier to business agility. In a related way, challenges with the ongoing need to shift mindsets from the prior state to a more agile one were identified in the qualitative analysis.

Steve Denning defines agile as a mindset that is “described by four values,” “defined by 12 principles” and “manifested through an unlimited number of practices.” The agile mindset is one particular set of beliefs that is a cornerstone to the culture of an organization with high maturity in business agility. Important as the agile mindset is for knowledge workers and teams, it is doubly so for leaders. It is all too easy to fall back to traditional management styles when work gets hard or markets go soft. Leaders, at all levels of the organization, need to back the team’s decisions, even when those decisions are not the same as they would make themselves. Leaders need to provide an environment where it is safe to fail, so that teams can take appropriate risks and experiment.

“People who do not share the [agile] mindset are in senior positions and their attitudes trickle down, no matter what is being done at lower levels.”

- BAI SURVEY RESPONDENT



Recommendation

Provide coaching and mentoring on the agile mindset to all levels of the organization, including leaders, knowledge workers, and every role in between. Because we are talking about a mindset shift, and not just learning a new process or tool, your people will need more than just classroom training.

ALIGNMENT

Respondents indicated that organizational alignment to business agility is an ongoing challenge. This was supported by the qualitative analysis, which also highlighted a demand for clearer metrics on agility.

Industry practitioners suggest that one of the primary reasons why organizations face challenges with business agility is a general lack of alignment – among leaders and across the organization – about the vision and goals for business agility. When this happens, different parts of the organization start optimizing their implementation of the strategy according to their own interpretations. They usually have positive intent, but the end-result is typically that different parts of the organization have become sub-optimized for their own individual or departmental goals, at the expense of the higher-level shared set of goals and outcomes. When this happens, it is very unusual for higher-level goals and outcomes to be achieved.



Recommendation

Invite the organization to participate in the goal-setting process to ensure not only that leadership is aligned, but that middle-management and the workforce-at-large are too.

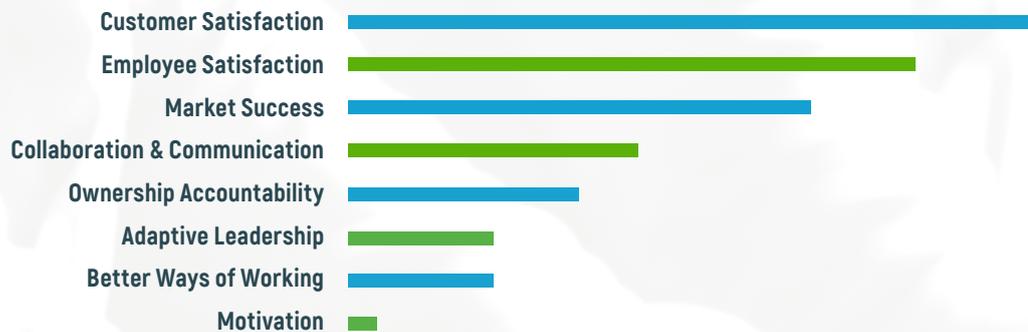
“Senior management is not bought in [to the transformation] due to a lack of alignment with [their] personal objectives.”

- BAI SURVEY RESPONDENT

BUSINESS AGILITY SUCCESSES

Respondents were asked to describe the single biggest impact that business agility has brought to their organization. As with the 2018 report, satisfaction, both customer and employee, along with market success, are reported to be the greatest benefits from business agility (58% of responses).

Most Significant Organizational Benefit of Business Agility



CUSTOMER SATISFACTION

Respondents indicated that customer satisfaction is one of the most significant organizational benefits realized by organizations that have measurable success with business agility. Related to customer satisfaction, the benefits of improved relationships with customers and brand recognition were revealed by the qualitative analysis.

Industry practitioners observe that customer satisfaction can be considered a leading indicator, and usually other bottom-line outcomes follow. For many organizations, changing customers' perceptions is actually one of the primary and explicit goals of their business agility transformation.

Given that we put the customer at the center of the Domains of Business Agility, it is very encouraging to find that the organizations that achieve higher levels of maturity with business agility also report corresponding and measurable success with customer satisfaction.

"We have improved lead times to our clients [and] our NPS ratings are trending up."

"Our customers love us and perceive us to be more agile than we actually feel."

- BAI SURVEY RESPONDENTS

EMPLOYEE SATISFACTION

Respondents indicated that employee satisfaction is a significant organizational benefit realized by organizations that have measurable success with business agility. Related to employee satisfaction, the benefits of improved employee engagement, increased transparency and collaboration within the organization were revealed by the qualitative analysis.

Industry practitioners observe that many organizations are setting explicit goals to improve employee satisfaction. They recognize the importance of having a high level of engagement with their workforce, understanding that this will provide them with competitive advantage in a fast-changing business world where the primary worker demographic has shifted in favor of knowledge workers. Like customer satisfaction, an increase in employee satisfaction often has a direct impact on other areas, including market success.

"[We have] more engaged employees and early signs of nurturing a growth mindset in some individuals and teams."

- BAI SURVEY RESPONDENT

MARKET SUCCESS

Respondents indicated that market success is a significant organizational benefit for those organizations that have measurable success with business agility. Related to market success, the benefits of increased revenues and market share were revealed by the qualitative analysis.

Industry practitioners observe that one of the primary goals of business agility is to improve market success. Not just by working more efficiently, but by developing new ways of delivering customer value and bringing the right products to market faster. Survey respondents have seen market success through improved business development, recognition by their customers, increased employee satisfaction and engagement, as well as through improved product or service delivery.

For some organizations, market success is also about other types of measures that are aligned to their unique organizational missions, such as societal impact. Given how keen transformation sponsors are to see a return on the investment they're making in business agility transformation, it's encouraging to see that organizations that achieve maturity with business agility also realize corresponding business outcomes.

"Our revenue is increasing."

"[Our] early delivery to market was effective to be the market leader."

"Revenue and customer KPIs have been improving."

- BAI SURVEY RESPONDENTS

SPEED-TO-MARKET

Respondents indicated that speed-to-market is a significant organizational benefit realized by organizations that have measurable success with business agility. Related to speed-to-market, the benefits of improvements in development and delivery, which include faster turnaround times, higher-quality offerings, and more tailored solutions, were revealed by the qualitative analysis.

Industry practitioners observe that improving speed-to-market is one of the most profound ways for organizations to create competitive advantage and distinguish themselves from the competition. Sometimes it is about shortening the time from a new idea for a product or service to its launch. Sometimes it's about creating improvement in one area of the customer value-stream. And sometimes it's about building adaptability and responsiveness into how organizations make decisions and fund initiatives so they can capitalize on new market opportunities. For most organizations, achieving measurable improvements in speed-to-market will be table-stakes for competing in today's business climate.

"The small-scale test-and-learn approach is getting us much faster visibility on what is important to our customers, which is improving time-to-value and time-to-learn."

"[We have] faster time-to-market on products and greater collaboration between teams."

"We have much quicker iterations, from months to days."

- BAI SURVEY RESPONDENTS

COLLABORATION AND COMMUNICATION

Respondents indicated that collaboration and communication are significant organizational benefits realized by organizations that have measurable success with business agility. Related to collaboration and communication, the benefits of increased transparency within the organization were revealed by the qualitative analysis.

Industry practitioners observe that organizational complexity is a major impediment to business agility. Each additional handoff exponentially increases the time and cost to create value. Many respondents identified significant collaboration, communication and transparency improvements (with associated time and cost benefits) from their business agility journey. Alignment, cross-divisional collaboration and interpersonal collaboration are identified as the three areas with the most significant improvement.

In their current state, most organizations recognize that they have different silos that don't work together to a shared purpose. By contrast, organizations that achieve results with business agility report that different parts of the organization – such as business, information technology, operations and even external partners – are now working together as partners in the overall shared success.

"We have developed a common language...to communicate within different units of the company through continuous discovery."

"Multiple teams work together [by collaborating] across team, location, and business functions with short feedback loops."

"Communication is the key [for our] teams to become more efficient."

- BAI SURVEY RESPONDENTS

OWNERSHIP AND ACCOUNTABILITY

Respondents indicated that ownership and accountability are significant organizational benefits realized by organizations that have measurable success with business agility.

Industry practitioners observe that ownership and accountability are two very difficult cultural traits to enable in an organization. There are many reasons for this. It's not as simple as leadership saying "you are now empowered!" As we show in the Domains of Business Agility, this is a complex ecosystem in which leaders, partners and the workforce all need to work together.

To move at the pace of the modern age, organizations must ensure that ownership and accountability are located at appropriate places in the ecosystem so that timely decisions can be made – enabling work to flow and opportunities to be seized. Investment in leadership, individuals and operations will be needed to create the preconditions and environment that will allow ownership and accountability to emerge. Given how difficult this is in complex organizations, it's encouraging to see that organizations that achieve maturity in business agility are seeing these new cultural traits emerge in such a measurable manner.

"Within specific areas of the business there is alignment, transparency, and an adoption of responsibility and ownership that translates into agility for these areas. This is encouraging and the wins in these areas are creating visibility and awareness that this new agile way of working may be able to address [the] systemic challenges the rest of the organization faces."

"Some of the new leaders are pushing for [new] accountability, review, and planning patterns that should allow the organization to break work up into smaller pieces and measure value differently."

"People are more and more willing to change the system instead of following the prescribed process."

- BAI SURVEY RESPONDENTS

SPECIAL THANKS TO



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ADDITIONAL THANKS TO OUR MEMBERS



