

3RD ANNUAL

AGILE AT SCALE REPORT 2020

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SUMMARY

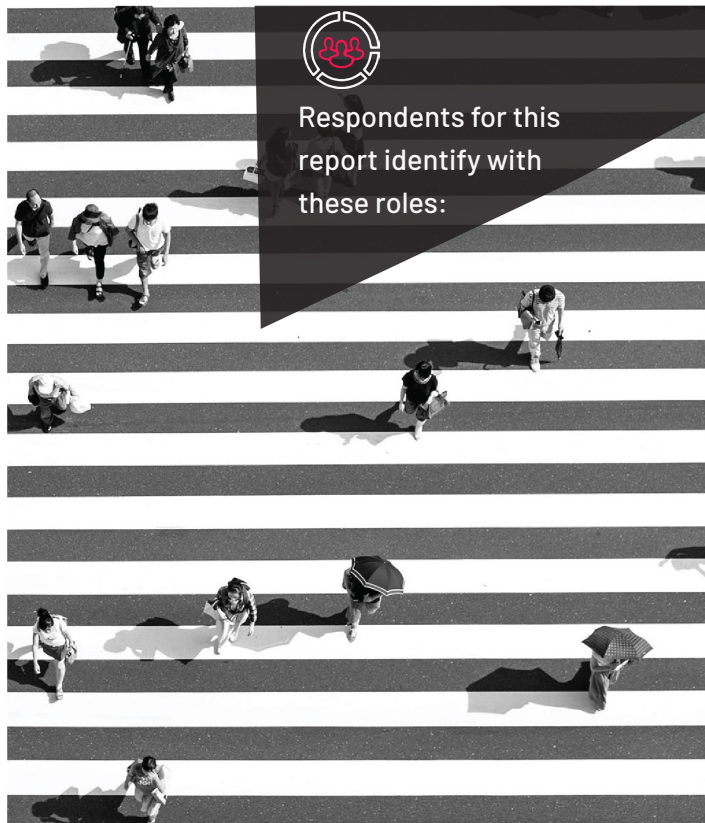
The 2020 Agile at Scale Survey provided us, once again, some valuable and interesting insights into the state of our practice. Cprime experts analyzed the responses from more than 3000 professionals, representing an impressive variety of verticals. We are happy to share this year's results with you.

Here are selected highlights of what we found:

- The range of organizations that adopt and scale Agile continues to grow, on a global scale, expanding beyond the transitional software development and early adopter industry verticals.
- Organizations continue to accumulate Agile expertise and knowledge with training, enablement and mentoring expanding significantly throughout the industry.
- Organizational culture remains a major factor of success in all aspects of scaling, including tools adoption and integration with technical practices.
- Executive support and buy-in continues to be crucial for successful implementation of Agile at scale. The sustained support from the C-suite proves vital for virtually every aspect of implementation.
- Enterprise agility and business value are the overarching goals and main focus of organizations implementing Agile at scale.
- Atlassian Jira Align burst onto the scene with dramatic increase in adoption, and became the tool of choice to support enterprise agility, alignment, and visibility.
- Compared to last year's survey, the importance of DevOps for the success of Agile at scale initiatives is increasing, especially for large companies, but organizations still struggle with implementing and realizing its full value.

RESPONDENT DEMOGRAPHICS

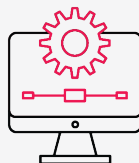
This demographic information will help you get acquainted with the survey respondents. Who are they and how do they define their role and organization?



DIRECTOR-LEVEL	17.8%
TEAM LEAD	13.6%
MANAGER	11.5%
PROGRAM MANAGER	11.5%
SCRUMMASTER	10.0%
TEAM MEMBER	5.8%
PRODUCT OWNER	5.8%
PROJECT MANAGER	5.2%
AGILE COE LEADER	4.7%
PRODUCT MANAGER	4.2%
RELEASE TRAIN ENGINEER (RTE)	3.7%
C-LEVEL	3.1%
VP-LEVEL	3.1%



The industries respondents work in:



SOFTWARE
25.7%



FINANCIAL SERVICES
14.4%



HEALTHCARE & PHARMA
12.3%



7.0%
INDUSTRIAL / MANUFACTURING



7.0%
OTHER (PLEASE SPECIFY)



5.4%
MEDIA / ENTERTAINMENT



5.4%
RETAIL



4.3%
GOVERNMENT



4.3%
TELECOMMUNICATIONS



4.3%
INSURANCE



3.7%
NON-PROFIT



3.2%
EDUCATION



3.2%
ENERGY



The size of
development
teams

< 50	31.9%
51-100	16.2%
101-500	21.6%
501-1000	11.9%
1001+	18.4%

Compared to last year, a larger number of respondents indicated that they had scaled enterprise-wide, a strong indication that organizations see the value of the entire development/program organization scaling Agile.

Scope of Agile
at scale initiatives in
respondents' organizations



33.5%

PROGRAM:
4-15 TEAMS

22.8%

ENTERPRISE-WIDE:
WHOLE DEVELOPMENT / PRODUCT
ORGANIZATIONS SCALING AGILE

12.0%

VALUE STREAM:
ENTIRE DEVELOPMENT OF A PRODUCT
LINE REPRESENTING CONCEPT-TO-CASH

24.6%


PORTFOLIO:
MORE THAN 2 PRODUCT LINES

7.2%

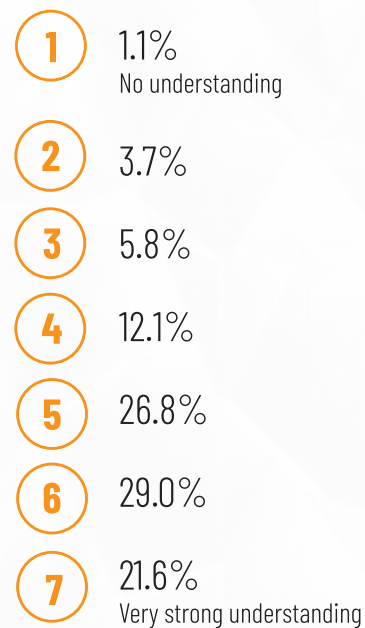
OTHER

THE MULTIPLE FACETS OF SCALING

A subjective analysis allowed respondents to assess their own understanding of what scaling Agile means to their organization. More than 75% of respondents indicated they had a good to very strong understanding of scaling Agile. This finding correlates nicely with the increasing prominence of Agile at scale in the industry, illustrated in the previous finding, that indicated that over 50% of the organizations claim to have scaled to at least the portfolio level (including the Portfolio and enterprise-wide).



Self-rated
understanding
of scaling Agile



EXPECTED BENEFITS FROM SCALING



This year's report indicated that enterprise agility, business value and alignment are the key desired benefits. Interestingly, visibility dropped to 6th place. It is safe to assume that while visibility's importance remains high, other elements such as the internal organizational alignment provides more value.

With the speed of changes and level of uncertainty in the marketplace, business value and getting value into the customer's hands more quickly becomes critical. Results from C-suite respondents indicate less disconnect between them and the teams they run. C-level execs emphasized the need for better management of their distributed teams while highlighting the ability to quickly learn, pivot, and meet market needs as critical.



Desired benefits
of scaling Agile

AGILITY	BUSINESS VALUE	ALIGNMENT	PLANNING	PREDICTABILITY
49.2%	45.6%	39.8%	37.2%	28.3%
VISIBILITY	MANAGE DIST. TEAMS	BETTER QUALITY	IMPROVE MORALE	
26.7%	21.5%	19.4%	14.7%	
METRICS	INTEGRATE SOFTWARE/ HARDWARE TEAMS	OTHER		
12.0%	9.4%	2.6%		

There remains a concerning discrepancy between C-level executives and agile delivery teams when it comes to the framework of choice. This discrepancy highlights the need to educate and advocate internally for the specific needs and challenges of scaling agile at the enterprise level and the many ways it differs from small scale implementations.

FRAMEWORK SELECTION

Over the last 3 years of conducting this survey, the flexibility of the selected framework remains the number one reason for adoption. A growing percentage of respondents indicated that the existing internal company knowledge of the framework was the main criteria.

The results confirm that as organizations mature, expand their usage of the framework and continuously learn, their trust and proficiency in the framework, also expands.

Last year, the simplicity of the framework ranked higher in our findings. Our findings this year demonstrate that as organizations gain additional practice, experience, and knowledge their ability to adopt the framework to their particular needs and take on more complex challenges increases as well.

Framework
of choice



SAFe®	33.5%
SCRUM ONLY	23.6%
CUSTOM	11.0%
ENTERPRISE SCRUM	7.3%
NOT SURE	5.8%
SCRUM@SCALE	5.2%
OTHER	4.2%
SPOTIFY MODEL	2.6%
NONE	2.6%
NEXUS	2.1%
LeSS	1.6%
FLEX	0.5%
DaD	0.00%

This year, as was in the previous, “flexibility of the framework” proved to be the most important factor in framework selection.

In this year’s report, we see “existing internal company knowledge of the framework” emerge as a top factor. Given the growing emphasis on Agile certification and training initiatives seen among large enterprises, this does not come as a surprise.



Main criteria for framework selection

Flexibility of the framework	52.2%
Existing internal company knowledge of the framework	35.6%
Proven and published industry standards, best practices, case studies for the framework	32.2%
Simplicity of the framework	29.4%
Access to public knowledge, strong global community of users for the framework	23.9%
Access to professional service firms that can guide the transformation with selected framework	23.3%
Training availability on the framework	23.3%
How the framework mirrors existing agile lifecycle management tool(s) and DevOps tool(s)	20.6%
Available agile lifecycle management tool(s) that support framework out-of-the-box	18.9%
How the framework mirrors existing organizational structure	16.7%
Costs of the transformation with the different frameworks	12.8%
Available certifications for the framework	12.2%

ORGANIZATIONAL SCALING SUCCESS

For our respondents this year, alignment took the top spot, followed by visibility and business value. In most cases, the companies who have managed to scale Agile are indeed reaping the benefits they were hoping for, including improved collaboration, faster time-to-market and better customer experience, and transparency throughout the process.

Attained
benefits
reported:



1

ALIGNMENT
47.2%

2

VISIBILITY
46.6%

3

BUSINESS VALUE
43.8%

4

PLANNING
40.9%

5

AGILITY
39.2%

6 - Predictability 32.4%

7 - Metrics 24.4%

8 - Better quality 21.0%

9 - Better manage distributed teams 20.5%

10 - Further accelerate product delivery 17.1%

11 - Integration of software and hardware teams 14.2%

12 - Morale improvement / employee engagement 11.9%

13 - Governance framework 11.4%

14 - Better adherence to compliance 9.1%

15 - Other 4.6%

TOP 3

1st Gaining a better understanding of what dependencies impact my team's output

*This ranked 1st in last year's study as well

2nd Increased agile adoption

3 way tie

3rd Gaining better agility when the end user's requirements change
Gaining better predictability of all my teams' quality of output
Building a better plan for building out our roadmap

BOTTOM 3

1st Established a governance framework

2nd Identifying what metrics each of my teams needs to report on

3rd Building a better plan for building out our roadmap

CRITICAL FACTORS TO AGILE AT SCALE SUCCESS

- EXECUTIVE SPONSORSHIP
- WILLINGNESS OF EXISTING CULTURE
- DEVOPS PRACTICES AND CULTURE

Executive sponsorship ranked, by far, as the most critical factor for the success of Agile at scale initiatives. In addition to strong executive commitment, DevOps practices and organizational culture of openness seem to pave a way to success.

CHALLENGES ADOPTING AN AGILE AT SCALE FRAMEWORK

While executive support seems to considerably enhance the chance for Agile at scale success, the lack thereof was cited as the primary roadblock to achieving that success. These results are consistent with previous surveys and highlight the importance of adequate support at the executive level in creating the right culture, acceptance, and organizational conditions where Agility thrives.



STOP

Core challenges experienced by respondents

19.0%

LACK OF EXECUTIVE SUPPORT

15.3%

OTHER IN-FLIGHT STRATEGIC INITIATIVES

14.2%

LACK OF GENERAL UNDERSTANDING

13.2%

BUDGET

11.6%

OTHER

10.5%

NOT NECESSARY IN OUR ORGANIZATION

7.4%

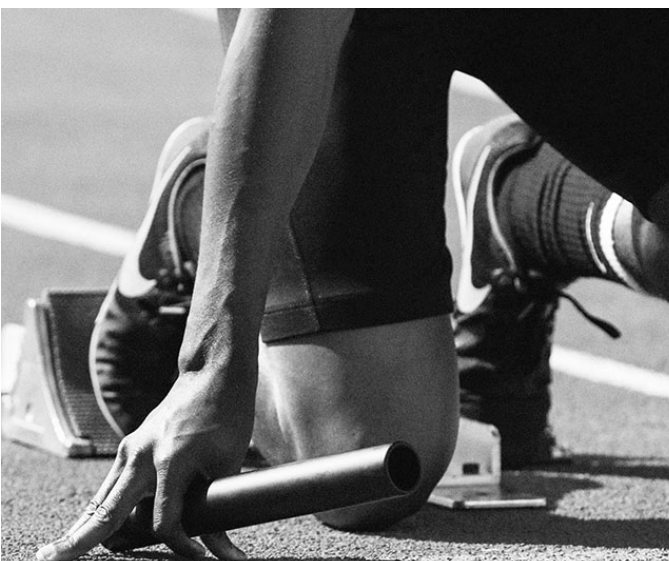
I'M NOT SURE

6.3%

HEADCOUNT

2.6%

TIME



LEARN TO WALK BEFORE RUNNING

The vast majority of organizations (over 42%) are well into their 3rd year of implementing Agile before deciding to scale. Results are in line with previous years' findings.

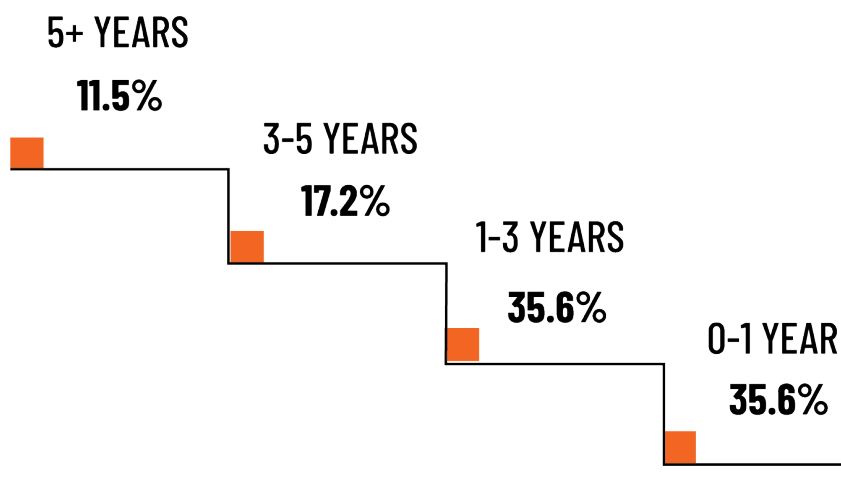


How long organizations practiced Agile before starting to scale



TAKING THE FIRST STEPS

More than 70% of respondents are fairly new to scaling Agile with 1 to 3 years of experience, results consistent with prior surveys. The stickiness of Agile at scale is reflected in the 29% of respondents with upwards of 3 years of experience.



Length of time since starting scaling journey

AGILE TECHNOLOGY AND INITIATIVES

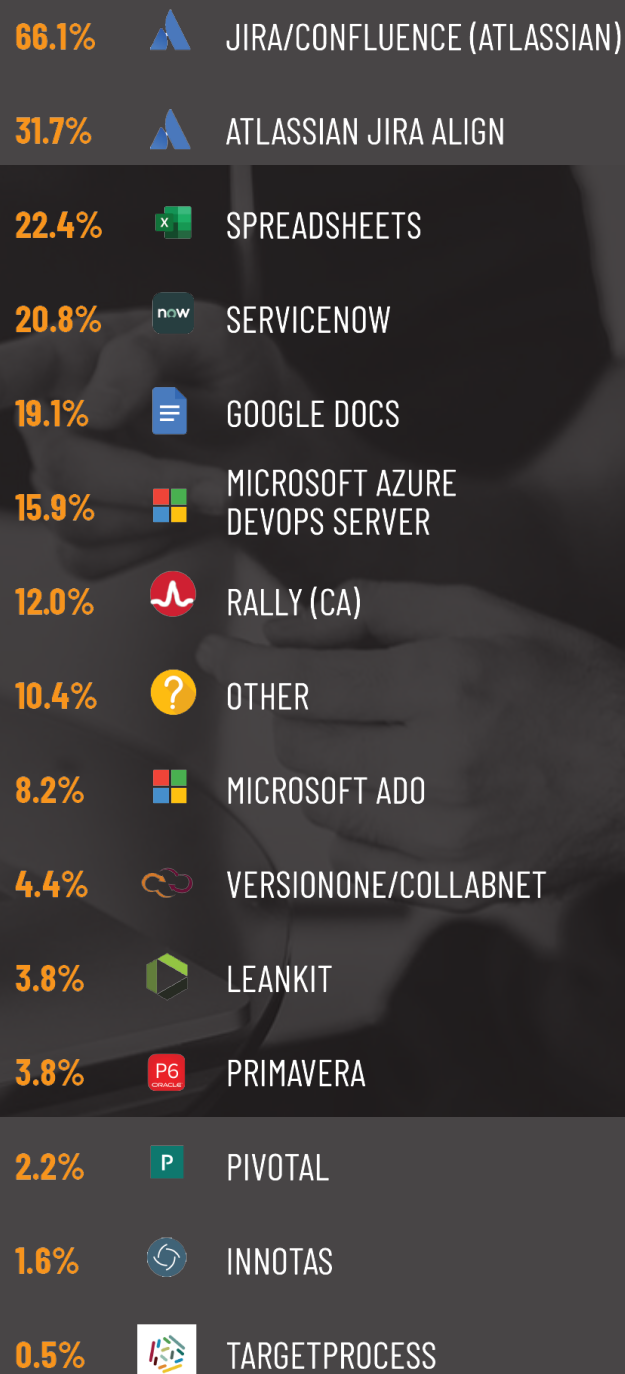
LIFECYCLE MANAGEMENT TOOLS AND INITIATIVES

Project management tools that support Agile processes are critical. Technology that supports an organization scaling Agile is all the more essential to the success of their scaling initiatives.

Jira Align, the latest entry into the Atlassian portfolio is gaining traction with 32% adoption rate with survey respondents. Surprisingly spreadsheets remain ubiquitous with Agile practitioners despite their inefficiency. We also note an uptick in organizations adopting full stack solutions for their initiatives.

EDITOR'S NOTE: Cprime is a longtime Atlassian Partner and one of the largest providers of deployment and education on Atlassian tools, so survey responses may be impacted by the preferences and affiliations of our audience. These results may not be indicative of the wider market share figures.

Agile
technology
tools of choice:



AGILE & DEVOPS INTEGRATION ON THE RISE

Organizations employ a variety of tools to facilitate and accelerate their scaling efforts. This year's report indicated some shift in the tool landscape, while confirming what many suspected: DevOps is really (really!) important, but getting it right may not be so simple...

Gitlab remained at the top of the tools stack of choice with AWS advancing to a close second. It's worth noting the large percentage of respondents use two or more tools listed below. This is also extremely common among organizations who have adopted DevOps practices.



DevOps tools
of choice:

57.9% GITLAB



38.2% KUBERNETES



GOOGLE CLOUD - **17.4%**

NEW RELIC - **9.6%**

55.6% AWS



32.6% BITBUCKET



APPDYNAMICS - **15.2%**

CHEF - **7.9%**

47.2% JENKINS



22.5% SONARQUBE



ARTIFACTORY - **15.2%**

PIVOTAL - **4.5%**

46.6% AZURE



22.5% SPLUNK



BAMBOO - **13.5%**

SONATYPE - **4.5%**

41.0% DOCKER



19.7% ANSIBLE



NEXUS - **12.9%**

ELASTICO - **3.9%**

ZEPHYR - **11.8%**

TESTRAIL - **3.9%**

PUPPET - **11.2%**

TRICENTIS - **1.7%**

HOW IMPORTANT IS DEVOPS?

DevOps remained the engine powering the delivery of quality software solutions with over 67% of respondents highlighting its importance in their organizations. While widely acknowledged as a critical component in scaling Agile, DevOps remained challenging to implement with only 11% indicating that their DevOps initiatives were well integrated with their scaling efforts. The larger the organization, the more likely DevOps initiatives are considered to be important or very important and currently in-flight.



TOOL ADOPTION: SUCCESS FACTORS

A recurring theme in this year's survey (as in past years) is the critical importance of executive support and the culture it instills in all aspects of the scaling effort. In this case, strong executive sponsorship drives successful adoption and integration of lifecycle management tools, thus maximizing the ROI from these investments and accelerating the scaling effort.

AGILE CULTURE
53.3%

EXECUTIVE
SUPPORT
47.8%

INTERNAL AGILE
EXPERTISE
45.1%

ORGANIZATIONAL ALIGNMENT - 42.3%
INTERNAL TOOLING EXPERTISE - 33.0%
TEAM PREFERENCES FOR TOOLING - 28.6%

INTERNAL RESOURCE AVAILABILITY - 23.1%
EXTERNAL AGILE EXPERTISE - 14.8%
EXTERNAL TOOLING EXPERTISE - 11.5%



Factors of a successful
tool integration

ABOUT THE REPORT

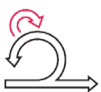


Cprime conducted “The State of Agile at Scale 2020” survey from September–October 2020 by email using the Survey Monkey platform. We surveyed more than 3,000 individuals with a professed interest in Agile practices. Our goal was to get better insight into how companies look at scaling their Agile development methods and practices across the enterprise. Respondents from a wide variety of industries represented every level of management and company participation, from C-level to team member. We asked respondents to comment on their Agile framework and tools, the outcomes they seek from scaling Agile, as well as outcomes they have achieved. We also wanted to know what they consider to be the obstacles to scaling Agile in their organization, the pace of their progress, and their intentions about integrating DevOps with their Agile practice.



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