

## Agile transformation: helping customers achieve fast, low-cost deployments for its mission-critical on-premises solutions

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Like many technology companies, we've gone agile. Of course, agile isn't a new idea. The Agile Manifesto was published in 2001, and its underlying ideas date back to the 1990s. The lean principles that many agile organizations adopt originated in the car factories of post-War Japan. There's a vast amount of information about agile and lean online, and the language of scrums, sprints, and empowered teams is common currency in organizations everywhere. Probably at yours too.

Our agile vision is to deliver valuable features to customers quickly and often, and act on their feedback. It's about short lead times, continuous improvement, and centering everything we do around our customers and what they tell us they need.

Agile evangelists like to say it's not a methodology, it's a philosophy. A different way of thinking about software. Even so, to get there we've had to make significant investments in new tools and processes.

The crucial change is that we're now doing our development and testing together rather than sequentially. We test as we go, using automation. That means we can deliver and deploy new and improved products faster. Instead of annual releases, we're releasing new software every two weeks.

We started with Fidessa AMS, our post-trade Affirmation Management Service. We produce shippable software every two weeks, we deploy to production every month or two, and our customers get the latest version automatically. Also, there's now only one latest version, whereas before there was an additional branch version. We call this branchless software a single code line.

For our customers, these changes have been a dramatic improvement. They're always on a new version – their average software age has fallen to about three weeks – and they can see improvements all the time. Their engagement with us has soared. When new features

materialize quickly, customers are much more enthused to tell us what they need next, so we can build those features into future releases.

Now we're going agile for our more complex solutions as well: Fidessa Sentinel for compliance, and Fidessa IMS for order management. Here we supported three annually released branch versions as well as developing the latest version. This is where things get interesting.

Moving to agile deployments and a single code line is relatively straightforward for a solution like AMS. It's a multi-tenanted SaaS system. We deploy it directly from development, and the deployment and configuration are under our control.

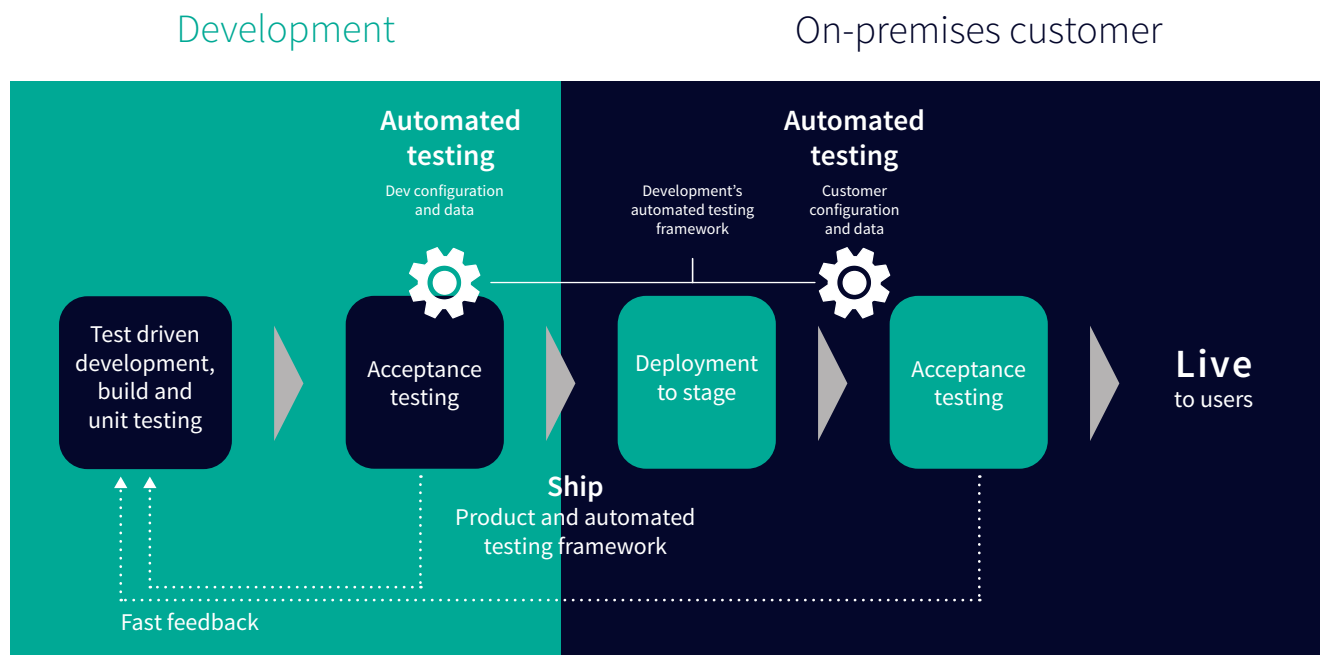
With Sentinel and IMS, we're dealing with single-tenant, mission-critical systems, installed on-premises. Customers do their own deployments, and each deployment is configured to their specific requirements and consumes their own data. Compared to AMS, it's a whole extra level of difficulty.

We want to get our on-premises customers to an average software age of three months. To do that, we need them to deploy our software at least every six months. That's an ambitious target. As far as we know, no software vendor in our industry has achieved anything like this before with on-premises systems of such scale and criticality. We believe success for on-premises will translate well to our hosted versions of the same solutions.

Understandably, our customers are somewhat wary. It's a big leap for them. It's an all-or-nothing transition where all the parts of the process need to be in place for it to work. Doing it right takes commitment, and investments in processes, tools, and training. And it takes a little courage.

So far, we have five on-premises customers live on the single code line software. They're all at different points along the code line since they've taken the latest software from our two-weekly releases. We've had positive feedback and remarkably few issues. The next big challenge is for them to start taking frequent regular updates, so they can start getting the latest features with short lead times, and we can act on their feedback.

To enable our customers to deploy our frequent releases, we're working with them to improve their automated testing capabilities. The right tools are vital, so we're setting them up with the automated testing tools we use ourselves.



We're also happy to share some lessons we've learned along our agile journey.

**First**, agile isn't only about development. Although the process of agile transformation often starts in a firm's development teams, it really succeeds when agile thinking permeates through to client-facing teams like support, sales, and marketing. Agile is about fast-paced innovation centered on customer needs. Potentially, everyone has a role to play in delivering that.

**Second**, we recommend seeking external help with your agile transformation early on. Engage with real practitioners who can educate staff at all levels across your organization. Build a strong community of scrum masters who can coach others beyond their scrum teams.

**Finally**, make sure your automated testing tools are easy to install and use for your professional services staff and your customer's IT staff. Ship example tests that work out of the box, and make sure you have good documentation and tools to help build and run tests.

Turning the agile philosophy into a practical reality is challenging. Time, strength, cash, and patience are all required, and real life is rarely as straightforward as the world of theories and ideas. The benefits of agile aren't immediate, and the first few agile deployments can be difficult as the creases are ironed out and best practices are put in place.

But repetition is the path to mastery. The benefits of rapid, automated deployment are there for the taking. And even if a deployment doesn't go smoothly, you've gained the ability to find issues faster and more cheaply using automated testing.

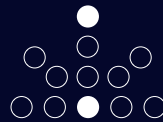
Our customers are starting to make the leap. And we're making it with them. They're enjoying the benefits of automated testing and faster, branchless releases. We're enjoying having happy customers. It's a classic win-win.



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