net solutions

Agile Product Development 2020

How to leverage Agile in an uncertain business climate

Preface

Dynamic customer demands, along with technologies that change at the speed of Moore's law, stimulate today's hyper-competitive digital environment. COVID-19 has brought further tectonic shifts in consumer behavior, pushing businesses toward a new paradigm where they find themselves pressured to innovate and accelerate their digital transformation to stay relevant.

Businesses don't have a choice but to reimagine the way they approach digital product development. Building a resilient malleable digital product requires a holistic approach, powered by an Agile product development mindset that catalyzes innovation.

When Agile practices become an organization's default choice for product development, it changes the way businesses run projects.

Net Solutions' Agile Product Development 2020 report explores how digital champions are integrating Agile processes into their organization's broader digitization agenda to drive product development and manage headwinds.

We hope you enjoy reading the study and gain valuable insights to prepare your organization's product development strategy for what the post-COVID era will bring.

We look forward to your feedback.

Contents

Key Findings

Based on data from a survey of leading businesses and additional in-depth interviews, we identified a number of key findings that provide insights into how organizations can use Agile product development to gain a competitive advantage.

1

Customer focus is key

A quarter of the leaders in the study have a definition of agile with the customer in their mind

2

Organizations struggle to understand benefits that Agile Development offers

Although there is consensus among business leaders on what Agile means, understanding Agile and its benefits is a struggle for their teams.

3

Agile Product Development drives performance

While a large percentage of the businesses follow Agile methodologies in their product development process, a few leaders reported to still follow the Waterfall method*.

4

DevSecOps is a must-have

Almost 8 in 10 surveyed industry leaders are at various stages of DevSecops implementation in their organizations.

5

Stability rhymes with Agility

While most of the product development teams focus on a stable product, close to a quarter of teams prefer faster product rollout cadence.

6

Continuous Customer Satisfaction Improvement and Faster Product Delivery are the new backbone of Agile Product Development

The most common expectations from the organizations' Agile technology investments are 'continuous customer satisfaction improvement' and 'faster product delivery.'

7

Product-Market Fit and Undefined Process are the biggest roadblocks to Agile Product Development

Most of the surveyed organizations name a lack of product alignment with the target market and an ambiguous process as the biggest roadblocks to Agile product development.

8

COVID-19 is an instrumental factor in propelling organizations to adopt Agile Methodology

The confidence of businesses in Agile methodology has risen during the COVID-19 pandemic; however, a few organizations are still struggling to embrace the Agile process.

*The waterfall model is a breakdown of project activities into linear sequential phases, where each phase depends on the deliverables of the previous one and corresponds to a specialization of tasks.

Profile of Respondents

Net Solutions' research provides insight into product development and Agile practices applied in industry, backed by survey responses from working professionals including product managers, startup owners, Agile practice coaches, scrum masters, and CXOs. The sample is spread across different revenue segments as well as industry types and respondents.

11 Countries:

India   USA   Canada   Croatia   Germany   S. Korea

Australia   UK   Singapore   Austria   Bulgaria

Workforce Size:

1. >5000   2. 1000-5000   3. 500-1000   4. 100-500   5. <100

Roles:

1. Product Manager

2. Startup Owner

3. Agile Practice Coach

4. Scrum Master

5. Senior Release Specialist

6. Chief Technical Officer

7. Product Delivery Manger

8. Chief Operating Officer

CHAPTER 1

Understanding Agile

Summary

As the business environment has changed, so has the definition of Agile practices. With the COVID-19 wave sweeping across industries and uncertainty the new normal, organizations are rapidly realigning their product development strategies.

To survive the COVID-19 crisis, businesses are addressing two critical factors—speed and customer experience—by embracing 'agility at scale,' which has the capability to move the needle on both factors simultaneously.

Net Solutions' Agile Product Development survey highlights how businesses are responding to the changed circumstances with a new definition of Agile, the foundation of which lies in speed and customer experience.

The challenge, however, lies in the stunning discovery that 60% of surveyed industry leaders agreed that their executive teams do not completely understand the definition of Agile development and the value it provides to their organization.

Key Facts

68.6%
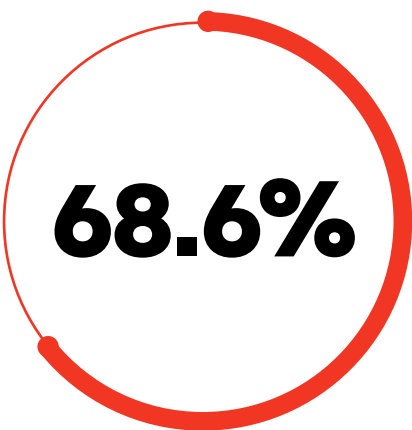
of the leaders define the Agile process as a holistic approach that focuses on customers' needs (40%) and is quick to respond to changes in the marketplace (28.6%).

37.7%
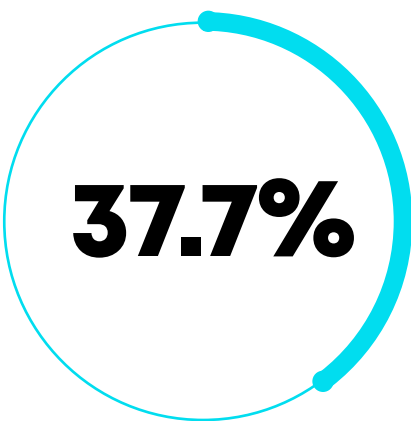
of the leaders reported that their executive teams completely understand what Agile development is and the value it provides to their organization.

12.1%

of the leaders believe that using advanced processes, tools, and training to enable successful reactions defines the Agile process.

A quarter of the leaders in the study define Agile with the customer in mind.

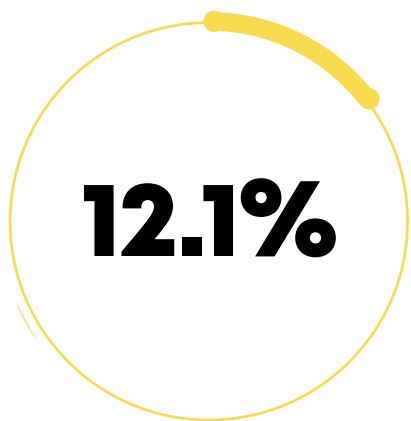Business leaders across industries seem divided in how they view the definition of Agile. 68.6% of the leaders define Agile as a holistic approach that focuses on customers' needs and is quick to respond to changes in the marketplace.

19.3% and 12.1% of the leaders defined Agile as providing continuous learning in their organizations by utilizing experiments, advanced processes, tools, and training. (Exhibit 1)

The continuous focus on accelerating customer-centric, Agile product development strategies points towards the first principle of the Agile Manifesto:

"Our highest priority is to satisfy the customer through early and continuous delivery of valuable software."

How does your organization define Agile?

Focused on its customers' needs which call for customized offerings

Quick in responding to changes in the marketplace or environment

40%

28.6%

19.3%

12.1%

Uses advanced processes, tools, and training which enable successful reactions

Continuous learning from experiments
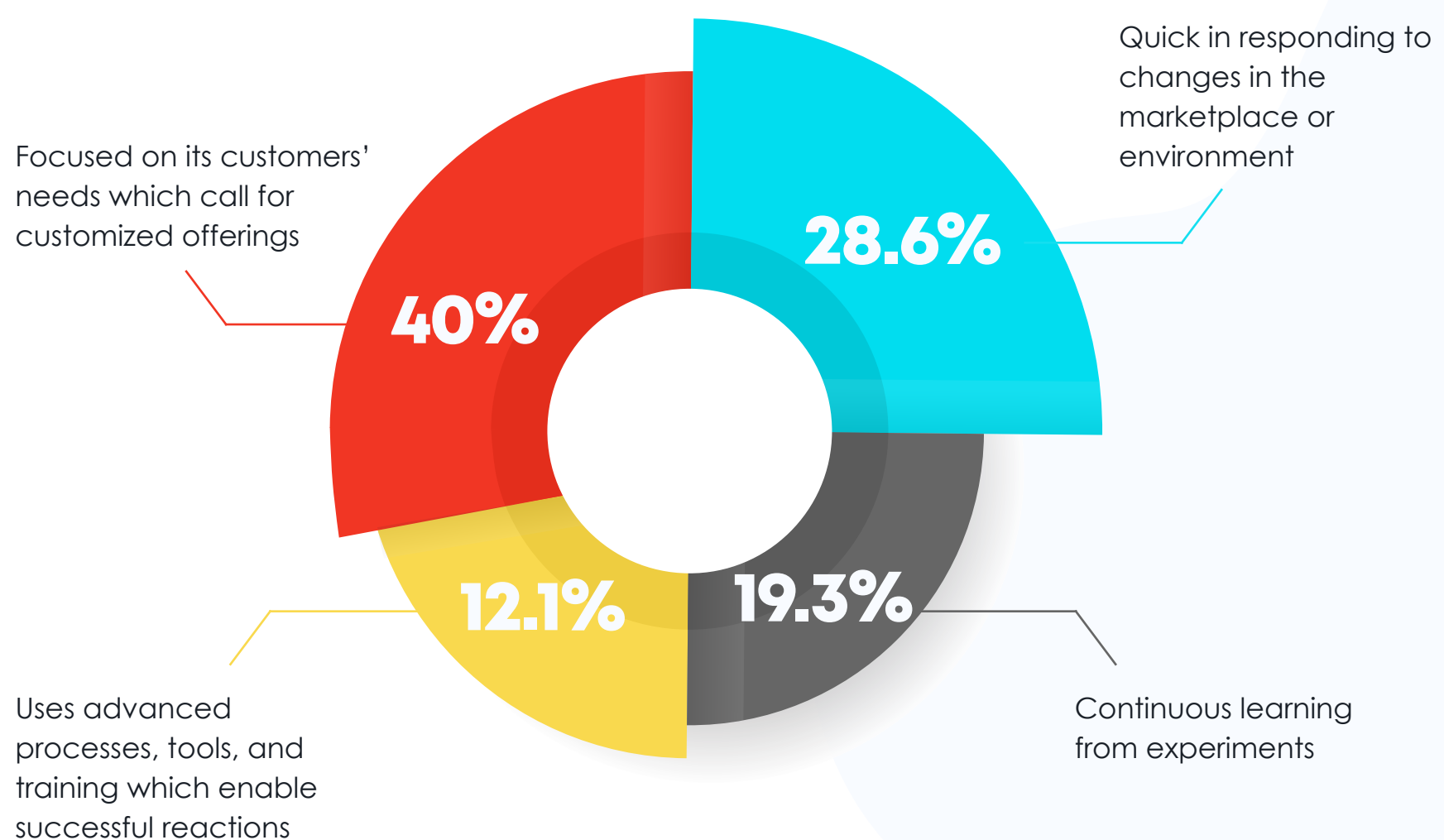
Exhibit 1

As businesses accelerate their digital product development, they also need to redesign their business models to **innovate, accelerate,** and **transform** quickly.

Historically, businesses focus on effectiveness and efficiency with Agile Product Development a second-class citizen. Such business models do not work in the era of digital disruption and uncertainty.

Instead of only focusing on efficiency, businesses must design product development methodologies for speed, experience, and adaptability—factors that define agility— enabling them to survive and thrive in today's ever-evolving business environment.

"

If Agile principles are not applied consistently throughout the product development journey, your product will fall flat in the market.

Thomas Ross

Digital Transformation Facilitator

Although the surveyed business leaders were unequivocally unified in expressing their views on the definition of Agile, understanding Agile development and its benefits is still a struggle for most of their teams.

66.2% of the surveyed leaders believe that their teams do not have a complete understanding of Agile development and the value it provides to their organization. In fact, 4.4% of the business leaders admitted that their teams have no understanding of Agile development. (Exhibit 2)

Businesses achieve agility by aligning delivery with strategy. They develop that strategy by transforming their teams' mindset, according to 37.8% of business leaders whose teams completely understand what Agile development is and the value it delivers to their organization.

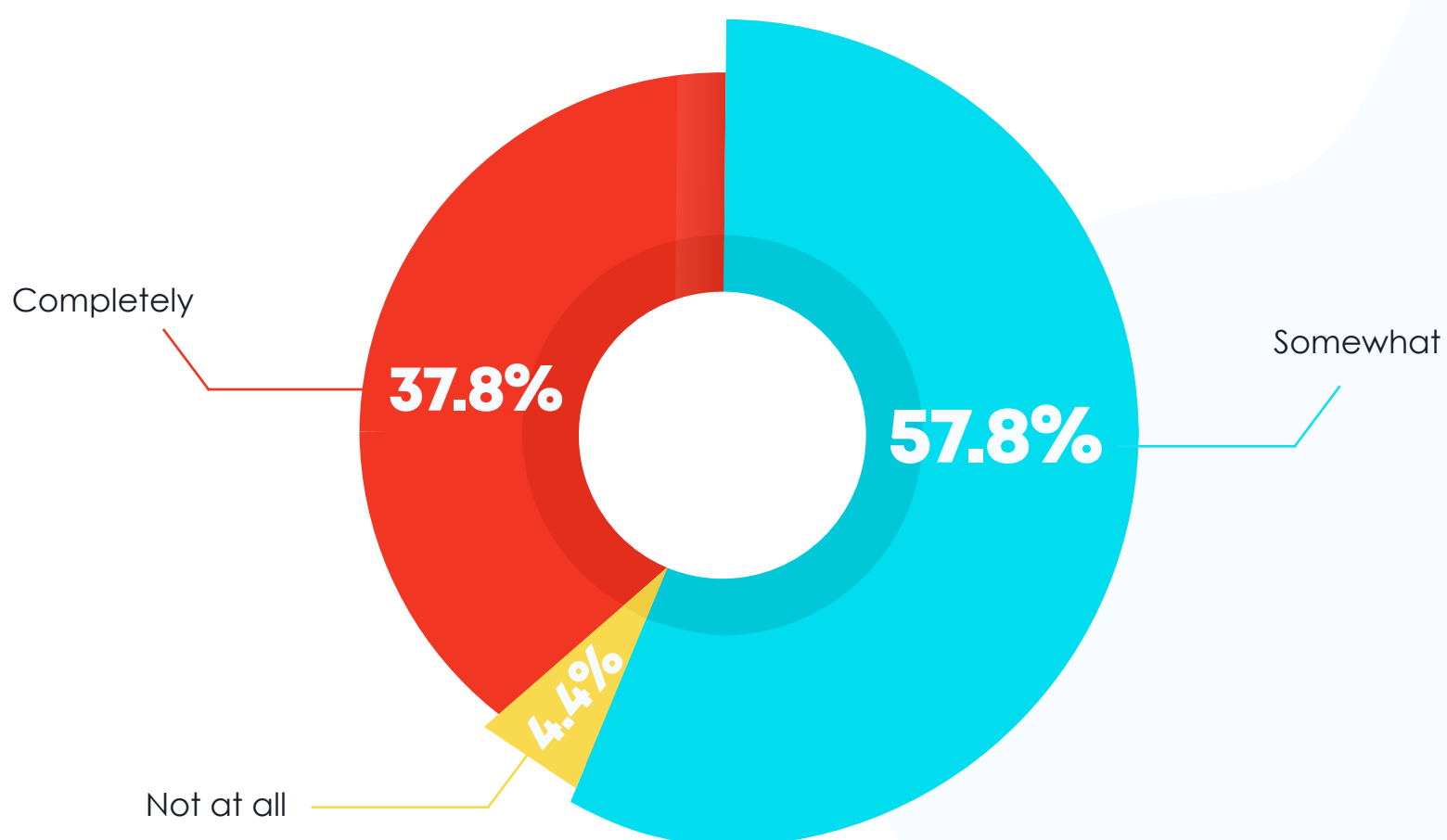## Does your organization and executive team understand Agile development and its benefits?

Completely 37.8%

Somewhat 57.8%

Not at all 4.4%

Exhibit 2

Net Solutions Suggests

Agile development is not just a *default* process; rather, it's a mindset. Leadership should reach out and engage their team early and often, taking the right steps to build a CX-driven product, at speed and scale.

The foundational factors for an Agile product development methodology are fixed: **Speed** and **CX**. All aspects of the product development process should be aligned under a strategic vision to **discover, define, design & build,** and **deliver** the results through continuous improvement.

4D Agile Product Development Flywheel
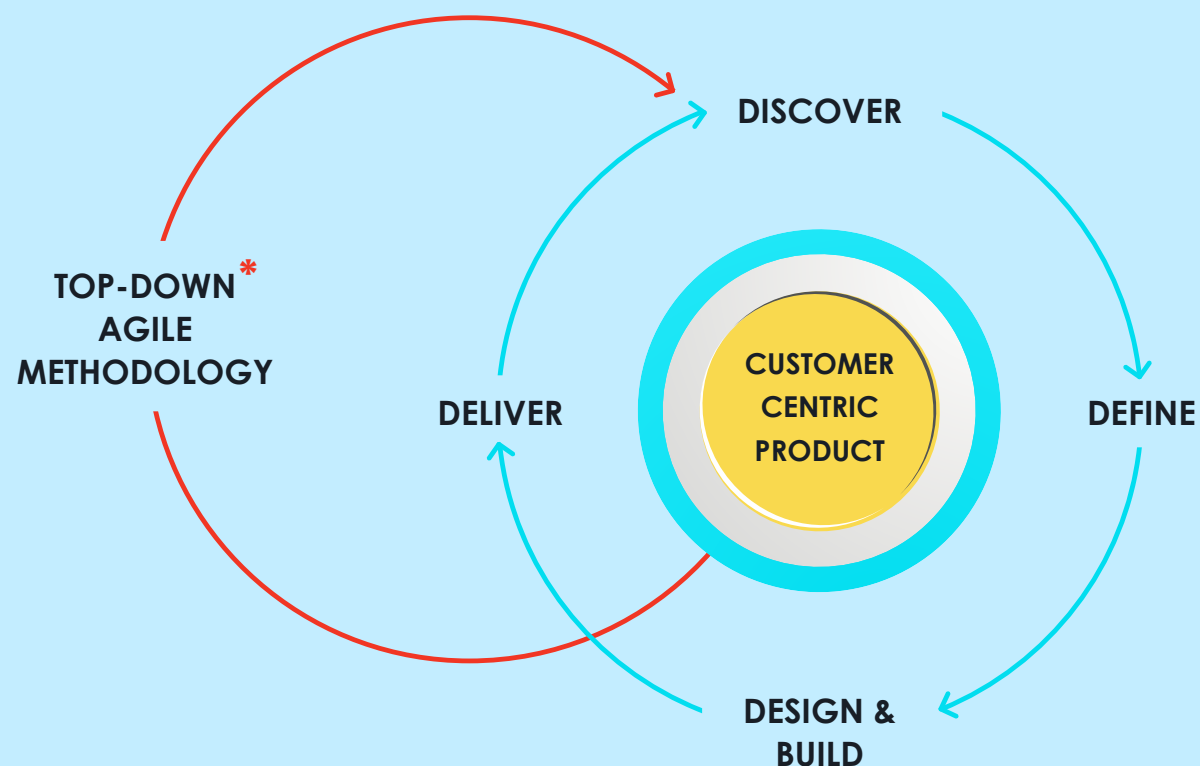
Discover

- Identify business and functional requirements
- Brainstorming sessions

Define

- Use design thinking to empathize with & understand target audience

Design & Build

- Use scrum-based agile development methodology
- Encourage collaboration
- Create flexible architecture

Deliver

- Use DevSecOps defined culture to deliver value to your product through launch and beyond
- Improve based on end-user feedback

*Top-down Agile Methodology is a propelling force that keeps the agile product development flywheel running.

Quick Tale

Building Soaq's Flagship Product: An Enterprise Video Platform that Maximizes Employee Engagement

A team of people who excel in technology-based learning and development conceptualized and founded Soaq in 2015. Soaq CEO Daniel Wolfe carries a vision to help organizations master internal communications.

Soaq turned to Net Solutions to build a corporate communication platform, complete with machine learning, to recommend relevant videos, flexible access systems, and a highly intuitive interface.

Discover

A Business Analyst (BA), a User Experience (UX) Analyst, and a Technical Architect (TA) worked with the Soaq team to clearly identify and document the scope of the project.

Define

- The teams defined the User Stories* based on brainstorming sessions with the client.

- The TA worked with the BA and the UX team to determine the technology and procedures they would use to build a shippable Minimum Viable Product (MVP).

Deliver

- We released an MVP to the market.

- We gather feedback, and continually improve the product with each iteration.

Design & Build

- We presented a Proof of Concept (PoC) to Soaq, outlining the proposed UX, design, and technical specifications.

- Post approval, the team undertook development using Agile and Scrum methodologies.

The result is the world's first intelligent, widely-adopted enterprise video solution - making Gartner's List of Cool Vendors in Content Services.

*A user story is an informal, natural language description of one or more features of a software system

How Agile Operates

Summary

More than half of the surveyed industry leaders prefer a stable product, and Agile development is a prerequisite to achieve that stability and stay competitive in the long Darwinian run. Businesses recognize this fact—almost all the business leaders use the Agile process in their product development process, in one way or another.

However, with the pandemic pushing businesses to exhibit increased levels of confidence in outsourcing product development projects, it has become more important to apply DevSecOps (Development, Security, and Operations) principles in the entire development journey.

The inability to apply DevSecOps principles across the product development chain is one of the reasons why, for many businesses, 10-30% of products fail to meet their target customer needs.

Key Facts

60.7%

of the leaders focus more on stable products than on products delivered at speed.

20.7%

of the organizations do not apply DevSecOps principles across any of their teams.

57%

of the organizations' architecture supports Continuous Delivery.

69.3%

of the businesses reported that 10-30% of their products fail to meet customer needs.

0.7%

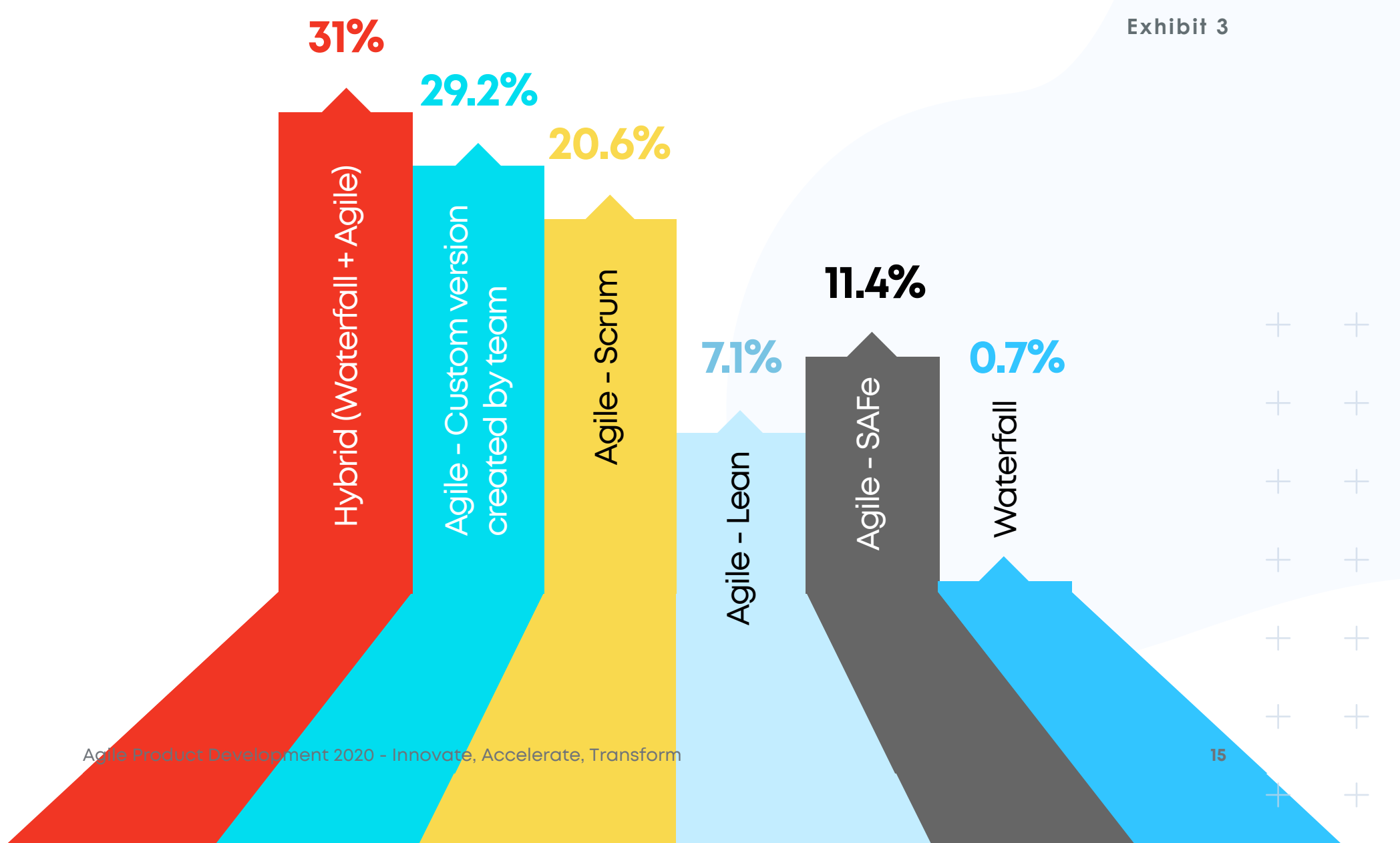of the businesses still follow the Waterfall approach to product development.

While a large percentage of the businesses follow Agile methodologies in their product development process, a few leaders reported that they still follow the Waterfall methodology.

Businesses are undoubtedly realizing the value that the Agile product development approach delivers. This statement is confirmed by the fact that 99.3% of the surveyed organizations have adopted the Agile process or are experimenting with it.

Among the most popular Agile approaches that surveyed leaders selected, a hybrid (Waterfall + Agile) is the most preferred approach (31%), followed by the custom version (29.2%) and Scrum (20.6%) respectively. (Exhibit 3)

The good news is that the organizations are embracing the Agile process in an era where speed separates the legends from the laggards; however, a few organizations (0.7%) still place their faith in the Waterfall method.

What development processes are being used at your organization?

Exhibit 3

31% — Hybrid (Waterfall + Agile)

29.2% — Agile – Custom version created by team

20.6% — Agile – Scrum

7.1% — Agile – Lean

11.4% — Agile – SAFe

0.7% — Waterfall

Almost 8 in 10 surveyed industry leaders currently apply DevSecOps in their organizations.

An Agile product development approach enables faster time-to-market and a secure, stable product. DevSecOps (Development, Security, and Operations) is the secret sauce to get this done.

Unsurprisingly, 79.3% of industry leaders surveyed have already begun applying DevSecOps in at least one of their teams to increase security and business agility and reduce friction between different Agile development teams. (Exhibit 4)
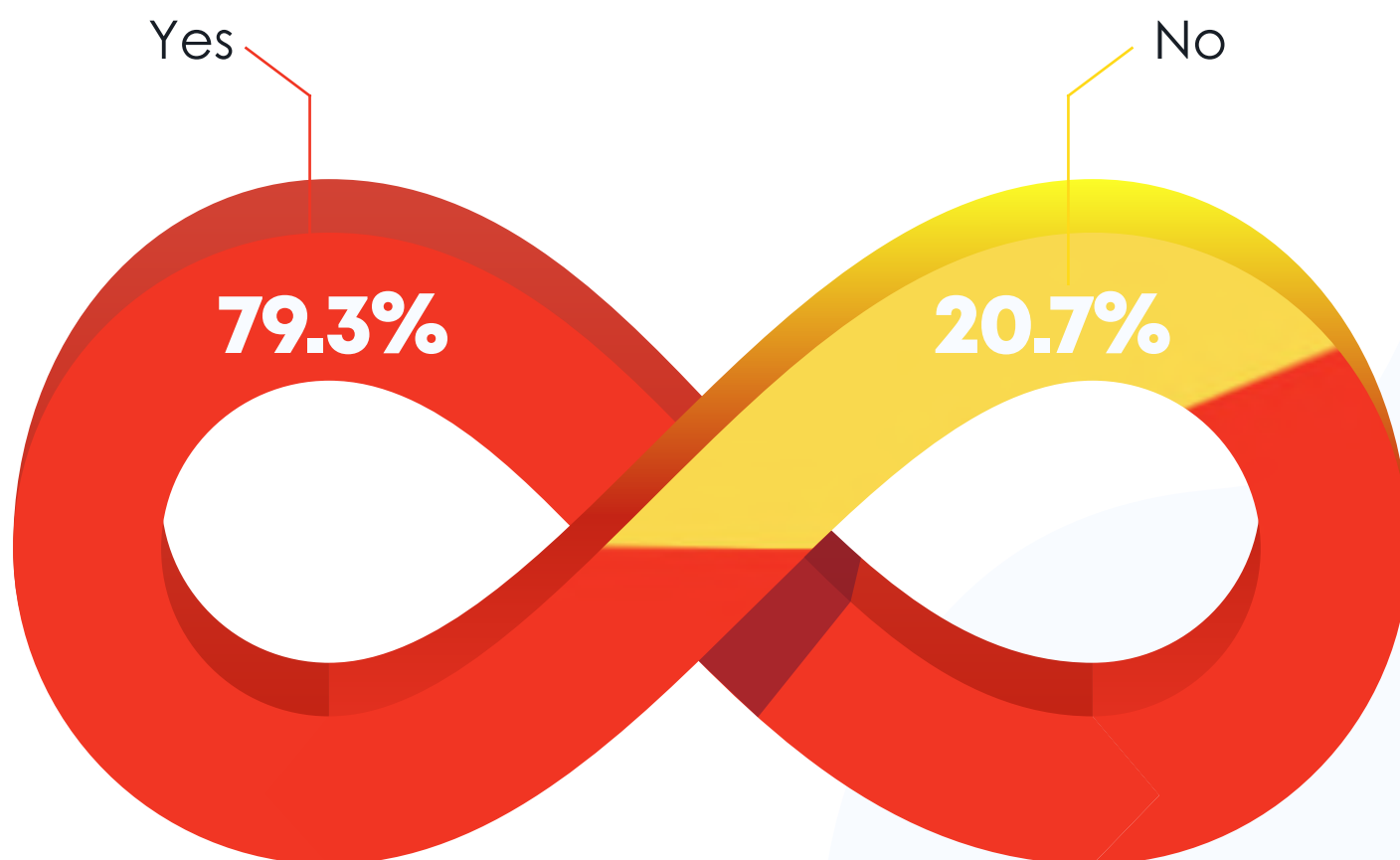
Do you apply DevSecOps?

Yes

No

79.3%

20.7%

Exhibit 4

The global health crisis reinforces the strength of the co-creation process (as it pertains to software development and Digital Transformation), which includes working with external partners and customers. Thus, embedding security at each stage of the product's life cycle is more important than ever in today's uncertain and unpredictable business environment.

In the **Net Solutions State of Digital Transformation 2020 report**, we share that 37.3% of organizations believe 'digital security' is the biggest challenge that they face on the road to digital transformation. Organizations should take active measures to embed and keep track of security in their product development pipeline.

The Value Case for DevSecOps

Net Solutions submits the following reasons for organizations to adopt the DevSecOps philosophy:

- It enables faster, secure, automated, and reliable software releases (from development to operations).

- It helps improve the product's stability and reliability.

- It enables continuous delivery, ongoing innovation, and increased opportunities for bottom-line growth.

- It helps to securely embrace and meet customers' ever-changing needs and expectations.
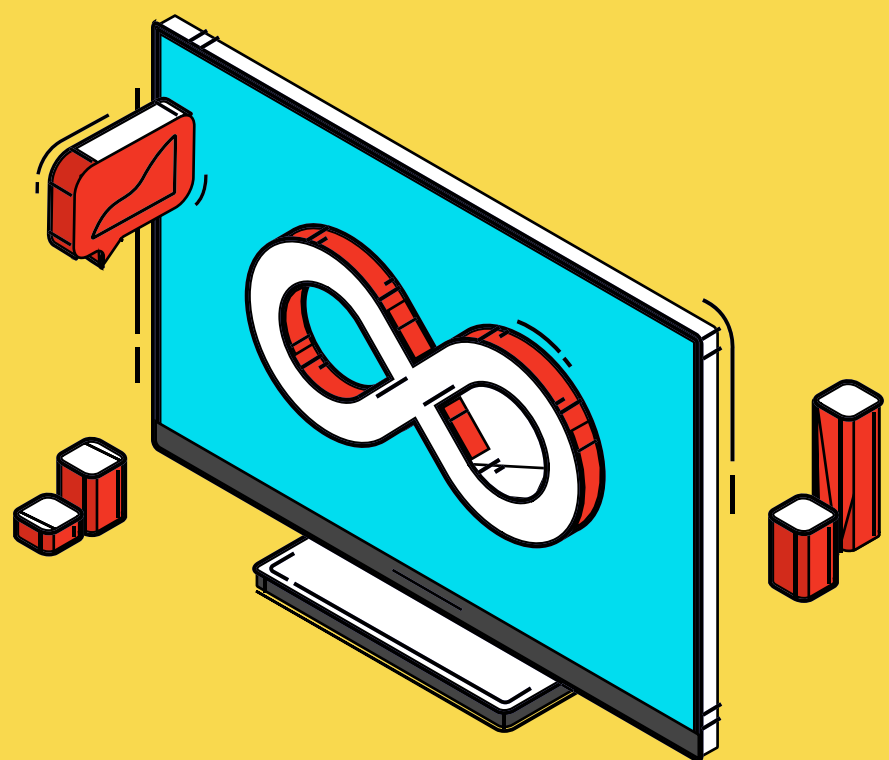
While most of the product development teams focus on a stable product, close to a quarter of the teams prefer product development at speed.

Contrary to the factors—speed and experience—that define the Agile process in the current unpredictable business environment, 60.7% of the surveyed business leaders prefer a stable product over products delivered at speed (39.3%). (Exhibit 5)

Delivering a successful product depends upon two key factors: speed and stability. Organizations are often faced with a choice between focusing on stability or speed, thereby putting an immense amount of pressure on product delivery teams. These teams must be able to design, build, and deliver customer-centric products quickly, with a high degree of confidence in the outputs that their product development teams have produced.

To achieve the right balance of speed and stability, it is vital to incorporate security into the product development life cycle from the beginning, because DevSecOps-driven Agile teams spend 50% less time fixing their product's security issues.

Speed vs Stability - what does your product development team focus on the most?

Speed

39.3%

Stability

60.7%

Exhibit 5
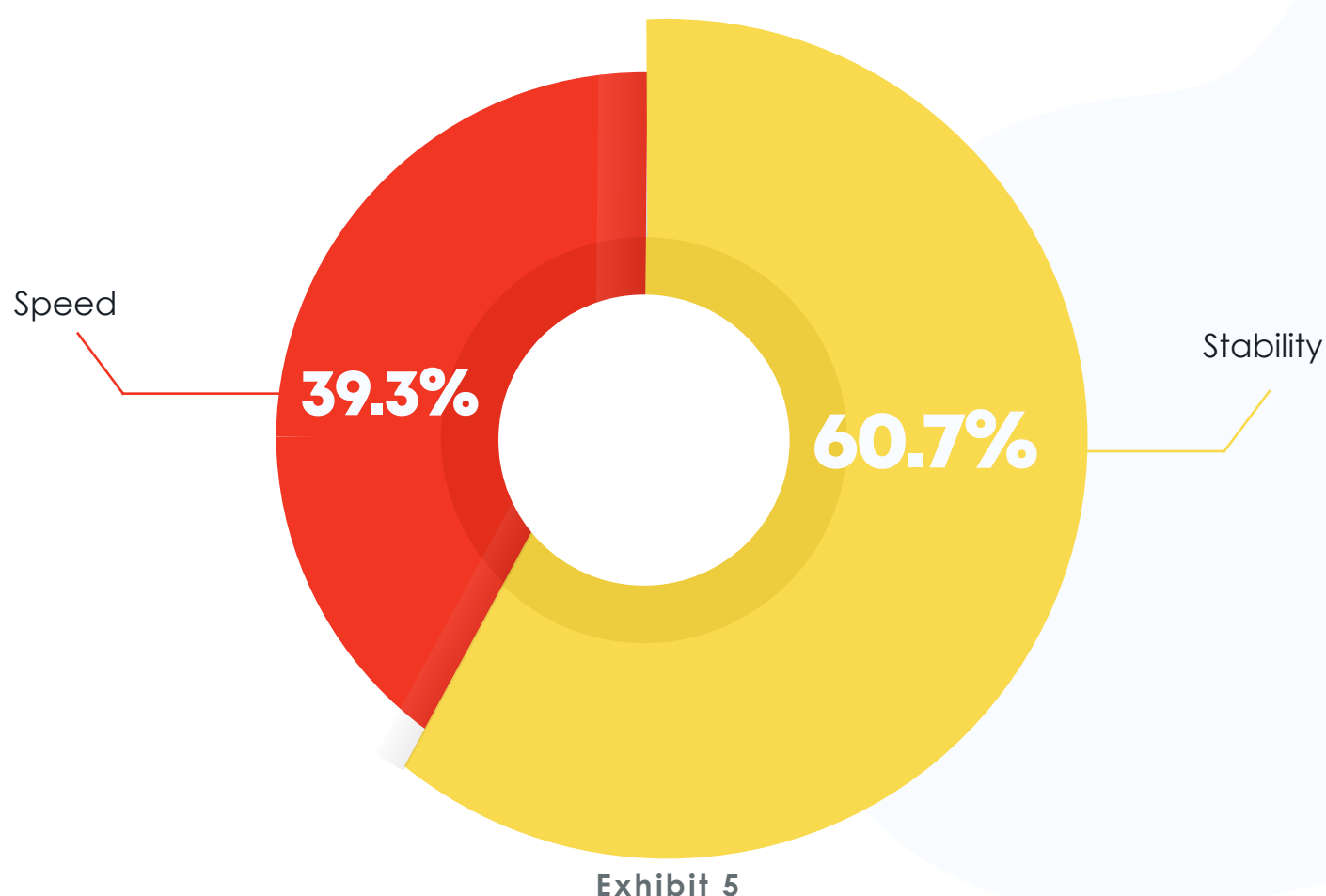
The (Novel) Agile Development Process

Kurt says: In my free time, I write novels, which is a pretty good metaphor for application development. I start out with a preliminary outline, followed by the characters, plots, and so on. Chances are that I will move key sections around and push some characters into the future.

Kurt Cagle
Author and Information Architect

First Draft

This iteration has many inconsistencies; you're trying to balance what to share and what to keep back, and oftentimes even your anchor points may not quite work.

Second Draft

This draft is more polished; you know what you're trying to achieve, and you start building nuances. This version takes longer, but it's more stable, and generally making changes to it is difficult.

Third Draft

Here, you work on sentence structure, dialogue, and consistency. Then, you pass it on to an editor, and from there it's off to the publisher.

This, to me, SHOULD be the way that the Agile process works, because it's the way that most innovative productions work.

In the beginning, you prioritize speed in order to come up with many worthwhile scenarios. Change at this stage costs very little. By the end, however, you seek stability and focus on consistency.

So both speed and stability are appropriate, at the right times.

Less than one-third of the organizations release new features for their products every week or every six months—one of the reasons why is that in close to 70% of organizations, 10-30% of products fail to meet customer needs.

Taking into consideration the cutthroat digital landscape where loyalty is not a given, businesses cannot afford to wait for several months to release new features into the hands of demanding customers.

Our report highlights the fact that 73.6% of the organizations fail to release new features for their products within the span of one week (Exhibit 6). This is one of the reasons why 69.3% of the businesses reported that 10-30% of their products fail to meet customer needs. Only 2% of the surveyed organizations claimed their products meet all customer requirements very well. (Exhibit 7)

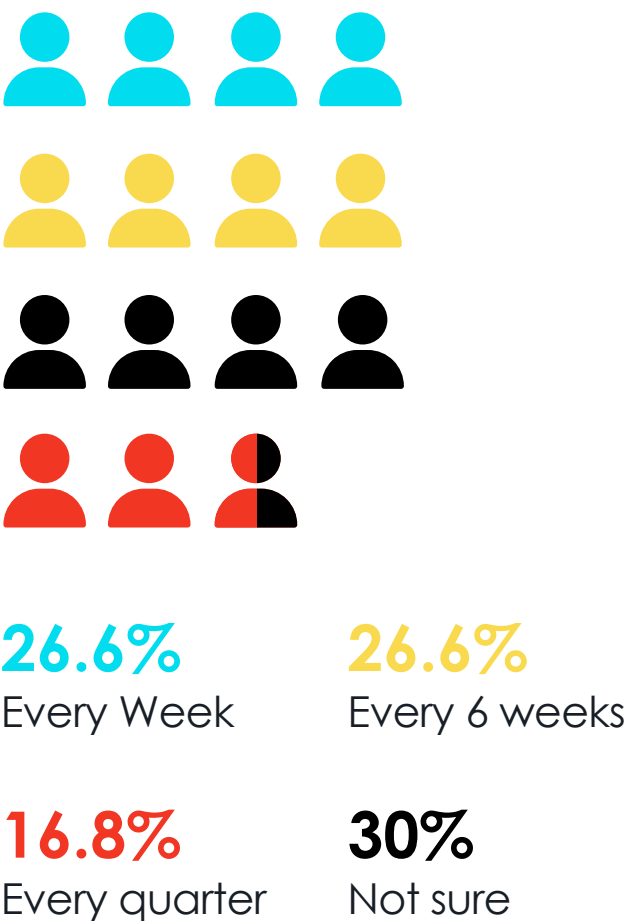## How frequently do you release new features for the product to your customers?

26.6%
Every Week

26.6%
Every 6 weeks

16.8%
Every quarter

30%
Not sure

Exhibit 6

Roughly what percentage of your company's products fail to meet customer needs?

69.3% 10 - 30% fail to meet needs

28.6% 30 - 50% fail to meet needs

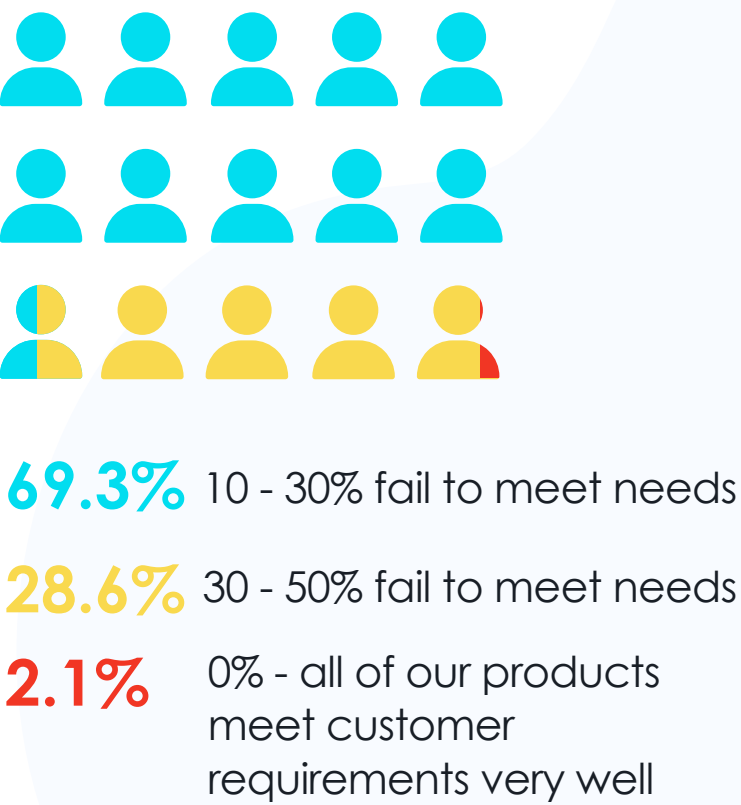**2.1%** 0% - all of our products meet customer requirements very well

Exhibit 7

Software deployment frequency is constantly under pressure to increase. To streamline the software release process, we advise you to follow the best practices of a blend of various technologies, tools, and processes—DevOps, Continuous Delivery (CD), and Continuous Integration (CI)—that work together to align your business strategy with your customers' needs.

For instance, the success behind Candy Crush (one of 270 million people's favorite games since 2012) lies in its continuous updates as per the demands of its users. King, the Swedish developer behind Candy Crush Saga, adds new content to the game weekly and updates the back-end systems every two weeks or so.
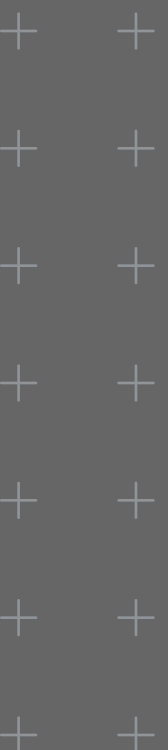
"

Staying relevant and keeping up with the trends is vital in today's competitive space. If you do not have new games, new offers, new features, or promotions you fall behind the competition. If you don't show progression, your customers will go somewhere that does.

Gali Hartuv

Head of VIP, 10bet

Net Solutions Suggests

The product development industry has already "crossed the chasm" with regard to DevOps. In order to achieve the right balance of speed and stability, businesses will have to shift to emerging technologies, backed by Agile methodology, to fuel their stable product development acceleration.

However, shifting to cloud technology without a security-first approach will put your product in danger. Thus, based on the trending technologies and Agile approaches, Net Solutions introduced its Digital Transformation Flywheel to help businesses gain the necessary momentum they require to accelerate their product development process.
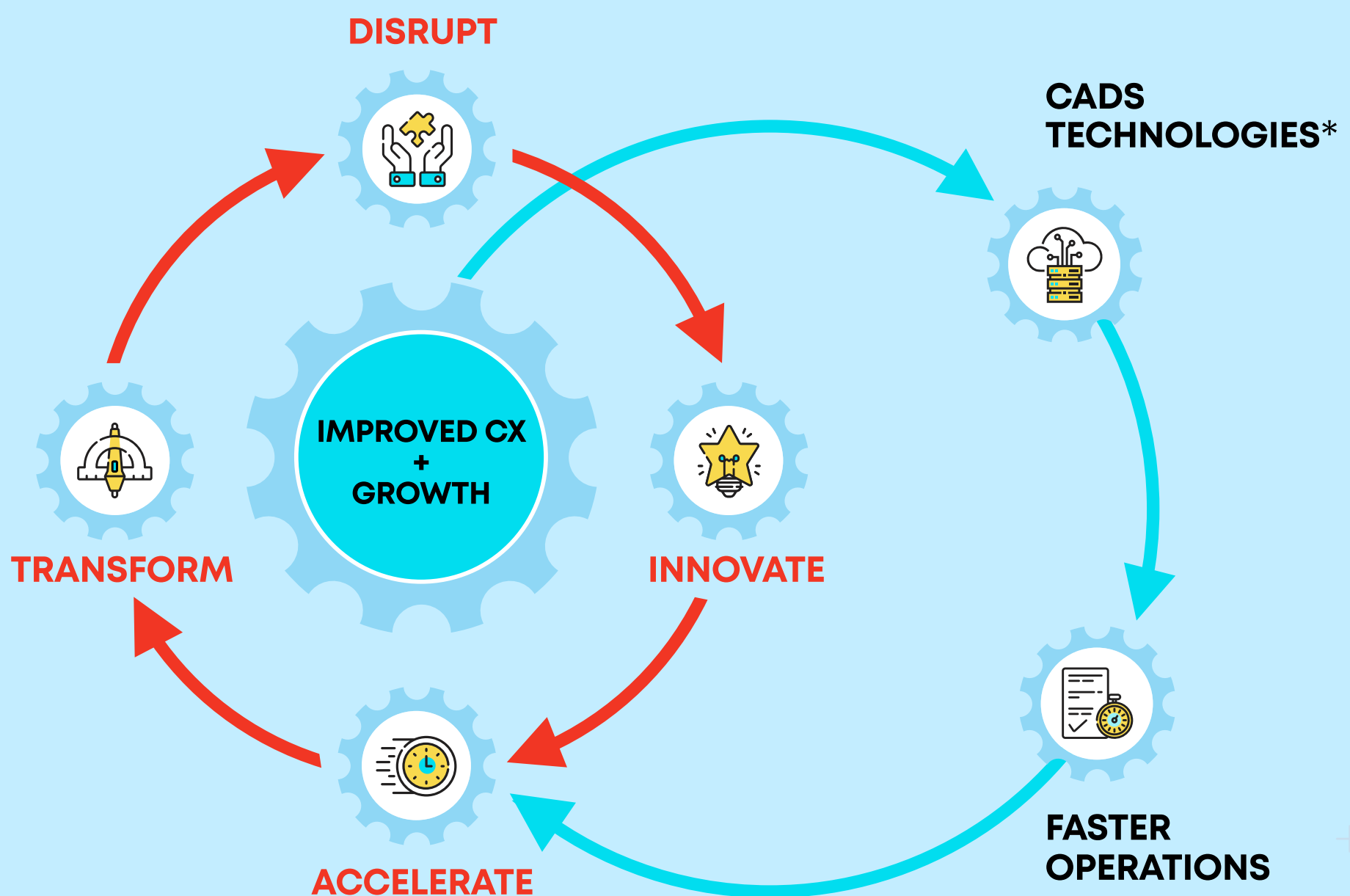
* Cloud, Artificial Intelligence, Data Analytics, Security (CADS) — key technologies highlighted in the Net Solutions' State of Digital Transformation 2020 report — combined with Agile and DevSecOps methodologies keep the digital transformation flywheel spinning.

CHAPTER 3

Trends, Benefits, and Challenges

Summary

In today's dynamic business ecosystem, surrounded by nimble competitors and demanding consumers, it is becoming necessary for organizations to work faster and deliver more value. Agile product development promises exactly that—more than one-third of the surveyed leaders expect faster product delivery and continuous customer satisfaction improvement from their Agile technology investments.

Still, the struggle is real. A quarter of surveyed business leaders reported that lack of alignment with the target market, customer, and strategy is the biggest challenge that their product development team faces.

Embedding agility in the product development process is not as simple as a number of tech juggernauts like Google, Amazon, and Facebook might make it look. These companies make the Agile product development process look easy.

However, the reality is that for most organizations this process is hard, and they end up making mistakes, some of which short-circuit the entire process.

Key Facts

35.8%
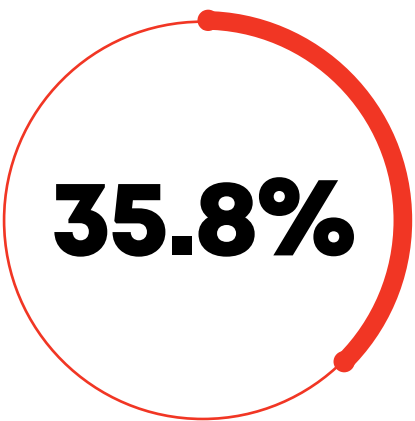
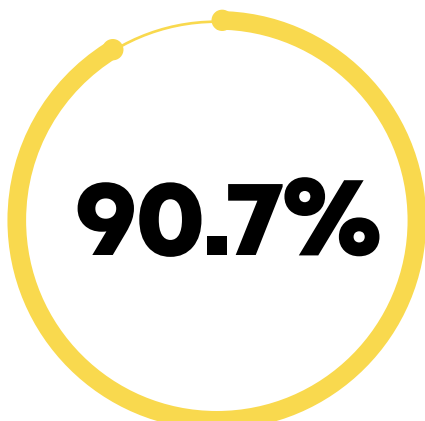of the organizations expect a faster product delivery and continuous customer satisfaction improvement from their Agile technology investments.

34%
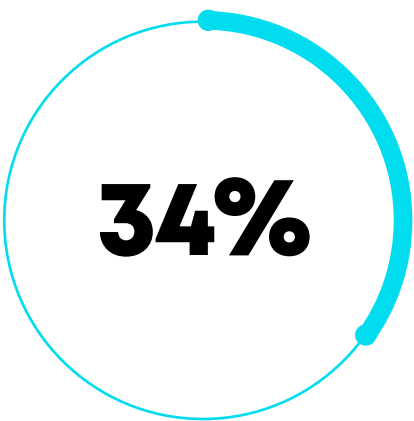
of the industry leaders cite an undefined process as the biggest challenge that their product development teams face.

90.7%

of the product development teams have witnessed the problem of scope creep while building a Minimum Viable Product (MVP).

The most common expectations from the organizations' Agile technology investments are 'continuous customer satisfaction improvement' and 'faster product delivery.'

At 35.8%, most surveyed organizations state 'faster and continuous customer satisfaction improvement' as one of their key expectations from Agile technology investments, while increased flexibility comes third, at 29%. In addition to continuous customer satisfaction improvement, we see the organizations (35.2%) striving for faster product delivery too. (Exhibit 8)

In the modern, digital age, industry verticals are susceptible to disruption, which is why Agile mindset is the only way of building products.

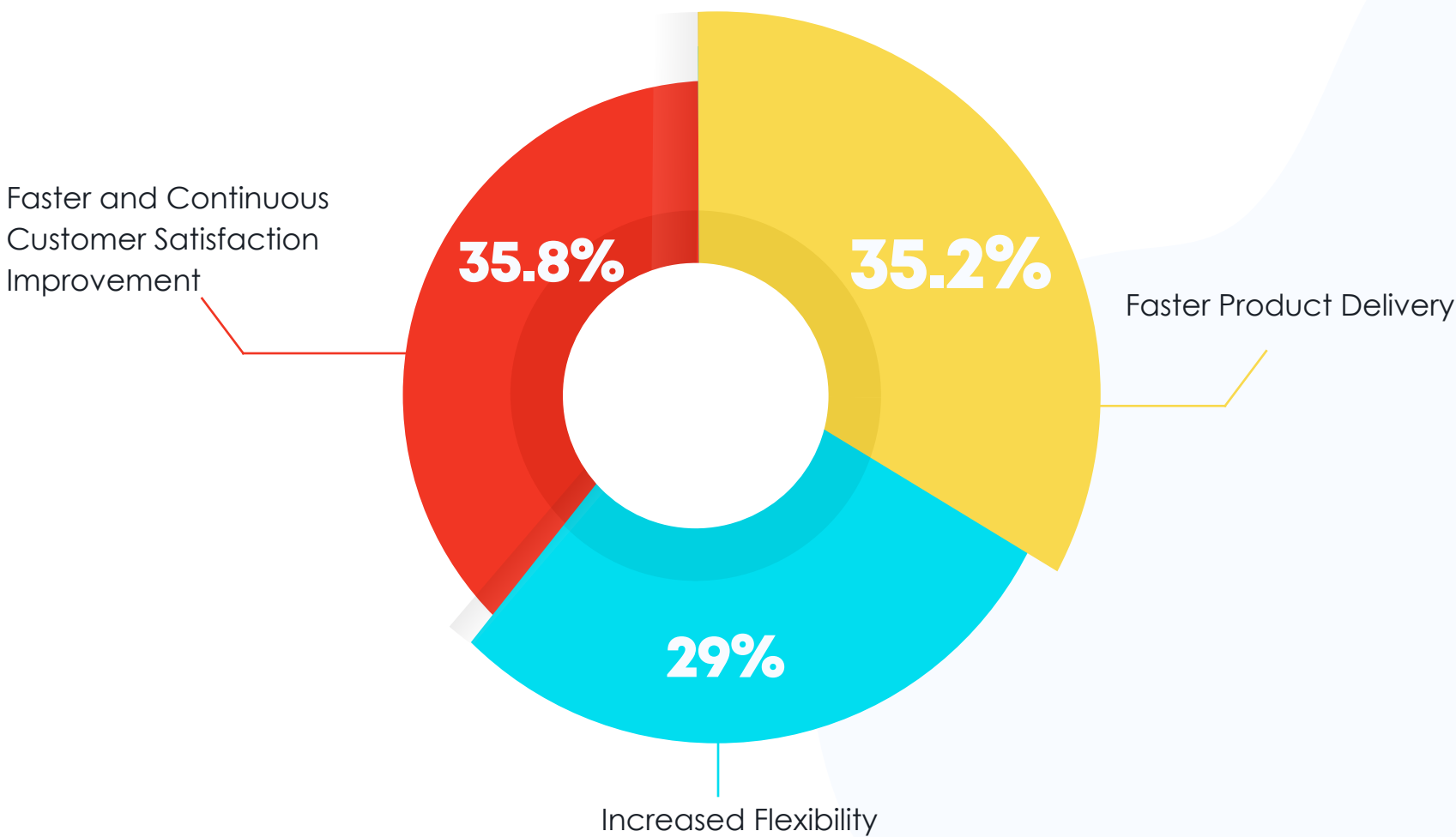## What value does your organization expect from its Agile technology investments?

Faster and Continuous Customer Satisfaction Improvement

35.8%

35.2%

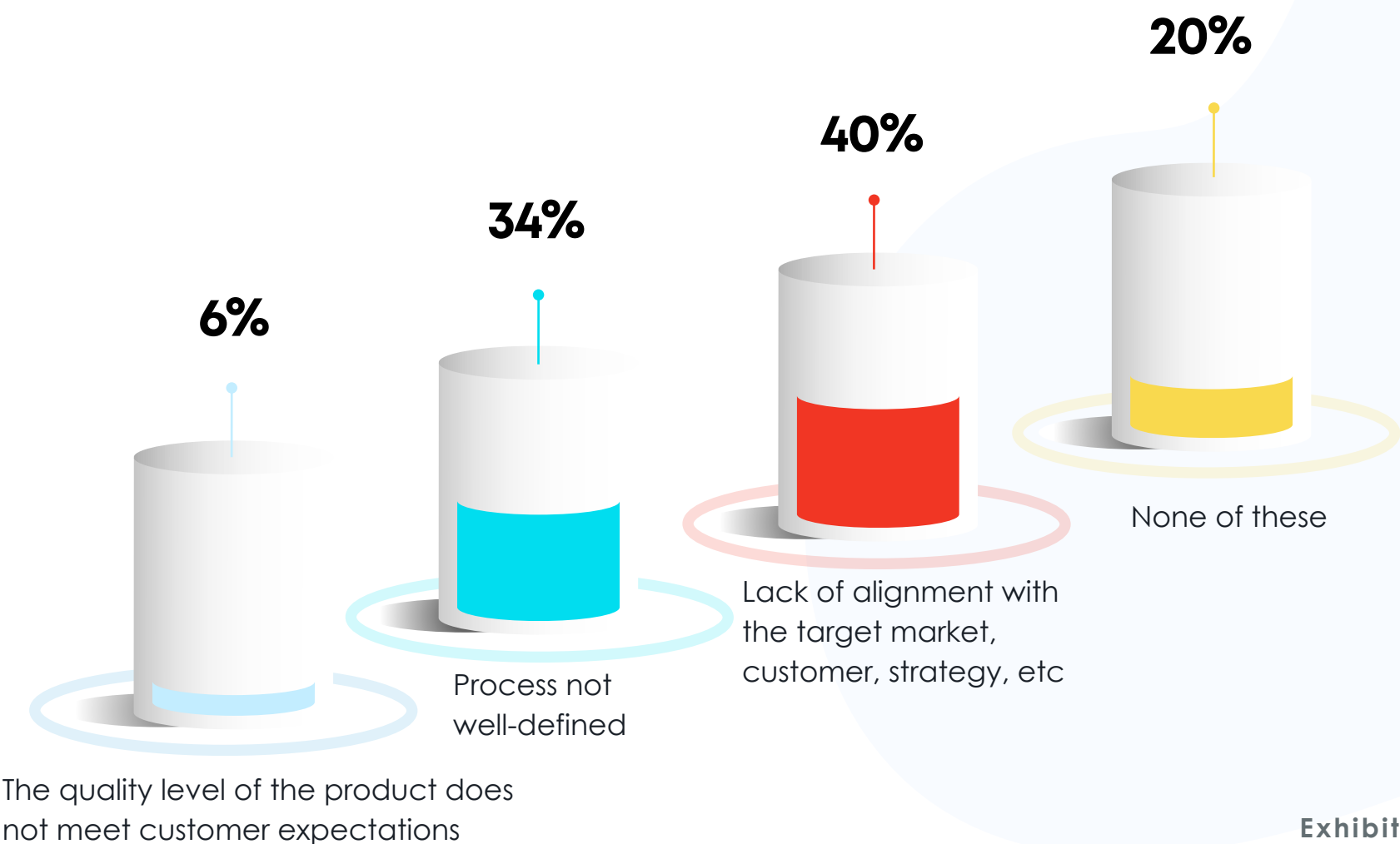Faster Product Delivery

29%

Increased Flexibility

Exhibit 8

Most of the surveyed organizations name a lack of product alignment with the target market and an undefined process as the biggest roadblocks to Agile product development.

The road to Agile product development winds through many challenges along the way. In our survey, we find that regardless of how long an organization has been following an Agile product development methodology, lack of product alignment with the target market, customer, and strategy is consistently the biggest perceived challenge among surveyed business leaders (40%). (Exhibit 9)

We also discovered that 34% of the businesses name an undefined process as the biggest challenge in their Agile product development journey. This finding highlights our view that this roadblock is an operating model challenge influenced by operations and processes, technological challenges such as Continuous Improvement (CI)/Continuous Delivery (CD), and performance management.

Select all of the following challenges that apply to the products and/or services being delivered by your team

6%
34%
40%
20%

None of these

Process not
well-defined

Lack of alignment with
the target market,
customer, strategy, etc

The quality level of the product does
not meet customer expectations

Exhibit 9

Most businesses face the issue of finding the right product/market fit because they dodge one of the important factors in the product development process: Market Segmentation. They then end up shackling themselves in queries about to whom they have to sell and what they have to sell.

It is important to understand that choosing segments intelligently allows you to tailor the marketing mix to more focused customer needs.

Captivating the early market within the niche of your business can help you to establish a robust position in the market, thereby outsmarting the cutthroat competition.
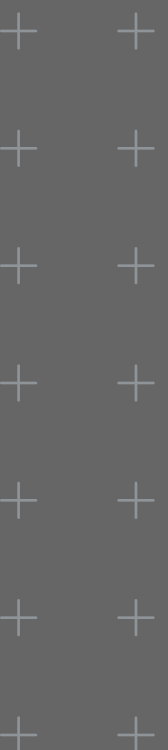
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The voice of the customer plays a crucial role in the development of a product. At current times as things change at a much faster pace, the importance of being agile is very much needed. Having iterative processes of development and improvement are critical and this scenario will last for the times to come.

Rishabh Chikker

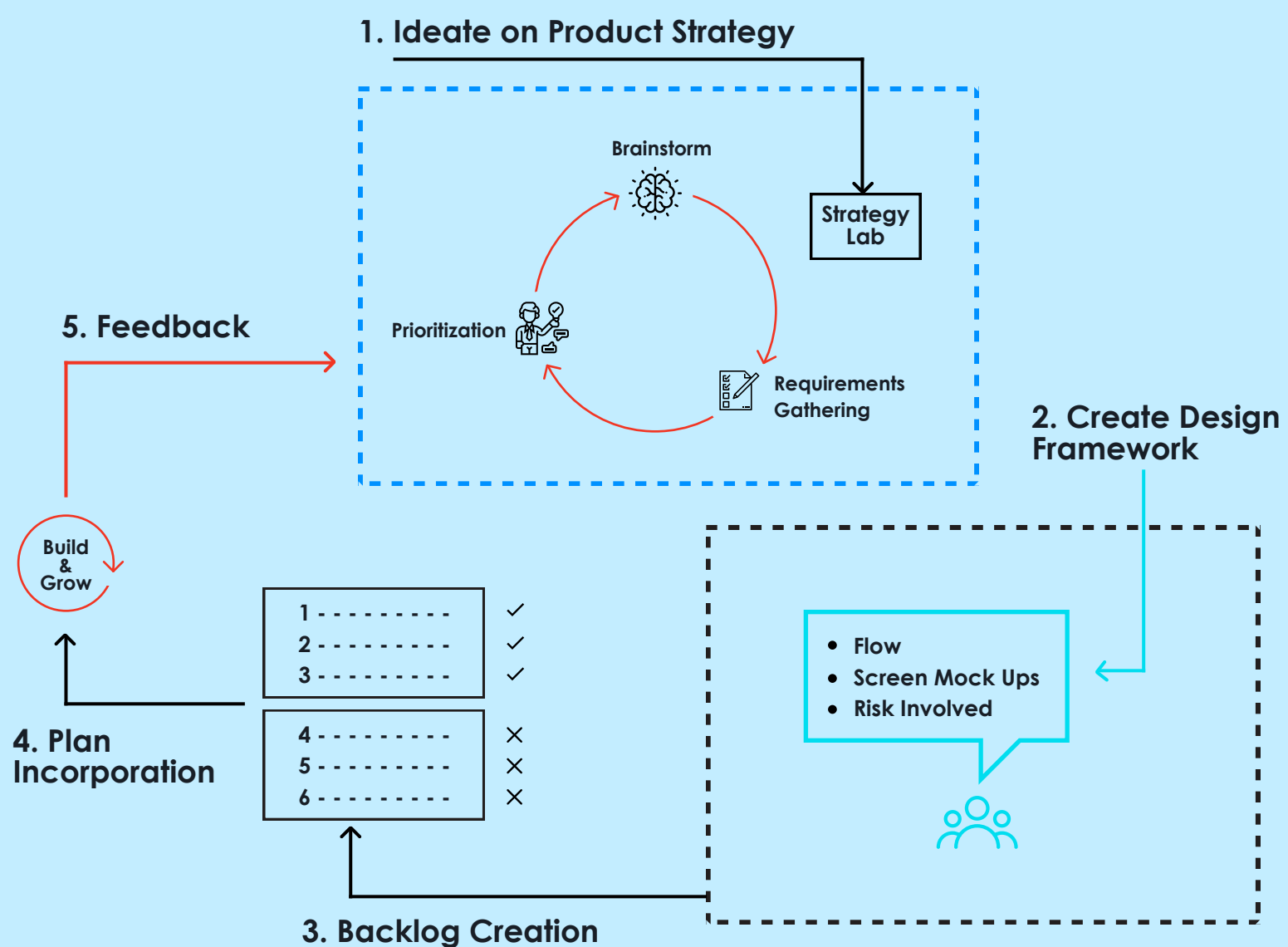Scrum Master Autonomous Driving, Aptiv

Net Solutions Suggests

The opportunities in digital product development evolve and expand on a daily basis, which is why Agile brands win.

To minimize waste, maximize opportunities, and move your business forward, we highly recommend that you follow the process of continuous improvement: scrum-based Agile product development that drives a dynamic iterative development process, allowing businesses to measure, test, and scale their solution in the markets.

Net Solutions' Product Development Process

1. Ideate on Product Strategy

Brainstorm

Strategy Lab

Prioritization

Requirements Gathering

5. Feedback

2. Create Design Framework

- Flow
- Screen Mock Ups
- Risk Involved

Build & Grow

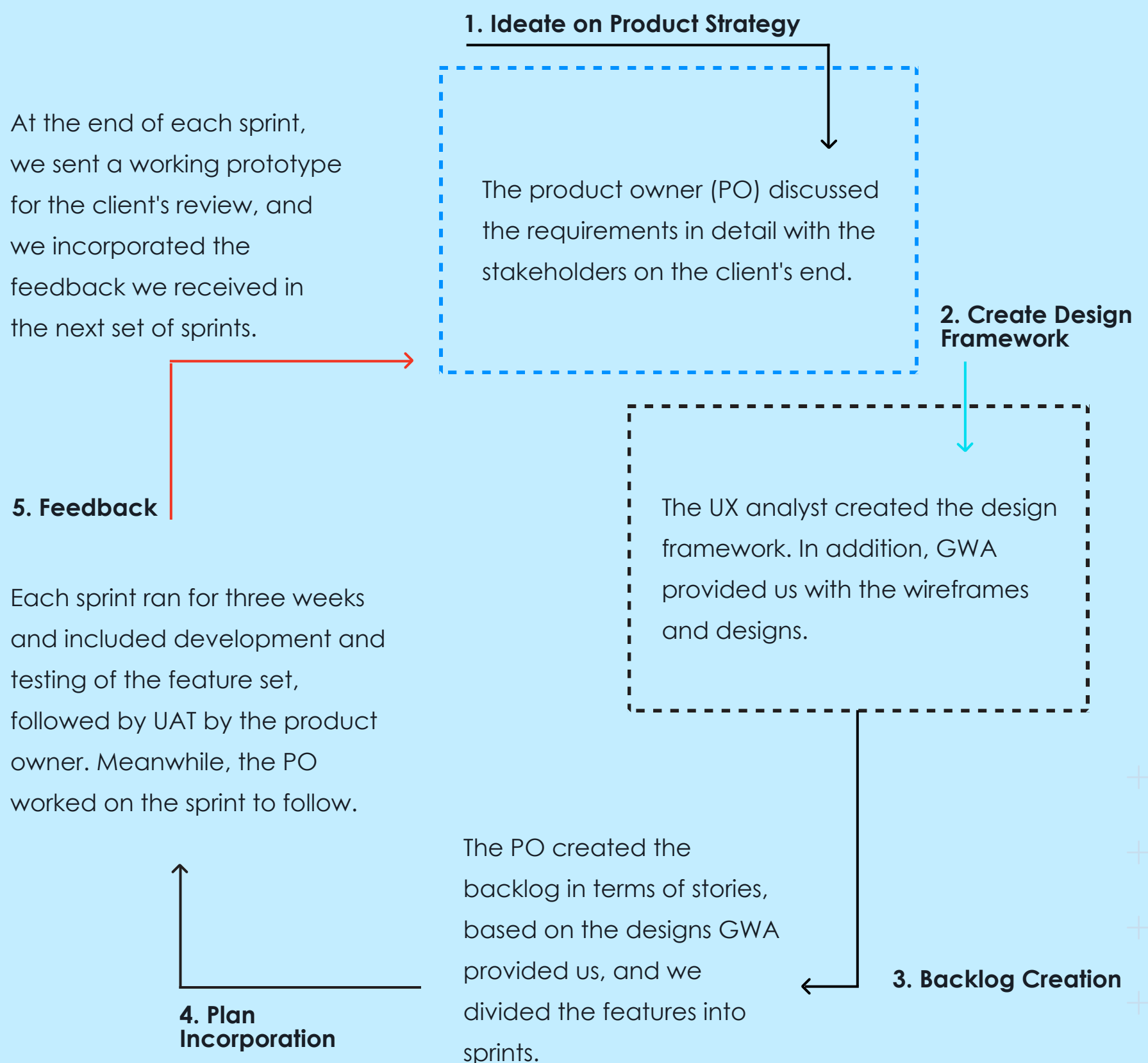4. Plan Incorporation

3. Backlog Creation

Quick Tale

Delivering Digital Customer Experience Across Multiple Properties, for GWA Group, with DevOps-driven Solutions

Style and substance are two areas that leading home improvement specialists GWA can't afford to skimp on when they serve their building and construction-sector clients. They turned to Net Solutions for a strategic upgrade and redesign for 11+ websites, portals, and apps.

1. Ideate on Product Strategy

The product owner (PO) discussed the requirements in detail with the stakeholders on the client's end.

At the end of each sprint, we sent a working prototype for the client's review, and we incorporated the feedback we received in the next set of sprints.

2. Create Design Framework

The UX analyst created the design framework. In addition, GWA provided us with the wireframes and designs.

5. Feedback

Each sprint ran for three weeks and included development and testing of the feature set, followed by UAT by the product owner. Meanwhile, the PO worked on the sprint to follow.

4. Plan Incorporation

The PO created the backlog in terms of stories, based on the designs GWA provided us, and we divided the features into sprints.

3. Backlog Creation

CHAPTER 4

Living Agile in COVID Times

Summary

COVID-19 has turned the world upside-down and dramatically changed the way customers think, thereby eventually challenging the organizations' operating and business models.

To cope with such challenges and adapt quickly to changing business priorities, most of the surveyed businesses have started to adopt Agile principles during the COVID-19 crisis.

By embracing the Agile mindset, organizations are trying to break down silos, suspend slow-moving hierarchies, and remove boundaries; however, more than one-third of the Agile teams are facing issues of communication, backlog grooming, and sprint review.
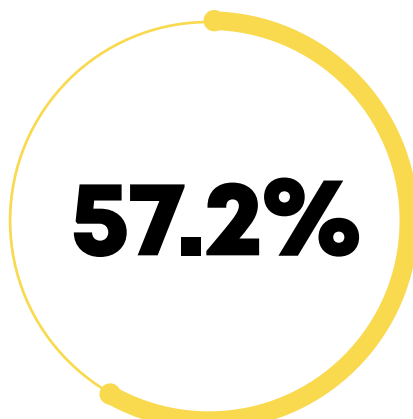
Key Facts

22.8%

of the remote Agile teams face communication challenges.

23.6%
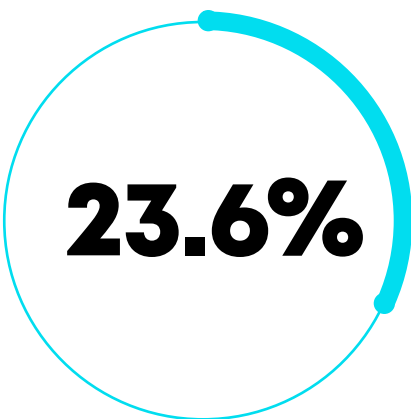
of the organizations were fully Agile even before the COVID pandemic.

57.2%

of the businesses reported that their performance management system doesn't support their Agile ambition.

The confidence of businesses in Agile methodology has risen during the COVID-19 pandemic; however, a few organizations are still struggling to embrace the Agile process.

With 23.6% of the businesses claiming to have attained full agility even before COVID-19 hit, we can infer that their leaders are optimistic about future growth.

However, things aren't going to look like they did a year ago. The competitive business landscape will look different as organizations come up with different product development models to enter new markets.

Exhibit 10 highlights that more than half of 57.8% of the organizations' teams have adopted Agile principles during the COVID-19 pandemic.

What percentage of your teams have started adopting Agile principles during the COVID-19 pandemic?
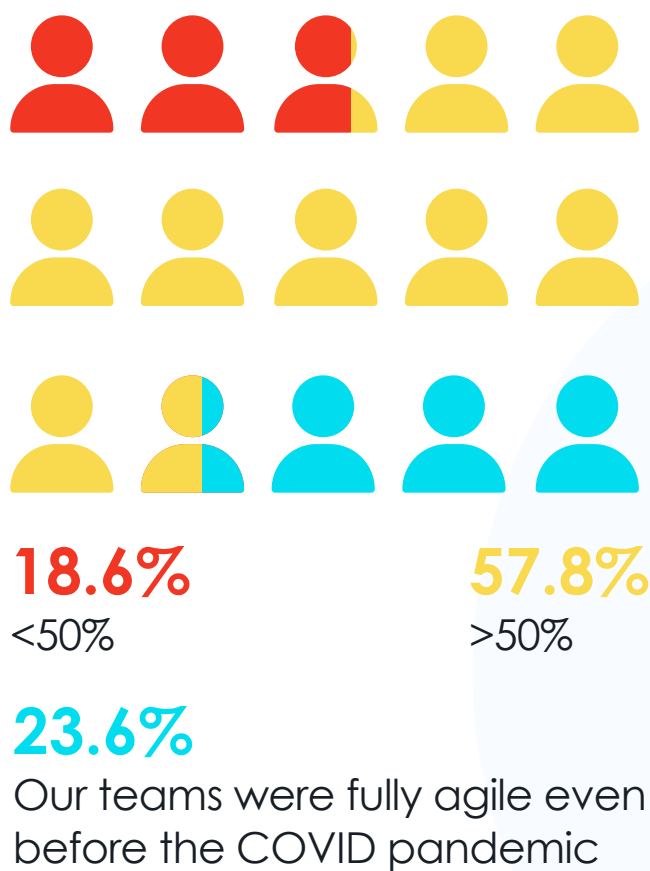
18.6%
<50%

57.8%
>50%

23.6%
Our teams were fully agile even before the COVID pandemic

Exhibit 10

Communication, sprint review, and backlog grooming are the three standout challenges Agile teams face.

As businesses move forward on their path to adapt to the COVID-19 crisis, their Agile teams can either be a source of business fiascos or competitive advantage. Organizations are struggling to keep their Agile teams aligned with organizational objectives, which can be inferred from Exhibit 11, highlighting that 33.5% of the surveyed Agile teams are facing challenges like communication, backlog refinement, and sprint review.

Businesses should understand that embracing the "Agile methodology" is more than simply implementing a new approach to innovation. Tackling these challenges requires a fundamental culture shift and a strong leadership commitment.

What is the major challenge that your remote agile team faces?

21.4% — Backlog Refinement
22.1% — Sprint Review
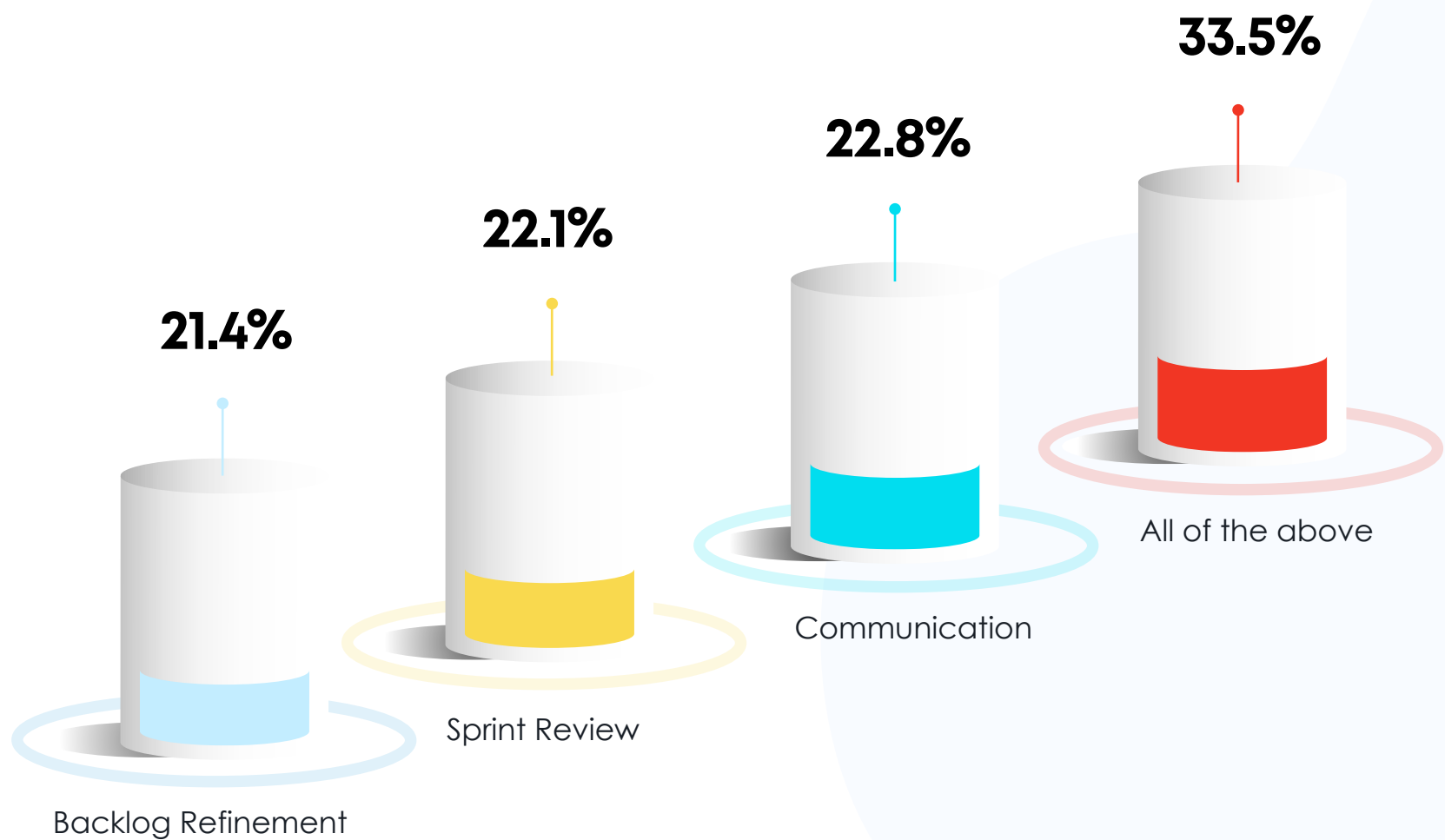22.8% — Communication
33.5% — All of the above

Exhibit 11

Final Thoughts

Speed & innovation and keeping the target customer in the mind are the two factors that separate the legends from the laggards, especially in today's complex and uncertain business landscape.

As the pandemic continues to alter business realities, organizations are trying to refashion and rewire their approach to product development by adding agility in their development processes, with a focus on a blend of practices–DevOps, CI, and CD–to increase the software release frequency.

The goal of our study is to deliver insights that help organizations benchmark their own teams and identify key capabilities that they can apply to their product development process.

About Net Solutions

Net Solutions is a strategic design & build consultancy that unites creative design thinking with agile software development under one expert roof. Founded in 2000, we create award-winning transformative digital products & platforms for startups and enterprises worldwide.

We help global startups and enterprises, including Unilever, Microsoft, Harvard Business Review, IMG, Mothercare, and Euro Car Parts across Software Development and Systems Integration initiatives.

Several leading publications - Wall Street Journal, Economic Times, Hindustan Times, Inc Magazine, and Brandon Hall Research - featured Net Solutions as a success icon of the global IT Industry.

Research Approach

Net Solutions Reports offer a detailed outlook on a wide range of issues using accurate data and in-depth analysis to present the most precise industry insights. While conducting research, we also carried out in-depth interviews with some key industry experts from three continents. Some of the interviews are also quoted in this report.

All quantitative interviews were conducted on a confidential basis. Also, it is to be noted that, you may encounter a few figures that do not add up to 100% since we excluded 'neither/nor' responses or rounded up the percentages.

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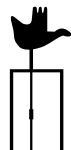New York, 10013
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