

EBOOK



# 38 IT leaders, legacy and the challenge of digital transformation

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# Executive Summary

Dealing with Legacy Systems is seen as the biggest challenge when implementing digital transformation programmes. Triad interviewed 38 IT leaders to discover what they see as the main drivers and challenges with modernising legacy infrastructure. Drivers mentioned include limited functionality, security, competition and compliance. Pressure to change also comes from the C suite as business and IT objectives move closer together, and from millennials in the workplace and customers who expect the intuitive user experiences of modern applications. For established businesses, ditching legacy systems is not an option. A hybrid approach, using agile techniques within a motivated work environment is advocated, with a focus on the end user experience.

# Introduction

When it seems IT strategists have only just got their heads around cloud there's now another issue impacting legacy systems – digital transformation.

Organisations born before the internet don't have the luxury of starting their IT infrastructures from new, and often legacy systems survive simply due to the cost of replacing them. There's also the fact that legacy replacement projects can, and do, fail. Organisations can remain stuck in the 'if it ain't broke don't fix it' mentality.

This is dangerous however, as the business case for digital transformation is a compelling one – driven by the twin commercial imperatives of improved efficiency and customer service, not to mention competitive advantage.

But how to fit legacy systems into a new digital architecture is a major conundrum, indeed research by Computing magazine in 2017 <sup>(1)</sup> revealed that IT leaders see legacy infrastructure as the biggest challenge within digital transformation programmes.



So how are IT leaders meeting this challenge? To find out how organisations involved in digital transformation are handling legacy systems, Triad interviewed 38 IT decision makers in UK organisations asking what was driving them to implement change and what they have found to be the major implementation challenges.

We've distilled their wisdom into this eBook – a must read for any IT leader contemplating what digital transformation may mean for their legacy systems.

# Chapter 1: Drivers for Change

## – *Functionality*

Whilst Gartner<sup>(2)</sup> supplies a handy catch-all definition for legacy applications -“an information system that may be based on outdated technologies, but is critical to day-to-day operations,” it was interesting to get a more nuanced definition of what legacy systems meant to the 38 IT leaders we interviewed.

“Legacy to me is any system not currently fit for purpose where changes/ enhancements cannot be made without incurring major costs. To make any changes you are going to have to go through a high-risk transformation.”

Hayen Bhouri, *Senior Manager* | Protiviti UK

# “You can end up with Frankenstein’s monster”

“Legacy systems have a problem in terms of functionality. That functionality may be sufficient for the business but the tools tend to be more cumbersome. Ultimately that slows down productivity and significantly impacts costs.”

Andrew Stickland, *Director, Customer Solutions & Success SCA (EMEA)* | Synopsys Inc

Stickland adds that when functionality becomes a problem, the decision on whether to stick or twist has to be made:

**“Where a legacy system no longer fits, the challenge faced is to move or remain where you are. If you transition there are costs, if you remain you have a decision about how do you get that additional functionality.”**

Andrew Stickland, *Director, Customer Solutions & Success SCA (EMEA)* | **Synopsys Inc**

## **“You can only polish the stone to a certain extent”**

Daniel Allen is a data consultant at Comma Group. He identifies legacy systems as displaying certain characteristics:

**“..lots of workarounds, bolt-ons and slow business processes. There’s usually a poor quality of data and inadequate reporting. There are often too many complex integrations with older unsupported systems and an organisation can end up implementing long term workarounds and bolt-on functional modules on to an already fragile architecture. Systems landscape evolves and you can end up with Frankenstein’s monster.”**

Daniel Allen, *Data Consultant* | **Comma Group**

Daniel notes that there are both business and technical drivers when trying to move off legacy and that reaching wider audiences and channels is a significant driver:

**“If you’re working with potentially unsupported software, old hardware and trying to reach a wider audience through digital channels, there’s very much a need to move to the cloud or a route where you can reach that wider audience through multiple channels.”**

Daniel Allen, *Data Consultant* | **Comma Group**

Dave Smith, Practice Director for Life, Health & Pensions at Charles Taylor InsureTech says there comes a stage where organisations must recognise the need to move away from their legacy systems as they can only be updated so far:

**“Lots of organisations have done nothing with their legacy platforms for 20 years, systems are becoming more redundant and they are having to put in a point solution to a point problem rather than resolving the core problem - papering over the cracks of their core estate and ignoring the issues with their underlying legacy systems. Basically that legacy platform will still be an inhibitor. ‘You can only polish the stone to a certain extent but it is never going to become a diamond.’”**

Dave Smith, *Practice Director - Life, Health & Pensions* | **Charles Taylor InsureTech**

## — Competition

Gaining competitive advantage through improving IT technology capability is a rising priority for CEOs - a Gartner survey <sup>(6)</sup> shows, with 31% of CEOs seeing it as a business priority for 2017 and 2018.

Many IT directors operating legacy systems would confess to being jealous of start-ups that have a greenfield opportunity to build their IT infrastructure. Increased competition from these start-ups and ‘Agile’ organisations is another driver for change, as Hayden Bhouri describes:

**“The constant in business is cost; managing legacy system is not sustainable especially when you see more nimble organisations competing and delivering a similar, if not better quality of service and charging much less than some longer established institutions.”**

Hayden Bhouri, *Senior Manager* | **Protiviti UK**

‘Bulldozing’ existing systems is rarely an option for established institutions though, banks for example can’t simply rip-up their legacy systems. The IT leaders we spoke to are looking at ways to introduce new applications, services and approaches quickly, with the ability to scale.



**“Millennials in the workplace expect change.”**

## — Millennials & End-Users

According to KPMG<sup>(3)</sup> Millennials, or Generation Y are set to form the majority of the workplace by 2020 and their tolerance of legacy systems is much less sympathetic. A study by Wired<sup>(4)</sup> revealed frustration levels in certain IT scenarios e.g., finding documents, information sharing and locating co-worker details were far higher for 18-24 year olds.

Millennials have grown up with the internet, smartphones and apps and crucially software that is simply click and use with intuitive interfaces. A green screen and ‘IT training’ is anathema to Generation Y – they expect to be using modern systems, as Andrew Stickland observes:

**“Millennials in the workplace expect change, they expect software to evolve and continuously move to meet their needs. Legacy is unlikely to be able to do that in any shape or form. They expect more intuitive user interfaces and they don’t expect to be trained, it comes from mobile platforms and how they operate. They expect to switch it on and know how to use it. You don’t need training to use Facebook or email, it just works.”**

Andrew Stickland, *Director, Customer Solutions & Success SCA (EMEA)* | Synopsys Inc

Optimising the end user experience or UX, not just for millennial developers in-house, but also for customers, is seen as a priority by Andrew Stickland:

**“The end user/customer wants ease of use, more intuitive software and user experience. Legacy is cumbersome. It takes a big effort to get it going and a big effort to get stuff out.”**

Andrew Stickland, *Director, Customer Solutions & Success SCA (EMEA)* | Synopsys Inc

## — C Suite

When Delta Airlines had to cancel 2300 flights in the summer of 2016<sup>(5)</sup> due to a technical glitch, it was forced to cut its profit guidance for the third quarter. At the time, chief finance officer Paul Jacobson declared that the airline was as much a technology company as an airline and it needed to improve its systems.

The elevation of what used to be considered a support function to business critical one is why the C suite is driving much of the digital transformation agenda. According to Andrew Stickland, board level executives now take a much more active interest in what their users are doing with an eye to improving their value proposition:

**“The C suite is heavily influenced by people using the software on a day to day basis as they know it’s those companies that move with the times, increase their business efficiencies with the use of appropriate software and tooling, that will gain a significant competitive advantage.”**

Andrew Stickland, *Director, Customer Solutions & Success SCA (EMEA)* | **Synopsys Inc**



**“Legacy technology is holding us back”**

Hayen Bhouri also acknowledges that the board is much more involved in IT decision making:

**“The C suite is driving the change, it used to be the IT department that brought new ideas, however now it can often be the other way around. Legacy technology is holding us back.”**

Hayen Bhouri, *Senior Manager* | **Protiviti UK**



## — *Security, Data Loss and Reputation Risk*

The 2017 attacks of WannaCry and NotPetya both used known vulnerabilities of legacy operating systems – namely SMB v1 protocol.

Judicious use of security patches can mitigate this risk – assuming someone is monitoring the legacy system carefully – There have been recent examples where a data breach has been tracked back to a web application vulnerability for which a patch was available.

The lesson for companies large and small is that legacy systems pose a security risk – the older they are the more vulnerable they become. The potential reputational loss, observed very publicly in the press is in itself enough to drive organisations to update their systems according to Daniel’s experience:

**“One of the big drivers is the risk of losing important and sensitive data and the potential reputational damage, not just financial – complaints from customers and the bad press that can follow. The avoidance of potential regulatory fines and loss of core business is a good way of measuring your IT investment.”**

Daniel Allen, *Data Consultant* | Comma Group

**“One of the big drivers is the risk of losing stuff”**

## – *Compliance issues*

A lesser threat, but still a significant one in terms of potential fines and reputational damage, is compliance with new regulations around data – for example GDPR.

Data collected on legacy systems and historic privacy statements may no longer apply, something that is on Andrew Stickland's radar:

**“The potential issue with legacy systems is not being able to handle some regulatory or legislative requirements such as compliance or GDPR - you can find yourself being forced to move. Once you start bolting on software it can become more complex and harder to manage.”**

Andrew Stickland, *Director, Customer Solutions & Success SCA (EMEA)* | **Synopsys Inc**



# Chapter 2: Legacy Transformation Challenges

## – *Buy or Build*

After decades of building up their IT infrastructures, companies are faced with deciding which legacy systems to keep and which to cut. There are no easy formulas, every organisation has unique systems architectures and business needs.

Moving from legacy applications and hardware systems to newer models is a complex, high-risk exercise, but one required if IT leaders are to deliver the cost savings and improved user experiences expected of them.

Andrew Stickland comments that some systems simply are not fit for modern purpose:

**“Unless you can leverage your legacy software and use it in more modern practices it does become an impediment.”**

Andrew Stickland, *Director, Customer Solutions & Success SCA (EMEA)* | **Synopsys Inc**



**“The debate you have is  
do you buy or build”**

Marta Moreira, Head of Project Management at Hargreaves Lansdown sees decision making on legacy transformation as a simple choice:

**“The debate you have is do you buy or build. When you have legacy you have no option but to build internally and this reduces the amount of innovation you can put in and the amount of features. It makes you less agile.”**

Marta Moreira, *Head of Project Management* | **Hargreaves Lansdown**



## — *Fear of Change*

# “If it ain’t broke, don’t fix it”

Many large organisations avoid changing their legacy systems for fear of a disruption to services. Banks for example simply cannot afford any system errors that impact on the customer experience. There’s also an historic, cultural resistance to change, especially in organisations where IT has been seen as a cost centre, with a board habitually resistant to increasing spending in that area.

Pressure from competitors unencumbered by legacy IT systems offering better customer experiences is knocking down these walls though, with the c-suite aware they need to adapt or die. Strategic decisions needed to modernise legacy systems can’t be avoided.

## — *Cost & Time*

Digital transformation is not a fast process where legacy IT systems are concerned. A recent survey in the world of global asset management firms <sup>(7)</sup> showed that whilst 80% of the 200 firms surveyed are prioritising digital transformation, two thirds are slowed down by legacy systems and culture clashes.

Be prepared for a time consuming and costly process says Moreira:

**“Legacy is not a standard set of parameters which makes it more difficult and expensive so you need to decide whether you want to take the time impact and the cost impact.”**

Marta Moreira, *Head of Project Management* | **Hargreaves Lansdown**

**“It’s one reason why everyone is moving to the cloud.”**

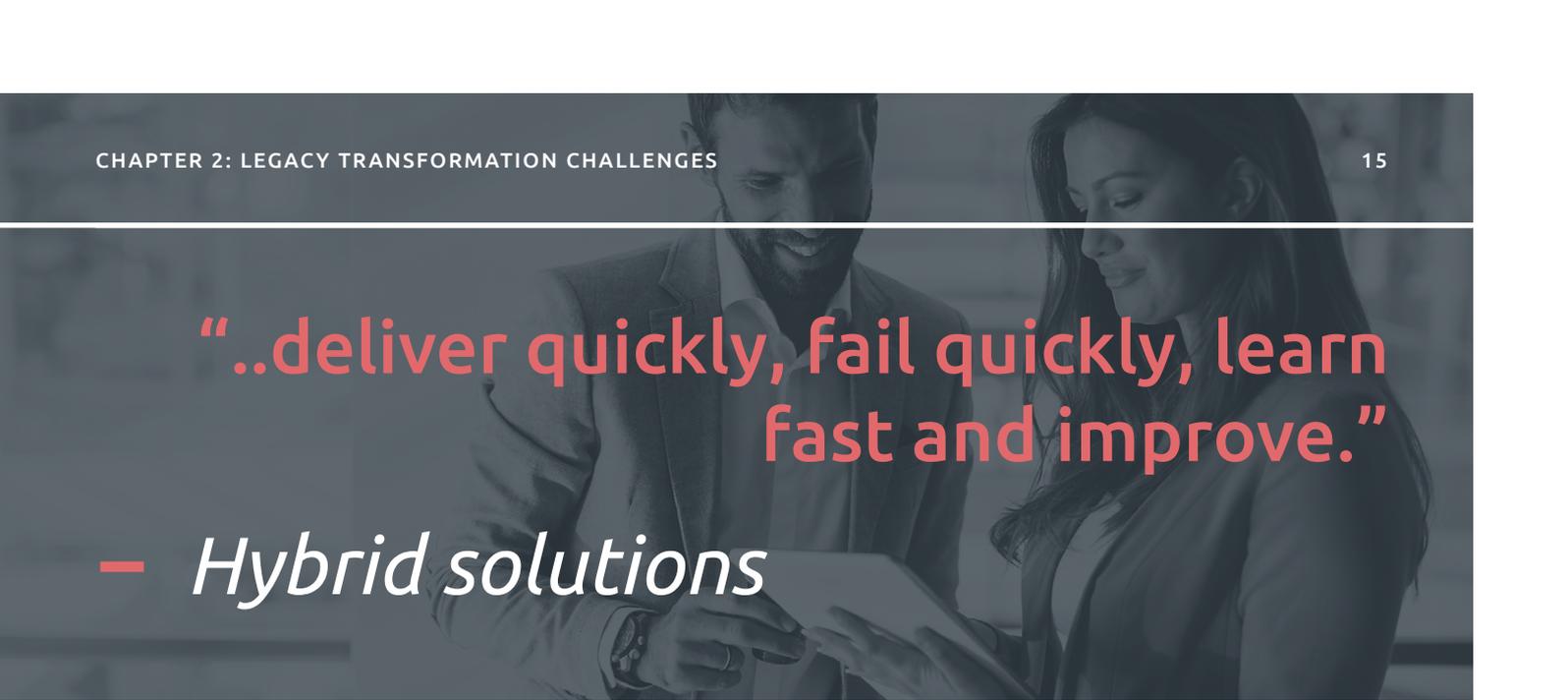
**“Moving from old to new world can be a long term programme often over a period of 5 years. You can ultimately get to the end of your journey but find that the destination isn’t what you expected and find that the system you have built is coming to its own end of life support and is therefore in danger of being obsolete before it’s even delivered.”**

Daniel Allen, *Data Consultant* | **Comma Group**

In this scenario, Daniel says organisations are often looking for customisable off the shelf solutions rather than adapting or building their own bespoke solution:

**“It’s one reason why everyone is moving to the cloud - turnkey solutions will be continuously updated to the latest and greatest solution with very little overhead.”**

Daniel Allen, *Data Consultant* | **Comma Group**



**“..deliver quickly, fail quickly, learn fast and improve.”**

## – *Hybrid solutions*

Abandoning legacy systems completely though is not an option for many organisations, especially long established ones, in which scenario, a hybrid approach can be a viable way forward, according to Andrew Stickland:

**“We have seen some successes integrating more modern tools whilst retaining the legacy as a more archaic record system. Then we continue to use our records based on the system and traditional interface and integrate other more modern apps into it. It gives the same power it always had with the same controls only with a more modern outlook.”**

Andrew Stickland, *Director, Customer Solutions & Success SCA (EMEA)* | **Synopsys Inc**

Dave Smith has also seen a mix of technologies work well:

**“More organisations are implementing a best of breed approach so you do not have a key dependency on one solution from one provider, rather than a big bang approach.”**

Dave Smith, *Practice Director - Life, Health & Pensions* | **Charles Taylor InsureTech**

Smith is also a fan of Agile techniques when implementing new technology:

**“Where an agile approach is taken, you deliver quickly, fail quickly, learn fast and improve. With waterfall you can be waiting a year before you see any results and then the outcome is not what you wanted in the first place.”**

Dave Smith, *Practice Director - Life, Health & Pensions* | **Charles Taylor InsureTech**

## — Resourcing

There's a general concern in the IT sector that the workforce with specific skills to run legacy systems is dwindling considerably, with many close to retirement. A survey of Cobol programmers in the US though found the average age to be between 42 and 49 - meaning that they're at least a decade from retirement on average.

However, the IT leaders we interviewed still considered finding people with legacy IT skills a challenge, Andrew Stickland has witnessed this first hand::

**"Finding developers that can work on legacy systems is an issue, even if that vendor still exists."**

Andrew Stickland, *Director, Customer Solutions & Success SCA (EMEA)* | **Synopsys Inc**

Marta Moreira shares Stickland's view on the challenge of resourcing legacy systems:

**"Finding people who are able to support the business areas and able to code in that language is difficult, there are not a lot of people out there who can."**

Marta Moreira, *Head of Project Management* | **Hargreaves Lansdown**

Moreira sees some advantage in using more common applications from a resource perspective:

**"If you are doing everything yourself you are going to have to have very robust documentation to support new team members. Using more mainstream applications means the language is more standard and the hiring pool is far larger."**

Marta Moreira, *Head of Project Management* | **Hargreaves Lansdown**

## “Finding developers that can work on legacy systems is an issue.”

In a job market where resources can be hard to find, Hayen Bhouri underlines the importance of establishing a work culture that motivates and encourages innovation amongst staff:

“Organisations need to maintain their current pool of talent. The newest members of a company’s workforce want to embrace more innovative technologies and relish an internal competition culture, e.g. the recent Protiviti Hackathon for RPA. In the past one would automatically think of replacing the old system, now with robotic process automation (RPA) and other solutions, one can build a bridge to develop one’s in-house skills and set one’s resources thinking and learning about alternative ways, of which there are many.”

Hayen Bhouri, *Senior Manager* | **Protiviti UK**



“We engage as one unit.”

Hayen strongly believes in collaboration:

“The traditional silo operating model of business lines and IT is not sustainable. Those that have been most successful in their IT transformation programmes have had business and IT work together, engaging as one unit and sharing one vision.”

Hayen Bhouri, *Senior Manager* | **Protiviti UK**



## — *Customer Driven & Efficient*

Despite the internal resourcing challenges it's important to keep an eye on the end user experience says Andrew Stickland:

**“You need to stay agile, current to customers requirements and reduce operating costs.”**

Andrew Stickland, *Director, Customer Solutions & Success SCA (EMEA) | Synopsys Inc*

Daniel sees a focus on the end user as the way to simplify IT systems:

**“A whole generation now expect to access information on tablet or phone. As the requirement is to add new customer interactions or a new customer portal to your legacy system, things get a little overcomplicated. That is the time to take stock of the current landscape, current architecture and simplify.”**

Daniel Allen, *Data Consultant | Comma Group*

# **“You need to stay agile.”**

To take this thinking further from a business perspective, Daniel recommends thinking about the impact of not implementing change:

**“There’s a thought process you go through with every project and it starts with understanding where business is lost by not being able to reach your demographic. What is the risk and impact of not doing anything.”**

Daniel Allen, *Data Consultant* | **Comma Group**

Thinking about the project in this way also makes the process more efficient and targeted Daniel believes:

**“When understanding your target customer demographics, sometimes just how it currently exists is perfectly okay. Let’s not create or over-engineer a solution that is only going to hit a small proportion of your audience. Whilst extending an already existing and fragile ecosystem has its place, workarounds that are not carefully considered against the impact downstream can lead to greater risk of technical debt. The full cost of implementing temporary workarounds instead of measuring the longer term ROI from the benefits of refactoring or redesigning the architecture, data constructs and software design to make for a better and faster solution should also be considered when making any IT investment. This could help keep that ‘monster’ at bay which would be a negative battle to fight for all involved.”**

Daniel Allen, *Data Consultant* | **Comma Group**

Hayen Bhouri adds a note of caution when focussing on user experience:

**“Think beyond the front end user experience, you can have a new UX but if the back end processes are not fit for purpose then you will be found out later.”**

Hayen Bhouri, *Senior Manager* | **Protiviti UK**



# Conclusion

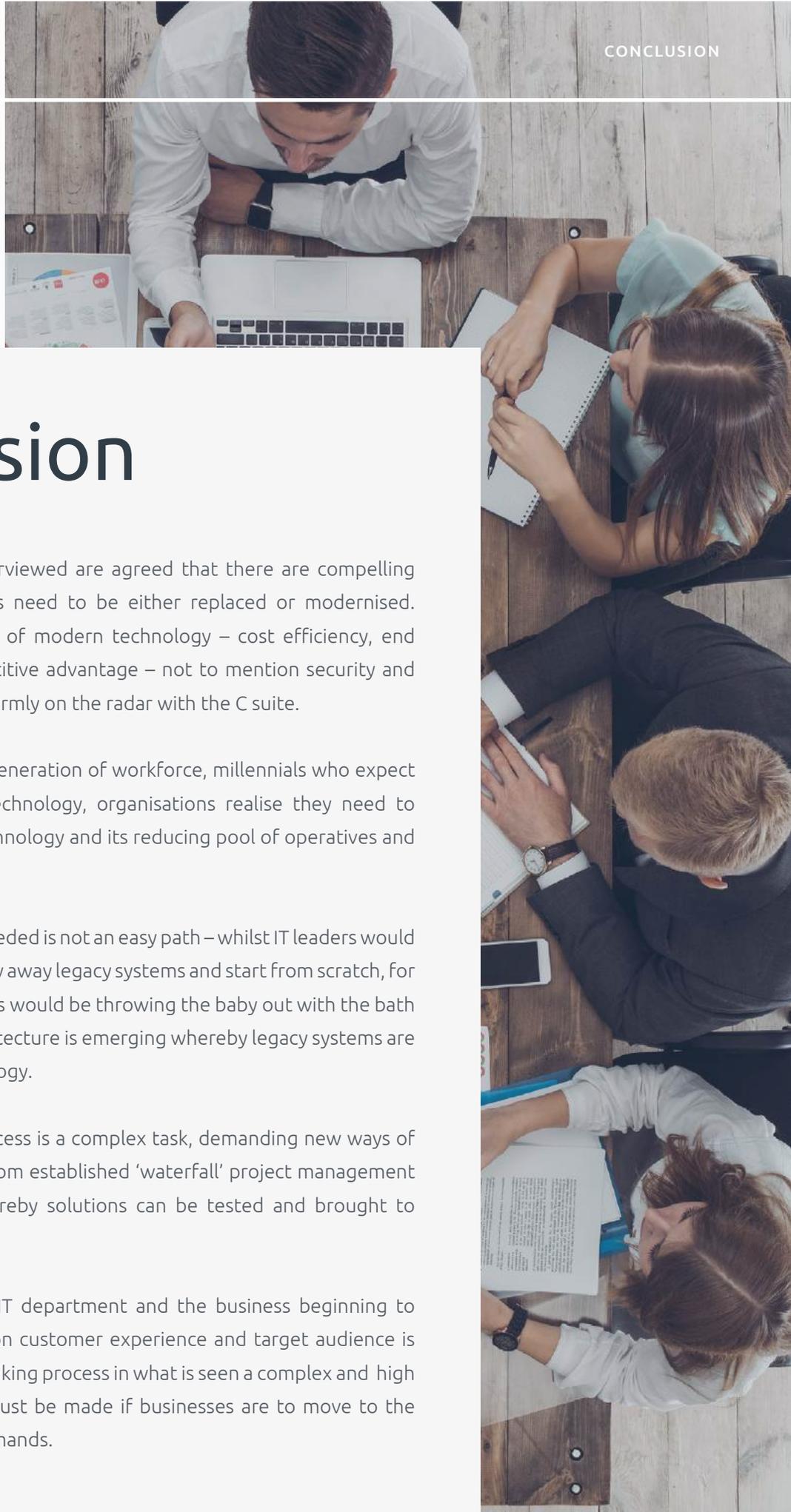
The 38 IT leaders Triad interviewed are agreed that there are compelling reasons why legacy systems need to be either replaced or modernised. The commercial advantages of modern technology – cost efficiency, end user experience and competitive advantage – not to mention security and reputational risk, has put IT firmly on the radar with the C suite.

Equally, to attract the new generation of workforce, millennials who expect to be working with new technology, organisations realise they need to move away from the old technology and its reducing pool of operatives and growing security risk.

Implementing the change needed is not an easy path – whilst IT leaders would love the opportunity to throw away legacy systems and start from scratch, for established organisations this would be throwing the baby out with the bath water. Instead, a hybrid architecture is emerging whereby legacy systems are integrated with new technology.

Managing the transition process is a complex task, demanding new ways of working and a move away from established 'waterfall' project management to an 'Agile' approach, whereby solutions can be tested and brought to market quickly.

With the objectives of the IT department and the business beginning to align more closely, a focus on customer experience and target audience is simplifying the IT decision making process in what is seen a complex and high risk journey, but one that must be made if businesses are to move to the digital model the market demands.





# Final Thoughts

“The insights from our IT leadership group are truly fascinating. Wrestling the legacy tiger to the ground involves not only strong technology and digital skills but it also demands a sophisticated understanding of some of the classic legacy pitfalls. For example, a good digital transformation that includes migration away from legacy could pose a significant threat to staff with legacy skills. Taking them on the digital journey, respecting and utilising their deep understanding of the legacy landscape, and providing them with a significant role are all key considerations when leading your teams. Indeed, many of your legacy technologists will also be subject matter experts when it comes to the legacy business processes.

At Triad, we have experienced digital transformations that have impacted on legacy in a number of ways. In some cases, we have adopted a “surround and shrink” strategy that seeks to contain the legacy and manage it almost like a “black box”. Connecting to the black box through interfaces and, increasingly, RESTful API’s means that organisations can start to make customer-facing changes without needing to re-engineer the legacy parts at all. Elsewhere, we have helped clients to retire their legacy platforms, which can often present a great opportunity to re-engineer processes and streamline operations. Regardless of the approach, one thing for sure is that organisations must understand their legacy. Failing to do so could cause catastrophic failures and loss of reputation, not to mention the costs associated with failed projects.

So, there are risks to manage when dealing with legacy. However, organisations who adopt an appropriate approach and engage with experienced partners need have nothing to fear when it comes to delivering true digital transformation.

I would like to thank all of our IT leaders who have contributed to this ebook. I know our transformation teams at Triad have benefited greatly from the insight and perspectives shared in the paper, and I am sure this will be a valuable contribution to the thinking of Digital Leaders across the spectrum.”

*Adrian Leer, Managing Director*

**Triad**

# Biographies



## Andrew Stickland

*Director, Customer Solutions & Success SCA (EMEA) | **Synopsys Inc***

The logo for Synopsys, featuring the word "SYNOPSYS" in a bold, purple, sans-serif font with a registered trademark symbol.

Starting work as a developer in the 80's, Andrew worked on applications that would be considered legacy today. In the intervening years a lot has changed not only in languages and methods but in the way software is built. For 6 years until 2017 Andrew worked for an Atlassian Solution Partner supporting and guiding small to large enterprises in the enablement of development tooling to meet the needs of modern development practices. Andrew now works in the Software Integrity Group at Synopsys with a focus on Open Source.



## Daniel Allen

*Data Consultant | **Comma Group***

The logo for Comma, featuring the word "comma" in a lowercase, sans-serif font with a colorful, multi-colored dot at the end of the tail of the 'a'.

Daniel is a Data Migration and Integration Consultant with 20 years of commercial IT experience. From requirements to implementation he has full software development lifecycle experience leading many technical projects.



## Hayen Bhouri

*Senior Manager | **Protiviti UK***

The logo for Protiviti, featuring the word "protiviti" in a lowercase, sans-serif font with a registered trademark symbol, and the tagline "Face the Future with Confidence" in a smaller font below it.

Hayen is a Senior Manager at Protiviti, the largest global risk consulting firm. He has an international experience within both industry and in consulting. Hayen spent over 15 years at one of the largest European banks, across several business lines, functions and was the head of UK information security. He led several flagship IT and Operations programmes, currently leading Office 365 offering at Protiviti UK and has a considerable ability to design and deliver large, complex multi-year transformation programmes. He is a trusted advisor to several clients and specialises in managing transformation programmes, data privacy, information security, risk, data governance and IT architecture design.



## Dave Smith

*Practice Director - Life, Health & Pensions* | **Charles Taylor InsureTech**



Dave has spent over 30 years in the Life & Pensions industry. Unable to decide on his career path when leaving school, he joined the largest local employer which happened to be a Life & Pensions provider. 20 years later having worked across most areas of the business from Customer Services, Actuarial Support, Sales, Product Marketing and Development and IT he joined a Software supplier to deliver Core Policy Administration Systems to the global Life & Pensions industry. Having successfully delivered solutions to insurers in UK, France, Belgium, Australia, South Africa and United States Dave joined Charles Taylor InsureTech as Practice Director for Life, Health & Pensions. My job at InsureTech is to work closely with prospective clients, identify their business issues, then find a way to solve them more effectively than any other provider.



## Marta Moreira

*Head of Project Management* | **Hargreaves Lansdown**



Marta has 20 years of experience as a commercially minded and process driven IT Leader. She specialises in building delivery frameworks, managing transformation programmes and portfolios, reviewing and selecting technology solutions and working with the executive management team driving company strategy. She has worked for organisations such as Microsoft, Sky and Sony and most recently, she is the Head of Project Management for Hargreaves Lansdown. She recently moved to Bristol where she lives with her husband and two young sons. She is an MSP Practitioner, PMP, certified Scrum Master, certified Scrum Practitioner and PRINCE 2 Practitioner.

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<b>Cathy Diver</b>	<i>Digital Service Model Owner</i>

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