AGILE METHODOLOGY
FRIEND OR FOE?

Triad Agile Methodology

TechPros.io
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Introduction

Sir Winston Churchill, former British statesman and author once said: “A pessimist sees the difficulty in every opportunity; an optimist sees the opportunity in every difficulty.” This statement is especially true when it comes to how different businesses approach digital transformation and the Agile methodology that has become famous alongside it.

A fundamental change to your process methodology may seem intimidating and tough at first, but the opportunities are endless. However, tapping into these opportunities demands that you learn as much as you can about the innovations that are out there and how they can boost efficiency and increase productivity. The more you know about how innovations are changing your industry, the easier it is to equip yourself to adapt and lower your risk of falling behind the competition.

Agile software development is a mindset and a culture that helps development teams respond to the variability around how new product development “should” be done. With work divided into sprints — each running for a predetermined time period — teams are given regular feedback so that they have numerous opportunities to assess their progress and align what they are doing with the needs of the client.

In his book The Digital Transformation Playbook, author and Columbia Business School faculty member David Rogers argues that digital transformation is not about technology — it’s about upgrading your strategic thinking. Drawing on case studies from big brands like GE, British Airlines and The New York Times, Rogers explains that any business that wants to evolve must start by rethinking their strategy.

And this is what Agile is all about.

Is Agile part of your strategic roadmap? If yes, why do you plan to embrace it? If not, what are your reservations?

Keen to answer these and other questions, Triad partnered with TechPros.io to conduct 60 interviews with C-level executives about Agile use in their businesses. We wanted to discover how businesses are faring when it comes to Agile so we asked them about their successes and failures. Our aim was also to find out, how different business segments perceive Agile and to uncover if these perceptions have an impact on access to and budget allocations for the resources needed to guarantee Agile success.
When it comes to Agile, most businesses understand the benefits — from greater adaptability and increased customer satisfaction to improved collaboration — to name just a few. But when the time comes to actually change their processes, the same businesses are tentative about taking the first step. And just because the advantages to using Agile may be obvious, it doesn’t mean that there aren’t any disadvantages. Agile naysayers worry about the potential lack of focus on product design and user-centricity, as well as the inefficiencies that can arise when Agile is used in larger organisations.

So, what do our interview participants have to say?

Most agreed that a key issue with Agile adoption comes down to a lack of understanding.

“First and foremost, we must acknowledge that Agile is one of those really overused and yet misunderstood terms. There are a lot of organisations, teams and departments that believe they are ‘Agile’ but actually, they aren’t,” notes N Brown Group CIO, Adam Warne.

The success of Agile comes down to two things — people and culture, believes Warne. The people side of things demands that businesses establish a common understanding of what Agile is and what it isn’t. They must also be clear about who is responsible and accountable for what during the development process, he continues.

From a cultural perspective, Agile cannot be seen as a technology concern, adds Warne. It is about improving business-wide processes. “Without this, conflict is inevitable because different teams will end up going in different directions and wasting lots of energy. If you have a culture that encourages alignment once decisions have been made, which is what this methodology relies on, that’s a mark of success for implementing Agile.”
A digital business transformation and change expert from one of the UK’s leading telecoms service providers agreed that people tend to be cautious about Agile because they don’t understand what it is. Citing that if you ask a group of people to define what Agile is, chances are that each person will give you a different answer. Everyone seems to have a general idea but no real effort is being made to help larger groups of people to really drill down into what Agile is all about. "It’s not enough for people to know that Agile has something to do with big fancy digital experiences," this change expert asserts. They need to understand how it can benefit all aspects of the business.

Head of technology at The Co-Op, Danielle Haugedal-Wilson’s experience of Agile has been mixed. Why is this the case? Much like her counterparts above, it all comes down to a lack of understanding. "People misinterpret the Agile Manifesto or they erroneously label something Agile, when actually it is not," she says. Agile success is also thwarted when companies fail to create the right conditions for success, adds Haugedal-Wilson. "A key benefit of Agile is the fact that you can change things up as you go along. This is why you can’t be too attached to the plan or strategy you set out with when the project first began. The original plan may no longer be the best way to deliver the desired outcome and this is when it is crucial that businesses are willing to adapt," Haugedal-Wilson asserts.

When discussing Agile advantages and disadvantages, a CIO at a global supply chain solutions organisation believes it is critical to qualify success or failure. Part of the rationale behind Agile is to fail fast. To do things in much smaller chunks, with constant feedback from your customers so that you never head too far down the wrong path. But in some settings the idea of finding out that you may have done something wrong, in order for you to do something right, could be considered a failure.
For Warne, it all comes down to finding the right solution for each unique problem. “I actually believe that there are some projects where a Waterfall approach is still a valid approach. Especially if you have a fixed output and the world isn’t going to change beneath you, while you’re in the middle of design and development.” He believes that where Agile really shines is in situations where customer expectations are constantly changing. For example, modern customers have high standards — especially in terms of how they interact with brands and how they perceive good customer service. Agile lends itself very well to this kind of consumer because the process allows for changes to happen as consumer needs evolve.

Felipe Penacoba Martinez, CIO for the retail and business banking at Santander, cites this iterative strategy as a key benefit of Agile. Because you’re testing constantly, and you’re delivering more frequently, it’s far easier to take a step back and assess what you’ve built and correct any incorrect assumptions you may have made. This ups efficiency and makes it possible to deliver a solution in less time.

Ultimately, there is no silver bullet and it comes down to finding the right approach to match your needs, notes Milton. “You just need to pick the right methodology for the right type of project.”

In Summary: Our survey participants reveal that by not understanding Agile properly, many organisations fail to create the right environment and culture to enable Agile success. In line with this, our survey participants also believe that many businesses still haven’t identified a common and complete definition of Agile and how it impacts ways of working. This is critical if you want to use Agile to its full potential.

So, the good news is that if your business does understand Agile, and you use it effectively, you’re ahead of the pack. The more you understand about Agile, the better equipped you’ll be to decide if it’s the right fit for the task at hand.
View from the top. How do business leaders feel about Agile?

With technology making an impact across all business segments, everyone needs to get on board. Especially senior management. If business leaders don’t understand the value of your new Agile endeavours, chances are that your requests for backing/funds will be met with an icy response, explains Felipe del Corral, Santa Fe Relocation CDO.

In the past, Warne has worked in organisations that wanted to adopt Agile because they thought it was going to drive more revenue, profit, ROI, etc. But they didn’t understand that along with all of this agility come some serious challenges, he notes. “My current role is in a business that is well on the way to being a true Agile business. Here, Agile isn’t seen just as a ‘technology thing’, it’s a business-wide approach to how we deliver the ideas we have.”

In larger organisations with complex hierarchies, like a bank, handing over control to Product Owners is often met with resistance, says Martinez. Many directors feel that by empowering Product Owners, they’re giving up some of their own control. With this in mind, he advises that business leaders must be reassured that they are still responsible for overseeing the results and providing guidance around broader business strategy.

“Because you’re testing constantly, and you’re delivering more frequently, it’s far easier to take a step back and assess what you’ve built and correct any incorrect assumptions you may have made. This ups efficiency and makes it possible to deliver a solution in less time.”

Santander CIO, Felipe Penacoba Martinez
In line with this, when approaching the C-suite about implementing Agile, it’s important to make a very compelling business case and to be very specific around how adopting this new methodology can add value, Martinez continues. "You need to prove to them that the investments will pay off in the future. Not only promising returns in three or four year’s time, which is the typical project time frame. But also, you must reassure them with metrics that they can follow-up on to prove that things are on the right track.”

Unfortunately, CFOs and financial directors often struggle with Agile because it is misaligned with how financial planning is generally done, adds Warne. “If I had a magic wand, what I’d probably do is wipe everybody’s preconceptions of what Agile, Waterfall and all the other methodologies are. I think there are so many misconceptions that are preventing businesses from actually experiencing the benefits of Agile in practice.”

In Summary: Getting the whole C-suite on board is clearly crucial to successful Agile adoption. Agile is not just a technology concern and business leaders should not be any less responsible for, or invested in, the initiative’s success. But don’t expect this to be easy. Take the time to understand their drivers and expect a wholesale transformation from business metrics through to financial planning to be potential blockers to delivering a truly Agile environment.
CHAPTER 2
AGILE AS A FOE
In a world of disruption, having new ideas is essential. However, no real value will be derived if businesses fail to align their ideas with broader business goals and earmark the budget and manpower to translate them into reality.

Research shows that around 50% of IT projects fail outright. This dismal statistic is not caused by a shortage of project managers or technology tools, but the result of inefficient resource allocation and a lack of alignment between resource use and business goals. Because developers and users are constantly collaborating with each other to ensure they’re on the right track, Agile typically demands more time and energy from everyone involved. This, in turn, can increase costs.
Agile challenges

Where Fabrice Khullar, head of product at MatchesFashion.com, has most commonly seen Agile go wrong is at the enterprise level. It is a great fit for small ventures and start-ups because everything is a lot more straightforward. But when you get into larger enterprises with extensive hierarchies, you’re not just creating software. You’re creating an asset that needs to live up to the expectations of all of the people who use it and interact with it every day.

Linda Currie, VP for strategy and planning at Pearson, shares this sentiment. Agile efforts often stumble in larger organisations because they are simply too big and too clunky to change fast enough. Public listed companies have shareholders driven by results and board members motivated by the promises they’ve made to the market, Currie notes. As such, when enterprises are looking to embrace Agile methodology they ordinarily have to work around the constraints and controls that go hand-in-hand with running a large business. And failing to be adaptable and flexible goes against how Agile projects are meant to work.

But it’s not only larger firms that are facing Agile issues.

Simply throwing new technologies at problems is not a solution, says Danielle Haugedal-Wilson, technology head at The Co-Op. One often hears people saying things like: “we need an app for that”. Sure, this may be the perfect approach in some instances, but she advises that before anyone goes out and spends time and money developing a “miracle app”, they should take the time to determine if an app is really the best approach. This entails asking what strategies and solutions may be more or less successful and, very importantly, spending time with your users and asking them what they really want.
Felipe del Corral, CDO at Santa Fe Relocation, believes that when Agile projects fail, it’s usually because of a lack of understanding around what Agile is. Echoing the thoughts shared in the previous section, del Carrol notes everyone may be talking about Agile but that doesn’t mean that they’re all doing it properly. In line with this, he stresses that businesses must get their Agile strategy right from the get-go to avoid developing bad behaviours and habits. Success is found when your development is based on flexibility framed by solid guidelines and foundations, del Corral continues.

Funding can also be a barrier. Often a business’ finance and accounting team will have a budget forecast for the whole year, says Fabrice Khullar, head of product at MatchesFashion.com. This means that they’ve already earmarked funds towards paying for specific projects and business outcomes and they have to distribute capital based on this predetermined budget. If the IT team approach them about funding an Agile software development project, it’s likely that the required funds won’t be available because the business’ financial resources for the next while are already accounted for.

In Summary: Larger businesses, heavily laden with bureaucracy and bound by the wishes of shareholders, aren’t always flexible or adaptable enough to embrace pure Agile methodology in a single step. And, funding can also prove to be an issue when it comes to Agile. So, when starting or building your Agile capability, take the time to review the existing processes or factors that could limit adoption and put strategies in place to overcome them as early as possible.
Our previous eBook focused on the digital skills shortage and outlined how a lack of skills is affecting business transformation across all industries. This issue is especially relevant within the Agile space. Warne describes the digital skills shortage as a key Agile stumbling block. There’s definitely an Agile skills shortage, he says. Looking at things from a broad technical skills perspective, there’s a lack across the UK, Warne continues. If you marry this shortage with the skills businesses need to work in an Agile way, the number of people in the market shrinks, again. For Warne, not having the right people to execute your Agile plans is a huge hurdle to success.

We know that skills are rare but the reality is that learning Agile skills doesn’t happen overnight, says a UK digital business transformation expert. Which means that we need to be incredibly specific when determining exactly what type of skills we need. Businesses must be conscious about building those capabilities because people are the cornerstone of Agile success or failure.

When discussing Agile talent, head of technology at The Co-Op, Danielle Haugedal-Wilson’s passion for finding the right people is obvious. In the past, many have found it challenging to find the people who already have the skills, she says. “So, I’ve changed my approach. I now look for people with the right attitude and aptitude. Even if they’d never been an analyst in an Agile environment before, I’ll bring them into the team and train them on the Agile tools and techniques,” asserts Haugedal-Wilson.

What makes her pick these people? They have to have an Agile way of thinking. They must be curious, detail oriented and focused on self development. “Having these ingredients in place, makes it easier to mould the Agile experts of the future.”
Sure, there is a lack of Agile people in the UK, confirms Karl Smith, Paradigm Interactions CEO. At the same time, one mustn’t forget that an Agile mindset is often at odds with more traditional learnings and perceptions around how business should be done, he explains. This calls for a change in company culture and a change in how we perceive business. “Training is essential. Many organisations think that people learn by osmosis but this simply isn’t true,” asserts Smith. We need to give people the tools and skill sets to adapt. You can champion an Agile culture all you want but you must remember that changing people’s mindsets will not be a quick process.

Santander’s retail and business banking CIO, Felipe Penacoba Martinez, agrees. People are used to working in a certain way. Some have been working that way for over 50 years. But today, there are so many new job roles. Training must be tailored to provide the skills needed to fulfill these roles. Different roles require different training. Training programmes must have flexible content so that workers are given everything they require to add as much value as possible, Martinez points out.

As part of this training, organisations should strive to create a common language and level of understanding around what Agile processes are about, Warne adds. “There are so many terms and buzzwords flying around.” Something like a glossary of different terms, which explain what is meant by each, can be a simple step towards achieving a shared understanding.

According to Haugedal-Wilson, offshoring is also a possibility when skills are scarce. Particularly when what is needed is something entirely new and novel. Offshoring allows businesses without niche skills to access these resources and get the work done quickly, as and when they need it, she says.
"We can’t allow Agile to become fragile," cautions Thyle Carroll, head of delivery at the Financial Times. It boils down to this: if you want an innovative culture, you need to create one. This demands that organisations find a balance between support and supervision. With Agile you need to have far stronger and more robust processes in place to allow for a level of freedom that doesn’t have a negative impact on project success. Flexibility and collaboration may be the foundations that support innovation but this doesn’t mean that there can’t be any rules or guidelines, Carroll points out.

In Summary: As Agile gains popularity, there is greater need for people with not only with technical skills, but also the ability to put those skills to use in an Agile way. This has the potential to worsen the current digital skills shortage.

Our experts recommend searching for people with an Agile mindset and attitude, rather than only accepting fully formed practitioners. However, this doesn’t mean that you shouldn’t be incredibly specific about the skills you require. At the end of the day, training is a must to develop a common understanding of Agile.

Does one size fit all?

Agile cannot solve all development problems and it cannot be seen as the best approach out there. When Fabrice Khullar, MatchesFashion.com’s head of product, was working at a previous job he was part of a team that developed both software and hardware products. This experience gave Khullar great perspective around how the game changes when you’re working on different types of projects. For example, when you take a hardware product into production in a factory — and you are going to build 100,000 units of something — iteration isn’t possible.

“You have to have the final product nailed down because once that device is in the customer’s home you can’t go in, open things up and change faulty components.” In this case, Agile methodology doesn’t fit, explains Khullar. On the other end of the spectrum, sometimes developers will spend six months working on something and when they show the results to their stakeholders they are not impressed because they imagined the outcome in a slightly different way. It’s all about matching your design and development approach to the task at hand.
CHAPTER 3

A WORD FROM TRIAD’S AGILE PRACTICE LEAD, DAVE LOVEGROVE
As part of our Agile survey, we asked the participants how they felt about working with third party companies on Agile project delivery. We also wanted to find out what approach they typically took when introducing these new partners into the business.

The participants agreed that developing relationships with third parties can prove valuable but only in instances where everyone has a common understanding of what Agile actually means, with clear lines of communication and, most importantly, when the project calls for it.

At Triad, we agree.

The reality is that Agile is never applied in the same way. Private and public sector clients have different approaches to delivering Agile projects. For example, the public sector is far more prescribed and, from our experience, geared towards end user needs. On the other hand, private sector projects are more revenue-driven and most commonly seek to improve efficiency, which in turn boosts the bottom line.

We believe that finding the right balance between the two should be the ultimate goal. And we say this based on experience working on Agile projects for both public and private sector clients that have delivered huge customer and revenue benefits.

To help you find the right supplier for Agile project success, we’ve rounded up a few of the key benefits of partnering with a third party:

**Accessing expertise:**
We all know there’s a digital skills shortage, and that this can make finding people with the necessary knowledge and experience a tough ask. In partnering with a third party, you will have access to niche skills and expertise if and when you need them. And because third parties work with such a broad spectrum of clients they can use their insights from other engagements to deliver a solution that is right for each user/customer.
Boosting scalability:
In line with the point above, when working with a third party, you can expand and contract your team size as your requirements change. This means that you’re only paying for the output you require. From a cost perspective, you no longer have to justify the expense of a salaried employee or providing the training needed to get the job done.

An outside perspective:
When you’re on the inside, or you’ve been working on a project for a long time, it can be difficult to identify where you may be going wrong. Suppliers can help to spot where you need to shake things up a bit and where you could be more efficient. It’s their job to help you identify and implement better working practices before things become a problem.

On this point, Agile projects often fail because of surrounding forces (management/business expectations). Because third parties are removed from client politics, they have a fresh pair of eyes, which they can use to spot hindrances with less fear of repercussions.

Greater visibility:
Suppliers in an Agile environment have less places to hide when compared with more traditional delivery approaches. Work is scrutinised daily and success is measured on continual output, so the client always knows how things are going and they can change things up should the project be heading in the wrong direction.
Unsure about how to choose the right third party to walk with you on your Agile journey? Here are a few questions you should ask before you get started:

- Do they have a reliable track record?
- Do they have a wide range of experience across different market sectors?
- Do you trust them?
- During your initial interactions, have they been good at communicating?
- Do you feel comfortable/confident working with them?
- Is there an option to “try before you buy”?
- Do they have skills that you don’t have internally?
- Is colocation an option?

The right Agile partner won’t come in and turn everything on its head. What they will do is suggest different techniques and strategies that can be implemented to tweak and improve how things are already being done. Ultimately, these partnerships should add value and provide you with the guidance and support you need to meet your business goals.
Yet again, our research eBook has provided a broad range of interesting and challenging views from senior technology leaders. Arguably, this particular topic – Agile success and failure – has generated one of the more controversial discussions.

Several different themes emerged and I would characterise them along the following lines:

**Executive alignment:**
Part of the craftsmanship of today’s CIO is to take their C-suite colleagues along with them. Agile, or whichever methodology one uses, should not be a hard sell. Rather, the CIO should instill confidence that they understand the organisational culture and that they know how to lead their business through strategic change. As such, I would argue that the approach used is of less importance than finding, or achieving the change required to deliver, the right cultural fit.

**It’s not a religion:**
Agile works for many organisations. That being said, a key tenet is “inspection and adaptation”. Businesses should avoid being wed forevermore to a particular approach and be prepared for (and push for) ongoing improvement. With this in mind, one could even argue that Agile as we know it today will eventually be seen as “old hat”.

**Who’s kidding who:**
The idea that Agile doesn’t fit budgeting cycles is more indicative of resistance to change than any hard facts. It is, of course, possible to budget for Agile but doing so requires realism and flexibility. Anyone who believes that other methods improve forecastability has forgotten the myriad case studies of projects running out of time, budget and missing the scope goal.

**Not a good solution for large organisations – really?**
Let’s not forget that most of today’s ‘unicorn’ organisations have achieved incredible growth using Agile methods and much of their success is ascribed to their understanding and ability to delight customers, a core tenant of Agile. Therefore, the issue may be related to resistance to organisational change (moving from one way of getting things done to another, without tripping up in the process) than it is about the method per se.

To be honest, I hadn’t foreseen these themes before reading the body of the eBook and it was, for me, a timely reminder that digital transformation has more to do with function of people and culture than it has to do with method. This fits perfectly with our philosophy at Triad, because we’re all about stepping into the shoes of our clients and walking with them to understand what will create success in their businesses.

Once again, I would like to thank our eBook participants for their invaluable contribution to this important discussion.
Thank you

Thank you to everyone who contributed to this eBook. We appreciate you taking the time to participate in the interview process and sharing many valuable insights. Your participation has played an integral role in making this eBook a useful resource for everyone with an interest in Agile.
Participant biographies

Danielle Haugedal-Wilson

Danielle is an experienced Head of Architecture, Board Member & Non Exec Director at The Co Op. Her skills include Digital Strategy, Strategy Mapping, and Enterprise Architecture, with a strong business development and retail background.

Danielle also holds a Bachelor’s degree focused in Financial Services from The Manchester Metropolitan University.

Felipe Del Corral

Felipe is a forward thinking, strategic leader that brings together customer experiences, digital innovation, and commercial results.

He has broad digital experience gained through working for digital agencies, world class consumer brands and his own start up.

Felipe’s expertise involves driving all phases of the digital development, from UX design and full-stack development to prototyping & testing, content creation, SEO, analytics and support.

He is passionate about customer centricity based on Design Thinking methodology and works in an agile way to drive continuous innovation.

Fabrice Khullar

Fabrice Khullar is Director, Product and User Experience at MATCHESFASHION.COM, the global luxury-shopping destination for men and women.

A senior leader with significant product leadership experience in multi-channel retail, consumer electronics, technology, media and telecoms. Experienced in large scale, consumer-facing digital product development, user experience, and agile transformation.
**Thyle Carroll**

As a champion of agile practice since 2005, Thyle is currently director of delivery for Enterprise Services & CyberSecurity at the Financial Times. One of the world’s leading global business news publishers, the Financial Times’ innovative business model makes it one of the world’s most successful digital news operations, with over 1,000,000 paying customers. Thyle’s previous roles include 5 years at Microsoft working on TV experiences for the Xbox, directing service delivery for local search & lead generation business European Directories, and Head of Release Management at News International.

**Adam Warne**

As Group CIO for N Brown Group, Adam is a believer that innovation is never hampered by a lack of ideas, but rather a lack of detecting the significance and substance of ideas that already exist.

His enthusiasm for technology is surpassed with the reward of developing his team to use tools and techniques in original ways to accomplish goals that to others seem impossible.

**Linda Currie**

Linda is an experienced and energetic global business performance and transformation leader specialising in the delivery of business strategy, change and transformation programmes.

She has a reputation for building strong customer relationships, and driving business results through integrated solutions. Her experience gained over 16 years transcends industries such as education, finance, public sector and telecommunications.
Karl Smith

Karl Smith is involved in a number of different consultancy services all focused on how humans work and what they do. He has been at the forefront of design and technology innovations for 30 years taking global leadership roles in human-centred design and major technology innovations.

He is also involved in AI, IoT3, Blockchain and Organisational Design consulting with client companies, start-ups and his own companies. Karl is a lifetime Fellow of the British Computer Society.

Felipe Penacoba Martinez

Felipe has had a successful career in the Financial Services industry for over 21 years ago, starting as a consultant at Accenture implementing core banking systems and collaborating in large-scale IT transformation programmes.

Originally from Spain, he settled in the UK in 2008, where he was the CIO at Santander for Retail and Business Banking.

He has since joined Finastra in April 2019 as Enterprise Architect for Retail and SME Banking.
# Acknowledgements

A list of survey participants by full name and title.

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<td>British Telecom</td>
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<td>Gavin Whatrup</td>
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<td>DriveTech</td>
<td>Ian Dudley</td>
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