Plandek

Sage

> **Case Study**

Sage

Sage expands Plandek rollout following best in class adoption support and coaching.

01 The Context

Sage is a global academic publisher of books, journals, and library resources with a growing range of technologies to enable discovery, access, and engagement. The academic industry is going through a transformative period moving from traditional collection-centric approaches to more patron-centric ones. Technology delivery at Sage is also going through delivery transformations, moving from a project to product approach that requires changes to mindset and approach, particularly in measuring the value of delivery and how delivery happens.

02 The Problem

Daniel Pierce, Sage's Sr Director of Data & Analytics shared with us that before employing Plandek, SAGE tried to build their own value stream management capabilities within Atlassian and Azure products. Daniel explained how these toolsets lacked insight at a macro level and would require significant effort in terms of data computation and storage to meet their use case of generating visibility across their organization's software delivery lifecycle (SDLC). This limited scope of out-of-box reporting saw Sage and Daniel look to the market for other tools that could identify change and business opportunities that were worth the investment.

03 | The Solution

Daniel advised that after researching Software Engineering Intelligence (SEI) platforms in the market, they found Plandek to be the best in class when it comes to adoption support, coaching and training. This was a key differentiator for Sage, when comparing Plandek to other companies who just simply provide metrics.

"Plandek provides industry experts who tailor to our needs, it's a customer-focused approach, Plandek are leaders in this space so we need to tap into this experience."

Adoption support   **Coaching**   **Training**

At Plandek we believe this consultative approach is vital to becoming data-driven, as the functional side of using metrics is only one piece of the puzzle. The educational side is where the true value lies.

For example, users can build and configure a lead time metric, but what is it showing them? What actions can they take to improve it, based on the insights they're seeing? Plandek has a dedicated customer success team whose main purpose is to work with all of our clients to help them leverage the tool as much as possible.

Implementation

When it came to the implementation of Plandek at Sage, Daniel shares: "It was pretty seamless, establishing the data connections needed to use the tool was easy. The biggest issue was how we at Sage were going to use it - what are meaningful metrics? Any new company making this cultural change will have to go through this journey though as it's where the industry is moving to; it's not a problem, it's a learning curve".

Daniel clearly understood the challenges that can come with being data-driven; due to this and our advice, Plandek was only initially embedded within Daniels department being the data and analytics teams at SAGE (roughly 100 engineers out of a total scope of 350). This staggered approach to the implementation allowed us and Daniel to understand the team's level of maturity based on how effectively they adopted the tool. From here we could gauge the organizations' appetite for a tool like Plandek and cater our approach accordingly.

At the beginning of the working relationship, Daniel's teams expressed some concerns over the idea of them being gamified, performance reviewed, and pitted against each other made them hesitant to engage, as would be expected. With our guidance, Sage handled this appropriately, openly sharing their goals and intentions as well as encouraging the teams to input how they think the tool should be used.

04 The Outcomes

Plandek has been embedded into Sage's infrastructure and workflows in a way that worked best for them, providing confidence to the key stakeholders that the tool will drive improvement but also to the developers that it won't be used as a form of surveillance. One of the primary ways this alignment was achieved was through setting up a transparent channel of communication from the ground up at Sage. This created a forum for which development teams could raise feedback and the C-suite could provide steer.

Daniel advised that the tone has now changed internally at Sage, transitioning from a position of 'why do I need metrics to do my job' to a 'how can I use metrics to show me the best way to do my job'.

"At the end of the day, it's a competitive industry, we need to improve how we deliver but there is a right and a wrong way to do that."

Monthly Meetings
Below you can see the agenda for Sage's monthly Plandek governance calls which is for anyone wanting to pitch in to the metric conversation.

The monthly meeting series is meant to showcase technology product delivery teams and their achievements. We invite everyone in technology to highlight our teams, celebrate successes across the department, and provide greater transparency. The goals of this meeting include:

> Enable teams across product delivery to see and hear what **other teams** are working on, on a consistent, regular basis.

> **Cross-inform** teams, building bridges to identity and cohesion.

> Provide greater **transparency** between roles, scrum teams and departments.

> Breakdown/prevent **silos** between teams and departments.

> Celebrate team **successes**.

> Demonstrate **innovation**, Lean, and cross-team collaboration activities.

> Encourage team members to **present**, thereby providing empowerment and recognition along with diverse voices across the department.

> Help build **connections** between teams and departments across technology.

"It's early days for hard statistics, but the business change alone is a huge success. With time, more stats will come, but for now the successful process of re-architecture and re-evolution that Plandek has driven at Sage has been invaluable."

Daniel on the successful rollout of Plandek at Sage

Success Stories

Some of these successful business changes at Sage, as a result of adopting Plandek, include:

> Greater **insight** and visibility across SDLC

> Ease of **access** to data & metrics

> Agile maturity and workflow **efficiency**

> Process **governance**

> Formal **quality** gates and assurance

> Macro level performance **benchmarks**

> Cohesive **infrastructure** and channels of communication

With greater insight and visibility at the top of Sage's priories, the ease of access to digestible insights via Plandek was a big win alone. Daniel added that this unlocked the ability to benchmark where they're at meaning they can plan for where they want to go; it's created a delivery standard.

"Before there was an element of 'how are we performing?'. We used to be disconnected, but now the teams have autonomy [with] guidelines to operate within. ***We can push them to be better in a healthy way****. All of our scrum master's regularly review core metrics within their ceremonies but what actions they take and conversations they have based on the insights they see is entirely up to them and their team, it's robust but flexible."*

Following the successful adoption of Plandek by Daniel's teams at Sage, the organization sponsored the tool for a technology-wide rollout, fitting in with Sage's culture of measurement initiative.

Plandek

About

Plandek is an intelligent analytics platform to help software delivery teams deliver valuable software, faster and more predictably.

Plandek enables technology teams to track and drive their improvement and share understandable KPIs with stakeholders interested in accelerating value creation/improving delivery efficiency. As such Plandek is a key global vendor in the fastest growing area of DevOps known as Value Stream Management.

Plandek works by mining data from delivery teams' toolsets (such as issue tracking, code repos and CI/CD tools), to provide actionable and intelligent insight across the end-to-end software delivery process for users throughout the delivery team - from Team Lead to the CIO.

Plandek is recognised as a top global vendor by Gartner and Forrester and is used by private and public organisations globally to optimise their technology delivery.

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