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# Scaling Agile Successfully

**IS YOUR BUSINESS READY?**

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## EXECUTIVE SUMMARY



There are many challenges associated with executing a company's [agile transformation](#) and enterprise scaling efforts, and sometimes knowing when to scale agile — as well as how to take these collaborative environments to a new level — can feel overwhelming.

We designed this white paper to help you recognize when to scale agile, alert you to common pitfalls that can happen during the process, and explain how to best drive cultural change to embrace the agile process across business divisions.



## INTRODUCTION

**As customer expectations constantly increase, competitive threats emerge and innovative technologies enter the marketplace, businesses must reshape how they envision, develop, deliver and operate technology to survive.**

Leveraging agile — a customer centric business and technology delivery approach that focuses on creating collaborative environments in which solutions iteratively evolve between cross-functional teams — is crucial to an organization's ability to respond to the marketplace. But introducing a company to a new way of thinking and a new way of working is no small feat.

Agile culture puts people at the center, which engages and empowers everyone in the organization. They can then create value quickly, collaboratively and effectively. This effect is highly desired in agile transformations because it leads to high competitiveness, faster time to market, early return on investment, better quality, early risk reduction and more.

Perhaps you've run a successful pilot with a single or a few teams, or maybe multiple teams within your organization have been agile for years. The question then becomes: When do you take the big leap to scale agile to the enterprise portfolio level and across functional divisions? Knowing when it's time to scale agile can be difficult, but if you know the signs to look for, you'll be better prepared to make that decision.





# Avoiding the Pitfalls of Scaling Agile



If you are a leader struggling to execute your company's [agile transformation](#) and enterprise scaling efforts, you are not alone. According to the [State of Agile Report](#), organizations face plenty of challenges in implementing or expanding agile, particularly in environments that continue to be both unpredictable and volatile.

In fact, one-third of the *State of Agile Report* survey participants identified 10 or more challenges faced in their business agility adoption journey. The most significant barriers included challenges with organizational culture, resistance to change and lack of organizational support and skills, among others.

Additional reasons for agile transformation failure include culture clashing, goal misalignment, not going far enough up the stack (scaling) and failing to address business concerns. A transformation can also fail when company leaders don't implement tracking mechanisms that enable dynamic adaptation to market and environmental changes in a productive and cost-efficient manner.

Considering these very real obstacles, it's no wonder so many agile transformations fall short. [The Gartner State of DevOps Report](#) unveiled that 90 percent of organizations underestimate the full benefit of agile transformation initiatives. Further insights show [47 percent of agile transformations](#) to be "complete failures," as stated by Forbes Insights and MIT Sloan Management Review.



\*Gartner State of DevOps Report

\*\*Forbes Insights and MIT Sloan Management Review

# Focus on Improvements and Evolution, Not Transformation



If you're a business executive, your company may have an agile center of excellence (COE), and you may have seen or heard program increment planning, retrospectives and product increments discussed in meetings and email memos. However, you may have also noticed there is little to show for the efforts, and your company is still not able to advance in the competition, much less adjust to market changes.

Similarly, if you are an IT executive, you may have observed that although software releases have increased, teams still cannot predict when they will accomplish tasks. Perhaps it's all-hands-on-deck after each release to deal with bugs or issues until they're resolved, usually siphoning a day or two of your staff's hours as they work through the inevitable fallout. This frequently happens when agile is implemented as a process without pragmatic consideration and adaptation to the context of processes, the environment, and even team members and their willingness to implement change.

Going back to the way things used to be is not a viable solution, and neither is starting over. Many organizations have participated in agile transformations for a long time. People get tired and burn out. Starting over could counteract enthusiasm and process involvement. And fiscally, there is likely little to nothing left in the budget for relaunching.

Agile is now mainstream. So, it's time to focus on targeted improvements in evolution over time instead of transformation — continuous systemic and team-level agility improvements as part of ongoing business and operations.

While transformation means change – which can be scary to some people – improvement also typically means making something faster, easier or more streamlined, which most people embrace. It's time to let your teams know they can make a difference, starting with addressing the areas that will have the most impact, running targeted diagnostics and implementing specific improvements to drive positive outcomes.

# Knowing When to Scale Agile



To be successful in leading an agile transformation, you need to ask questions and listen as much as you speak.

- ❓ **Are your expectations of agility in alignment with the transformation vision?**
- ❓ **Has your transformation vision changed and caused a mismatch?**
- ❓ **Are you influential at the executive and enterprise level, and do you care about overall business agility?**

It's important to realize you can only go so far by focusing on one level. Agility thrives when all levels come together and align. Once you have the answers to these questions and a realistic understanding of how far you can go, you can proceed to uncover the root causes and circumstances you need to improve.

If your sphere of influence is at the enterprise level, you need the company to move quickly and deftly to future-proof the organization. Look for the capacity to pivot, strength and continuity to be competitive in the current and future market. You need diagnostics and steps to improve the primary line with which you earn money and add value.

You'll need to invest in an innovative product or service line in addition to your current lines and evaluate what has potential. If the new line becomes viable, shift the budget toward it and create a buffer capacity. You must be prepared for different scenarios, so you can make changes and scale quickly.

If your sphere of influence stands in the IT organization, you need to focus your desired improvements on what you want, the performance characteristics you care most about and what you need to achieve those characteristics. Improvements at this level are about realizing those conditions. It is likely about the ability to form teams around products rather than projects, elevating Scrum Masters and teams' aptitudes, improving a certain product, breaking dependencies, aligning around the business architecture or improving [DevOps](#).

# FIVE SIGNS THAT YOUR COMPANY NEEDS TO SCALE AGILE

If your organization has noticed one or more of the following, it may be time to scale your agile efforts.

1

## Trouble with Dependencies

You may notice your teams work great independently, but they have challenges with dependencies and cross-team collaboration. The cause may be too many interdependencies, leading to teams becoming too reliant on one another.

Departments may struggle to break work into independent deliverables one or two teams can complete within expected timelines, which leads to slow progress and missed commitments. Your practice is lacking scaled agile's coordination and predictability across multiple teams and levels. Companies miss out when they don't have a standard approach and a common language to collaborate across teams and departments.

2

## Team Duplication

A surefire sign it's time to scale agile is when teams unknowingly duplicate work. For example, someone may recreate the same or similar tools rather than creating them once and sharing them. You may also notice problems in common functionalities. For example, teams may build similar application programming interfaces (APIs) for the same purpose but in separate ways depending on which team wrote the code.

3

## Problems with Product Cohesion

Another indication you're ready to scale agile is if your product lacks a uniform customer experience or doesn't have a coherent architecture. This lack of cohesion leads to multiple problems, making it confusing for customers to navigate your product and find the services they need. This also makes it difficult for teams to support the underlying applications and add new functionality.

4

## Agile Team Effectiveness Not Improving

If you've tried diverse ways to increase your teams' effectiveness but haven't seen much benefit, you may have reached a point of diminishing returns or where significant effort at the team level leads to minimal improvement.

Development at the individual team level can only go so far before teams begin to create optimizations that slow the overall rate of delivery. When that happens, consider scaling to bring agile techniques to higher levels of the organization, eliminating systemic problems and increasing your overall effectiveness.



5

## Lack of Enterprise Business Agility

If your small teams can't keep up with changes in the market that demand a shift from simple gadgets to complex solutions, it's an unmistakable sign you need business agility throughout your enterprise.

You'll need the right amount of structure and governance to help several teams working on complex solutions, which may mean bringing your entire organization under one roof and linking all departments, people and work around your business's value streams. Before you scale agile, however, it's important to ensure you have successfully implemented the process in at least one team, which can serve as an example for the others.

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## BEFORE YOU SCALE AGILE

You can't scale bad code. This sentiment also applies to scaling teams. Do not attempt to move ahead with scaling agile until you have succeeded in implementing agile in one team. The team will only face more challenges when integrating their work across teams into a single product increment.

Even if your team seems to operate well, before considering scaling to further teams, ensure the pilot team:

- Has truly adopted an agile mindset
- Can operate from agile and lean values and principles
- Has succeeded with its implementation of agile, e.g., delivering working software every sprint.

The team should no longer operate on a project basis. You should empower them, allowing for self-organization and focus on flow for dependable delivery. To scale well, you also need to confirm you have at least one team that [embraces automation](#) and can release working software without introducing large amounts of risk or overhead. Other teams can then take advantage of the lessons learned from automation. It sets the tone for implementing speed and quality, keys of agile delivery.

Once you begin your journey into scaled agile, you'll see the benefits of a collaborative environment in more ways than one, including increased potential for change, reduced redundancies, improved employee engagement and a better bottom line.

# How to Scale Agile



There are several accepted approaches to scaling agile. While each methodology focuses on different aspects of agility, each will help your organization transform its business practices to achieve its goals through operational optimization.

## There are three main frameworks:

### Large-Scale Scrum (LeSS) →

Generally described as a light framework, LeSS scales agile by applying Scrum's principles — like fast feedback, quick innovation, continuous improvement, rapid adaptation to change and others that deliver products in short cycles — across teams.

### Scaled Agile Framework (SAFe) →

SAFe focuses on aligning teams on a product at scale with more defined roles to cover management areas.

### Disciplined Agile (DA) →

People consider this framework a "people first," hybrid approach to team organization for those already using agile. A lightweight approach, DA shines a light on "what" and the tools to make it happen but leaves the "how" to the organizational leaders.

## Other scaling frameworks include:

### Scrum@Scale (SaS) →

This model is less tested and documented, making it less suitable for an enterprise.

### Nexus →

This is a scaled Scrum approach with up to nine Scrum teams working to deliver a product.

### The Spotify model →

This model isn't a framework but the company's views on scaling.

### Enterprise Kanban/ Portfolio Kanban →

This is a customer satisfaction management method.

# WHICH FRAMEWORK IS RIGHT FOR YOU?

## Scaled Agile Framework (SAFe)

While each of these options has pros and cons, SAFe, which has been in use for a decade, is a proven, integrated framework with values, principles, practices and competencies for achieving agility at scale. SAFe defines a comprehensive set of roles to cover concerns such as architecture, product management, release management, portfolio management and other product focus areas within your organization. By aligning cross-functional agile teams around value rather than departments or silos, leading enterprises can quickly meet changing customer needs.

Some note that SAFe can be too rigid and prescriptive, adding unnecessary complexity to scaling and making it more difficult for users to easily adapt it to specific environments compared to other frameworks. But SAFe is a framework with options – not a prescriptive blueprint – and you do not need to implement it by the book.

## Large-Scale Scrum (LeSS) and Portfolio Kanban

While LeSS and the Portfolio Kanban offer the least overhead, they do not provide pragmatic how-tos for your entire organization and enterprise agility. LeSS is much more minimal, only adding the notion of a product owner hierarchy to the standard Scrum roles. The Portfolio Kanban approach is also less inclusive than SAFe, and SAFe includes several Kanban systems, such as portfolio Kanban systems and all other aspects of approaches to business and delivery agility.

No matter which framework you choose, leveraging the power of a scaled agile framework can help your company make quicker decisions, communicate more effectively, streamline operations and stay focused on the customer. However, having the appropriate system in place isn't the only change you'll need to make to succeed.



# Understanding Organizational Culture to Address Agile Culture



Agile culture puts people at the center, which engages and empowers everyone in the organization. They can then create value quickly, collaboratively and effectively. This effect is highly desired in agile transformations because it leads to high competitiveness, faster time to market, early return on investment, better quality, early risk reduction and so on. However, as we stated earlier, many agile transformations fail — and one of the key reasons is company culture clashing with agile values.

Organizational culture is a complex notion. We define organizational culture as a representation of the dominant set of an organization’s values, beliefs, norms and attitudes that are manifested through

shared patterns of behaviors, individual and organizational structures, approaches and artifacts common to an organization’s members.

If we look at this a bit closer, we see two parts: the feelings-based, invisible part and the manifested, visible part. We get the proverbial tip of the iceberg connotation with organizational culture’s manifestations showing above the surface and the core parts below.

To create an agile culture, we need to integrate agility into both the visible and invisible parts of the organization. The parts below the surface are especially hard to change. However, they are crucial to achieving the return on investment in agile.

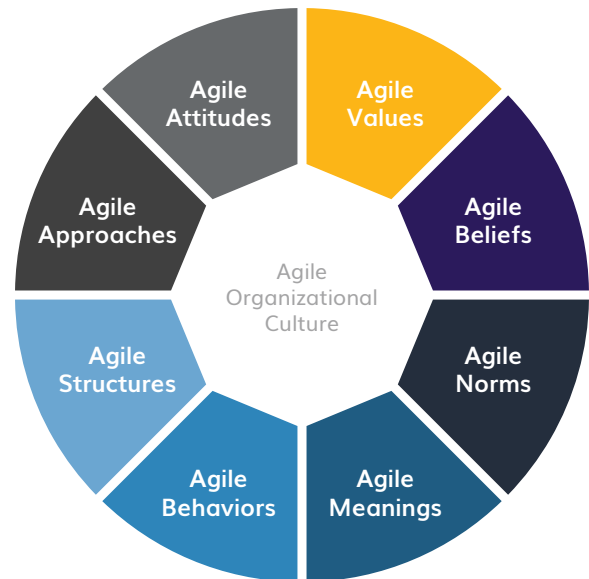


# WHAT IS AGILE ORGANIZATIONAL CULTURE?

An agile culture is how people in an organization think, perceive and operate in a truly agile environment. To break it down, it is a representation of the dominant set of [agile values, agile beliefs, agile norms and agile attitudes manifested through shared patterns of agile behaviors, individual and organizational agile structures, agile approaches and agile artifacts](#) common to your organization's members. The agile culture allows your organization to respond rapidly to changing market conditions, with less hierarchy in decision making.

You can only successfully build an agile culture from an agile mindset. The culture fosters attention to people and teamwork to stimulate trust, support and collaboration. This means empowering small agile teams to make things happen. Here are a few ways to build that trust:

- **Keep communication channels efficient and open with more transparency.**
- **Integrate flexibility and transparency with continuous learning and improvement in a common direction.**
- **Encourage and support acceptable risks and experimentation by seeing possibility in uncertainty.**
- **View mistakes and failed experiments as learning opportunities and means for improvement.**



Professional autonomy plays an important role in agile culture, trying things that fall within the sphere of expertise, both individually and team-wise. The teamwork element will balance the autonomy to prevent chaos, e.g., people inventing in all directions.

Agile organizational culture promotes customer value, emphasizes deliverables and creates transparency around the product as much as is feasible. This culture keeps options of what to build open as long as possible, and it keeps specific commitments loose to facilitate maximum learning about the right thing to build.

Once organizations truly know what agile culture is, they can create the needed awareness, desire, knowledge, ability and reinforcement for creating an agile culture. This is a more thoughtful approach than "build it, and they will come," and trusting your organizational culture will develop on its own if you implement agile methodology, structure and processes. Remember the iceberg? You need to address both above the surface and the below.



# HOW TO DRIVE AN AGILE CULTURE CHANGE

Let's look at the major steps involved in driving an agile culture change. Start by making sure you have a clear rationale for why your organizational culture should change. Spoiler alert – it should not be because it is the latest trend.

Essentially, there are five major steps in driving agile culture change:

- ◆ **Leadership learning**  
Knowledge and role modeling of both agile culture and leadership styles
- ◆ **Assess existing culture**  
Define the desired state and assess the current one
- ◆ **Map out your plan**  
Develop your action plan, including the people change aspects
- ◆ **Work the plan**  
Implement the plan, iteratively, with patience and steadfastness
- ◆ **Evaluate progress**  
Limit to three to five metrics.



## STEP 1: LEADERSHIP LEARNING

I recall an executive who promoted agile but wasn't versed in agile culture. The executive wanted faster delivery and implemented visible practices, like daily stand-up meetings, burndowns and user stories instead of requirements. To ensure the new way of working was worth it, the executive insisted on keeping heavy, status-reporting routines, and he even openly disrespected employees during long meetings when they didn't deliver fast enough.

This executive did not think much about his leadership style and focused on supervision and performance rather than clearly communicating purpose, being respectful, portraying confidence in goal achievement, including followers in problem solving and investing in followers' development.

Having heard that culture was key to succeeding with agile, the executive insisted on an internal agile culture campaign. Messages went out tooting "a shared way of working with interdependent team collaboration with ease, flexibility and speed to rapidly create customer value."

Did it work? Of course not. He never integrated the agile structure and values of respect, trust, empowerment, ownership and accountability. The executive didn't bother to learn and personally evolve with agile culture, nor enable an agile structure or servant leadership. The company pointed out agile and Scrum as the cause of failure. People in the organization got frustrated, fatigued and lost their appetite for change.

If you are an executive, leader or manager, you need to be more than simply aware of what agile culture is – take the time to study agile values, beliefs, norms, attitudes, behaviors, structures, approaches and artifacts. Your awareness must grow into desire, deep knowledge, personal change and the ability to authentically support the culture change.

Leaders and managers must role model agile culture aspects in the organization. Since leadership style matters and needs to align with agile culture, you may also need coaching in transformational and servant leadership to inspire followers to both commit to the shared vision and goals and develop to their highest potential.

## STEP 2: ASSESS EXISTING CULTURE

Do an assessment of your current culture so that you get a baseline from which to measure future progress. Call out the aspects aligning with agile you want to retain and anything you don't. Articulate in detail the agile values, beliefs, norms, attitudes, behaviors and outcomes you desire. Define the non-negotiables. Come up with behavioral descriptors for each agile value, belief, norm and attitude, and articulate how those would translate into actionable behaviors at all levels — from individual contributors to middle managers to executives.

## STEP 3: MAP OUT YOUR PLAN

Develop a strategic plan and implementation action plan. The strategic plan addresses the "what" and the "why" of the activities and the "what's in it" for the people in your organization, while the implementation plan addresses the who, where, when and how.

You will need to integrate the agile culture into your company's overall organizational strategy and processes, so consider how you should map that out. Plan for how you will address the critical parts of change readiness and continuous change management. It needs to include how you will handle the following:

- **Application of agile values, beliefs, norms, attitudes and behaviors in every area of the company**
- **Agile culture training – formal and informal**
- **Implementation of optimal agile structures, approaches and artifacts in the organization**
- **Metrics and assessments for evaluating the culture change progression.**

Changing to an agile culture is a continuous journey of learning. Stay away from big-bang approaches or a mass switch-over at a specific point in time. As in other aspects of agile, you should change the culture with an incremental and iterative approach, which you should reflect in your company's plan.

## STEP 4: WORK THE PLAN

With the plan in place and thoroughly communicated, it's time to set things in motion. It will be busy as you establish the agile values, beliefs, norms and attitudes, along with ensuring the agile behaviors, structures, approaches and artifacts. Here you train, enable, communicate, demonstrate, role model, reward, measure, analyze, reinforce, adjust and expand the agile culture iteratively. Patience and steadfastness are critical. Changing a culture can take anywhere from months to several years.

Keep in mind, resistance to change can hinder any change effort. Many organizations try to ignore or eradicate such resistance. Instead, seek to comprehend and address why the resistance exists. While working through the plan, you will also need to promote an openness to change.

You can do this by clarifying the "why" and the "what's in it for me" you established in step three for the people in your organization. This will later support an increased change momentum as your people will begin to desire the change. Since lack of participant involvement and communication during change are factors contributing to resistance, avoiding it is important.

## STEP 5: EVALUATE PROGRESS

Measuring progress becomes vital during the realization of the agile-culture change to decipher the progress and need for improvements. Help demonstrate the effectiveness of your efforts by implementing employee surveys and analyzing gaps between desired and actual behavior.

The agile culture will ultimately affect the value you create for customers, internal or external. The teams leading the change should decide what makes sense to measure in the areas of health and maturity, delivery or performance and business outcomes. First, agree on what's important and then figure out how to measure it, keeping the measurement limited to three to five keystone metrics. Then, measure outcomes such as customer satisfaction, higher quality of product and time to market, comparing results with the baseline of before the transformation began.

We encourage experimentation of measuring in all metric areas, delivery performance, business results, and team and organizational health. Avoid an emphasis on following standardized measuring procedures as this is counter-intuitive to the aim of agile. Ask people how they experience the culture in the company and if and how it has changed. This may be done via indirect cultural indicators based on survey analysis, including teamwork culture, improvement culture, urgency culture, vision culture and focus culture.



# Need a Boost for Improving Agility?



Changing organization culture is one of the hardest things to do. And while scaling agile may sound overwhelming, one way to ensure you reset your agile transformation and move forward with improving your processes is to work with a partner. Look for someone with a holistic, system-level thinking view and approach to improving your agile capabilities. You need someone to connect the dots between business agility, technology and team-level agility.

The goal is for them to help your organization develop and [deliver software at speed and scale](#) with reliability – think “bringing Google, Facebook, Amazon, Apple, Netflix-style software development and release capabilities to your organization” – ultimately improving business agility at scale. Regardless of the agile framework you implement, your partner should help you focus on the capabilities you need to ensure success.

Another way to achieve success is through a [coaching team](#). A strong coaching team focuses on outcome-based goals and reviews where you need to improve to achieve those goals. You aren't looking to embark on another agile transformation, so your coaching team should focus on diagnostics and targeted solutions to achieve your outcomes. Because the most significant barriers to agile adoption include challenges with organizational culture, resistance to change, and lack of support and skills, look for a team with expertise in these areas.

According to the 2021 [State of Agile Coaching](#), “An agile coach helps organizations, teams and individuals adopt agile practices and methods while embedding agile values and mindsets. The goal of an agile coach is to foster more effective, transparent and cohesive teams and to enable better outcomes, solutions, and products and services for customers.”

A coach will be a true partner in your journey to scale agile and will help you realize and sustain your organizational goals.

# Agile Improvement Capabilities You Need for Success

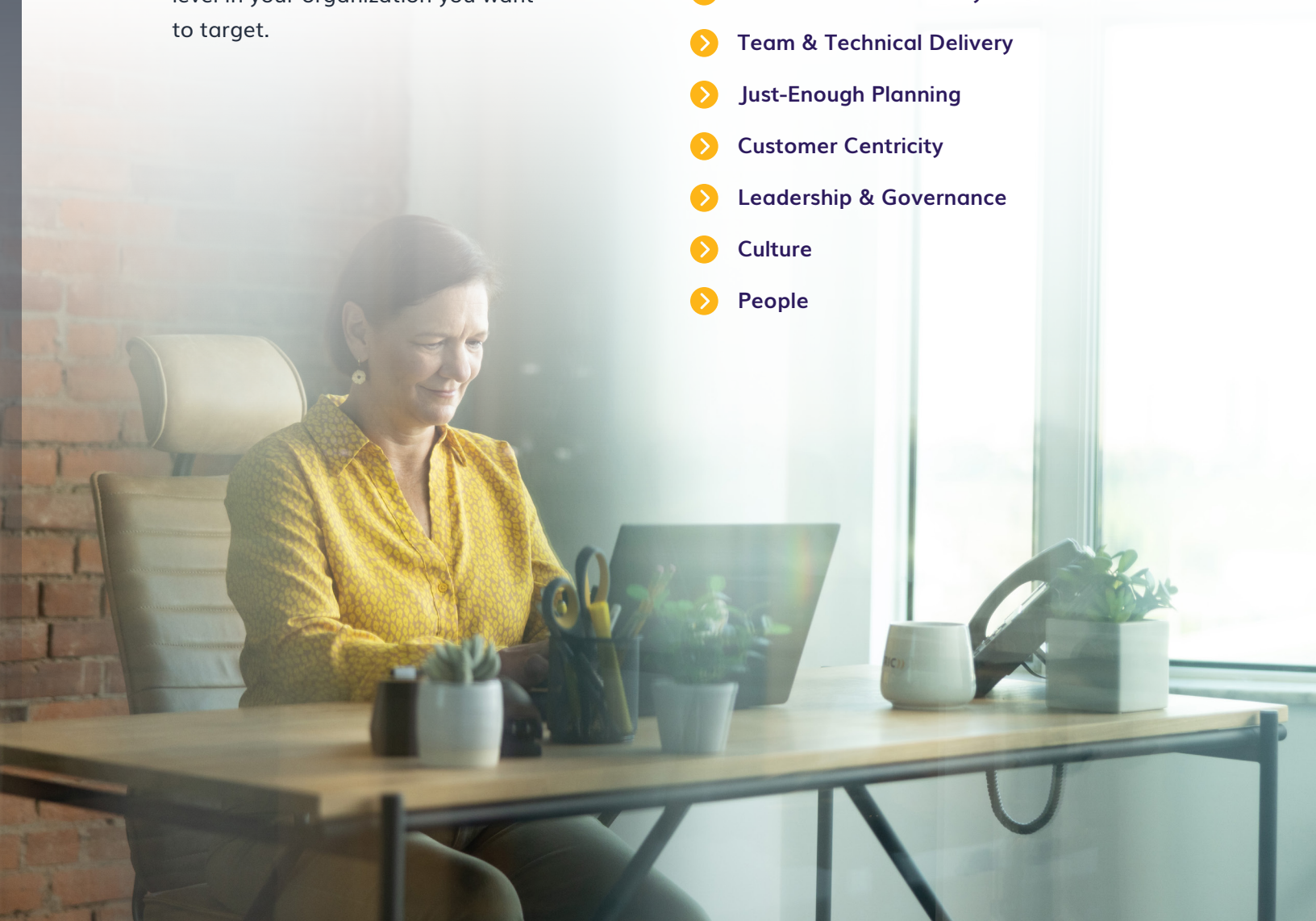


At Centric Consulting, we emphasize seven key agility capabilities — tailored to create the ability for an organization to move quickly and easily — companies should base improvements on to gain the most value. Each area has a great impact on improving agility in an organization, and we address each differently depending on what level in your organization you want to target.

We begin with initial questions in each area and proceed with root cause analysis to uncover what truly needs to improve before we collaborate on improvement implementation.

Areas include the following:

- Value Stream Centricity
- Team & Technical Delivery
- Just-Enough Planning
- Customer Centricity
- Leadership & Governance
- Culture
- People



Learn more about each agile capability area in the chart below.

CAPABILITY	ENTERPRISE LEVEL	TEAMS LEVEL
 <b>Value Stream Centricity</b>	<p>Are your products, services and operations aligned with what your customers care about?</p>	<p>Are teams aligned around prioritized products and services? How can you remove bottlenecks and improve flow?</p>
 <b>Team &amp; Technical Delivery</b>	<p>Do we have an agile mindset behind technology? Is technology priority aligned with business priorities? Is there a solutions approach and skillful architect in place that enable nimble updates?</p>	<p>Do teams show signs of the Agile Mindset? How proficient are they in agile approaches, ceremonies, tool usage and development practices? Do they understand and act on accountability?</p>
 <b>Just-Enough Planning</b>	<p>For each product and service, is there a product vision, product roadmap and quarterly increment planning and how well are these working?</p>	<p>Does each team participate in quarterly increment planning, sprint planning and daily planning effectively?</p>
 <b>Customer Centricity</b>	<p>How impactful is your company's business strategy based on putting customer first to provide a positive experience and build long-term relationships? To what degree is are you performing and leveraging market and user research?</p>	<p><b>To what degree are the following customer centric practices used?</b></p> <ul style="list-style-type: none"> <li>• User Design Thinking</li> <li>• Personas</li> <li>• Empathy Map</li> <li>• Gemba</li> <li>• Prototyping</li> <li>• Release on Demand</li> <li>• Continuous Feedback</li> </ul>
 <b>Leadership &amp; Governance</b>	<p><b>To what degree:</b></p> <ul style="list-style-type: none"> <li>• Are organizational structures in place to promote agility?</li> <li>• Do leaders role model and practice servant leadership?</li> <li>• Is the Agile Center of Excellence impacting improvements?</li> </ul>	<p><b>How well do teams and teams-of-teams adhere to:</b></p> <ul style="list-style-type: none"> <li>• Collaborative guidelines?</li> <li>• Attention to system-design guidelines?</li> <li>• Compliance mandates?</li> </ul>
 <b>Culture</b>	<p>How agile are your company's values, beliefs, norms, meanings and attitudes?</p>	<p>What do the teams display in terms of agile behaviors? How can they grow? Are there reliable Communities of Practices available? Is there continuous learning and innovation?</p>
 <b>People</b>	<p>How can you improve relationship building, team and individual empowerment, and work aligned with your company goals?</p>	<p>Do individuals and teams relate, especially in virtual and hybrid organizations? How do people interact, connect, and find meaning?</p>



## FINAL THOUGHTS

# Feeling like your agile transformation hasn't taken off or that you're on the failing end of your journey is disheartening, but you aren't stuck there!

Take the time to evaluate your status, recognize the steps you need to improve and invest in a partner or coaching team who can lead you the rest of the way. With intentionality and patience, you will see success.

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Dr. Anna-Carin Fernstrom is a manager for the Modern Software Delivery Practice at Centric Consulting. She is passionate about helping leaders and teams become more agile. As a native Swede, Anna-Carin began her career as an intern at the Nordic House Cultural Center in Iceland. After moving to the United States, she changed her career focus to the IT sector, systems engineering and project/program management. She did her doctoral research and dissertation in agile culture and transformation. Anna-Carin lives in Raleigh, NC, where she enjoys the arts and being in proximity to the beach and mountains.

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