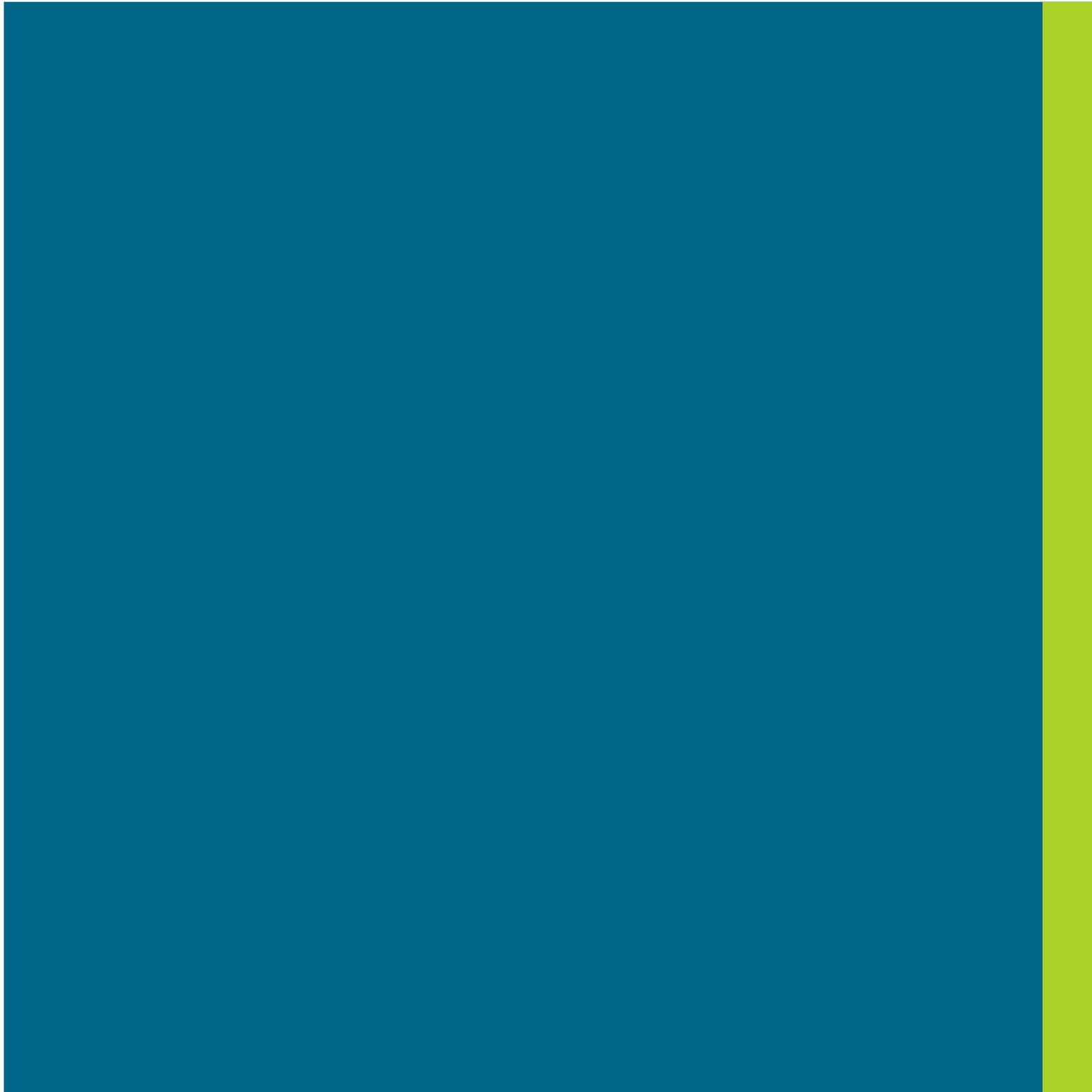




ORGANIZATIONAL AGILITY AS A COMPETITIVE FACTOR

READ UP The "Agile Performer Index 2"

- + **Competitive advantage:** Agile companies are better performers than their peers
- + **Agile transformation complexity:** Organizations' change capabilities need development
- + **Management commitment is key:** Becoming agile requires executive clarity
- + **Starting an agile journey:** Agility 'fitness tests' identify starting points for initiating change



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METHODOLOGY

For the second Agile Performer Index, goetzpartners worked with the NEOMA Business School and the Center for Effective Organizations at USC's Marshall School of Business in California to develop a global sample for this study.

Over 5,000 executives and directors from companies in the European Union, North America, and Asia as well as organizations in the Middle East, Africa, and South America, were invited to take the survey. Over 600 business leaders (N=637) responded to the 40 questions on agility that documented practices related to strategy, structure, human resource practices, and innovation. The questions were aggregated into 12 equally weighted design characteristics, which were organized, again with equal weighting, into the four agility routines.

In the 2019 data, we endeavored to counteract the bias of many c-suite executives, who tend to overestimate the "true" agility score of the organization, by acquiring multiple surveys from the same firm. We were able to collect at least two surveys from 58 firms thus allowing us to compare agility ratings between levels of the hierarchy within the same firm.

For the second Agile Performer Index, the data suggest that organizational complexity begins to set in – and the need for agility becomes urgent – when a firm reaches 100 people. The analyses described in this report exclude the results from these small firms.

KEY INSIGHTS

 In 2019, agile companies remain better performers compared to their peers. The second Agile Performer Index confirms that the most **AGILE COMPANIES** within an industry are, on average, **1.7 TIMES MORE SUCCESSFUL** than their peer group. Agility can still be viewed as a significant competitive advantage and a key to success in a dynamic market environment.

 Companies are **STRUGGLING TO EMBED AGILE ROUTINES** within their organizations. Despite increased efforts to achieve higher levels of agility, overall agility scores declined from 2017 to 2019. The complexity of an agility transformation is high, and most companies still lack the required change capabilities.

 The relation between agility and performance is influenced by the industry's uncertainty. On the base of a larger and more diverse sample in the second Agile Performer survey, the role of several agility elements like **LEADERSHIP, COMPANY SIZE** and **INDUSTRY UNCERTAINTY** reveal important effects.

 Leadership and executive perceptions are key to an agile transformation. Becoming agile requires **EXECUTIVE CLARITY**, yet many C-suite leaders still overestimate their organization's level of agility. However, the perception gap between executives and middle managers is closing and suggests that top management is starting to grasp the efforts required.

 An agile transformation journey should always start with an **AGILITY FITNESS TEST**. While there is no 'one size fits all' solution for what an agile transformation journey should look like, the survey results point to the importance of a clear assessment of the status quo in the organization itself, ideally in conjunction with peer-group benchmarking to determine how agile competitors are.

 There are three basic requirements for a successful **AGILE TRANSFORMATION**. To succeed with agile transformations, leadership teams must commit to and understand their new role, create the conditions for change and empowerment in the organization and be more transparent regarding operational and financial information.

01

INTRODUCTION

In 2017, goetzpartners created a diagnostic tool, the Agile Performer Index, to help organizations define a clear starting point for their agile transformations. The tool is complemented by a sophisticated, science-based set of measures through which organizations of all sizes can achieve continuous, efficient and sustained improvements in their agility.

In the first Agile Performer Index, goetzpartners and the NEOMA Business School demonstrated the relationship between agility and performance. A survey of 285 European companies utilized the methodology of Prof. Christopher G. Worley, a renowned expert on agility and organization development. The Agile Performer Index documented that agility programs are a suitable way for organizations to achieve lasting performance and competitive advantage.

To offer insights into the movement of companies' agility levels and identify the challenges of the transformation to agility, goetzpartners partnered with NEOMA Business School again for the second edition of the Agile Performer Index. With a new partner, the Center for Effective Organizations at USC's Marshall School of Business in California a global sample of more than 600 global executives was surveyed from September 2018 until February 2019 to determine the agility of their organizations.

The second Agile Performer Index is one of the first studies that examines the agility development in organizations over time. It reconfirms the relationship between agility and entrepreneurial success, and at the same time, shows that agility efforts must be considered against the background of industry uncertainty, company size, and management perception. The study highlights difficulties and pitfalls companies face when pursuing agility and offers guiding insights into ways to cope with them alongside the proven fitness programs.

DEFINING AGILITY

As the discussion around organizational agility grows, so do the number of agility definitions, the claims of its benefits, and how to achieve them. In this period of flux and ferment, organizations are being encouraged to increase their speed of decision making, implement flatter, network structures, change to growth mindsets, and adopt agile methodologies across the board. With no clear definition it is difficult to understand what agility is and whether it is increasing, decreasing, or remaining stable.

Agility is today widely understood to be the highest form of organizational adaptability. An organization's reaction to external developments, followed by timely action to internal processes and product portfolios, is vital to prevail in a continuously changing market environment. In this report, the authors again investigate whether this capability is also reflected in the company's financial performance. Therefore, the definition for agility remains as follows:

Agility is an organization's ability to make timely, effective, and sustained changes resulting in performance advantages.

FOUR AGILITY ROUTINES

To understand an organization's ability to make timely, effective, and sustained change, the survey asked business leaders to respond to 40 questions related to strategy, structure, human resource practices, and innovation. These 40 questions roll up to **FOUR AGILITY ROUTINES**.

The authors used these routines to evaluate a company's agility and then investigated potential relationships with available data on company performance. For the purpose of this survey, "success" was defined as profitability (Return on Assets) above industry average over the 10-year period between 2007 and 2017.

ROUTINE	DESIGN CHARACTERISTIC	ROUTINE DEFINITION
STRATEGIZING	Strategy	We have developed robust, flexible strategies valid across the company that integrate the needs of our customers, the competitive environment and the contribution of our employees.
	Identity	We are known in the external environment for our innovative, adaptable and customer-oriented attitude, and we believe this philosophy and these values represent the way we work
	Purpose	We have defined and communicated an inspiring, values-based corporate purpose that sustains the company on its path into the future
PERCEIVING	Structure	Our employees work in structures with a strong focus on the marketplace. As many people as possible have direct contact with the external environment and especially customers.
	Information flow	We ensure that information can flow quickly, transparently and unfiltered between operational-level people and decision-makers, both vertically and horizontally. Our managers keep staff up to date on how the company is performing.
	Future orientation	Incorporating the future and its alternative possibilities is an essential part of all management reviews. All employees are encouraged to contribute their ideas.
TESTING	Innovation	Our daily routine inspires employees to innovate and take appropriate risks.
	Resource deployment	Our systems for allocating resources (people, budgets, tools) are flexible and can adapt to changes in the market environment.
	Learning processes	Experiments and learning processes are indispensable to the process of continuous change in our company, and we share learning outcomes and inspiring practices on a broad basis.
IMPLEMENTING	Change	The ability to execute complex and continuous change in our company, including enacting and measuring outcomes, is well coordinated and works better than competitors.
	Leadership	We develop leaders at all levels. Our approach is heterarchical, and we encourage all employees to share their leadership qualities within the company. It is part of our daily routine to give people the opportunity to develop, and to promote and encourage new knowledge.
	Remuneration	We have a flexible remuneration system, with a clear and timely correlation with the company's performance and with the knowledge and skills of individual employees.

AGILE PERFORMER INDEX 2 - KEY RESULTS

OVERALL AGILITY LEVELS DECLINE

The first surprise in the second Agile Performer Index is that the level of agility, overall, declined. In 2017, the overall average agility level for European firms was 68. In 2019, overall agility for European, North American, and other regions was 65. **For European organizations alone, the index dropped 6%, from 68 to 64.**

Thus, part of the decline may be the addition of new regions to the sample. However, given the amount of attention and resources devoted to agility in North America and the proportion of North American firms in the sample, this doesn't seem likely.

Why then, might agility be declining?

We offer two important and related concerns based on our conversations with executives in different countries and industries:



More and more organizations are considering and implementing agility transformations. The success rate of these transformations vary widely and leadership teams are learning about the complexity and pervasiveness of the change as well as the length of time required. Agility scores may decline because executives are coming to grips with the difficulty.



The amount of information about agility (and the learning described above) results in a "recalibration" of what it means to be agile. Two years ago, agility was a new concept and there were few benchmarks against which to judge an organization's level of agility. Today, there are more cases of agility being discussed and an executive's definition of "high levels of agility" may have matured. The agility scores have declined because there is a more sophisticated notion of agility.

AGILITY LEVELS IN MANY INDUSTRIES HAVE DROPPED

In 2017, the agility scores varied significantly between industries and there remain important differences in the second survey. And like the overall scores, the agility scores for industries also declined with one exception.

Between the leading industry Service Business (68 points) and the poorest performer Public Sector (51 points) lies a difference of 17 points in 2019. However, as mentioned above, average agility levels are lower. Former leading industries Travel & Transportation (2017: 73 points) and Service Business (73 points) have lost significantly (-9 and -7 points compared to 2019). The Public Sector, which was already lagging behind in 2017, dropped by -14 points to an agility score of 51 points. Finance and Insurance (66 points in 2019) is the only industry that could increase its level of agility compared to 2017.

AGILITY LEVELS BY INDUSTRY IN 2017 AND 2019



02

AGILITY AS A COMPETITIVE FACTOR

AGILITY AND COMPANY PERFORMANCE

The second Agile Performer Index provides continuing evidence of the measurable financial gain from higher agility. A direct comparison of overall agility levels with financial performance reveals that the more agile companies are between 1.5 and 1.7 times more successful than low agility companies.

Furthermore, the results suggests a decreasing return to increasing agility that is not evident in the 2017 data. Performance increases with increasing agility for the first three quartiles are followed by a performance decline for firms in the top quartile. However, by virtue of the larger and more diverse sample in this study, this result masks a third important contextual factor, the industry's uncertainty. In low uncertainty environments, where changing customer demands or digital disruption is (relatively) lower, such as construction, natural resources, and the public sector, agility may not confer the same advantages as in industries where the pace of change and uncertainty is higher.

The second Agile Performer Index confirms:

Agility is still key to being successful in a dynamic, competitive environment. However, there are several other factors also influencing the correlation between agility and performance.

AGILITY, FINANCIAL PERFORMANCE AND INDUSTRY UNCERTAINTY

The results show that the relationship between agility and financial success is affected by an important contextual factor: the industry's uncertainty. The faster the pace and volatility of change in products, services, technology, and operating models, the more important agility becomes. This is a new and significant finding with critical implications.

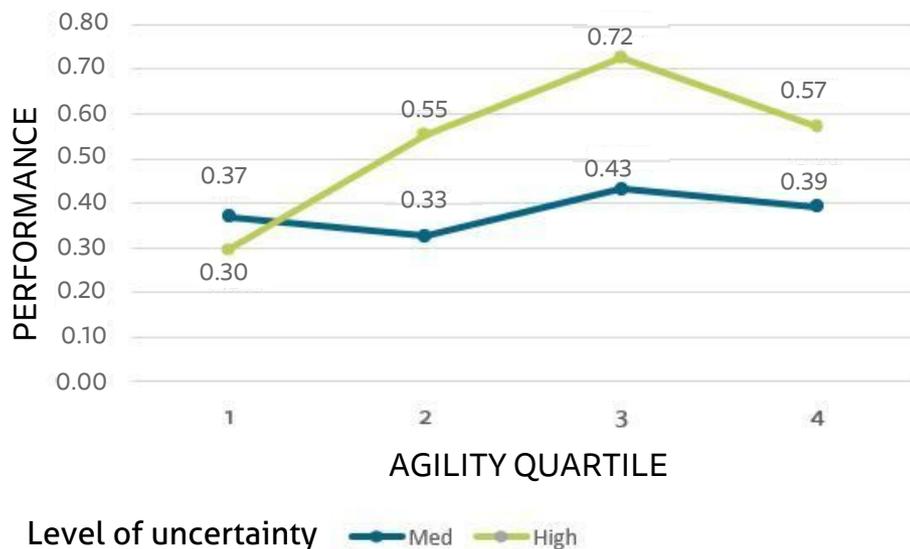
In moderate uncertainty industries, the levels of agility seem relatively unrelated to performance. In high uncertainty industries, like technology, media, telecommunications, financial services, and consumer goods, performance increases with increasing agility, although we again see a drop in performance for top quartile agility scores. In this subset of data, the agility performance advantage is 2.4 and 1.9 for the third and fourth quartiles of agility.

The number of firms from low uncertainty industries, such as construction, natural resources, and the public sector, was too small and the wide dispersion of their financial results was too high to make meaningful conclusions. However, the general pattern of performance in low uncertainty industries suggested that 1st quartile agility levels were associated with low levels of performance followed by a significant increase in performance for second quartile firms, and then a dramatic decline in performance for third quartile levels of agility. There were only two fourth quartile firms with wide performance differences.

The results suggest that not all firms need to aim for maximum levels of agility. Firms in low to moderate uncertainty environments should focus on those agility routines that reflect their distinctive strengths and capabilities. They should not try to become agile in all areas of the organization. Organizations in high uncertainty industries, however, have no such luxury. They must work to achieve higher and higher levels of agility, although the data suggest that 3rd quartile agility levels may even be more consistently profitable than fourth quarter agility levels. The complexity and intensity of implementing and then maintaining such a high level of agility may not be worth the effort.

These results offer executives a more refined choice regarding the transformation to agility. They suggest, in contrast to the very loud exhortations to achieve maximal levels of agility, that organizations should think surgically about when and where agility makes sense given the firm's size, industry, and relative advantages.

INDUSTRY UNCERTAINTY AND AGILITY IMPACT ON PERFORMANCE



03

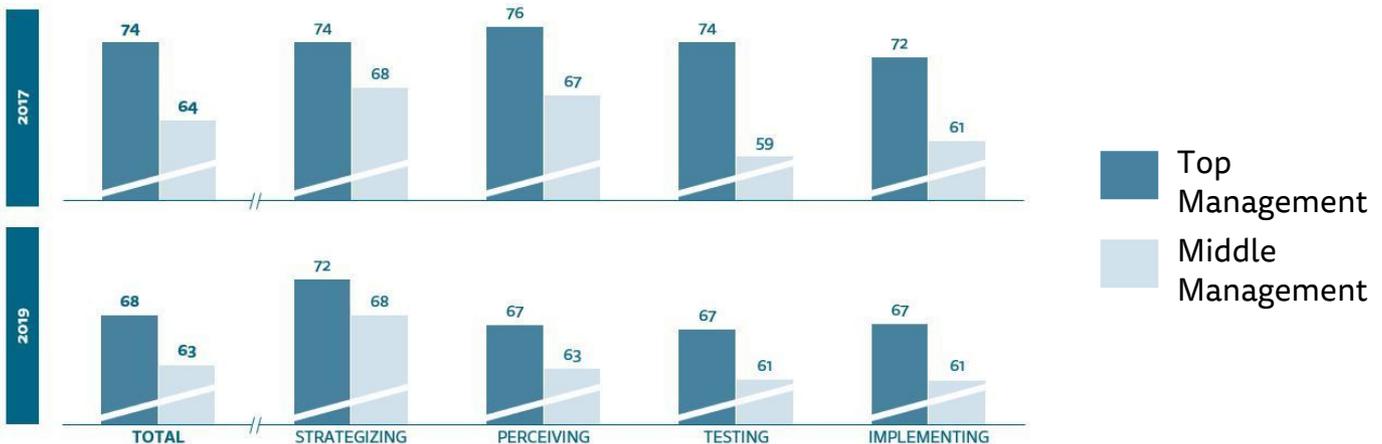
AGILE THINKING AND AGILE PRACTICE

Agility impacts the entire organization. However, there can be a strong disparity across the organization in terms of how agility is viewed, as shown by the more detailed analysis of the index results of various management levels: agile thinking at executive level does not necessarily mean the organization is an agile performer at an operational level.

Despite increased company efforts to achieve higher agility throughout the last years, overall agility scores have declined from 2017 to 2019 by ~4% across all industries. One reason for the unsatisfying development of agility since 2017 might be the lack of awareness among the leadership. As in 2017, C-level executives surveyed in the second Agile Performer Index rated their own company's agility higher than middle managers. However, the gap decreased by 43% over the last two years, suggesting that top management views on agility are becoming more realistic.

In support of the earlier finding regarding agility and management learning, this increasingly realistic view suggests that top management is starting to grasp the full complexity and amount of effort required to achieve higher agility.

DIFFERENCES IN AGILITY PERCEPTION BETWEEN MANAGEMENT LEVELS



04

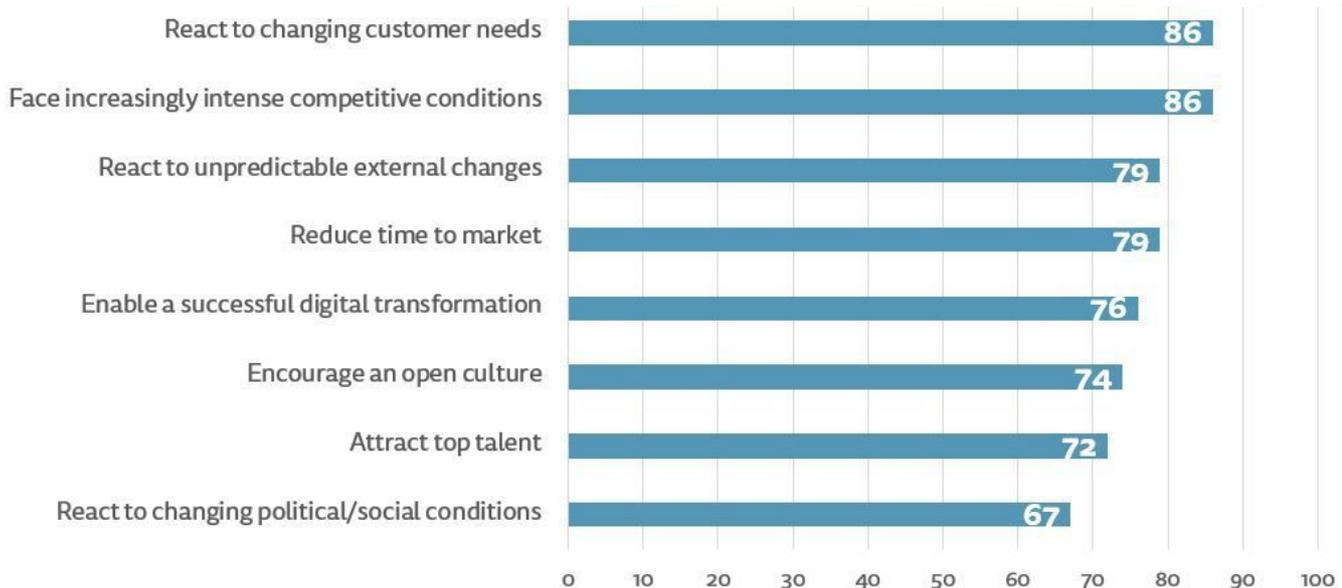
AGILITY TRANSFORMATION

MOTIVATIONS FOR AGILITY

For the companies surveyed, there are many different reasons to pursue agility. When given the opportunity to say which of several reasons motivated the transformation to agility - the respondent could choose as many as applied – they tended to say “all of these are good reasons.”

Customer (86%) and competitive pressures (86%) were the most agreed to reasons followed closely by external market pressures, reducing time to market, and digitalization. But the overall impression here is that agility seems to be viewed as the only organizational response that addresses all (or nearly all) of today’s challenges.

REASONS FOR AGILITY TRANSFORMATION (consent in %)



Together, the findings regarding the gap in perception and the reasons for agility, have important decision-making implications for organizations considering a transformation to agility.

Few people are surprised by the finding that executives overestimate their level of organizational agility. However, when executives believe their organization is agile when it is not – and especially in high uncertainty environments – the organization may not see the urgency to change. As a result, they may fall further behind the competition. The survey results suggest that there are plenty of reasons to pursue agility, but if executives already and inaccurately believe the organization is agile, none of these motivations matter.

It is critical that the top managers in an organization listen carefully to the people who are in touch with different stakeholders, such as customers, suppliers, industry associations, analysts, and local communities, to understand whether the organization is as agile as they believe. It is, in fact, an important capability of agile organizations to understand whether the organization is as agile as they believe.

BARRIERS TO AGILITY TRANSFORMATION

Respondents were also asked about the potential barriers to a successful transformation to agility. The results indicate that there are several equally strong potential sources of resistance and barriers. However, the most agreed reasons point towards management being a crucial factor hindering successful agility transformation. 70% of participants named poor people managing skills as the number one barrier, followed by different management styles (68%) and middle management resistance (65%).

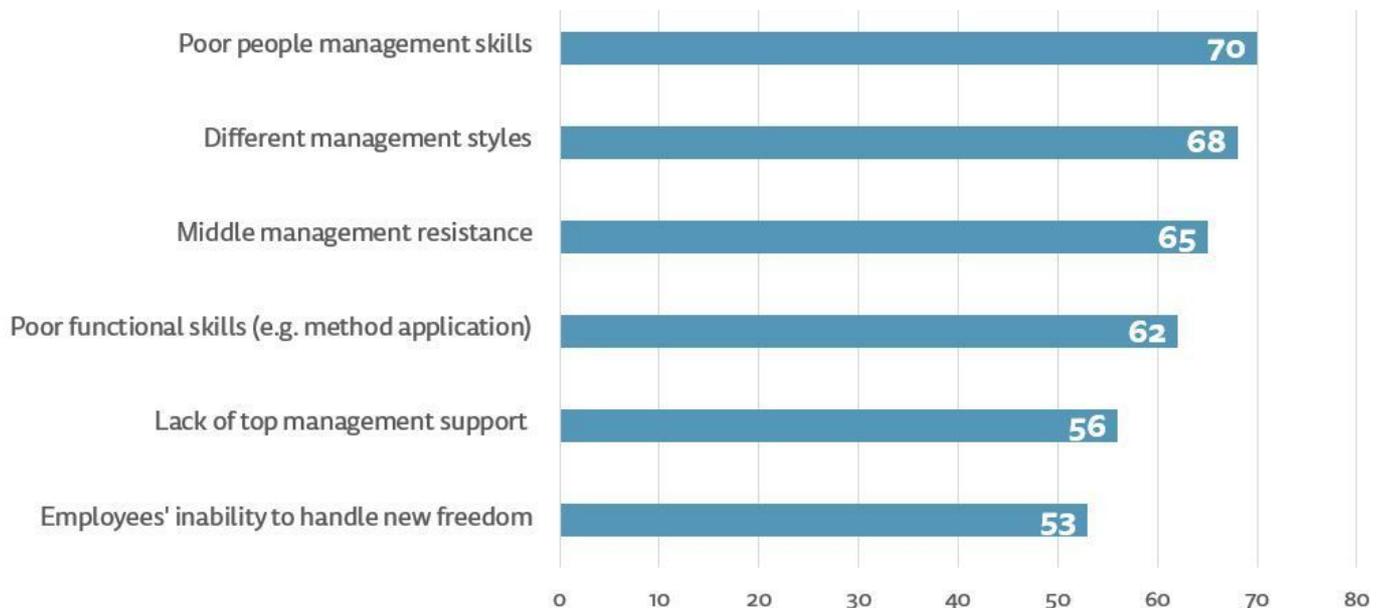
The employees' role was deemed as one of the lower barriers to agility advancements in organizations. The fact that the respondents make middle-management responsible for hampering agility corresponds to the findings regarding the perception of agility levels between management levels. It also underlines that a decision taken to be more agile at C-level will not, in itself, establish agility at the operational level.

The data on barriers suggests that organizations looking to become agile or engage in an agility transformation need to adopt a broad and systematic approach. Transformation processes must communicate broadly and transparently, provide training and other support, involve middle managers in meaningful ways, and ensure consistent support from the top. The complexity of the transformation is apparent.

An agile transformation is initiated by strategic decisions at the senior management level. However, the organization is not properly agile until agile practice has been introduced along every dimension, from a loosening of rigid hierarchical control to iterative working methods in product development.

Therefore, the transformation towards agility cannot be viewed as a one-off, top-down initiative. The organization's management is not only responsible for selecting the most effective transformation program but must also ensure that the steps will resonate with the company's employees in order to guarantee their support for a successful and holistic change. However, the 2019 results also indicate that the prerequisites for mastering this kind of change are still not ideal in all organizations.

BARRIERS TO AGILITY TRANSFORMATION (consent in %)



05

AGILITY AND ORGANIZATIONAL CHANGE CAPABILITIES

The results of the second Agile Performer Index have confirmed that success belongs to companies which are resilient in the sense that they recognize and adapt to change variations and that have managed to embed these agile capabilities in their organization.

However, most companies still lack the required change capabilities and therefore do not achieve the targeted success with their agile transformations. As mentioned before, the profound organizational and cultural change towards becoming agile is a multi-year journey requiring tremendous effort.

THE IMPORTANCE OF CHANGE CAPABILITIES

For companies that want to embark on a journey towards agility, the 2019 Agile Performer Index gives many insights into the ongoing, inner workings of agile organizations. When examining agility factors within the four agility routines, it becomes apparent that across all industries change and learning scores are especially low. These results correlate with the companies' self-assessment of their change capabilities.

When asked about their change capabilities within their organizations, only few respondents agreed that people in their organization applied design tools to make change initiatives successful and generated data promptly to understand a change's success. However, participants rated their companies' attentiveness to changes in their external environments and the competencies to align change initiatives to fit their cultures better. Overall, the evaluation of change capabilities showed only little differences between industries or regions.

These results represent a picture of how the concept of change management still needs to evolve and mature in many organizations. Since agility impacts the entire company, such changes cannot be implemented selectively. Rather, the act of aligning itself to agile principles will in fact change the company continuously, efficiently and sustainably – and this change cuts right across every aspect of the organization.

While purpose is the strongest agility factor across many industries, learning resources and change scores are particularly low.

AGILITY WEAKNESSES ACROSS INDUSTRIES (deviation from highest score in %)

	STRATEGIZING			PERCEIVING				TESTING			IMPLEMENTING	
	Strategy	Identity	Purpose	Structure	Future	InfoSharing	Innovation	Resources	Learning	Change	Leadership	Reward
TOTAL	(3%)	(6%)	-	(9%)	(9%)	(10%)	(2%)	(12%)	(16%)	(13%)	(7%)	(8%)
Service Business	-	(7%)	(4%)	(4%)	(10%)	(11%)	(3%)	(8%)	(16%)	(13%)	(9%)	(8%)
Travel & Transportation	(3%)	(8%)	-	(7%)	(10%)	(11%)	(9%)	(14%)	(15%)	(14%)	(6%)	(9%)
TMT	(4%)	(2%)	(3%)	(14%)	(15%)	(9%)	-	(14%)	(24%)	(20%)	(10%)	(6%)
Consumer Goods & Retail	(3%)	(6%)	-	(13%)	(10%)	(9%)	(3%)	(12%)	(14%)	(12%)	(5%)	(8%)
Finance & Insurance	(2%)	(7%)	-	(5%)	(4%)	(8%)	(2%)	(13%)	(13%)	(12%)	(7%)	(6%)
Healthcare	(6%)	(11%)	-	(17%)	(14%)	(13%)	(8%)	(19%)	(18%)	(16%)	(15%)	(14%)
Industrial Goods	(2%)	(7%)	(3%)	(12%)	(5%)	(16%)	-	(12%)	(18%)	(12%)	(5%)	(8%)
Energy & Natural Res.	(14%)	(17%)	-	(14%)	(15%)	(18%)	(13%)	(22%)	(17%)	(19%)	(13%)	(21%)
Public Sector & Ass.	(27%)	(26%)	-	(7%)	(22%)	(20%)	(14%)	(25%)	(24%)	(28%)	(17%)	(39%)
Other	(1%)	(4%)	(7%)	(1%)	(10%)	(2%)	-	(4%)	(9%)	(9%)	(10%)	(10%)

FOUR KEY FACTORS TO DEVELOPING CHANGE CAPABILITIES

The results on change capabilities show that managers aiming to lead their companies on the way towards agility still have some internal work to do before embarking on this journey together with the whole organization. Building more advanced change capabilities set the base for a successful agility transformation. Since the decision for implementing agility requires not only a tactical change, agile approaches also call for strategic and cultural readjustments:

-  **BOOST LEADERSHIP AWARENESS:** Increase and broaden the internal channels of communication regarding change so that leaders of change initiatives can better understand the other changes going on in the organization and be less likely to “bump into” those changes unexpectedly. Leaders are more likely to see the need for coordination and orchestration when they have this awareness.
-  **LEVERAGE DESIGN THINKING:** There is a clear need for more design thinking in organizations. Organizational changes that are not aligned in service of the organization’s strategy, business model, and operating model can be wasteful efforts.
-  **ASSURE TAILORED APPROACH:** In today’s diverse world, no single change fits all situations. Change must be tailored to fit both the global strategies and values of the corporation as well as the local situation. Novice change practitioners do not have the breadth of experience to be able to understand how change processes can be adapted and organizations should look to hire or develop these skills.
-  **MONITOR CHANGE ACTIVITIES:** The weakest element in the change capabilities is monitoring. The ability to quickly sense whether a change is on track, supported, and aligned means more efficient change processes and the ability to make quick course corrections. Digitalization is likely to be an important contributor to the development of this change activity.

06

HOW TO START AN AGILE TRANSFORMATION JOURNEY

There is no silver bullet solution for what an agile transformation journey should look like for every company. However, the first step should always be an individual agility **FITNESS TEST** – a clear assessment of the status quo in the organization itself, ideally in conjunction with peer-group benchmarking to determine how agile competitors are.

The results from the organizational fitness test are benchmarked to produce individual **HEATMAPS** that help to identify optimum points for initiating change. With the support of science-based analytics, an organization can learn whether agility is already codified into its business practices and, if not, which areas it can address to become more agile – sustainably, efficiently and continuously. Given the results of the second Agile Performer Index, the heatmap also helps executives to choose the right, few routines to change and pinpoints transformation efforts that are not wasteful.

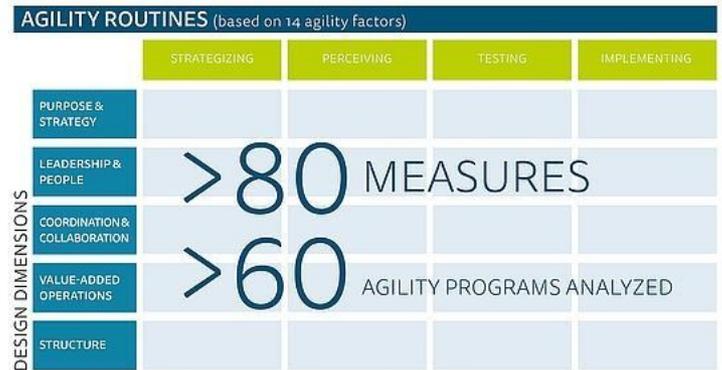
Next, the main framework for an **INDIVIDUALIZED AGILITY PROGRAM** can be established. In this regard, goetzpartners' approach helps to identify which program best responds to the organization's present situation and is based on a comprehensive use case repository with inspiring practices from over 60 transformation programs of well-known companies and features more than 80 actionable measures that are categorized in four agility fitness programs. The focus of the program is adjusted depending on the organization's starting point and terms of reference. goetzpartners summarizes the measures into four programs that engage with challenging questions and steer organizations through the process of improving their agility and also their performance.

Lastly, it's all about the **EXECUTION**: Agility change managers are responsible for stimulating agility oriented initiatives within their organization and eliminating obstacles throughout the transformation journey. Consequently, it is vital to continuously monitor the impact and the progress of the transformation and adapt the agility program accordingly.

THE AGILE TRANSFORMATION JOURNEY

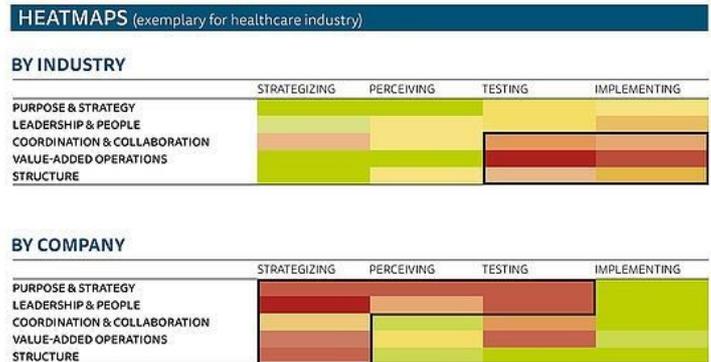
1 | THE BASIS

The first reference point for organizations that wish to improve their agility and therefore their performance is a sober assessment of current practices. goetzpartners has linked the four agility routines with the five design dimensions of the company organism.



2 | IDENTIFY KEY PRESSURE POINTS

With the help of a heatmap which is based on this matrix, companies are able to identify key pressure points and can individually determine where the agile transformation journey should begin.



3 | CREATE A SUITABLE FITNESS PROGRAM

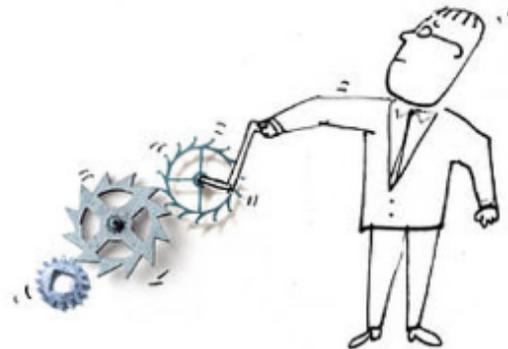
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4 | IMPLEMENTATION

The Agile Performer Index is a science-based diagnostic tool for organizations. In addition, with its workable recommendations for action and examples of best practice from small and large agile pioneers in every industry, goetzpartners can help organizations to become more agile – continuously, efficiently and sustainably.



The second Agile Performer Index demonstrates again that organizations can benefit significantly by aligning their strategy, structures, and operations in service of the agility paradigm.

However, transforming a company into an agile organization is a long-term challenge – above all, it's a challenge that takes in every aspect of the organization and agility can only be most effective when it embraces the entire enterprise.

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