Why We're Moving to Agile Software Development

It's November right now, and Christmas is just a little more than a month away.

Do you remember how long that month felt when you were a kid?

When you have your eye on something you want, you want it now. That feeling doesn't stop once you're an adult.

We know that getting our most innovative and advanced advisor technology updates to you quickly is important to your firm's business, so we're adjusting how we develop our software.

In this blog, we'll explain why we're moving to agile software development and how that change will benefit your firm's use of the Orion platform.

Waterfall Software Development: What It Means

In a traditional sense, most software development uses what's known as the "waterfall" technique to programmers. In fact, waterfall has been Orion's approach to software development since inception, allowing us to deliver an incredible amount of innovation in a short period of time.

In the waterfall technique, an idea is conceived, then analyzed, then designed, then built, then tested, and finally released. Each step is completed before work flows to the next step.

In other words, waterfall is a linear approach to software development.

There are many positives to the traditional waterfall approach:

- It gets customer agreement on a project early on in the development lifecycle
- Customer involvement isn't required throughout the entire process, so there's not a large time commitment
- There's less likelihood of building software piece-by-piece because requirements need to be set at the beginning of a project

All that said, the waterfall technique does have some drawbacks.

Most notably, there's really no room to change requirements after the specs have been written and passed to the programmers. This means that if you receive critical customer feedback, observe new industry trends, or gain competitive intel during the development process, chances are you can't make any changes to the requirements until development has concluded.
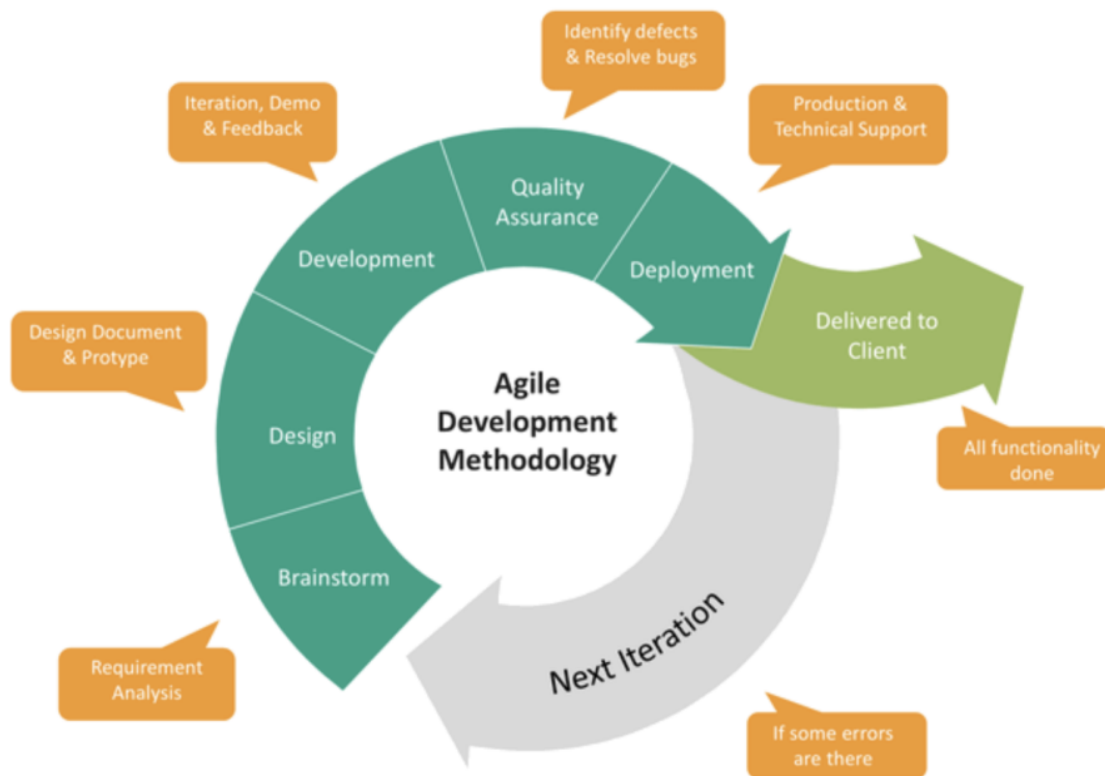
Agile Software Development: What It Means

There's another popular approach to software development, and it's called "agile." And as of today, Orion Advisor Tech is officially embracing an agile development process.

At a high level, the foundation of the agile development process is a "sprint," which essentially breaks down a large project (often referred to as an "epic") into much more digestible pieces (often called" stories"), allowing the team to focus completely on that story at-hand.

If waterfall is a step ladder, agile is circle. It allows us to treat each unique project as its own story, one that we can craft and edit with our clients in a collaborative, real-time process.

Here's a visual look at how the process plays out*:

The agile approach encourages teams to work fast, get more client feedback during reviews, iterate on a quicker timeline, and allows for continuous testing and adjusting of a development throughout its lifecycle.

Once a sprint is completed, the *team* focuses on the next story in the same cyclical fashion.

Scrums Aren't Just for Rugby

While there are different types of agile development, a popular option includes daily scrums.

A "scrum" refers to a daily meeting with key team members—think a product owner, product manager, QA analyst, marketer, lead developer, and scrum master in this case—to review yesterday's achievements, today's goals, and any potential obstacles standing in the way.

The daily meetings address some of the issues found in traditional software development.

Constant communication within the team allows everyone to be on the same page

with regard to scope changes, time estimates, and any other new developments.

Why We're Making the Switch to Agile

There are three primary reasons we're making the switch to an agile development process.

1. **Create a more flexible development framework.** We've always made building what our customers need a priority, and agile makes that mission easier to accomplish. As we get client feedback throughout all parts of the process, we can design software that is more consistent with our clients' needs—for now and tomorrow.
2. **Align internal teams to collaborate in a simpler, more meaningful way.** The agile framework encourages cross-communication throughout an organization, from product to support to marketing. As a result, clients often receive better support, more useful documentation, and an increased understanding of a product's value proposition.
3. **Deliver better products, more reliably.** Because agile development often results in more frequent releases, there's greater ability to test code in smaller batches and determine the root cause should anything break.

How You'll Benefit from Agile Software Development

You'll begin seeing direct benefits from our new software development process immediately.

Here are the two biggest improvements:

- **We'll be making monthly software updates from now on.** Agile doesn't require us to wait to release updates during a quarterly software update event, as we've done for most of our history. Instead, once a development is ready, it can be deployed. The Orion platform will be continuously improving, all the time.
- **Your input can be reflected more quickly.** We're in constant communication with our advisors, but we've had to put your awesome feedback on a slight hold until the initial requirements were complete.

Now, we simply iterate on a story and ensure we're more aligned with your needs in real time.

Because of the accelerated updates, you'll also be seeing more regular software release notes from our team, instead of a quarterly webinar and highlight blogs.

We're excited for this process to bring us even closer to our advisors.

If you're not an Orion client but want to better understand how *our* agile software development may improve *your* advisor technology experience, get in touch with our team here.

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*https://chercher.tech/jira/agile-methodology