

Leading Agile Adoption from the C-Suite

What Does this White Paper Cover?

Agile methodology originated in the technology sector, but as credit unions have come to resemble fintechs in both member service delivery and back-office operations, a faster, streamlined means of improving products, systems, and processes can offer a strong competitive advantage. The first foray into agile principles and practices for credit unions is often in enhancing digital delivery, but increasingly CEOs and their executive teams are recognizing the potential to apply agile across the enterprise. To realize their aim of bringing projects to fruition faster and more efficiently, executives and managers must support structural changes and embrace their roles as “lead learners” in undergoing agile coaching and training.

This white paper examines what agile looks like in a credit union environment and how leaders are providing a strategic framework to support the work of agile teams forming across departments. Two CEOs whose credit unions are well into their agile journeys share perspectives on their organizations’ transitions from “doing agile” to “being agile”—and the changes in work processes, roles and responsibilities, mindsets, and outcomes that are still underway.

“Being an anticipatory organization, we needed to see what was coming at us next in each one of these lanes, so we could deploy our agile teams and resources where they were most needed.”

John Janclaes, Partners FCU

Contributor Profiles



John Janclaes
President/CEO

Partners Federal Credit Union
Burbank, CA
\$2 billion in assets
180,000 members



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Managing Director and
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Dave Mooney
President/CEO (ret.)

Alliant CU
Chicago, IL
\$12.5 billion in assets
500,000 members



Angela Pardue
Vice President/
Chief Talent Officer

Partners Federal Credit Union
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Top 3 Takeaways

- 1 Shifting an organization to an agile framework requires training at the management level, as an agile mindset is different from traditional management strategies.
- 2 In transforming an organization, it is important to recognize that the goal is not to “be more agile,” but to use agile to better achieve the credit union’s goals.
- 3 Expanding agile from the project to organizational level will result in changes to the credit union’s structure and leadership.