

# Big Changes for Small Agencies

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*Snake Hill*  
WEB AGENCY

# Outline

## Intro - 2017 Drupal Business Survey

- How Big is Big?
  - Small and medium shops are numerous and relevant
  - Really big agencies are the exception
  - Some businesses stay small on purpose
- Enterprise Drupal
  - Drupal has always been sold to the enterprise
  - Drupal 8 is well suited for a variety of projects
  - Consumer market may be important
- People and Skills
  - Most Drupal people work for small shops
  - Freelancers are often hired at larger shops
  - Freelancers and small business owners are important to the ecosystem
- Drupal Community

*The evolution of the CMS marketplace to favor more comprehensive and thus also more complex solutions is **favoring bigger companies** with stronger competences through number of experts in specific fields. This can be a struggle for small vendors, as mastering clients' needs requires more expertise than is available on their staff.*

2017 Drupal Business Survey

# Drupal Business Survey Results

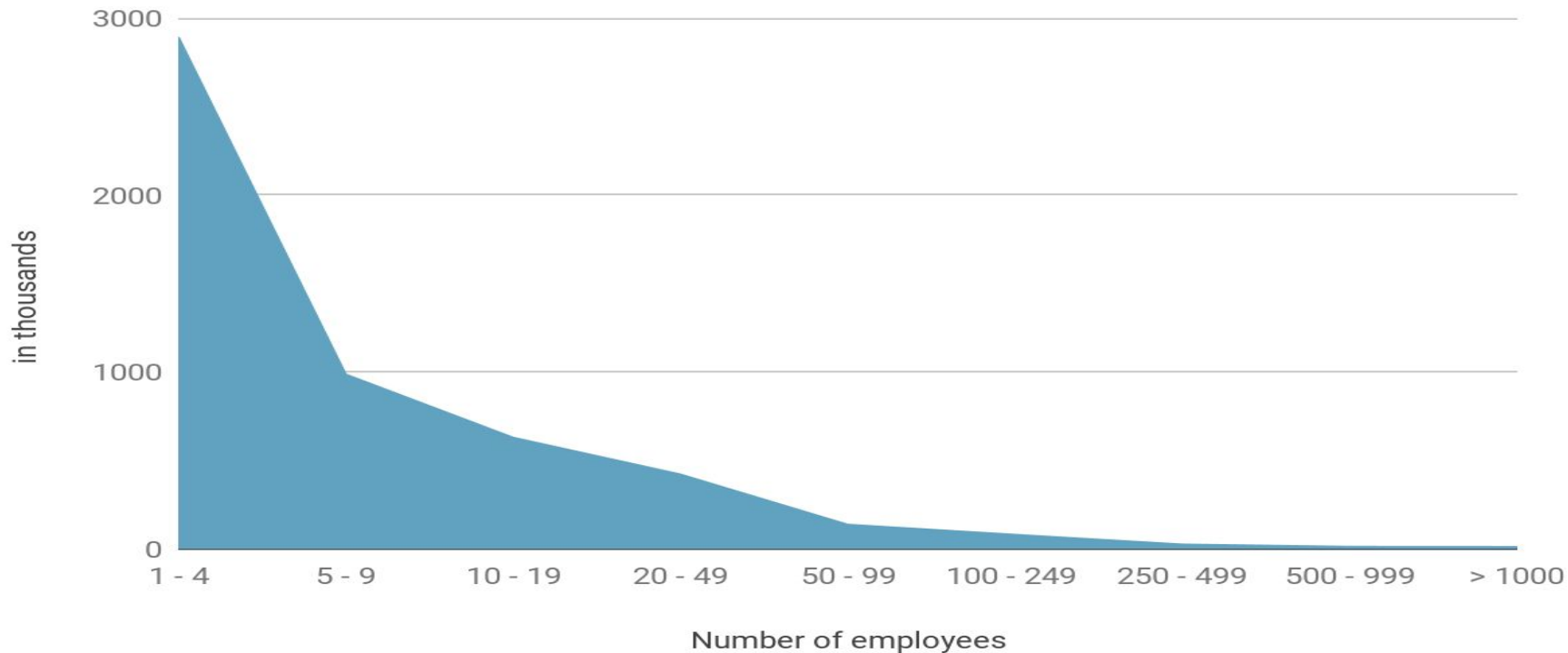
- Total 239 responses
- 40 different countries
  - Europe 136
  - North America 92
  - South America 5
  - Africa 10
  - Asia 30
  - Oceania 11

We need to create an environment that fosters and encourages speculation, ideas as well as mistakes and being in uncertainties, mysteries, doubts, without any wrong answers. If we don't have a place where that can happen, we can't uncover the solutions and the right answers.

John Keats  
Jacob Rockowitz

Drupal is the worst Content Management System except for all those other solutions

# How big is big?



Bureau of Labor Statistics

# Trends: Small companies getting smaller

- For companies smaller than 500 employees, the average firm size was roughly 19 in 2001, and roughly 13 in 2011
- New businesses are starting and staying smaller

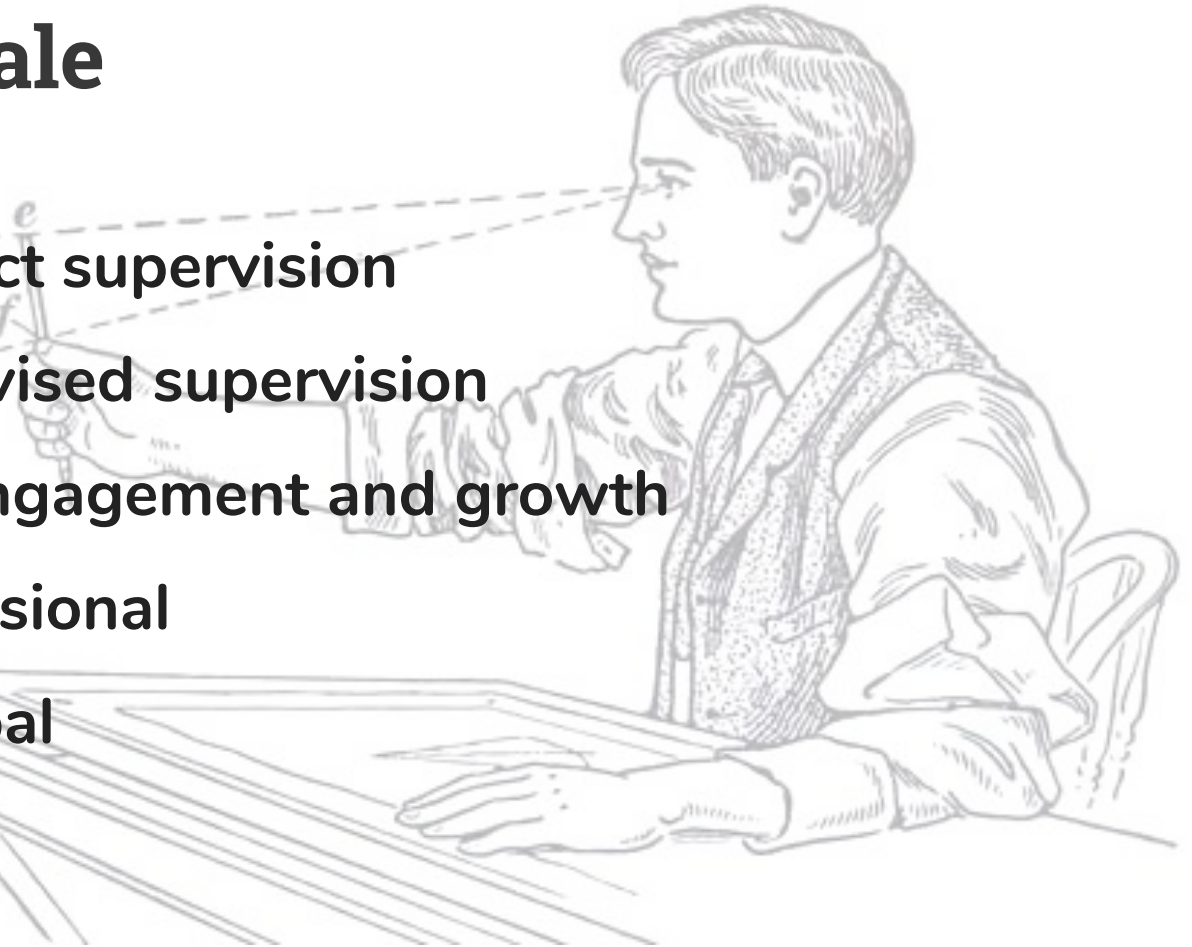
# Trends: Big companies getting bigger

The average size of companies with between 500 and 10,000 employees increased by roughly 35%. During those 10 years to roughly 2,200 employees on average.

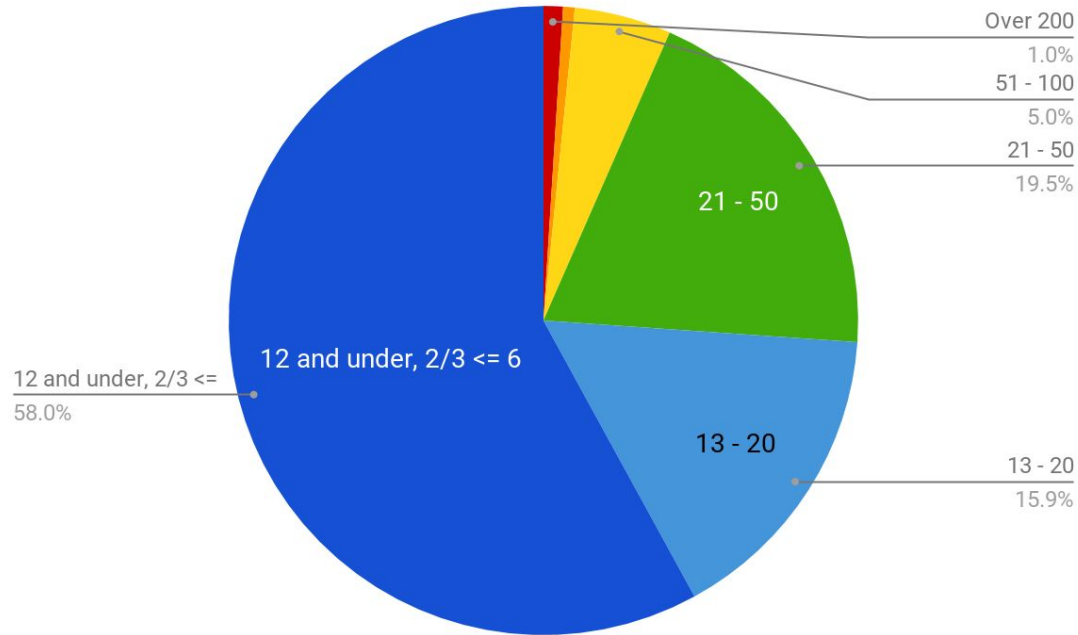


# Measuring Scale

- Under 20 - Direct supervision
- 20 - 50 - Supervised supervision
- 50 - 100 - Disengagement and growth
- 100 - 500 - Divisional
- Over 500 - Global



# Size in the Drupal Ecosphere



Source: Drupal Marketplace

# Small Agencies Abound

- Majority of the community works for “small” shops
- 74% of Drupal service providers have 20 employees or less
- Less than 2% of Drupal service providers have over 200 employees
- The focus of larger Drupal organizations is hosting, marketing, and consulting

# Small Agencies Are Essential!

- How accurate is the current narrative?
- How do we rally the majority of Drupal service providers?
- How does this majority thrive with Drupal 8?



**Enterprise Software**

# What is enterprise software?

- Satisfies the needs of an organization rather than individual users
- Business-oriented tools
- Costs more
- Complexity requires specialists to implement

# How is enterprise software purchased?

These "enterprises" use a lot of software, but most of that software doesn't get sold to the "enterprise" itself; it gets sold to one of the employees of the "enterprise", who has the authority to spend \$400 or whatever to get the software they personally use to do their job. That's not "enterprise" software, because it's sold to an individual, not a so-called enterprise.

"Enterprise software" is software that has to be sold to an "enterprise", where someone who doesn't use the software (typically a manager) must be persuaded to use his purchasing authority to buy the software. It's different in a variety of ways from other software, but none of these ways are strictly technical.

# How is enterprise software sold?

- Target C-Level Decision Makers
- Engagement through sales person
- Longer sales cycles
- Pay annually rather than monthly
- Add-ons and upsells
- Focus on big deals



# But...

*With the average American adult spending more than 60 hours per week on digital devices, quality expectations for software have risen dramatically. These new expectations have especially had a strong influence on the progress of software in the enterprise.*

Wired Magazine, "Enterprises Look to Consumer Apps for Software Inspiration"

# The Consumerization of IT

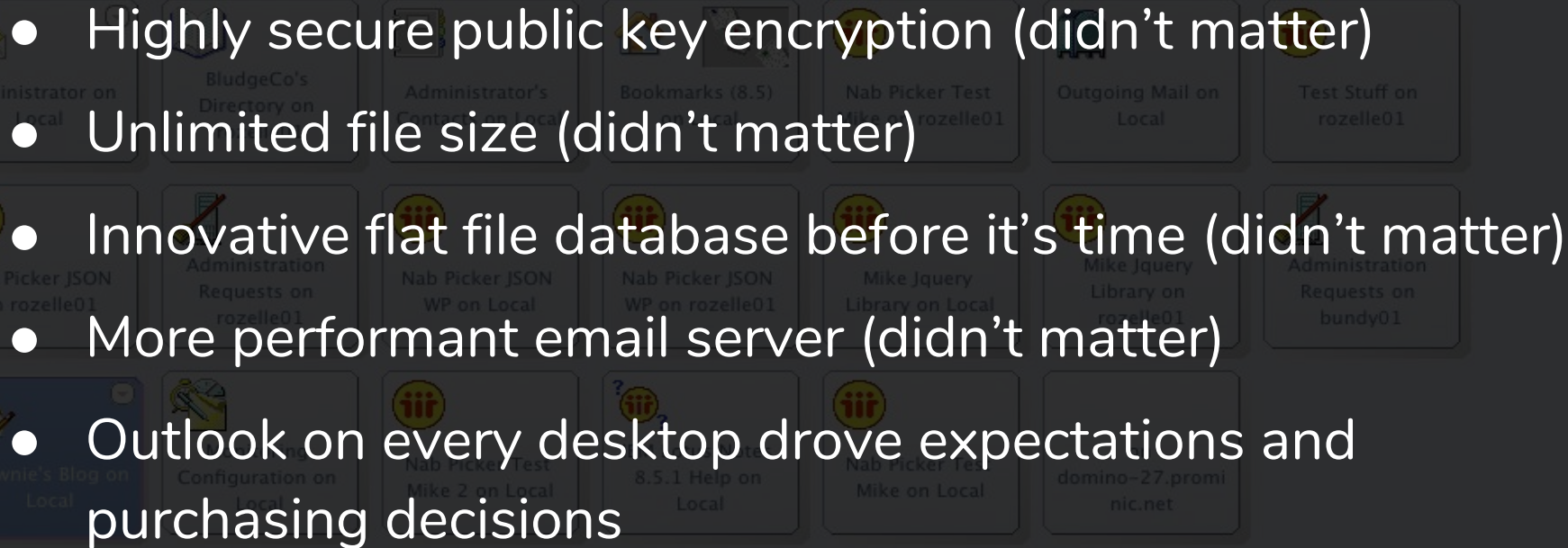
- Disruption of processes
- BYOD (Bring Your Own Device)
- Consistent User Experience
- Multiple Devices
- Easier Sharing
- Frictionless customer-facing systems

# Consumer Market is Important

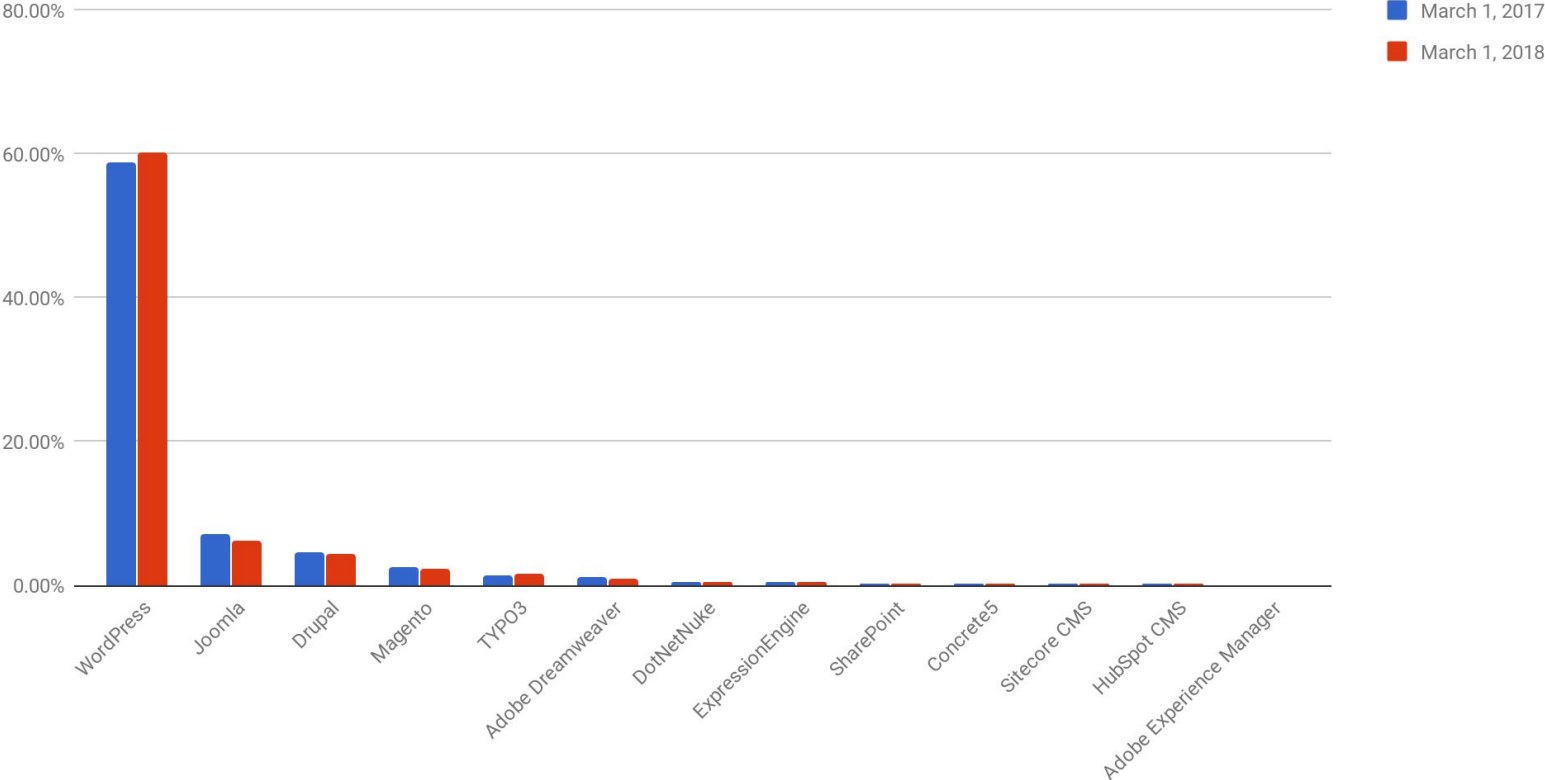
- Faster Innovation
- Higher bar for usability
- Market influence
  - Consumers are enterprise decision makers
  - Mixed environments
  - Cross-over applications



**FRACTURED  
FAIRY  
TALES**

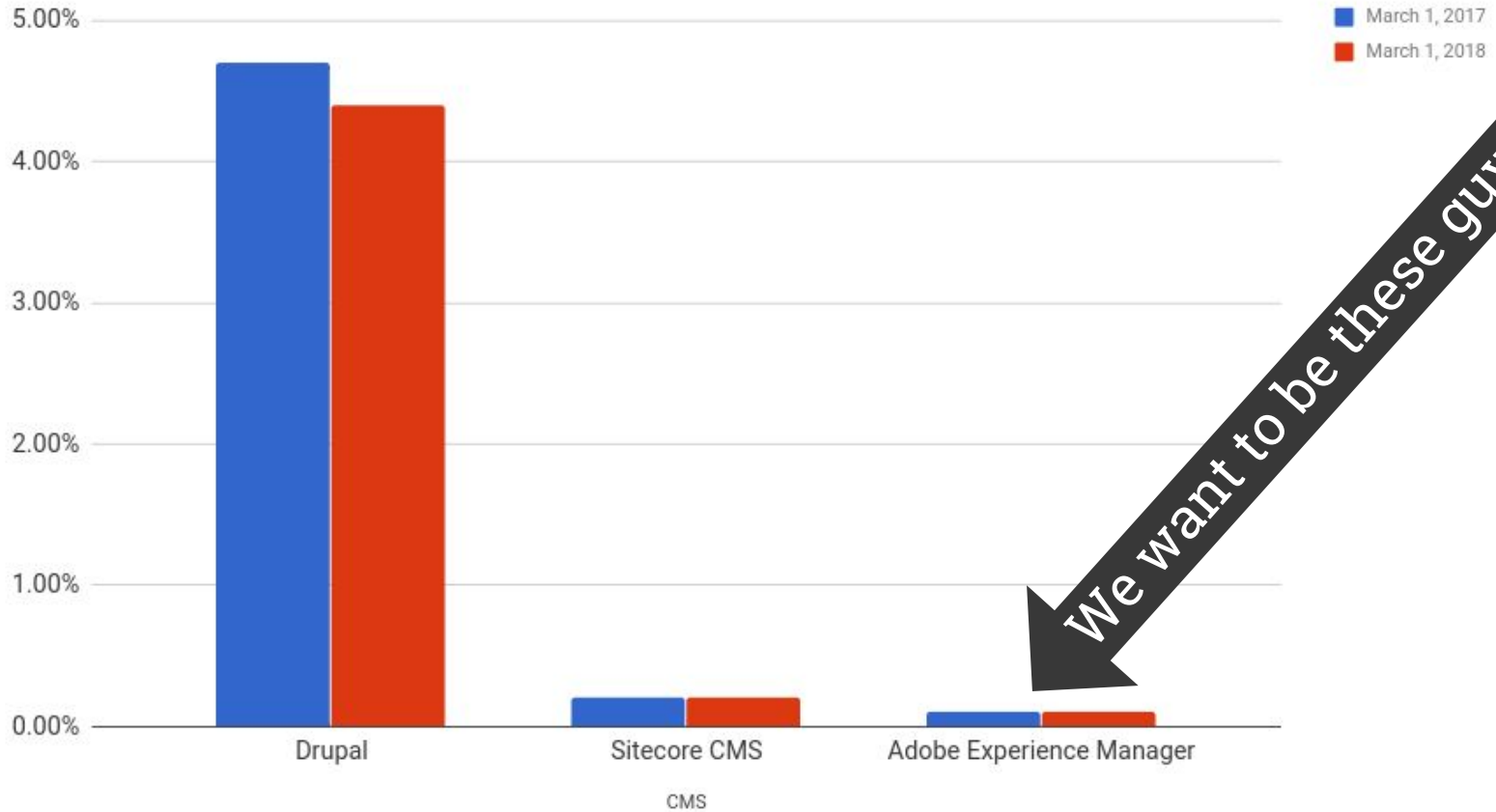
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- Workspace – IBM Lotus Notes
- Open Home Workspace Brownie's Blog – Blog Brownie's Blog – (Images \ Category) Replication and Sync
- Bundy
- Highly secure public key encryption (didn't matter)
    - Unlimited file size (didn't matter)
  - Innovative flat file database before it's time (didn't matter)
    - More performant email server (didn't matter)
  - Outlook on every desktop drove expectations and purchasing decisions

# CMS Market Share Trends



CMS

## CMS Market Share Trends - Enterprise Competition



# Enterprise market is complicated

- Selling to the Enterprise is complicated
- The consumer market influences the enterprise market
- Giving up ground in the overall CMS market presents a huge risk
- Differences may be more social than technical



# Enterprise Drupal?

Figure 1. Magic Quadrant for Web Content Management



Source: Gartner (July 2017)

# Acquia ≠ Drupal

- Business Strategy
- Resources
- Target Market
- Value Proposition

There are enough opportunities to go around

“2016/17 and D8 has been a big shakeout for talent in Drupal. A lot of people who could operate in commercial Drupal delivery in 2012-2015 (with demand outstripping supply markedly) simply will not be viable candidates for Drupal work in 2018. **There is no 'easy" work left and many people** who came in during the good times **will not be able to sustain careers** in the new world.”



# Drupal 8 is Hard

- Was Drupal 7 easy?
  - Site building became a thing
- Hard for who?
  - Site builders
  - Programmers
  - Themers
  - Users

# Drupal 8 is Hard

## Creating a site on local machine

Framework	Clicks	Commands run	Total Time
<b>Symfony</b>	3	3	<b>1:55</b>
Wordpress	7	0	7:51
Laravel	3	9	17:28
Drupal	*20+	0	*15:00+


\* Spoiler, I gave up counting clicks and reading docs on Drupal.org after 20 clicks and 15 minutes.

# Drupal paradox

Lower required skills lowers costs / Complexity raises required skills & costs

We wanted Drupal to be easier to use / But we made it more complicated

We build stuff for site builders / But we tell them Drupal 8's not their thing

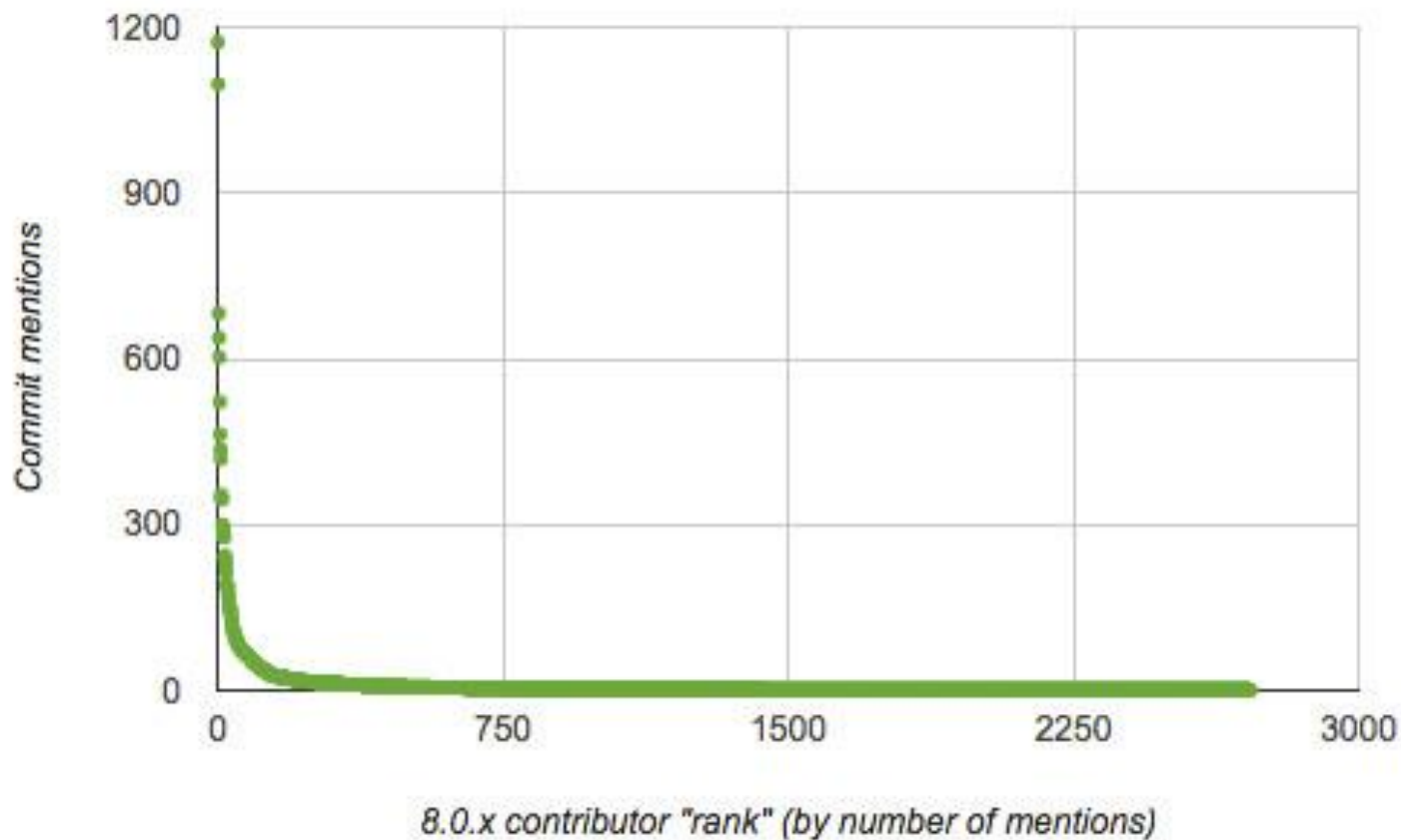


**YES! I am invincible!**





## The long tail of Drupal 8.0.x contribution



# Drupal Community

- Individuals and small shops create Drupal talent
- Individuals and small shops contribute to core and contrib
- Individuals and small shops drive adoption
- Individuals and small shops sell Drupal

# Let's Get Small

There's no direct correlation between big companies getting bigger and smaller companies closing.



Employment of web developers is **projected to grow 15 percent from 2016 to 2026**, much faster than the average for all occupations. Demand will be driven by the growing popularity of mobile devices and ecommerce.

# Good News

- *Social media ad spending is expected to pass newspapers by 2020*
- *1 million Drupal 7 sites need to be migrated*
- *Around 46% of websites do not use a CMS*
- *Nearly half of small businesses do not have a website*
- *A majority of websites are still not mobile friendly*
- *Websites created or redesigned by federal agencies for*

# Small & Medium Business / Mid-Market

- 101-500 employees
- \$10 million- \$1 billion Annual Revenue
- Main considerations for technology purchases include capabilities, functionality, and reporting
- If the middle market were a country, its GDP would rank it as the fourth-largest economy in the world

# Competing Against a Bigger Business

- Make size your strength
- Flexibility / Speed
- Personal
- Local
- Be unique
- Work with larger businesses



# Selling Small Agency Drupal

- Nimble Design & Build
- Personalized Support
- Content Marketing
- Upgrades / Migrations
- Consulting / Shock Troops
- Leverage Complimentary Technologies and Services

- If your agency is small, you're in the majority
- We're open source
  - Stay involved - Let your voice be heard
  - Contribute - Help steer the ship
  - Let's make Drupal easier
- You're in demand
- Drupal has always been for the enterprise



# Related Talks

## **In defense of small Drupal**

Wednesday 5:00 PM, Room 204

David Snopek, Co-Founder at myDropWizard, Inc.

## **WordPress vs Drupal: How the website industry is evolving**

Wednesday 2:15 PM, Room 205AB

Zack Rosen, CEO at Pantheon Systems

# References

**Drupal is the worst Content Management System except for all those other solutions** Jacob Rockowitz

**Have We Reached Peak Drupal?** Owen Lansbury

**Drupal, We Need To Talk.** Dave Hall

**Why is Drupal now the second most hated platform behind SharePoint?** dryer

# References

<https://drupal.sh/drupal-hated-sharepoint-platform-stack-overflow>

<https://www.drupal.org/association/blog/drupal-business-survey-2017>

<http://www.businessinsider.com/us-employment-by-firm-size-has-a-fat-tailed-distribution-2015-6>

# Questions

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Community

[Drupal4Gov / DrupalGovCon July 31 - Aug 2](#)

[meetup.com/Baltimore-Drupal-Meetup](http://meetup.com/Baltimore-Drupal-Meetup)

Baltimore DrupalCamp coming Fall 2018



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