



LOS ANGELES

DRUPALCON 2015



Nurturing Growth and Success in Digital Business



How To Run A Drupal Agency

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*** Warning:**

I HAVE NO IDEA!

**I've just tried lots of stuff, failing and succeeding,
and this is what I've learned**











Clients

Team

Brand

Tools



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Clients



Select the right clients

Establish a solid and equal relationship

Set clear billing principles

Manage the account

Selecting Clients

- ▶ **Your business is defined by the clients and projects you say 'No' to.**
- ▶ **Select your clients, just as they select their agency.**
- ▶ **Know what your kind of client is.**

Example: A Wunder client should...



Be looking for a long term partnership rather than a one-off project.

Be interested in working collaboratively rather than just sending a briefing document.

Understand that launching a website is getting to the start line, rather than the finish line.

See digital as core to the future of their business.

Have hard problems to solve which need more than a pretty brochure-ware style approach.

Be willing to work with our approach to delivery (unless they can show they deliver more successful web projects per year in a client/agency relationship than we do).

Be willing to work in an open and transparent way.

Have staff members that we would enjoy working with.

Be a company we would be proud to say we work with.



- 1. Idea / Contact / RFP**
- 2. Stop / Go Decision**
- 3. Discovery**
- 4. Prepare and Prove**
- 5. Proposal**
- 6. Presentation**
- 7. Agreement**
- 8. Retrospective**
- 9. Set up for Delivery**

	A	B	C	D
1	Wunder - New Client/Project Evaluation			
2		Client Name		
3		Project Name		
4		Stage at which we are evaluating it		
5		Date		
6				
7		Evaluator 1	Evaluator 2	Average
8	Evaluator Name			
9	Really really rough guess at budget required for project (GBP)	0	0	0
10	Really really rough guess at timescale required for project (weeks)	0	0	0
11	Really really rough guess at a suitable team size for project (headcount)	0	0	0
12		£ 0.00	£ 0.00	
13		1=Disagree, 10=Strongly Agree		
14	I know enough about the project to estimate it and write a proposal	0	0	0
15	We have the experience and skills to deliver this project	0	0	0
16	The project is a good fit for the technologies we use	0	0	0
17	External factors are manageable (3rd parties, integrations, risks etc)	0	0	0
18	The procurement process is reasonable for the project size	0	0	0
19	The project delivery timescale is reasonable	0	0	0
20	The project is financially viable (budget, billing timetable, payment terms)	0	0	0
21	The client is experienced in, committed to, or open to, Agile working	0	0	0
22	We have the right people available for the dates	0	0	0
23	We can show convincing evidence of our suitability for the project and client	0	0	0
24	The client is a good fit (strategy, culture, values, location, ways of working etc)	0	0	0
25	It's a client we'd be proud to say we work with	0	0	0
26	We have a relationship with a good contact at the client already	0	0	0
27	It's an opportunity to produce something great	0	0	0
28	There is an opportunity for a long term relationship	0	0	0
29	We are likely to win this (1 point for each 10% of likelihood)	0	0	0
30	I really think we should do this project (complete personal gut feel)	0	0	0
31	Total	0	0	0
32	Average	0	0	0
33				
34	Agreed Go / No Go Decision:		No-Go	



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Establish Relationship

- ▶ **Equal: mutual trust and respect**
- ▶ **Defined: contract, on-boarding, training, expectations**
- ▶ **Multiple contact points - like a zipper**
- ▶ **Suitable billing and payment terms**

Billing principles

- ▶ **Bill by sprint or day - but not by hours**
- ▶ **Bill a fair day rate for your talented people**
- ▶ **Bill for all the work you do**
- ▶ **Reward the client for helping your utilisation**

Manage the account

- ▶ **Maintain relationships with stakeholders**
- ▶ **Regular reviews**
- ▶ **Look for ways to do things better for them, maximise your value, and fix problems fast**
- ▶ **Provide advice, ideas, contacts, etc**

No Customer Is Forever

- ▶ **Never let one client be more than 20% of turnover**
- ▶ **Always be prepared to walk away**
- ▶ **Be ready for change at their end**
- ▶ **Manage a smooth and friendly exit**



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Know the right kind of person for your company

Recruit selectively

Pay well

Set people free to do great things

Support the team

The Right Person

- ▶ **Recruit for character, train for skills**
- ▶ **Know what kind of character you want**
- ▶ **You are building the culture of your company**
- ▶ **Better to grow slower and turn down work than recruit the wrong people**

Recruit Selectively

- ▶ **No recruitment agents. Advertise widely, use your networks**
- ▶ **Have a clear process that can help find and select the right kind of person**
- ▶ **Give people the chance to try out, and an easy out if it doesn't work**

Pay

- ▶ **Pay package should be roughly 1/3rd of likely billing for year**
- ▶ **Roughly 220 potentially billable days per year.
Assume utilisation of 80% = 176 days**
- ▶ **$176 * (\text{day rate}) / 3 = \text{a guideline for salary package}$**

Billing Income

The diagram consists of three vertical rectangular columns of equal width, each representing one-third of the total. The left column is orange, the middle is light green, and the right is light blue. A large black arrow points from the right side of the middle column to the left side of the orange column, with the text 'Billing Income' centered on the arrow. Below each column, the text '1/3rd' is centered. The labels 'Team Costs', 'Overheads', and 'Contingency & Profit' are placed in the middle of each column respectively.

Team Costs

1/3rd

Overheads

1/3rd

**Contingency
&
Profit**

1/3rd

BEWARE
OF POLE
WHEN REVERSING



You look after the team,
the team looks after
customers



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Document the way you do things

Use the simplest things that work

Train people

Measure, Track, Report

Continuously improve

Steve Hunton

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Keeper of the Wunder Way.
Leads our work to standardise our
processes and tools, and gain
quality accreditations.





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Use the simplest things that work

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Leisure centre winner is Steve

The winner of a competition to name the new leisure centre in Selby is Steve Wadsworth.

He has won a free year's membership from Wigan Leisure and Culture Trust (WLCT).

He chose the name 'Selby Leisure Centre'.

Purpose !





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The SENATE







Problems

- ▶ **Under-charging, under-estimating, under-billing**
- ▶ **Taking on the wrong clients and projects**
- ▶ **Building sites, not building a business**
- ▶ **Not knowing how you are doing**
- ▶ **Wasting time**

Fixes

- ▶ **Review your day rates, utilisation and project profitability**
- ▶ **Review all your clients and projects. Any that you need to improve the balance with, or part with?**
- ▶ **Document the 'way' you do things**
- ▶ **Implement proper project and business reporting**

Work ON the business,
not IN the business.

This year thousands of men
will die from stubbornness.

NO WE WON'T

Learn the preventive medical tests you need. ahrq.gov



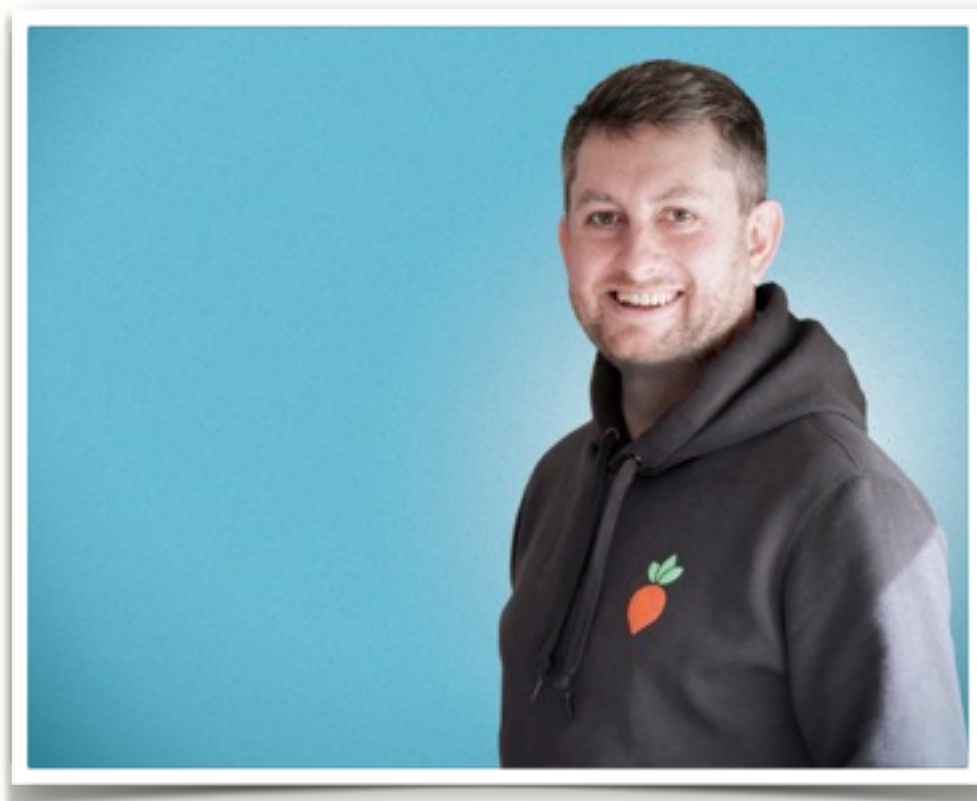
LAMAR

LS201

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Thanks! Keep in touch...



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