

WINNING AND DELIVERING BIG PROJECTS FROM A SMALL AGENCY PERSPECTIVE

DRUPALCON BARCELONA 2015

By [Ramon Vilar](#) / [@rvilar](#)

ABOUT ME



Ramon Vilar

@rvilar

<http://ymbra.com>



INDEX

1. Context
2. The team
3. Sales process
4. The methodology
5. Working closely
6. Culture
7. Impact in your business

CONTEXT

SMALL AGENCY

During this session, we can define a small agency as:

- Team with 3-10 people
- Multifunctional
- Horizontal

TYPICAL PROJECTS

- 1 to 4 months
- Every project from a different client or sector
- When working for big client, usually working through big agencies

OUR DESIRE

We want to remove layers between us and our clients to
work closely with them

We want projects during at least 6 months to not change very
often

Try to repeat several projects with the same clients

How can we do that and how we can transform our agency to
be the *perfect one* for them?

THE TEAM

THE TEAM

- It's impossible to have all the expertise in our team (cause the size)
- Two alternatives:
 - Generalists
 - Focus in some services

GENERALISTS

- Our developers, as in SCRUM, won't have any specific area of expertise
- They *can do* frontend or backend
- Alike, you will usually have people in your team more specialist in back or front

SERVICES

- Focus your business in a specific set of services
- As more focused in a set of services, your team will transform in more specialists on that
- Big clients usually have specific needs in some areas: performance, frontend, etc. Transform your team in a solution for that need

PLANNING YOUR RESOURCES

- What about deadlines and working peaks with a small team?
- Try to adapt your team to the work you usually have
- Beware the mistake of hiring new developers on working peaks
- Create a network of contractors (freelance) and teach them your methodology
- Use them to solve working peaks

SALES PROCESS

How to introduce you in that customer type?

- Classic
- Use same customer type to introduce you
- Be an expert and then try to be a need for them

For us, for example, it's easier to enter to a client for IT department instead of marketing

THE METHODOLOGY

BIG IN FRONT OF SMALL

- Usually big clients use classical methodologies into their organization
- This involves a lot of "unnecessary" documentation and is usually too slow for our day-to-day work
- It can be a pitfall for small agencies

OUR METHODOLOGY: INTERNAL

- Using agile as methodology to organize our development (mandatory in small teams)
- User stories in project backlog
- Organizing with 2-3 weeks sprints
- Retrospective at the end of every sprint to try to prevent pitfalls on development

OUR METHODOLOGY: EXTERNAL

- Only one person or small group (2-3 people) as contact for the project development (include at least one IT person)
- Try to extract all the requirements before starting development
- More in depth on requirements during the development
- Backlog prioritization with the client
- Demo meeting after every retrospective meeting with demo test plan for the client

WHO SHOULD CHANGE

- Clients usually don't use agile in their processes
- Adapt their workflow to use agile
- Don't try to use all agile techniques in the first project: slow progress during projects
- Retrospective at the end of every project to show them the agile positive things (and what need improvement)
- Introduce new changes in the methodology for next project

WORKING CLOSELY

CLOSELY WITH MANAGERS

- As a small agency, you need to remove all the classic layers
- Replace sales person for a technical that sales projects
- Use plain and direct language
- Don't hide problems nor benefits

CLOSELY WITH IT DEPARTMENT

- Integrate you with the IT department: try to be their counselor
- You should not be a simple provider. You must be their helper
- Be part of their team

CULTURE

TEAM CULTURE

- How do you explain to a client that the team won't work this week for DrupalCon? And DevDays? And DrupalCamp?...
- How do you explain that you "waste" project time in module fixes and patches?
- Be plain in your explanation

PROJECT AND COMMUNITY

- It's a benefit for them to improve Drupal as a platform
- Introduce them to the community culture
- Help them to create a page in d.o and give credit to the patches and modules developed for them
- This benefits them into the community too

IMPACT IN YOUR BUSINESS

FINANCES

- Big clients are usually slow on payments or have a very strict process
- This can be dangerous for finances in a small agency
- Introduce agile in your budgets for large projects
- Invoice at the end of every sprint or n sprints

TEAM

- Developers may end up bored to work in big projects
- Be careful with rotation
- Try to combine big and small projects on teams
- Involve them in all project phases
- Motivation is the key

CONCLUSIONS

- This is not a TODO to follow, is a recipe
- Take care of your team
- Humanize the relationship with your client
- IT department is better than marketing to introduce you

THANK YOU VERY MUCH!

Ramon Vilar

@rvilar

<http://ymbra.com>

