

# Tips For Running Your Drupal Agency



*You may be an expert in  
Drupal, but do you know how  
to run your business?*



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In the Drupal Association’s white paper, [“Growing Your Drupal Business”](#), we discussed many important aspects of starting and running an agency, including ideas about creating a business plan, building a corporate culture, and targeting your ideal customers. Once you’re set up, it is just as important to understand how to keep the business running smoothly and make it profitable for the long haul. In addition to hiring the best and brightest people— creative workers, technical workers, and management— success often comes from building the best business model that will generate the best results possible while helping your employees and clients enjoy their experiences working with your organization.

In this paper we will discuss some of the key issues that Drupal agency owners and company leaders face as they grow their business, including:

- Building a business
- Establishing business processes
- Hiring the right management mix
- Building relationships with clients
- Promoting Drupal to potential clients

## Building a Business

Let’s face it, the odds are that you started a Drupal agency because you are creative and enjoy building things in Drupal. Running a business may not initially be your strongest suit, and that is OK. Many books<sup>1</sup> have been published that discuss how to run a business; to save you time, here are a few areas that you should pay particular attention to when running your agency.

# Tips For Running Your Drupal Agency

## Write a plan

In order to create and intelligently grow your agency you will need to write a business plan. Simply hiring a bunch of developers and pursuing random clients will probably not set you up for long-term success. One of the most important parts of any business plan is identifying a set of goals and strategies and following it. If you do not have a strategy in place, then your agency will not be as well prepared to make decisions at potentially crucial junctures in its evolution. It is critical that you identify your goals, develop strategies and tactics that map to those goals, and put metrics in place to monitor your success. By following these guidelines you will be able to identify the types of clients that you want to work with and will be best able to serve.

Another important aspect of developing a business plan is gaining an understanding of how growth affects your agency. For instance, if you grow revenue by 10 percent, how many new employees would you be able to hire? What if you suddenly found yourself in a position to start working with a new client that will require a lot of resources? How would you know how to staff for that client? By establishing metrics for your business, including determining a headcount for developers, creative, and administrative staff, you will have a much easier time adjusting for growth.

## Plan for adjustments

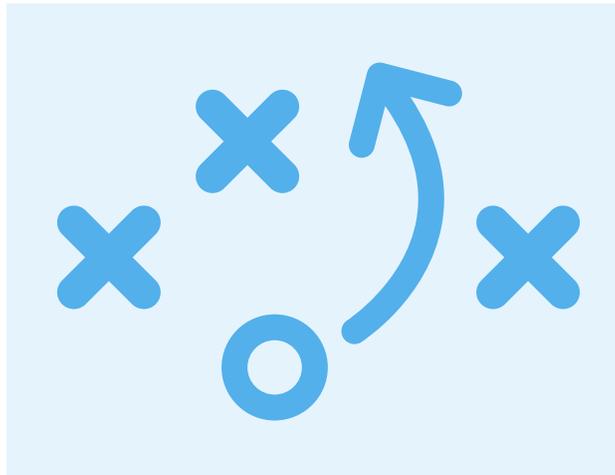
Even the best laid plans can go awry. Sometimes these changes are under your control, and other times you have no control. But part of being a leader of a creative agency means that you have to continually re-evaluate your plan and do a course correction which, in the business world, is generally referred to as a “pivot.” Being flexible is important for a business’ ability to adjust to changes in the market. It is commonly understood that planning for zero pivots means you are at risk because you are being too rigid. At the same time, pivoting four or five times

in the first year or two should raise a red flag indicating that your business plan probably needs to be revisited. In a typical business, you will have one to two pivots in the first few years of your business.

## Building a corporate culture

While every employee has their specific strengths and areas of interest, it is important to create an atmosphere where everyone can be successful and comfortable. As the leader of the agency it is your job

to create this culture and the best way to do this is to build it into your company’s business plan. It may seem obvious to some, but you should consider doing such things as having a monthly happy hour, providing coffee, soda and other refreshments, and facilitating other social activities to help encourage team-building and establish trust between employees. Creating this type of atmosphere helps lighten the mood inside the office, which is important especially when there is a deadline looming and the stress level may rise.



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At the same time, it is important to remember that you are running a business, not a recreation center. In order to provide a balance between work and play you should design a management structure that supports your goals and strategies but does not have a negative impact on your corporate culture. Do not be so rigid that your management team misses out on the fun, but always be mindful that the success of the business depends on the quality and timeliness of the work that is being produced.

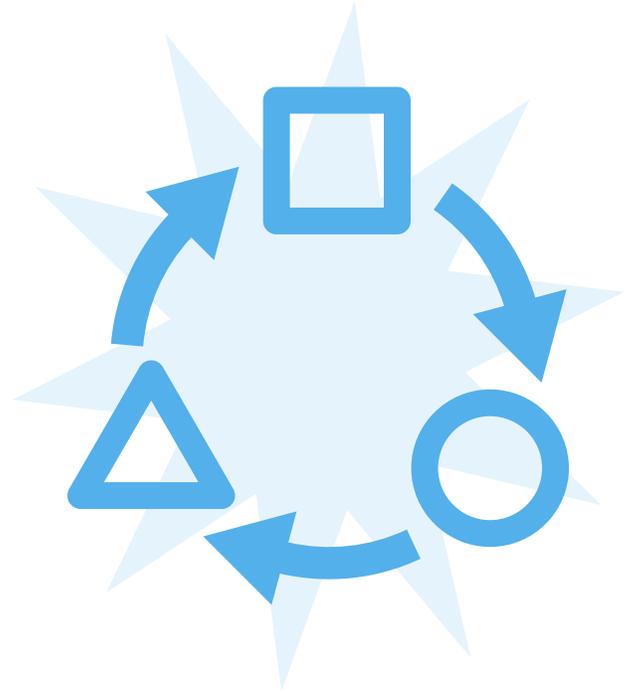
Another aspect of building a corporate culture revolves around the role that the physical office plays. With so many people in the workforce working from home, understanding the pros and cons of the virtual office are important. Giving your employees the freedom to work where they want and when they want is a great benefit, but it is also important to understand how this impacts the entire team. There are many books available that can help you understand the phenomenon of deploying a virtual team.<sup>2</sup>

## Establishing Business Processes

An important part of creating a business plan is making sure that you build an infrastructure to ensure that your business runs smoothly. Here are three key areas that should be addressed when writing your business plan.

### Feedback loop

Creating an internal and external feedback loop is a great way to ensure the growth of your agency. An internal feedback loop is a way for your employees to share ideas with their managers or with the entire company. Sure, some of the ideas might be a little crazy, but this gives every employee a voice and makes them feel as though they're part of the larger team.



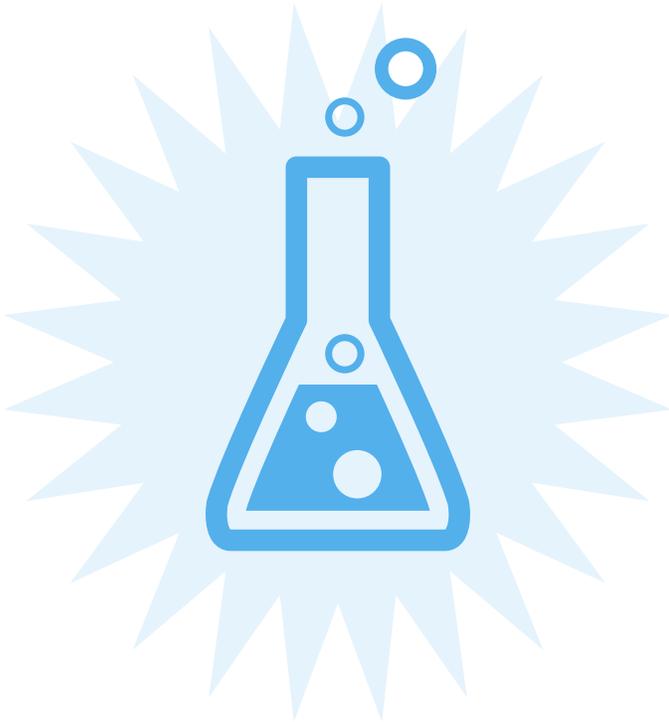
The external feedback loop is a very important part of your agency. You need input from clients to determine if your new business efforts are strong or need improvement; ensure you are following through on what was outlined in the project; and determine when you have delivered on your promises. Giving your clients a voice shows them that you value their opinion and that you are willing to listen and improve.

### Administrative processes

From the very beginning it is important to establish business processes to help your agency run smoothly. Outline the steps that it takes to secure new business including targeting specific types of clients, how to pitch an idea to a new client, internal applications needed to keep the machine running smoothly, and processes for incorporating new hires into the organization in order to make them feel welcome to the team. Also, financial forecasting processes are crucial to ensuring healthy cash flow and the ability to be agile as a business.



# The Drupal Opportunity for Web Hosting Organizations



## Formalizing Collaboration

Establishing feedback mechanisms and designing business processes are important because they help foster a collaborative environment. Collaboration is a word that is used quite often in the business world and with good reason. By collaborating, ideas are shared, processes are improved, and the end result is almost always better. Again, it is about encouraging clients and employees to share input and feel as though they are contributing to the betterment of your agency.

## Hiring the Right Management Mix

One of the more important hires, yet also one of the more underappreciated moves, is hiring a project manager or multiple managers as your business grows. Most of the employees in your business fall into one of the following categories: developers, sales and marketing, quality assurance, finance, and administrative. All of these departments are critical to the success of your company; however, having

a strong project manager can often make or break your company.

The project manager serves as the hub of each project since they are responsible for outlining the different phases of the project, creating the budget, communicating with the client, monitoring timelines, anticipating and/or identifying potential roadblocks, and appropriately allocating the resources of the internal team of developers. Just as important is the project manager's ability to set internal and external expectations and to keep the management team apprised of the status of each project.

Once the client has been engaged, the project manager is responsible for outlining the different phases of the project. While every project differs, there are three core areas that almost every project has: business analysis, project planning and development.

## Business analysis

- Outline the objectives and metrics and secure agreement with the client
- Confirm timelines, deliverables and ownership
- Make an internal risk assessment to secure buy-in from the management team

## Project planning

- Learn to be agile when it comes to planning
- Consider training to keep current on new technologies
- Explore new ways to develop storyboards

## Development

- User acceptance testing helps reduce or eliminate change request
- Delivery of the project
- Incorporate feedback, make changes and improvements



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## Building Relationships with Clients

Once the sales team has done its job and has secured an introduction to a potential client, it is time for the rest of the team to jump into the mix. However, before explaining the agency's capabilities, the project leader needs to demonstrate one of the most important skills of the entire team—listening. As former Chrysler CEO Lee Iacocca once said, “I only wish I could find an institute that teaches people how to listen. Business people need to listen at least as much as they need to talk. Too many people fail to realize that real communication goes in both directions.”

While this may seem obvious, it can be quite common for people with a technical background to focus on sharing what their capabilities are and what they can do rather than simply listening to what a prospective client is saying. This is especially important when outlining the scope of the project because you do not want your valuable in-house resources spending time on activities that the client is not interested in.

## Promoting Drupal to Potential Clients

The open source community is a very unique environment. Instead of buying expensive applications and service licensing agreements, those who work in the open source community do so

not just because they like to reduce costs, they do so because they want to be part of a collaborative community. The only way to grow the community is to be willing to share information and lessons learned with others, which means the entire community benefits.



When meeting with potential clients it is wise to educate them about the Drupal community. While some of this discussion will focus on the technical aspects of Drupal, the key issue to promote is how the community works together to improve results. Not only does this attitude promote collaboration within the community, it helps set the tone for your employees. By educating clients about the Drupal community, and helping contribute to the Drupal community through

message boards and presentations at industry events, the entire industry benefits.

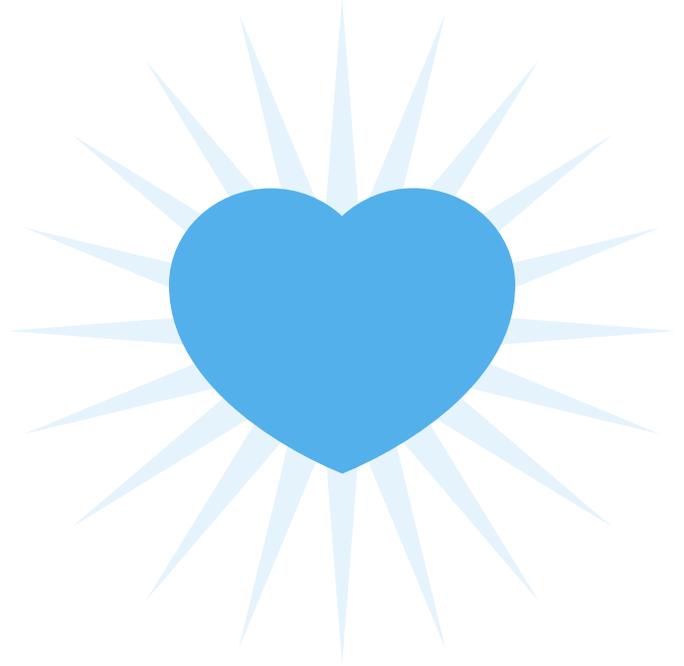
## You Are Part of a Community

Being the head of a Drupal agency can be both thrilling and overwhelming. Developing a plan, fostering an enjoyable environment, and establishing relationships with clients can be a very rewarding experience. Fortunately there are people and resources available the help you achieve your goals and realize your dreams. The Drupal community is one which draws from the experiences of those around you. The good thing is that you don't have to go it alone.

## Additional Resources

### <sup>1</sup>Books about running your own business

- Zero to One: Notes on Startups, or How to Build the Future
- The Lean Startup: How Today's Entrepreneurs Use Continuous Innovation to Create Radically Successful Businesses
- The End of Jobs: Money, Meaning and Freedom Without the 9-to-5
- The Hard Thing About Hard Things: Building a Business When There Are No Easy Answers
- The \$100 Startup: Reinvent the Way You Make a Living, Do What You Love, and Create a New Future
- The E-Myth Revisited: Why Most Small Businesses Don't Work and What to Do About It
- Agency: Starting a Creative Firm in the Age of Digital Marketing (Advertising Age)
- The Marketing Agency Blueprint: The Handbook for Building Hybrid PR, SEO, Content, Advertising, and Web Firms
- The Practical Pocket Guide to Account Planning
- Paid Attention: Innovative Advertising for a Digital World
- The Marketing Performance Blueprint: Strategies and Technologies to Build and Measure Business Success



### <sup>2</sup>Books about working in a virtual office

- The Virtual Office: Success Tools for Entrepreneurs and Small Businesses
- Virtual Freedom: How to Work with Virtual Staff to Buy More Time, Become More Productive, and Build Your Dream Business
- Work Smarter: 500+ Online Resources Today's Top Entrepreneurs Use To Increase Productivity and Achieve Their Goals: Updated and Expanded for 2015
- The Productive Person: A how-to guide book filled with productivity hacks & daily schedules for entrepreneurs, students or anyone struggling with work-life balance.

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