

ACCION VENTURE LAB

# Software, Systems, & Tools

DECEMBER 2020

ACCION



# Overview









- Between August and September 2020, Venture Lab surveyed **21 early-stage fintech companies** to understand what **tools and systems they use to power their companies' operations**
  - Respondents represent companies operating **around the world**, including the US, Latin America, Europe, Southeast and South Asia, and Africa
  - Respondents also represent **various sectors of fintech**, including MSME and Consumer Credit, Insurance, Payments, Neobank, and Personal Financial Management
- Respondents answered two surveys:
  - **Business Operations (“biz ops”) Survey:** Answered by CEO, asked for information about overall spend on software and focused on specific business operations including sales, marketing, recruiting, compliance, and HR (N=17)
  - **Developer Survey:** Answered by Head of Technology/CTO, asked for information about software related to managing software development and teams (N=14)
- The following **definitions and terminology** are used throughout the materials:
  - **Customer satisfaction** is based on the Net Promoter Score: *“Would you recommend this to a friend?”* (0-10)
    - “Promoters” rate a system very highly – must be either a 9 or 10
    - “Neutral” customers rate a system 7 or 8
    - “Detractors” rate a system 6 or less
  - Customers rated systems by their **value for money** on a score of 1-5
    - Excellent value for money (5.0), Good value (4.0), Average value (3.0), Fair value (2.0), Poor value (1.0)

# Executive Summary: Survey Insights











- **Later-stage companies tend to spend more on software**; early-stage companies should plan for step-change increases in their IT budgets especially at the Series A+ stage
- **Most companies, regardless of stage, more commonly use:**
  - Internal communications, CRM, help desk, and document collaboration biz ops tools
  - Version control, cloud hosting, continuous integration, and data management tools
- **Later-stage companies are more likely to use certain tools** related to:
  - Talent management (e.g., employee management, recruiting tracking)
  - Marketing (e.g., social media management, email management)
  - Web domain management
  - User testing
  - Deployment orchestration
- **Commonly used vendors** for each type of tool and **user satisfaction** with those platforms is detailed in the materials that follow

# Executive Summary: Most Commonly Used Tools

## Business Operations Tools

CRM 	Internal Comms. 	Help Desk 
Project Mgmt 	Data Analytics 	Recruiting 
Employee Mgmt <i>Various</i>	Social Media <i>Various</i>	Email Mgmt 
	Doc Collaboration 	

## Developer Tools

Version Control 	Cloud Hosting 	Web Domain 
User Testing 	Incident Mgmt 	Continuous Int. 
Deploy. Orch. 	Config. Mgmt  	Data Mgmt. 

# Business Operations Survey

# Overall software spend increases with company fundraising stage

*Approximately how much do you spend overall on a MONTHLY basis on software, systems, & tools? Please consider all monthly licensing fees and include both spend on developer and BizOps software, systems & tools.*

*Percentage of total software spend dedicated to Biz Ops tools varied significantly by company*

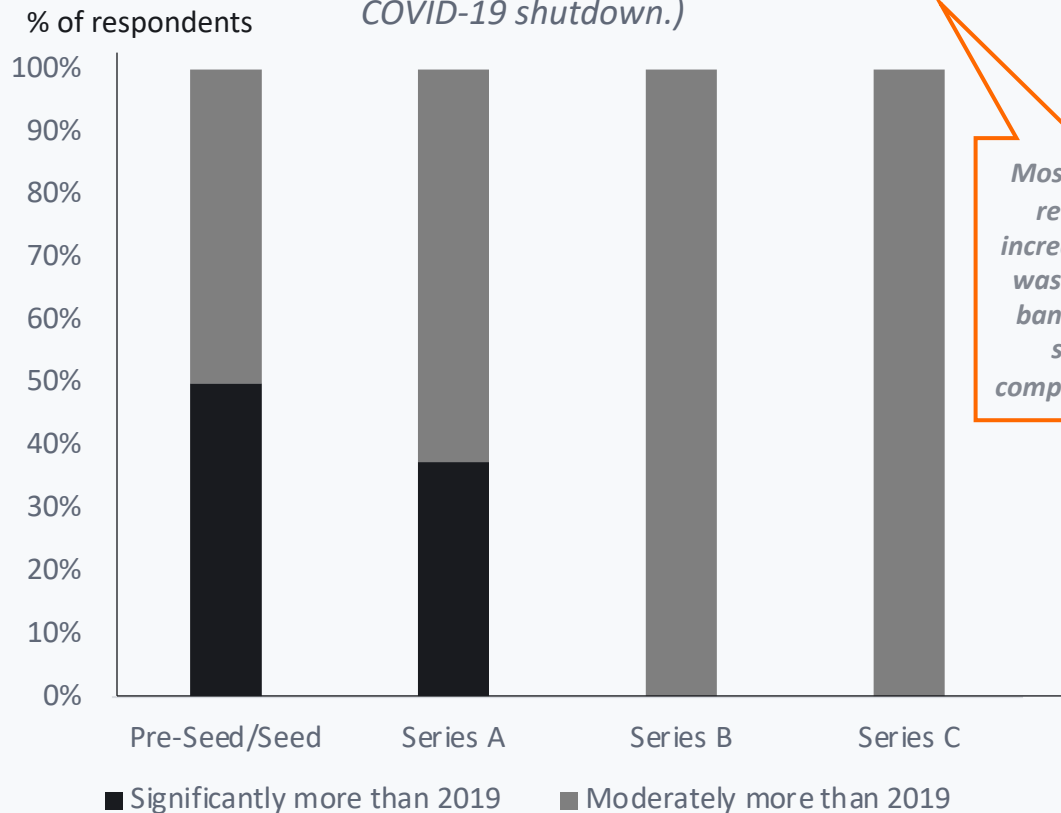
## Key Takeaways

- Monthly software spend is consistently higher among later-stage companies
- Companies should plan for IT costs to increase considerably as they grow



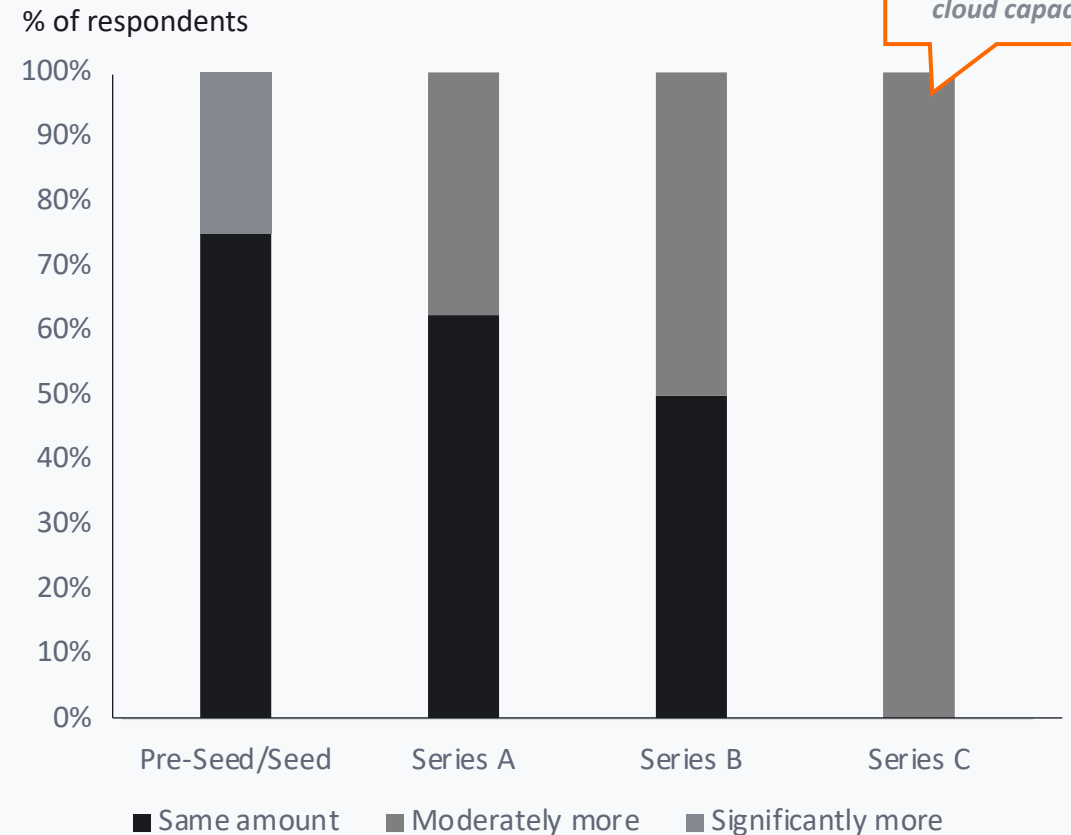
# Later stage companies saw the largest increase in Biz Ops IT spend vs. 2020 plans due to COVID-19

Did you plan to spend more or less on BizOps software, systems & tools in 2020 compared to 2019? (Consider your 2020 plans as they were developed prior to the COVID-19 shutdown.)



Most common reason for increased spend was increased bandwidth to support company growth

How has COVID-19 impacted your planned 2020 spend on BizOps software, systems & tools?



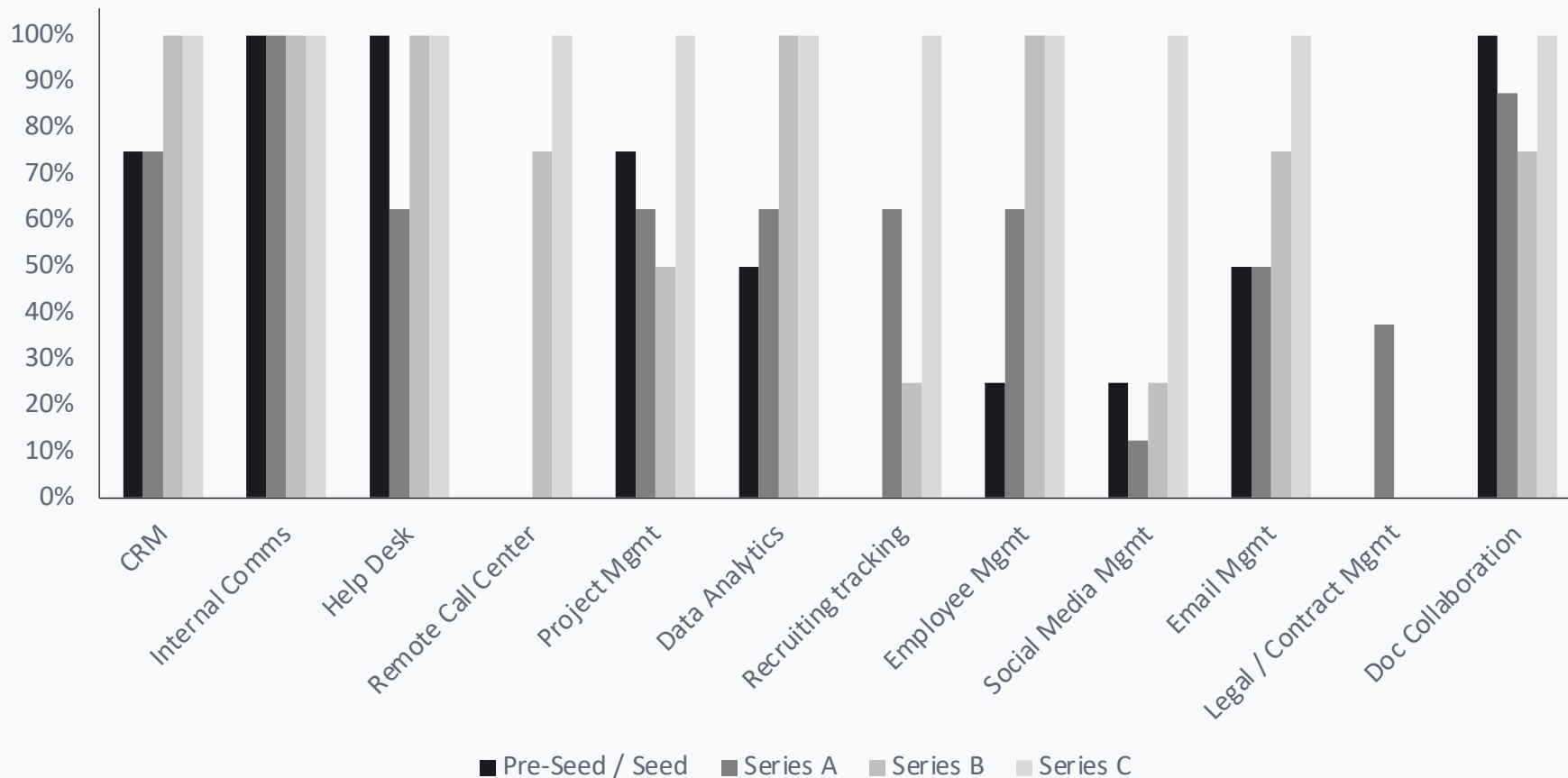
Companies that increased spend due to COVID typically added remote work tools (e.g., conferencing, help desk) or additional cloud capacity



# Later-stage companies are more likely to use various Biz Ops software systems

% of respondents using

*Do you use the following software, systems, and tools?*



## Key Takeaways

- Most companies, regardless of size, use internal comms, CRM, help desk, and document collaboration tools
- Later-stage companies are more likely to use certain tools related to:
  - Talent management (e.g., employee mgmt., recruiting tracking)
  - Marketing (e.g., social media mgmt., email mgmt.)

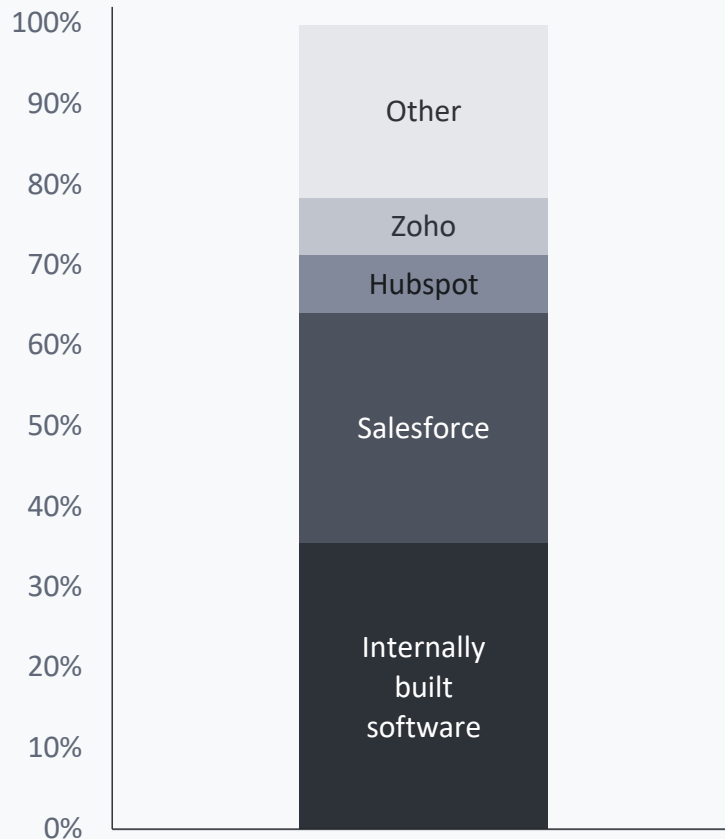




# Customer relationship management (CRM)

## Internally built solutions and Salesforce are most common CRMs

% of software users



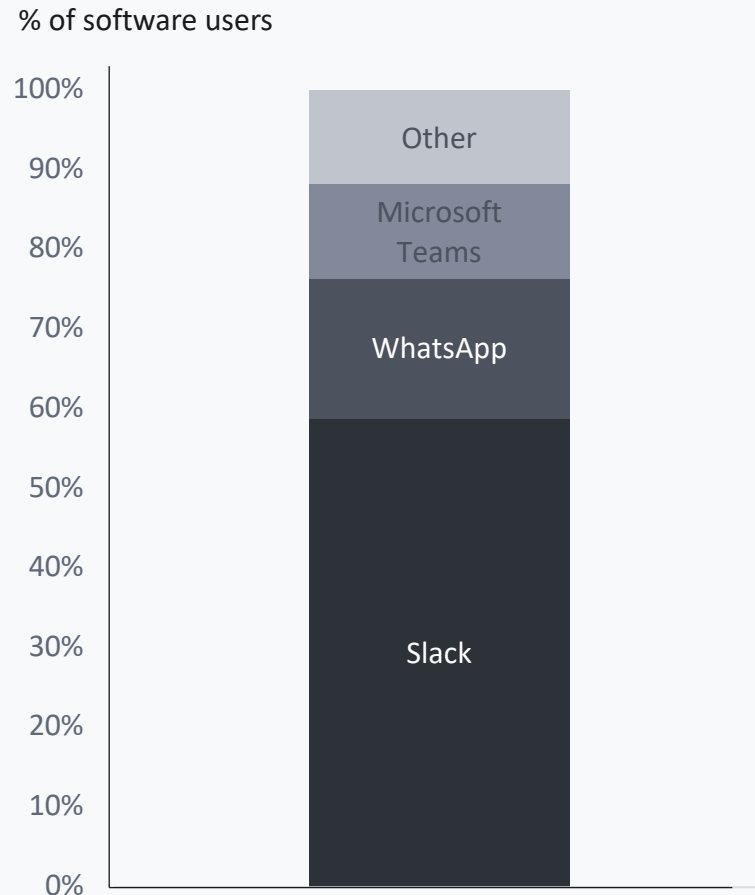
## Though more common, companies using internal solutions and Salesforce are generally less satisfied than those using Hubspot and Zoho

Company (# of users)	Satisfaction	Value for money	Pros	Cons
Internally built software (5)	<ul style="list-style-type: none"> <li>40% of users are promoters</li> <li>60% of users are detractors</li> </ul>	<ul style="list-style-type: none"> <li>4.5 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Flexibility</li> <li>Low cost</li> </ul>	<ul style="list-style-type: none"> <li>Slow / expensive to modify</li> <li>Requires significant tech resources</li> </ul>
Salesforce (4)	<ul style="list-style-type: none"> <li>50% of users are detractors</li> </ul>	<ul style="list-style-type: none"> <li>3.25 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Reliability</li> <li>Add-on/upgrade availability</li> </ul>	<ul style="list-style-type: none"> <li>Expensive</li> <li>Implementation can be difficult</li> </ul>
Other* (3)	<ul style="list-style-type: none"> <li>33% of users are promoters</li> </ul>	<ul style="list-style-type: none"> <li>4.33 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Value for money</li> </ul>	<ul style="list-style-type: none"> <li>Configuration required</li> <li>Lack of major brand name</li> </ul>
Hubspot (1)	<ul style="list-style-type: none"> <li>User is neutral</li> </ul>	<ul style="list-style-type: none"> <li>4.0/ 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Reliability</li> </ul>	<ul style="list-style-type: none"> <li>Limited data comparison ability</li> </ul>
Zoho (1)	<ul style="list-style-type: none"> <li>User is a promoter</li> </ul>	<ul style="list-style-type: none"> <li>4.0/ 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Ease to use / implement</li> </ul>	<ul style="list-style-type: none"> <li>Limited customization</li> </ul>

\*Other includes Vtiger, Zendesk, and Kontak (Zendesk user is promoter); Source: August 2020 AVL Biz Ops Tools & Systems Survey, N=17

# Internal Communications

## Slack and WhatsApp are most common communication tools



## Companies are satisfied with their internal comms tools; none have negative experiences

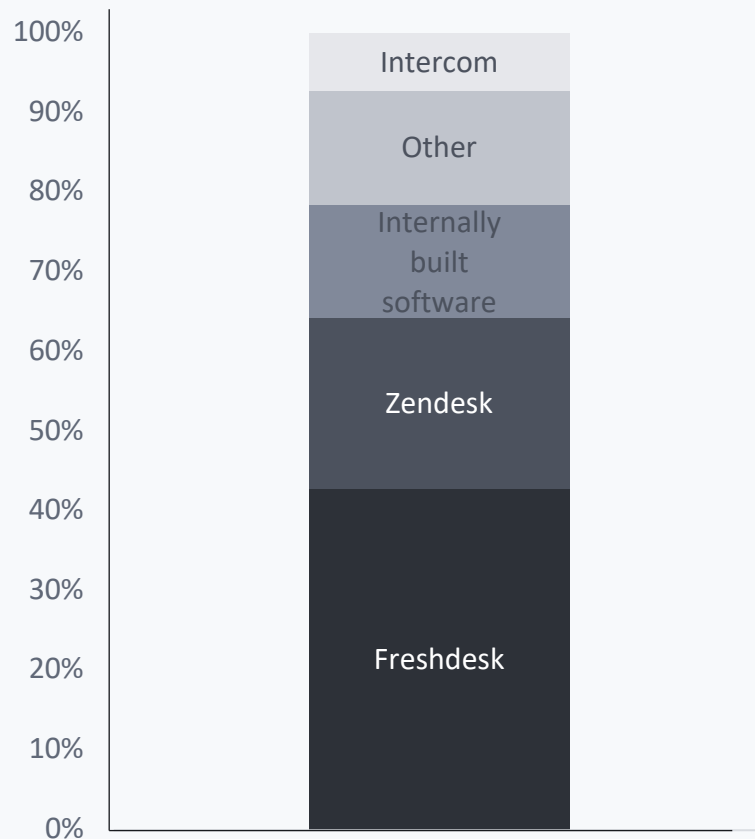
Company (# of users)	Satisfaction	Value for money	Pros	Cons
Slack (10)	<ul style="list-style-type: none"> <li>70% of users are promoters</li> </ul>	<ul style="list-style-type: none"> <li>4.5 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>User friendly</li> <li>Easy collaboration</li> <li>Integration with other tools</li> </ul>	<ul style="list-style-type: none"> <li>Cost</li> <li>Some video/app bugs</li> </ul>
WhatsApp (3)	<ul style="list-style-type: none"> <li>100% of users are promoters</li> </ul>	<ul style="list-style-type: none"> <li>5.0 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Free</li> <li>Widely used by employees and customers</li> </ul>	<ul style="list-style-type: none"> <li>Limited integration</li> <li>Privacy concerns</li> </ul>
Microsoft Teams (2)	<ul style="list-style-type: none"> <li>100% of users are promoters</li> </ul>	<ul style="list-style-type: none"> <li>4.5 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>User friendly</li> <li>Easy collaboration</li> </ul>	<ul style="list-style-type: none"> <li>None</li> </ul>
Other* (2)	<ul style="list-style-type: none"> <li>100% of users are promoters</li> </ul>	<ul style="list-style-type: none"> <li>5.0 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Seamless integration with other G-Suite tools</li> </ul>	<ul style="list-style-type: none"> <li>Limited non-Google integrations</li> </ul>

\*Other includes Google Chat and Hangout; Source: August 2020 AVL Biz Ops Tools & Systems Survey, N=17

# Help Desk

Freshdesk and Zendesk are most help desk tools

% of software users



Companies are generally satisfied with their help desk tools; none have negative experience, though value for money varies

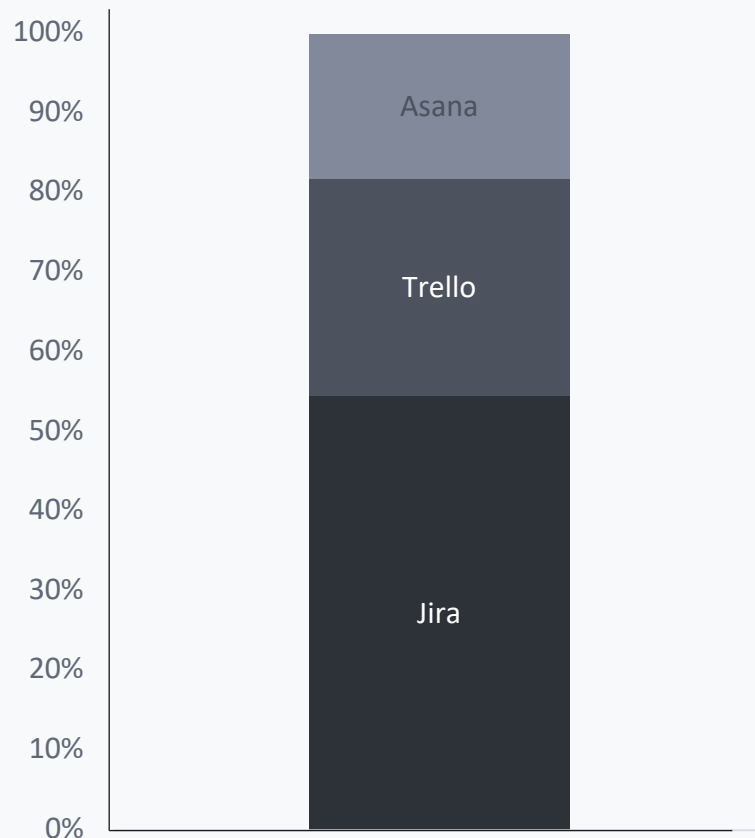
Company (# of users)	Satisfaction	Value for money	Pros	Cons
Freshdesk (6)	<ul style="list-style-type: none"> <li>83% of users are promoters</li> </ul>	<ul style="list-style-type: none"> <li>4.33 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Easy to use</li> <li>Helps with internal organization</li> </ul>	<ul style="list-style-type: none"> <li>Limited flexibility</li> </ul>
Zendesk (3)	<ul style="list-style-type: none"> <li>100% of users are promoters</li> </ul>	<ul style="list-style-type: none"> <li>4.0 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Easy to use / implement</li> <li>Integrates well with other tools</li> </ul>	<ul style="list-style-type: none"> <li>Relatively expensive</li> </ul>
Internally built software (2)	<ul style="list-style-type: none"> <li>100% of users are promoters</li> </ul>	<ul style="list-style-type: none"> <li>5.0 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Customized</li> <li>Inexpensive</li> </ul>	<ul style="list-style-type: none"> <li>Difficult / time-consuming to develop</li> </ul>
Other* (2)	<ul style="list-style-type: none"> <li>50% of users are promoters</li> </ul>	<ul style="list-style-type: none"> <li>3.5 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Integration w/ other tools (e.g., same provider as CRM)</li> </ul>	<ul style="list-style-type: none"> <li>Limited functionality / customization</li> </ul>
Intercom (1)	<ul style="list-style-type: none"> <li>User is neutral</li> </ul>	<ul style="list-style-type: none"> <li>4.0 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Easily accessible in browser</li> </ul>	<ul style="list-style-type: none"> <li>Less structured</li> </ul>

\*Other includes Abacus Call Manager and Qontak; Source: August 2020 AVL Biz Ops Tools & Systems Survey, N=17

# Project Management

## Jira is the most common project management tool

% of software users



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Source: August 2020 AVL Biz Ops Tools & Systems Survey, N=17

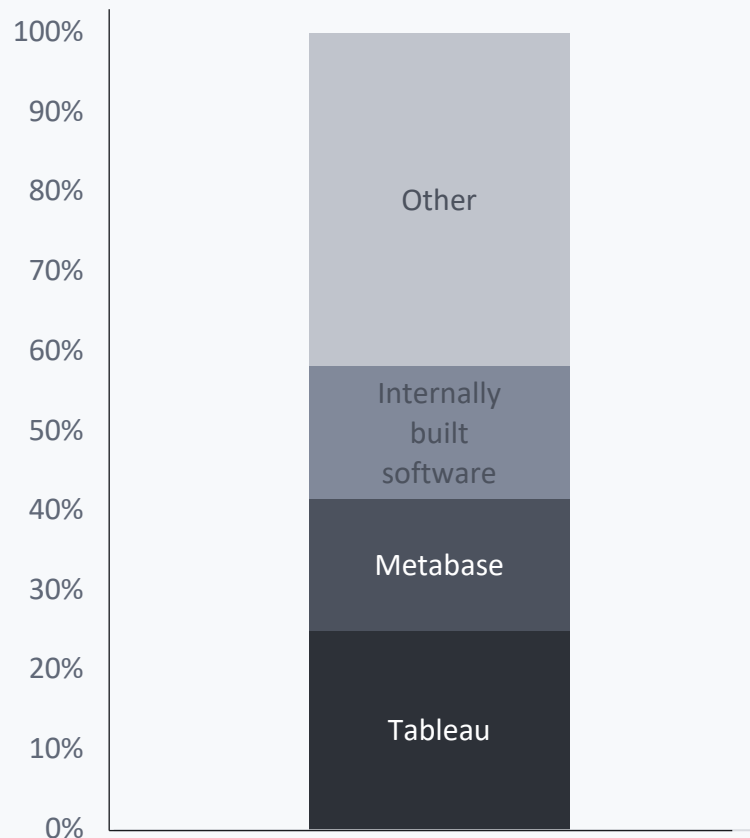
## Companies are satisfied with their project management tools; none have negative experiences, though value for money varies

Company (# of users)	Satisfaction	Value for money	Pros	Cons
Jira (6)	<ul style="list-style-type: none"> <li>67% of users are promoters</li> </ul>	<ul style="list-style-type: none"> <li>3.83 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Comprehensive functionality</li> <li>Widely used by Agile teams</li> </ul>	<ul style="list-style-type: none"> <li>Less user friendly for non-tech teams</li> <li>Weak mobile app experience</li> </ul>
Trello (3)	<ul style="list-style-type: none"> <li>100% of users are promoters</li> </ul>	<ul style="list-style-type: none"> <li>4.33 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Easy to use</li> <li>Helpful for stakeholder management</li> </ul>	<ul style="list-style-type: none"> <li>More limited functionality</li> </ul>
Asana (2)	<ul style="list-style-type: none"> <li>50% of users are promoters</li> </ul>	<ul style="list-style-type: none"> <li>3.5 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Flexibility</li> <li>Visibility across different projects</li> </ul>	<ul style="list-style-type: none"> <li>Not as applicable to waterfall projects</li> <li>Some features are less valuable</li> </ul>

# Data Analytics

**Tableau is the most common project management tool**

% of software users



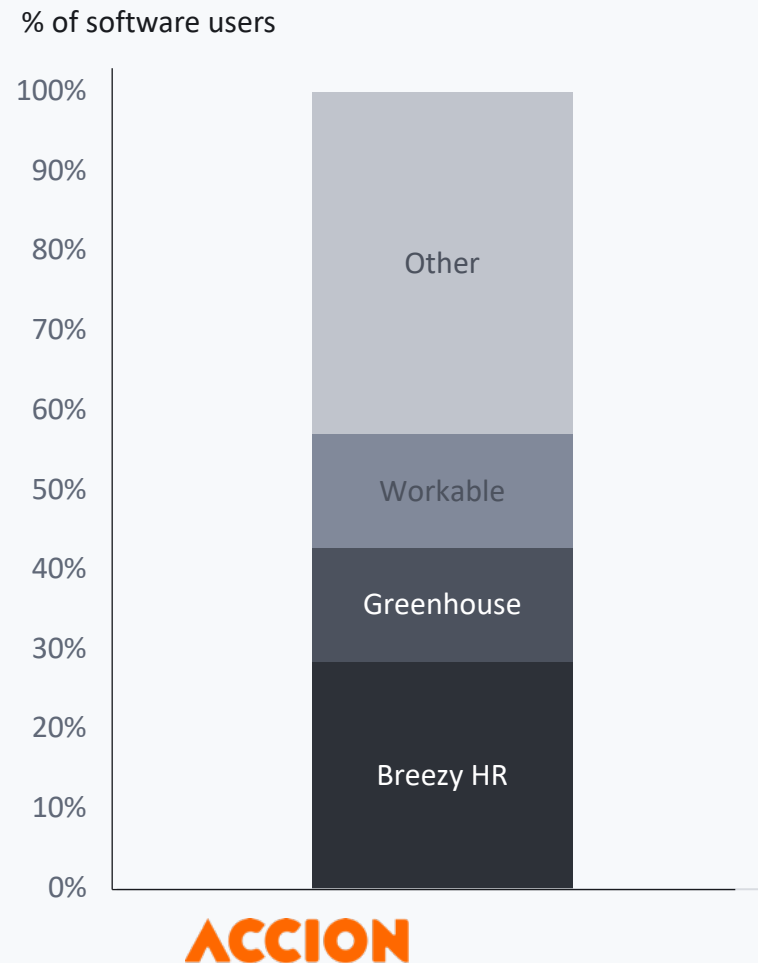
**Companies' satisfaction with data analytics tools varies; though most common, Tableau users are least satisfied**

Company (# of users)	Satisfaction	Value for money	Pros	Cons
Tableau (3)	<ul style="list-style-type: none"> <li>33% of users are detractors</li> </ul>	<ul style="list-style-type: none"> <li>3.67 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>High power functionality</li> <li>Helpful in visualizing data</li> </ul>	<ul style="list-style-type: none"> <li>Expensive</li> <li>Difficult to build</li> </ul>
Metabase (2)	<ul style="list-style-type: none"> <li>50% of users are promoters</li> </ul>	<ul style="list-style-type: none"> <li>4.0 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Easy to integrate with other tools</li> <li>Basic functionality is easy to use</li> </ul>	<ul style="list-style-type: none"> <li>Functionality glitches</li> <li>Query mapping can be difficult</li> </ul>
Internally built software (2)	<ul style="list-style-type: none"> <li>100% of users are neutral</li> </ul>	<ul style="list-style-type: none"> <li>5.0 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Customizable</li> </ul>	<ul style="list-style-type: none"> <li>Limited functionality</li> </ul>
Other* (5)	<ul style="list-style-type: none"> <li>60% of users are promoters</li> </ul>	<ul style="list-style-type: none"> <li>5.0 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Free / inexpensive</li> <li>Easy to use</li> </ul>	<ul style="list-style-type: none"> <li>Functionality can be limited</li> </ul>

\*Other includes Superset, Google Data Studio, Quicksight, and Periscope; Source: August 2020 AVL Biz Ops Tools & Systems Survey, N=17

# Recruiting tracking

**Breezy HR is the most common recruiting tracking tool**



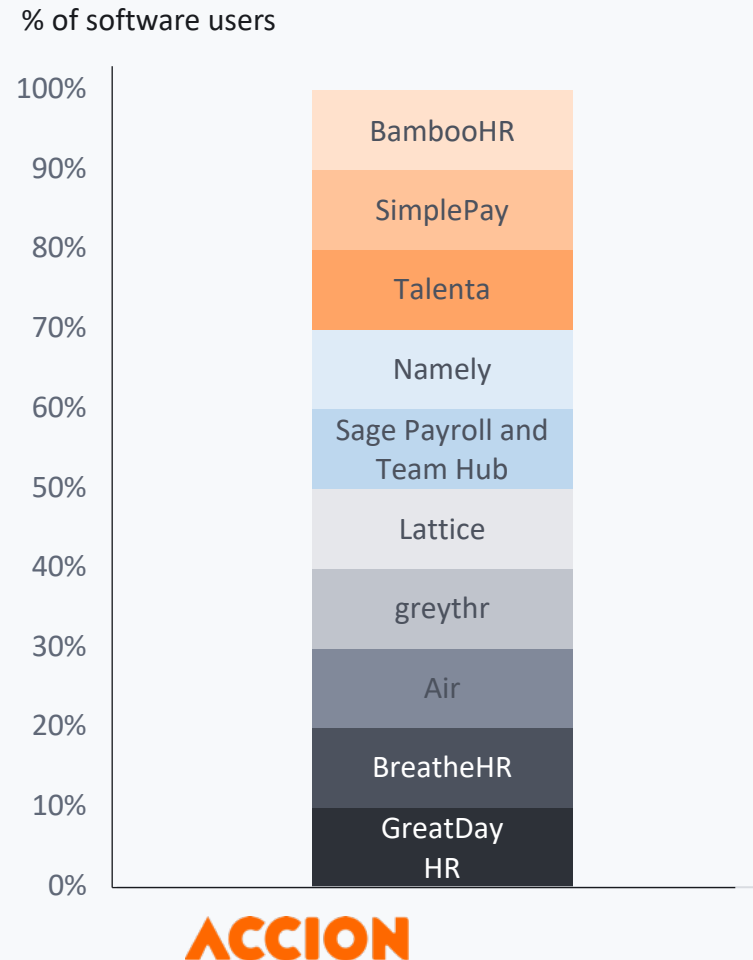
**Companies' satisfaction with recruiting tracking tools varies, driven by lower value for money scores than other software systems**

Company (# of users)	Satisfaction	Value for money	Pros	Cons
Breezy HR (2)	<ul style="list-style-type: none"> <li>50% of users are promoters</li> </ul>	<ul style="list-style-type: none"> <li>3.5 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Streamlines hiring process</li> <li>Relatively inexpensive</li> </ul>	<ul style="list-style-type: none"> <li>Limited functionality</li> <li>User interface isn't always intuitive</li> </ul>
Greenhouse (1)	<ul style="list-style-type: none"> <li>User is neutral</li> </ul>	<ul style="list-style-type: none"> <li>3.0 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Automated scorecard process</li> </ul>	<ul style="list-style-type: none"> <li>Implementation was difficult</li> <li>Relatively expensive</li> </ul>
Workable (1)	<ul style="list-style-type: none"> <li>User is a detractor</li> </ul>	<ul style="list-style-type: none"> <li>3.0 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Basic functionality meets needs</li> </ul>	<ul style="list-style-type: none"> <li>Functionality is limited and not always reliable</li> </ul>
Other* (3)	<ul style="list-style-type: none"> <li>33% of users are promoters</li> <li>33% of users are detractors</li> </ul>	<ul style="list-style-type: none"> <li>4.0 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Easy to use</li> </ul>	<ul style="list-style-type: none"> <li>Manual management process</li> </ul>

\*Other includes LinkedIn, Asana, and Rozee.pk; Source: August 2020 AVL Biz Ops Tools & Systems Survey, N=17

# Employee Management

Companies use a variety of employee management tools

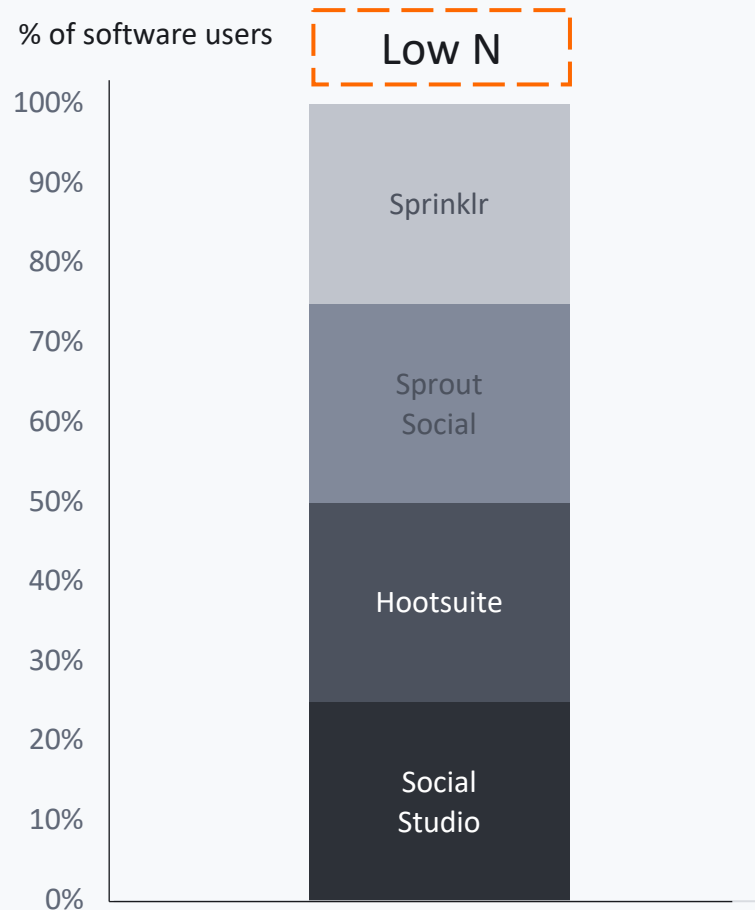


Companies' satisfaction with employee management tools varies; Lattice, Sage Payroll / Team Hub, and SimplePay users are most satisfied

Company (# of users)	Satisfaction	Value for money	Pros	Cons
GreatDay HR (1)	• Neutral	• 4.0 / 5.0	• Easy to use	• Simple functionality
BreatheHR (1)	• Detractor	• 4.0 / 5.0	• n/a	• n/a
Air (1)	• Detractor	• 3.0 / 5.0	• Easy to use	• None
Greythr (1)	• Detractor	• 3.0 / 5.0	• Easy to use	• Limited functionality
Lattice (1)	• Promoter	• 3.0 / 5.0	• Automated processes	• Significant training required
Sage Payroll / Team Hub (1)	• Promoter	• 4.0 / 5.0	• n/a	• n/a
Namely (1)	• Neutral	• 4.0 / 5.0	• Meets basic needs	• Limited functionality
Talenta (1)	• Neutral	• 4.0 / 5.0	• Inexpensive	• None
SimplePay (1)	• Promoter	• 5.0 / 5.0	• Easy to use	• Doesn't integrate
BambooHR (1)	• Neutral	• 3.0 / 5.0	• Easy to use	• Manual updates

# Social Media Management

## Companies use several different social media management tools



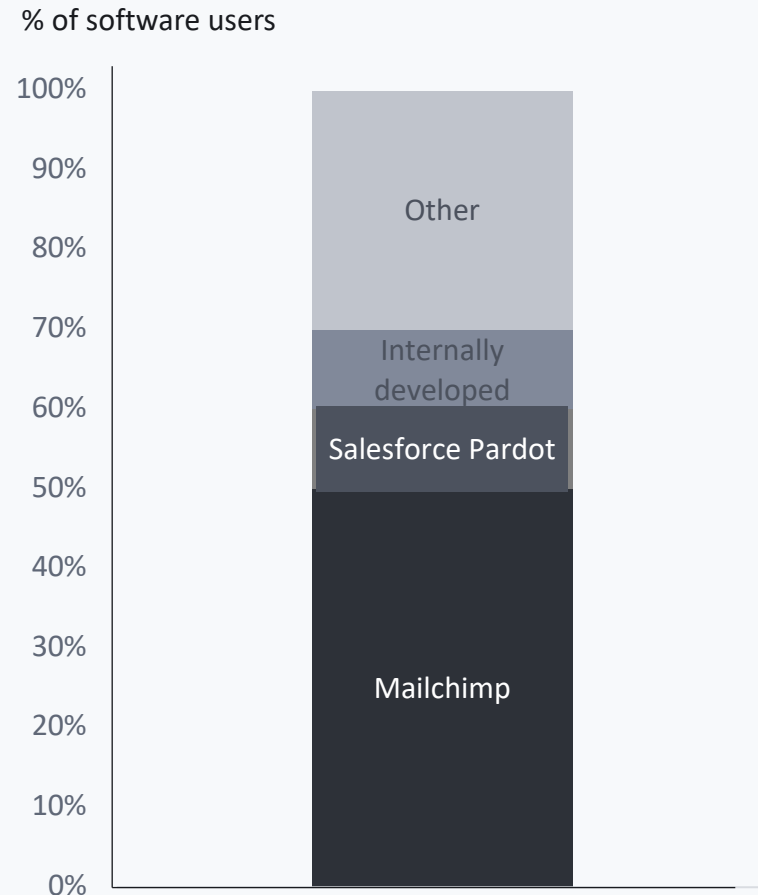
## Companies' satisfaction with social media management tools varies; Hootsuite and Sprinklr users are most satisfied

Company (# of users)	Satisfaction	Value for money	Pros	Cons
Social Studio (1)	<ul style="list-style-type: none"> <li>User is neutral</li> </ul>	<ul style="list-style-type: none"> <li>4.0 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Integrates well with CRM</li> <li>Able to handle large query volume</li> </ul>	<ul style="list-style-type: none"> <li>Expensive</li> </ul>
Hootsuite (1)	<ul style="list-style-type: none"> <li>User is a promoter</li> </ul>	<ul style="list-style-type: none"> <li>4.0 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>n/a</li> </ul>	<ul style="list-style-type: none"> <li>n/a</li> </ul>
Sprout Social (1)	<ul style="list-style-type: none"> <li>User is a detractor</li> </ul>	<ul style="list-style-type: none"> <li>3.0 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Meets basic functionality needs</li> </ul>	<ul style="list-style-type: none"> <li>Expensive</li> </ul>
Sprinklr (1)	<ul style="list-style-type: none"> <li>User is a promoter</li> </ul>	<ul style="list-style-type: none"> <li>5.0 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>n/a</li> </ul>	<ul style="list-style-type: none"> <li>n/a</li> </ul>



# Email Management

Mailchimp is the most common email management tool



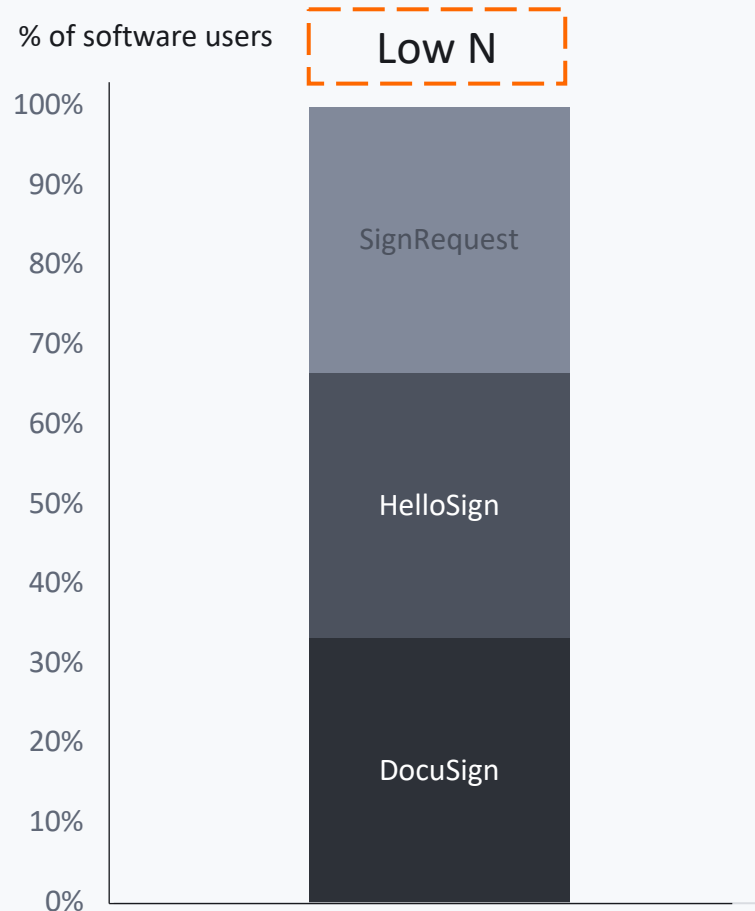
Though most common, Mailchimp users are least satisfied with their email management tool, likely driven by cost

Company (# of users)	Satisfaction	Value for money	Pros	Cons
Mailchimp (5)	<ul style="list-style-type: none"> <li>20% of users are promoters</li> <li>40% of users are detractors</li> </ul>	<ul style="list-style-type: none"> <li>3.2 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Easy to use, simple user interface</li> <li>Integrates well with other tools</li> </ul>	<ul style="list-style-type: none"> <li>Expensive</li> <li>Scalability</li> </ul>
Salesforce Pardot (1)	<ul style="list-style-type: none"> <li>User is neutral</li> </ul>	<ul style="list-style-type: none"> <li>4.0 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Strong functionality</li> </ul>	<ul style="list-style-type: none"> <li>Expensive</li> </ul>
Internally developed solution (1)	<ul style="list-style-type: none"> <li>User is a promoter</li> </ul>	<ul style="list-style-type: none"> <li>5.0 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Customized to company's needs</li> </ul>	<ul style="list-style-type: none"> <li>Difficult to develop</li> </ul>
Other* (3)	<ul style="list-style-type: none"> <li>100% of users are neutral</li> </ul>	<ul style="list-style-type: none"> <li>4.0 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Integration with other tools</li> <li>Comprehensive data capture</li> </ul>	<ul style="list-style-type: none"> <li>Expensive</li> <li>Complex to implement effectively</li> </ul>

\*Other includes Sendgrid, Salesforce Marketing Grid, and Apollo Mail; Source: August 2020 AVL Biz Ops Tools & Systems Survey, N=17

# Legal / Contract Management

Companies use several different contract management tools



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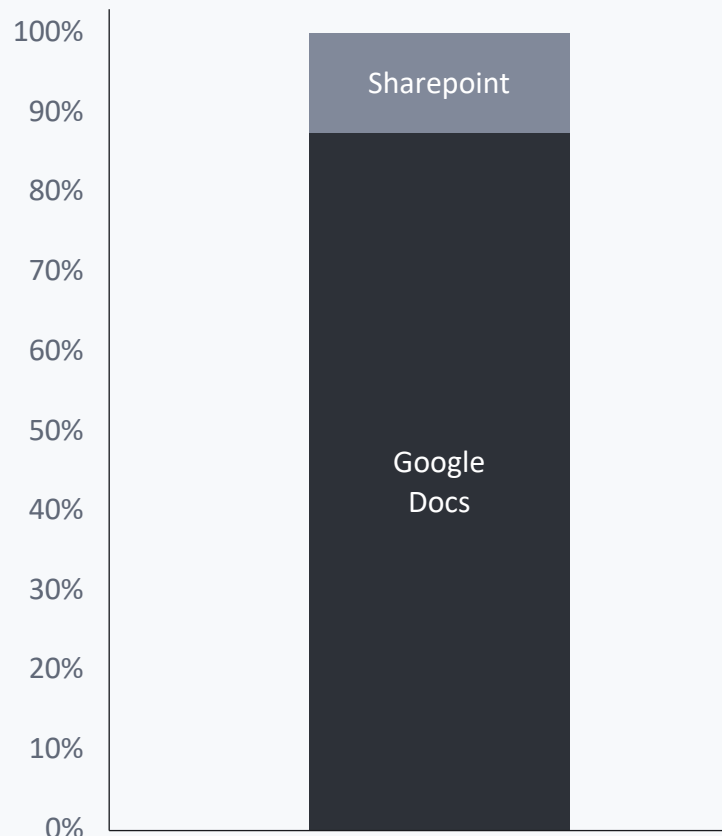
Companies are generally satisfied with their contract management tools; none have had negative experiences

Company (# of users)	Satisfaction	Value for money	Pros	Cons
DocuSign (1)	<ul style="list-style-type: none"> <li>User is neutral</li> </ul>	<ul style="list-style-type: none"> <li>4.0 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Easy to use</li> </ul>	<ul style="list-style-type: none"> <li>Somewhat expensive</li> </ul>
HelloSign (1)	<ul style="list-style-type: none"> <li>User is a promoter</li> </ul>	<ul style="list-style-type: none"> <li>4.0 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Easy to use</li> </ul>	<ul style="list-style-type: none"> <li>None</li> </ul>
SignRequest (1)	<ul style="list-style-type: none"> <li>User is a promoter</li> </ul>	<ul style="list-style-type: none"> <li>4.0 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Solid functionality</li> <li>Cost effective</li> </ul>	<ul style="list-style-type: none"> <li>Functionality is fairly basic</li> </ul>

# Document Collaboration

Google Docs is the most common document collaboration tool

% of software users



Source: August 2020 AVL Biz Ops Tools & Systems Survey, N=17

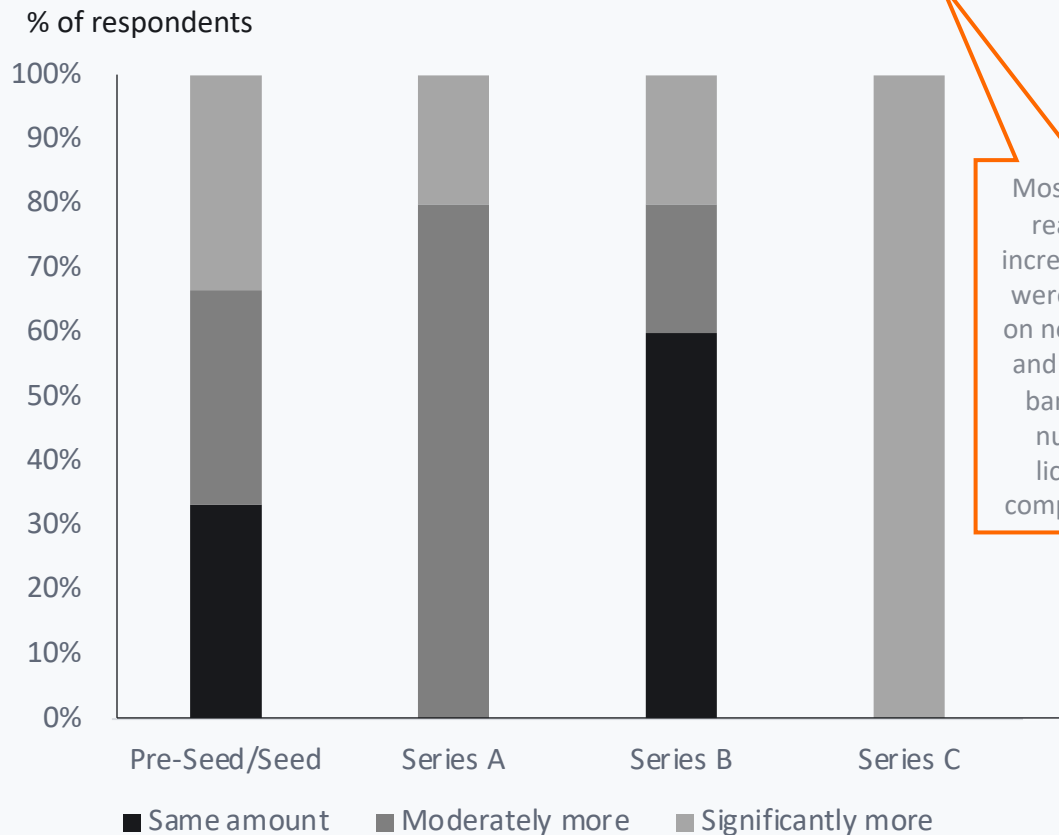
Companies are satisfied with their document collaboration tools, especially Google Docs; none have had negative experiences

Company (# of users)	Satisfaction	Value for money	Pros	Cons
Google Docs (14)	<ul style="list-style-type: none"> <li>71% of users are promoters</li> </ul>	<ul style="list-style-type: none"> <li>4.64 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Easy to use</li> <li>Seamless integration with other G-Suite tools</li> </ul>	<ul style="list-style-type: none"> <li>Limited functionality, especially offline</li> </ul>
Sharepoint (2)	<ul style="list-style-type: none"> <li>100% of users are neutral</li> </ul>	<ul style="list-style-type: none"> <li>4.0 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Integration with other Microsoft tools</li> <li>Easy collaboration</li> </ul>	<ul style="list-style-type: none"> <li>Expensive</li> </ul>

# Developer Survey

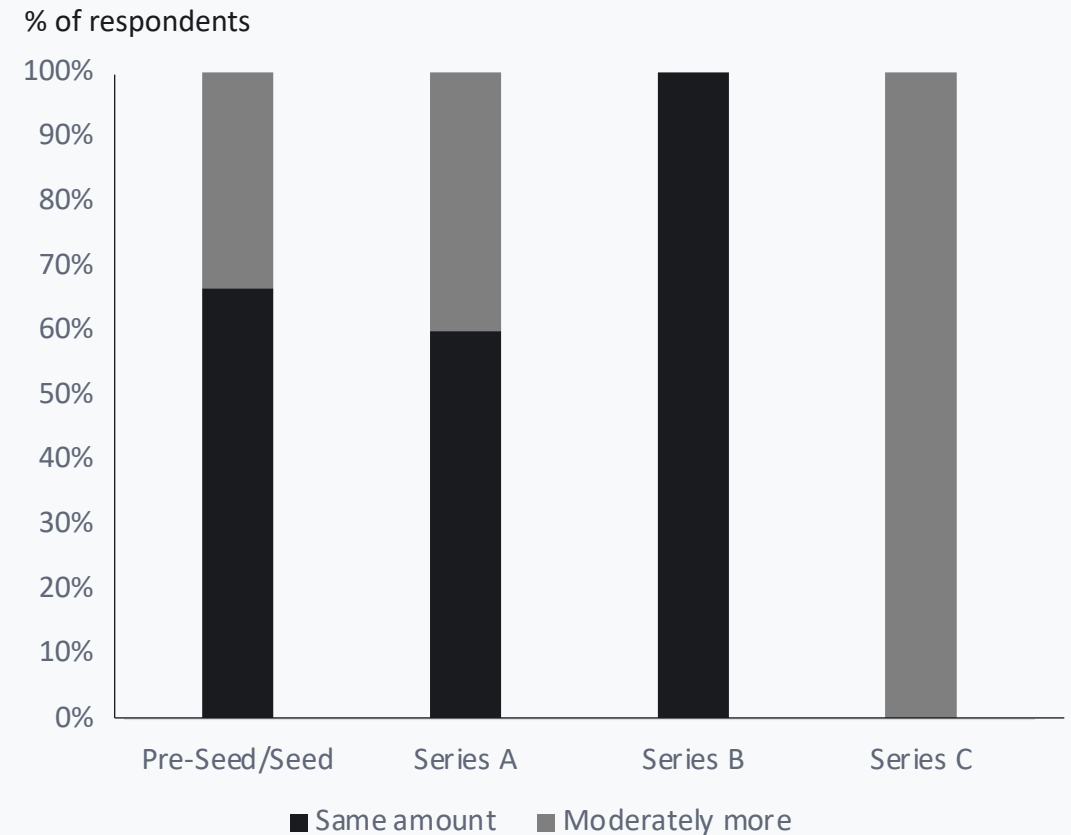
# Most companies did not see significant change in developer spend vs. 2020 plans due to COVID-19

*Did you plan to spend more or less on developer software, systems & tools in 2020 compared to 2019?  
(Consider your 2020 plans as they were developed prior to the COVID-19 shutdown.)*



Most common reasons for increased spend were spending on new systems and increasing bandwidth / number of licenses as company grows

*How has COVID-19 impacted your planned 2020 spend on developer software, systems & tools?*



# While most companies use core developer tools, later-stage companies are more likely to use certain systems

*Do you use the following software, systems, and tools?*

% of respondents using



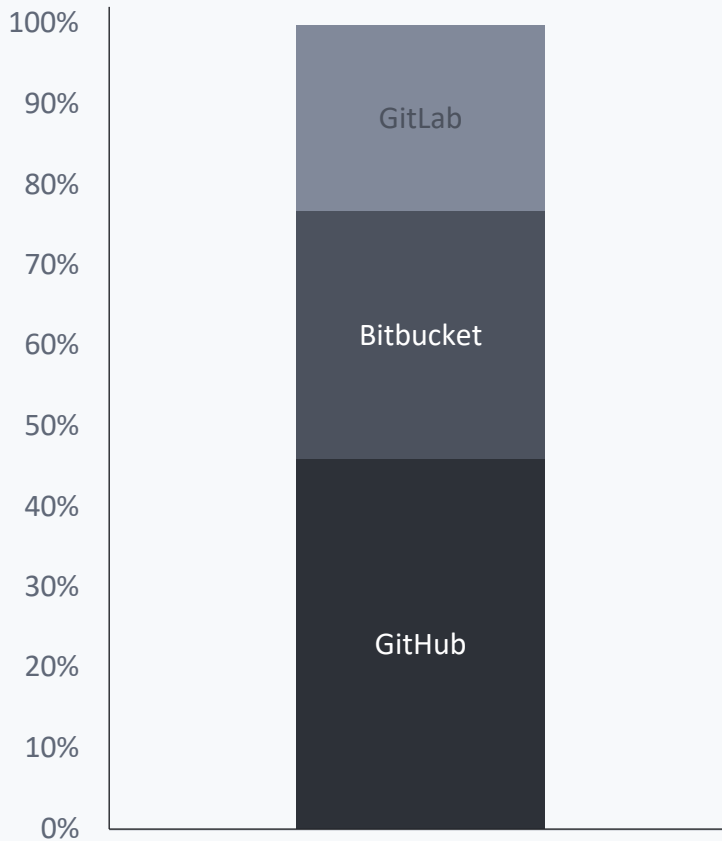
## Key Takeaways

- Most companies, regardless of stage, use version control, cloud hosting, continuous integration, and data management tools
- Later-stage companies are more likely to use web domain management, incident management, and deployment orchestration tools

# Version Control

## GitHub is the most common version control tool

% of software users



Source: August 2020 AVL Developer Tools & Systems Survey, N=14

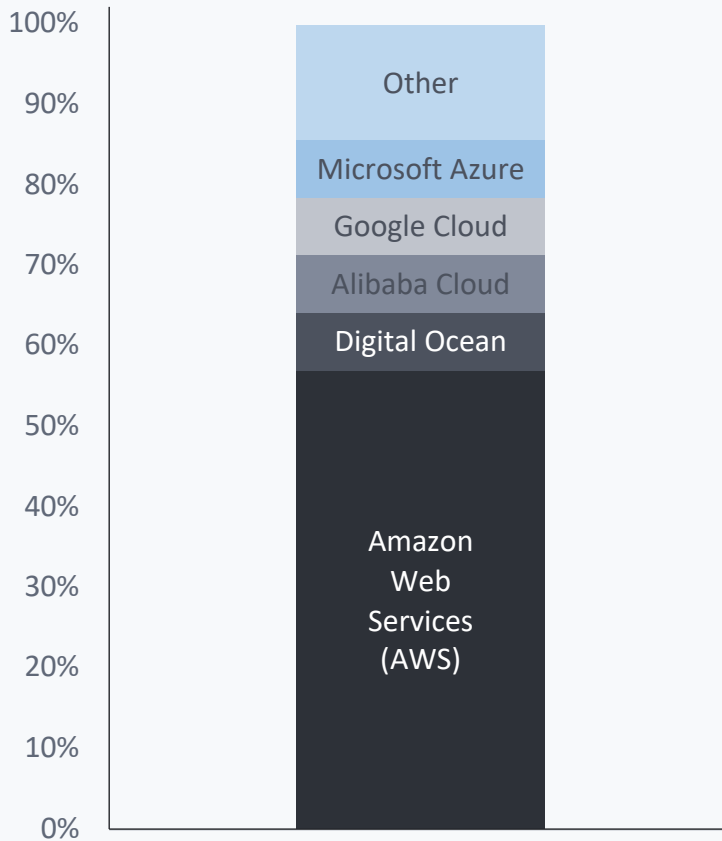
## Companies are generally satisfied with their version control tools; none have had negative experiences

Company (# of users)	Satisfaction	Value for money	Pros	Cons
GitHub (6)	<ul style="list-style-type: none"> <li>67% of users are promoters</li> </ul>	<ul style="list-style-type: none"> <li>4.5 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Universally known / used</li> <li>Integrates well with other systems</li> </ul>	<ul style="list-style-type: none"> <li>Somewhat frequent downtime</li> </ul>
Bitbucket (4)	<ul style="list-style-type: none"> <li>50% of users are promoters</li> </ul>	<ul style="list-style-type: none"> <li>4.5 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Integrates well with JIRA</li> </ul>	<ul style="list-style-type: none"> <li>Slow in adding new features compared to other options</li> </ul>
GitLab (3)	<ul style="list-style-type: none"> <li>100% of users are neutral</li> </ul>	<ul style="list-style-type: none"> <li>4.0 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Straightforward to implement and maintain</li> <li>Flexibility in feature set</li> </ul>	<ul style="list-style-type: none"> <li>Some reliability concerns</li> </ul>

# Cloud Hosting

## AWS is the most common cloud hosting platform

% of software users



## Though most customers have had positive experience with their cloud hosting platforms, value for money drives some variation in satisfaction

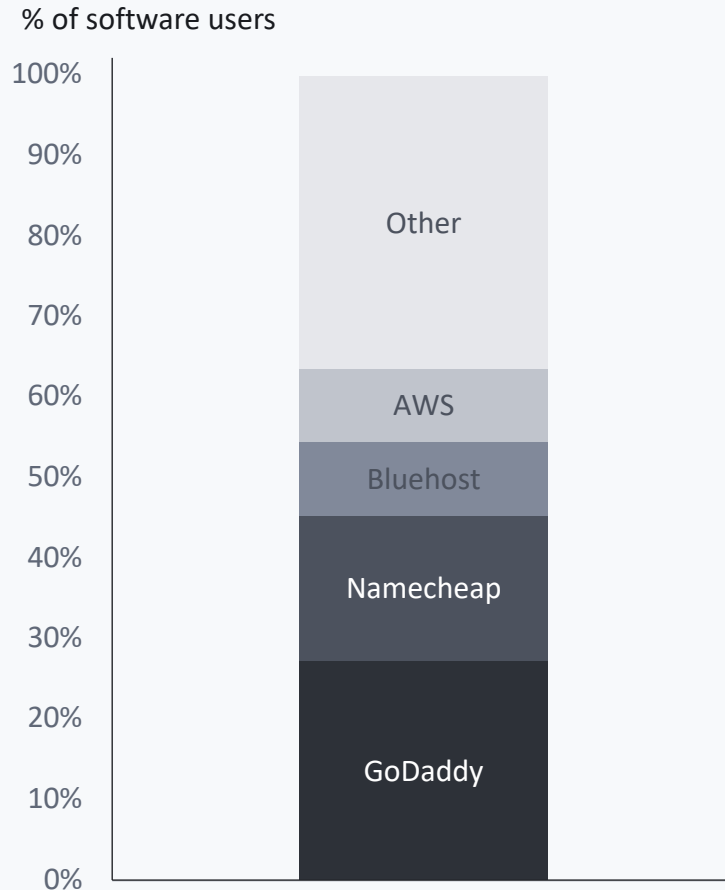
Company (# of users)	Satisfaction	Value for money	Pros	Cons
Amazon Web Services (8)	<ul style="list-style-type: none"> <li>50% of users promoters</li> <li>12% of users detractors</li> </ul>	3.88 / 5.0	<ul style="list-style-type: none"> <li>Highly reliable</li> <li>Broad familiarity and access to support</li> </ul>	<ul style="list-style-type: none"> <li>Expensive</li> </ul>
Digital Ocean (1)	<ul style="list-style-type: none"> <li>User is a promoter</li> </ul>	4.0 / 5.0	<ul style="list-style-type: none"> <li>Easy to implement</li> </ul>	<ul style="list-style-type: none"> <li>Expensive</li> </ul>
Alibaba Cloud (1)	<ul style="list-style-type: none"> <li>User is neutral</li> </ul>	3.0 / 5.0	<ul style="list-style-type: none"> <li>Limited set-up required</li> </ul>	<ul style="list-style-type: none"> <li>Expensive</li> <li>Less widespread familiarity</li> </ul>
Google Cloud (1)	<ul style="list-style-type: none"> <li>User is a promoter</li> </ul>	4.0 / 5.0	<ul style="list-style-type: none"> <li>Simple to use</li> <li>Developer-focused</li> </ul>	<ul style="list-style-type: none"> <li>Limited support available</li> </ul>
Microsoft Azure (1)	<ul style="list-style-type: none"> <li>User is a promoter</li> </ul>	5.0 / 5.0	<ul style="list-style-type: none"> <li>Integrates well with other systems</li> </ul>	<ul style="list-style-type: none"> <li>Less widely used</li> </ul>
Other (2)	<ul style="list-style-type: none"> <li>100% of users detractors</li> </ul>	2.5 / 5.0	<ul style="list-style-type: none"> <li>Easy to use</li> </ul>	<ul style="list-style-type: none"> <li>Limited functionality</li> </ul>

\*Other includes Heroku and RapidCompute; Source: August 2020 AVL Developer Tools & Systems Survey, N=14



# Web Domain Management

## GoDaddy and Namecheap are most common cloud hosting tools

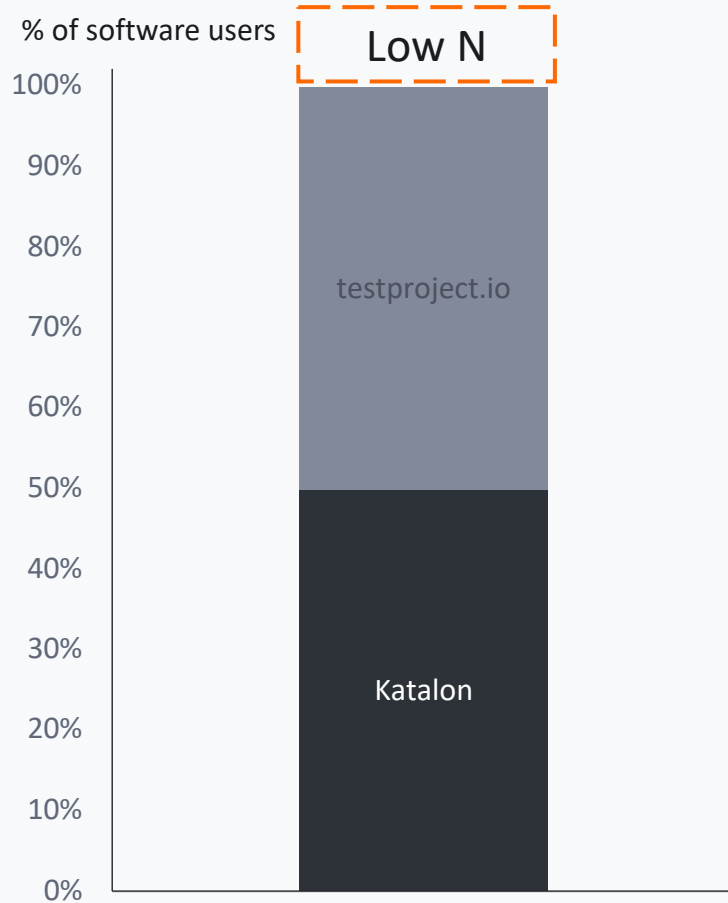


## Companies are largely satisfied with their web domain management tools, especially the most common, GoDaddy and Namecheap

Company (# of users)	Satisfaction	Value for money	Pros	Cons
GoDaddy (3)	<ul style="list-style-type: none"> <li>67% of users are promoters</li> </ul>	<ul style="list-style-type: none"> <li>4.0 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Easy to use, including for non-tech talent</li> </ul>	<ul style="list-style-type: none"> <li>None</li> </ul>
Namecheap (2)	<ul style="list-style-type: none"> <li>100% of users are promoters</li> </ul>	<ul style="list-style-type: none"> <li>3.5 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Easy to use</li> </ul>	<ul style="list-style-type: none"> <li>Expensive</li> </ul>
Bluehost (1)	<ul style="list-style-type: none"> <li>User is a promoter</li> </ul>	<ul style="list-style-type: none"> <li>4.0 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Value for money</li> <li>“One-stop” solution</li> </ul>	<ul style="list-style-type: none"> <li>None</li> </ul>
AWS (1)	<ul style="list-style-type: none"> <li>User is a promoter</li> </ul>	<ul style="list-style-type: none"> <li>5.0 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Comprehensive functionality</li> </ul>	<ul style="list-style-type: none"> <li>Must be using AWS for hosting too</li> </ul>
Other* (4)	<ul style="list-style-type: none"> <li>25% of users are promoters</li> <li>25% of users are detractors</li> </ul>	<ul style="list-style-type: none"> <li>4.5 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Free options available</li> <li>Easy to use</li> </ul>	<ul style="list-style-type: none"> <li>Limited integrations</li> </ul>

# User Testing

GoDaddy and Namecheap are most common cloud hosting tools



Source: August 2020 AVL Developer Tools & Systems Survey, N=14

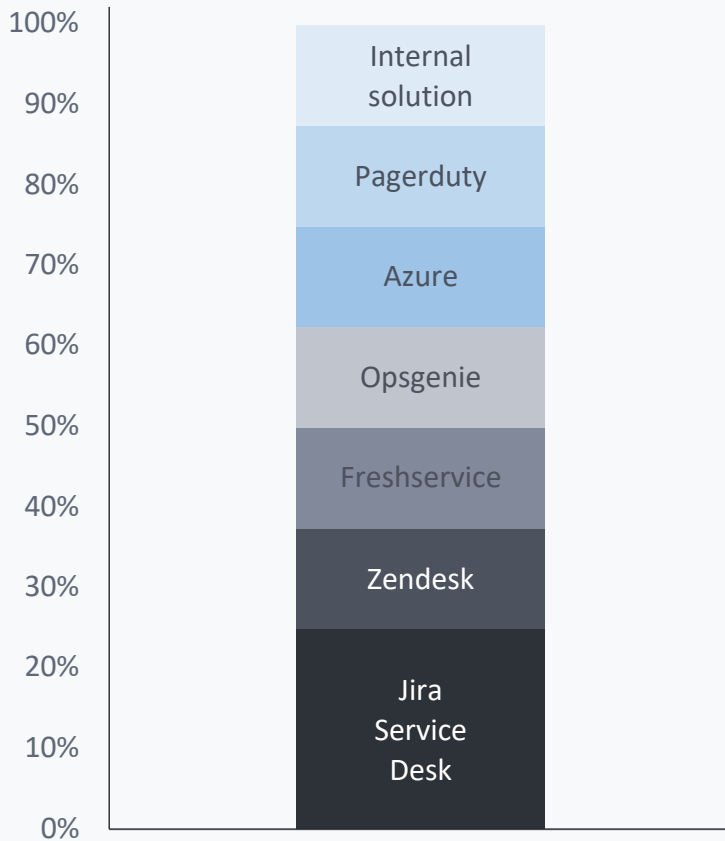
Companies are neutral on their user testing tools, seeing strong value for money and no negative experiences

Company (# of users)	Satisfaction	Value for money	Pros	Cons
Katalon (1)	<ul style="list-style-type: none"> <li>User is neutral</li> </ul>	<ul style="list-style-type: none"> <li>4.0 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Easy to use</li> </ul>	<ul style="list-style-type: none"> <li>Time consuming</li> </ul>
Testproject.io (1)	<ul style="list-style-type: none"> <li>User is neutral</li> </ul>	<ul style="list-style-type: none"> <li>4.0 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Open-source, free</li> <li>Community support available</li> </ul>	<ul style="list-style-type: none"> <li>Learning curve</li> <li>Dependent on community for functionality help</li> </ul>

# Incident Management

## Companies use a variety of incident management tools

% of software users



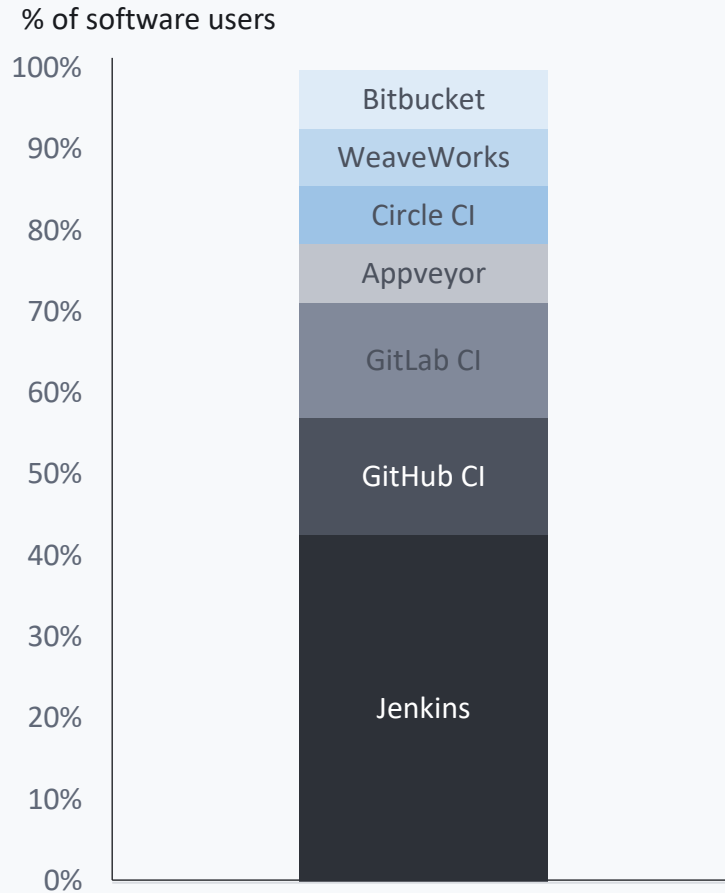
Source: August 2020 AVL Developer Tools & Systems Survey, N=14

## Companies are largely neutral on their incident management tools; Freshservice user is most satisfied

Company (# of users)	Satisfaction	Value for money	Pros	Cons
Jira (2)	<ul style="list-style-type: none"> <li>50% neutral</li> <li>50% detractor</li> </ul>	3.5 / 5.0	<ul style="list-style-type: none"> <li>End-to-end solution</li> </ul>	<ul style="list-style-type: none"> <li>Updates must be manual</li> <li>Expensive</li> </ul>
Zendesk (1)	<ul style="list-style-type: none"> <li>Neutral</li> </ul>	4.0 / 5.0	<ul style="list-style-type: none"> <li>Easy to use</li> </ul>	<ul style="list-style-type: none"> <li>Expensive</li> </ul>
Freshservice (1)	<ul style="list-style-type: none"> <li>Promoter</li> </ul>	N/A (free)	<ul style="list-style-type: none"> <li>Easy to implement</li> </ul>	<ul style="list-style-type: none"> <li>Difficulty working with sub-domains</li> </ul>
Opsgenie (1)	<ul style="list-style-type: none"> <li>Neutral</li> </ul>	4.0 / 5.0	<ul style="list-style-type: none"> <li>Wide integration capabilities</li> </ul>	<ul style="list-style-type: none"> <li>None</li> </ul>
Azure (1)	<ul style="list-style-type: none"> <li>Neutral</li> </ul>	5.0 / 5.0	<ul style="list-style-type: none"> <li>Easy to use "out of the box"</li> </ul>	<ul style="list-style-type: none"> <li>None</li> </ul>
Pagerduty (1)	<ul style="list-style-type: none"> <li>Neutral</li> </ul>	3.0 / 5.0	<ul style="list-style-type: none"> <li>Widely used</li> </ul>	<ul style="list-style-type: none"> <li>Limited integrations (esp. with Jira)</li> </ul>
Internal solution (1)	<ul style="list-style-type: none"> <li>Detractor</li> </ul>	3.0 / 5.0	<ul style="list-style-type: none"> <li>Highly customized</li> </ul>	<ul style="list-style-type: none"> <li>Tech resources required</li> </ul>

# Continuous Integration

## Jenkins is the most common continuous integration tool



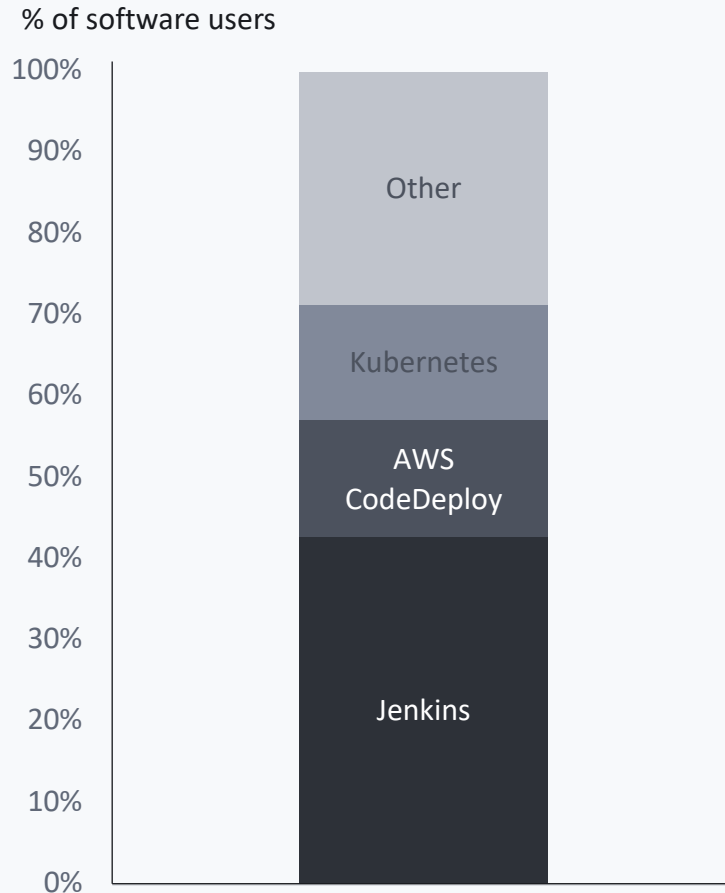
Source: August 2020 AVL Developer Tools & Systems Survey, N=14

## Companies' satisfaction with their continuous integration tools varies, likely driven but differing value for money perception

Company (# of users)	Satisfaction	Value for money	Pros	Cons
Jenkins (6)	<ul style="list-style-type: none"> <li>33% of users are promoters</li> </ul>	<ul style="list-style-type: none"> <li>4.2 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Easy to use</li> <li>Seamless integrations</li> </ul>	<ul style="list-style-type: none"> <li>Initial configuration / learning curve is difficult</li> </ul>
GitHub CI (2)	<ul style="list-style-type: none"> <li>50% of users are promoters</li> </ul>	<ul style="list-style-type: none"> <li>4.0 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>End-to-end solution</li> <li>Customizable</li> </ul>	<ul style="list-style-type: none"> <li>Relies on using other Git tools</li> </ul>
GitLab (2)	<ul style="list-style-type: none"> <li>100% of users are neutral</li> </ul>	<ul style="list-style-type: none"> <li>4.5 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Broad feature set and integrations</li> </ul>	<ul style="list-style-type: none"> <li>Reliability concerns</li> </ul>
Appveyor (1)	<ul style="list-style-type: none"> <li>User is neutral</li> </ul>	<ul style="list-style-type: none"> <li>4.0 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Easy configuration</li> </ul>	<ul style="list-style-type: none"> <li>Limited integrations</li> </ul>
Circle CI (1)	<ul style="list-style-type: none"> <li>User is neutral</li> </ul>	<ul style="list-style-type: none"> <li>3.0 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Parallel build functionality</li> </ul>	<ul style="list-style-type: none"> <li>Cost</li> </ul>
WeaveWorks (1)	<ul style="list-style-type: none"> <li>User is promoter</li> </ul>	<ul style="list-style-type: none"> <li>4.0 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Fast deployment time</li> </ul>	<ul style="list-style-type: none"> <li>Cost scales quickly</li> </ul>
Bitbucket (1)	<ul style="list-style-type: none"> <li>User is detractor</li> </ul>	<ul style="list-style-type: none"> <li>3.0 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Easy integration</li> </ul>	<ul style="list-style-type: none"> <li>Limited functionality</li> </ul>

# Deployment Orchestration

## Jenkins is the most common deployment orchestration tool



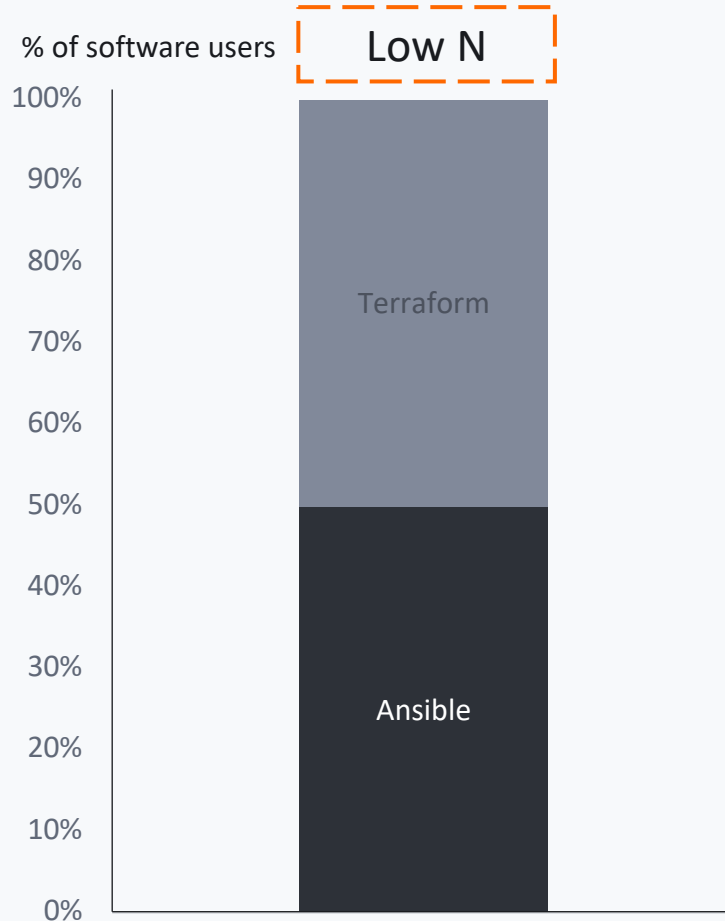
## Companies are generally satisfied with their deployment orchestration tools; none have had negative experiences

Company (# of users)	Satisfaction	Value for money	Pros	Cons
Jenkins (3)	<ul style="list-style-type: none"> <li>67% of users are promoters</li> </ul>	<ul style="list-style-type: none"> <li>4.5 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Variety of add-on customizations</li> <li>Free</li> </ul>	<ul style="list-style-type: none"> <li>Initial configuration / learning curve is difficult</li> </ul>
AWS CodeDeploy (1)	<ul style="list-style-type: none"> <li>User is a promoter</li> </ul>	<ul style="list-style-type: none"> <li>5.0 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Customer service</li> <li>Data security</li> </ul>	<ul style="list-style-type: none"> <li>None</li> </ul>
Kubernetes (1)	<ul style="list-style-type: none"> <li>User is a promoter</li> </ul>	<ul style="list-style-type: none"> <li>4.0 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Integrates with full ecosystem</li> </ul>	<ul style="list-style-type: none"> <li>Operations are complex for simple deployments</li> </ul>
Other* (2)	<ul style="list-style-type: none"> <li>User is neutral</li> </ul>	<ul style="list-style-type: none"> <li>4.5 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Broad feature set</li> <li>Easy implementation</li> </ul>	<ul style="list-style-type: none"> <li>Some reliability concerns</li> <li>Can be difficult to maintain</li> </ul>

\*Other includes GitLab and Terraform; Source: August 2020 AVL Developer Tools & Systems Survey, N=14

# Configuration Management

Companies use Ansible and Terraform for configuration mgmt.



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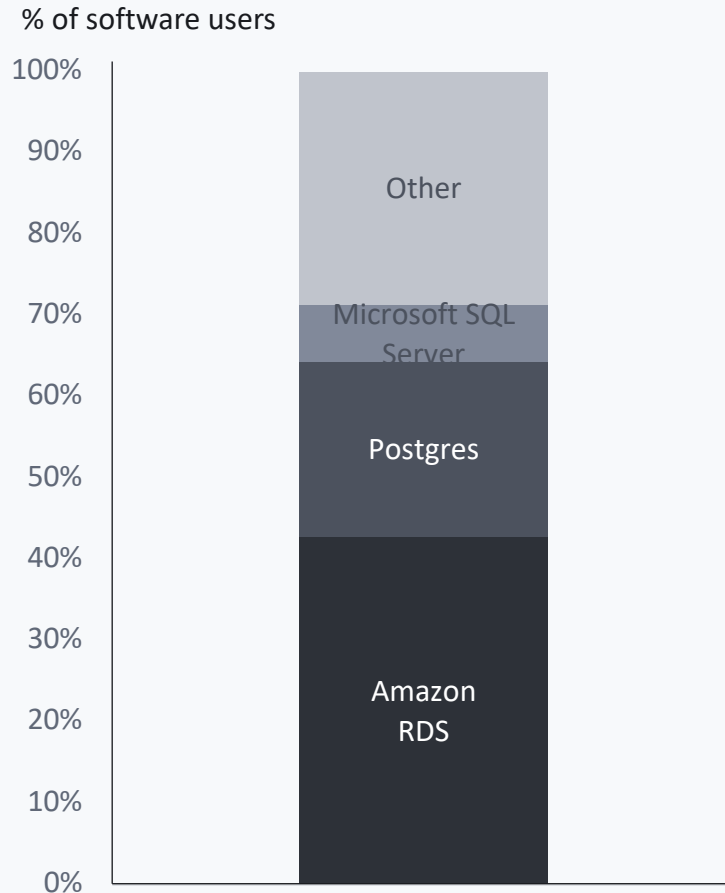
Source: August 2020 AVL Developer Tools & Systems Survey, N=14

Companies are satisfied with their configuration management tools; all are promoters

Company (# of users)	Satisfaction	Value for money	Pros	Cons
Ansible (1)	<ul style="list-style-type: none"><li>User is a promoter</li></ul>	<ul style="list-style-type: none"><li>N/A (free)</li></ul>	<ul style="list-style-type: none"><li>Broad, relevant feature set</li></ul>	<ul style="list-style-type: none"><li>None</li></ul>
Terraform (1)	<ul style="list-style-type: none"><li>User is a promoter</li></ul>	<ul style="list-style-type: none"><li>4.0 / 5.0</li></ul>	<ul style="list-style-type: none"><li>Easy to maintain after initial configuration</li></ul>	<ul style="list-style-type: none"><li>None</li></ul>

# Data Management

## Amazon RDS is the most common data management tool



## Companies' satisfaction with data management tools varies

Company (# of users)	Satisfaction	Value for money	Pros	Cons
Amazon RDS (6)	<ul style="list-style-type: none"> <li>33% of users are promoters</li> <li>17% of users are detractors</li> </ul>	<ul style="list-style-type: none"> <li>3.83 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Seamless to use alongside AWS</li> <li>Reliable security and support</li> </ul>	<ul style="list-style-type: none"> <li>Expensive</li> <li>Dependent on AWS ecosystem</li> </ul>
Postgres (3)	<ul style="list-style-type: none"> <li>33% of users are promoters</li> </ul>	<ul style="list-style-type: none"> <li>4.0 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Wide variety of use cases</li> <li>Easy to use</li> </ul>	<ul style="list-style-type: none"> <li>Initial configuration can be time-consuming</li> </ul>
Microsoft SQL Server (1)	<ul style="list-style-type: none"> <li>User is a promoter</li> </ul>	<ul style="list-style-type: none"> <li>4.0 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Integrates well with rest of stack</li> </ul>	<ul style="list-style-type: none"> <li>Limited relational databases</li> </ul>
Other* (4)	<ul style="list-style-type: none"> <li>25% of users are promoters</li> </ul>	<ul style="list-style-type: none"> <li>3.75 / 5.0</li> </ul>	<ul style="list-style-type: none"> <li>Limited maintenance</li> <li>Open source options have strong community support</li> </ul>	<ul style="list-style-type: none"> <li>Limited functionality</li> <li>Commercial support can be expensive</li> </ul>

\*Other includes Alicloud ApsaraDV, Cloud SQL / Datastore, BigQuery / Holistics.io, and MySQL; Source: August 2020 AVL Developer Tools & Systems Survey, N=14

**Thank you.**

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