



WP Roadmaps  
and Coaching

# *How to Stop Scope Creep Once and for All*

*Applying Productivity Management to  
WordPress Projects*



Image credit – wapu.us



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Max My  Shopping



**WP Roadmaps  
and Coaching**

*WordPress Roadmaps and Coaching by Beth Livingston*



# What You Will Learn During this Presentation

- What are the 6 Principles of Productivity Management.
- How the 6 Principles of Productivity Management help stop scope creep.
- Which 2 Principles are most critical to stopping scope creep.
- How to apply the 2 critical principles to a WordPress project.



Image credit – wapu.us





# What are the 6 Principles?

- Common sense methods for being productive when carrying out a task or set of tasks
- We often forget to apply them day-to-day
- Can be equally applied to website development, a fund-raiser at church, or tiling your kitchen floor



Where did they come from?

Believe it or not...



**CORPORATE AMERICA!!**



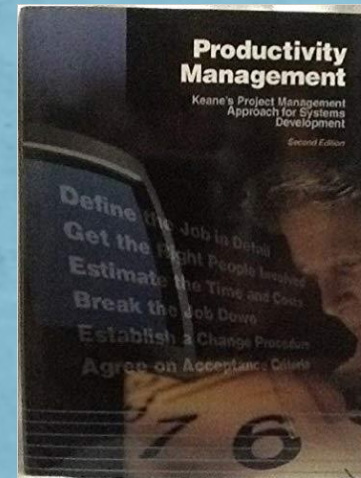


# Where did they come from?

One of the most successful IT Consulting firms of the late 90's and early 2000's in the US.



...wrote a book.



## That became our bible!!!

# This is **NOT** Project Management

## Project Management involves:

- Managing the mechanics of a project from proposal to final acceptance (budget, schedule, development, costs, etc)

## These Productivity Management principles:

- Should sit on top of any project management framework or methodology you are using
- While much of the application of these principles occurs at project inception, they actually run a like a ribbon through the entire project management life cycle.







# The Principles – Applied to WordPress Projects

## Keane's Original Principles

Define the Job in Detail

Get the Right People Involved

Estimate the Time and Costs

Break the Job Down

Establish a Change Procedure

Establish Acceptance Criteria

## For WordPress

Define the Job in Detail with a Content First Approach

Get the Right People and Plugins Involved

Estimate the Time and Costs

Break the Job Down

Establish and Stick To a Change Procedure

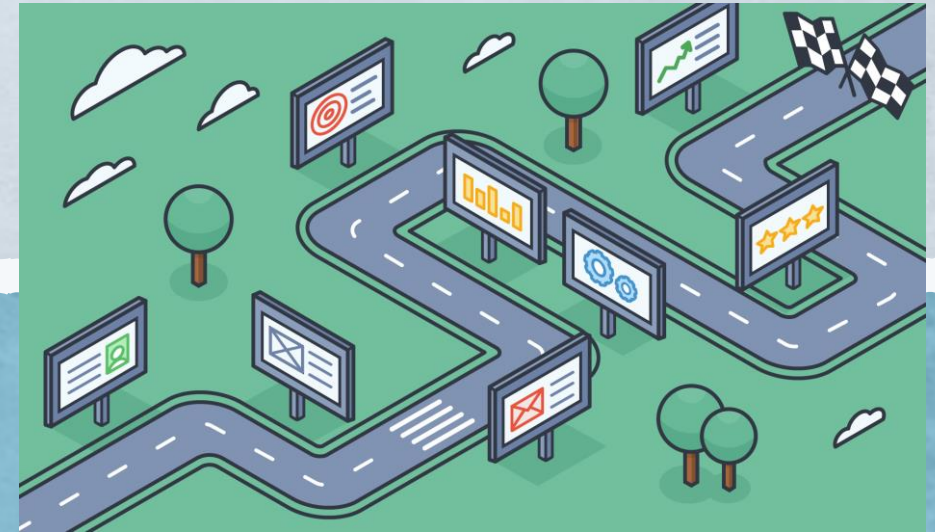
Establish Interim and Final Acceptance Criteria



# The Principles – Are based on the premise ...

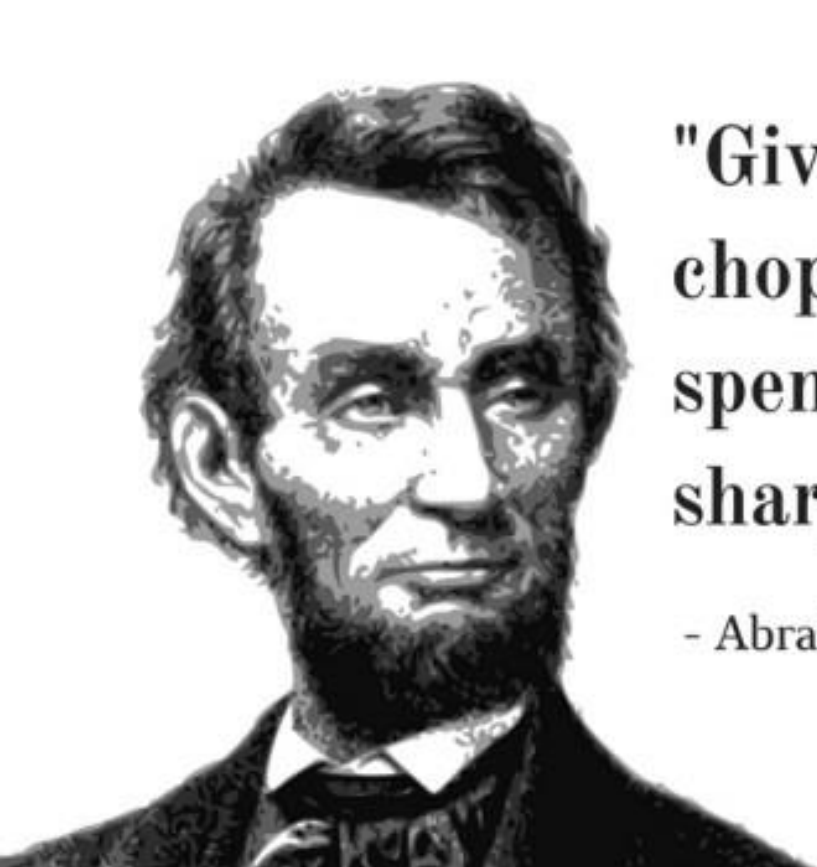
... a plan to complete a set of tasks is not a finite roadmap with a single best route from point A to point B decided at the beginning.

Instead, we should head out on our journey with a well-thought-out and well-defined plan understanding that discoveries made along the way may change the route taken as well as the final destination.





# The Approach Should Be...



**"Give me six hours to  
chop down a tree and I'll  
spend the first four  
sharpening the axe."**

- Abraham Lincoln





# Everything Needs to be in Writing

## **Adopt the Adage**

*"If it isn't in writing, it didn't happen."*

# *How the 6 Principles Help Stop Scope Creep*





# Define the Job in Detail with a Content First Approach

Use a “drill-down” method beginning with the Proposal and ending with a detailed Statement of Work.





# Get the Right People and Plugins Involved

Develop a standard list of :

- Team Roles and Responsibilities
- Technical Plugins
- Business Function Plugins

...and customize it for each project.







# Estimate the Time and Costs



## Early and often:

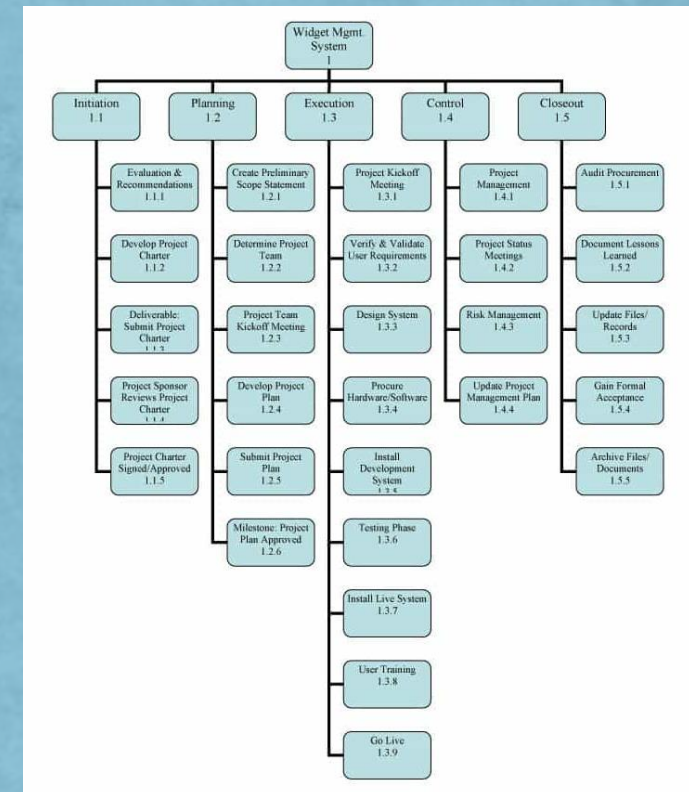
- Beginning of the project
- End of each phase for the next phase
- Major change of scope, management, tools, or procedures
- End of each reporting period (weekly)
- Anytime there is concern to warrant it



# Break the Job Down

Use a standard Work Breakdown Structure using the 80 Hour Rule and customize it for each project.

WORK BREAKDOWN STRUCTURE TEMPLATE						
No	Type of task	Description of task	Outputs deliverables	Work Package	Responsible person(s)	Dead-line
1	Main Task					
1.1	Sub-task					
1.2	Sub-task					
1.3	Sub-task					
1.4	Sub-task					
1.5	Sub-task					
1.6	Sub-task					
2	Main Task					
2.1	Sub-task					
2.2	Sub-task					
2.3	Sub-task					
2.4	Sub-task					
2.5	Sub-task					
3	Main Task					
3.1	Sub-task					
3.2	Sub-task					
3.3	Sub-task					
3.4	Sub-task					
3.5	Sub-task					
3.6	Sub-task					







# Establish and Stick To a Change Procedure

Acknowledge and actively manage change throughout the project.





# Establish Interim and Final Acceptance Criteria

Set the rules that govern acceptance during the project at the **BEGINNING** of the project.





# *The 2 Most Critical Principles for Avoiding Scope Creep*



# The 2 Most Critical Principles

1. Define the Job in Detail with a Content First Approach



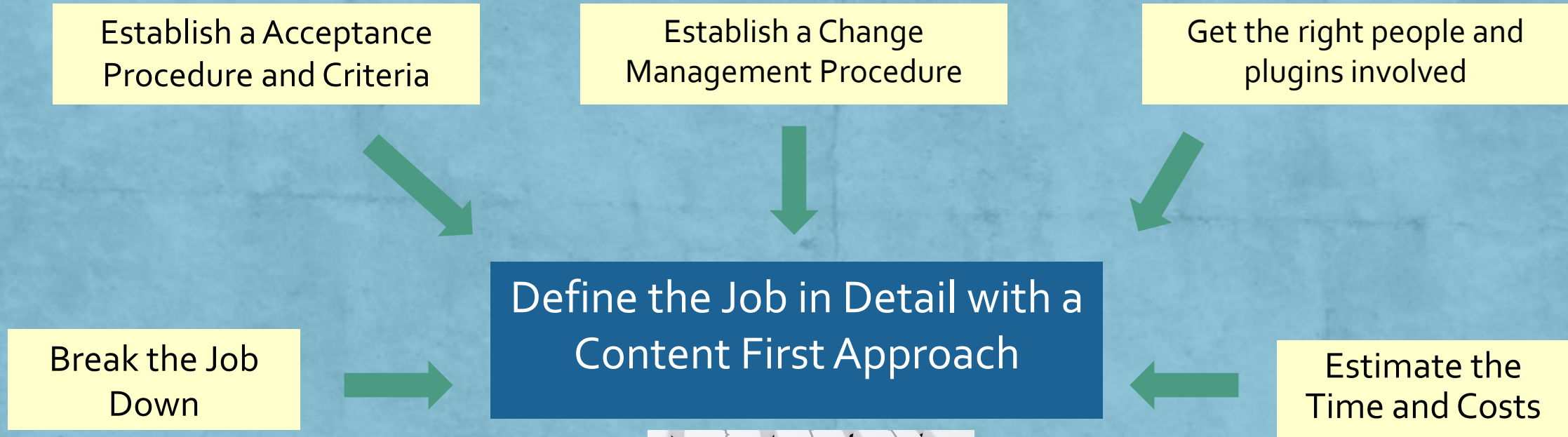
2. Establish and Stick To a Change Procedure







# The Single Most Critical Principle



# *How to Apply the 2 Most Critical Principles*





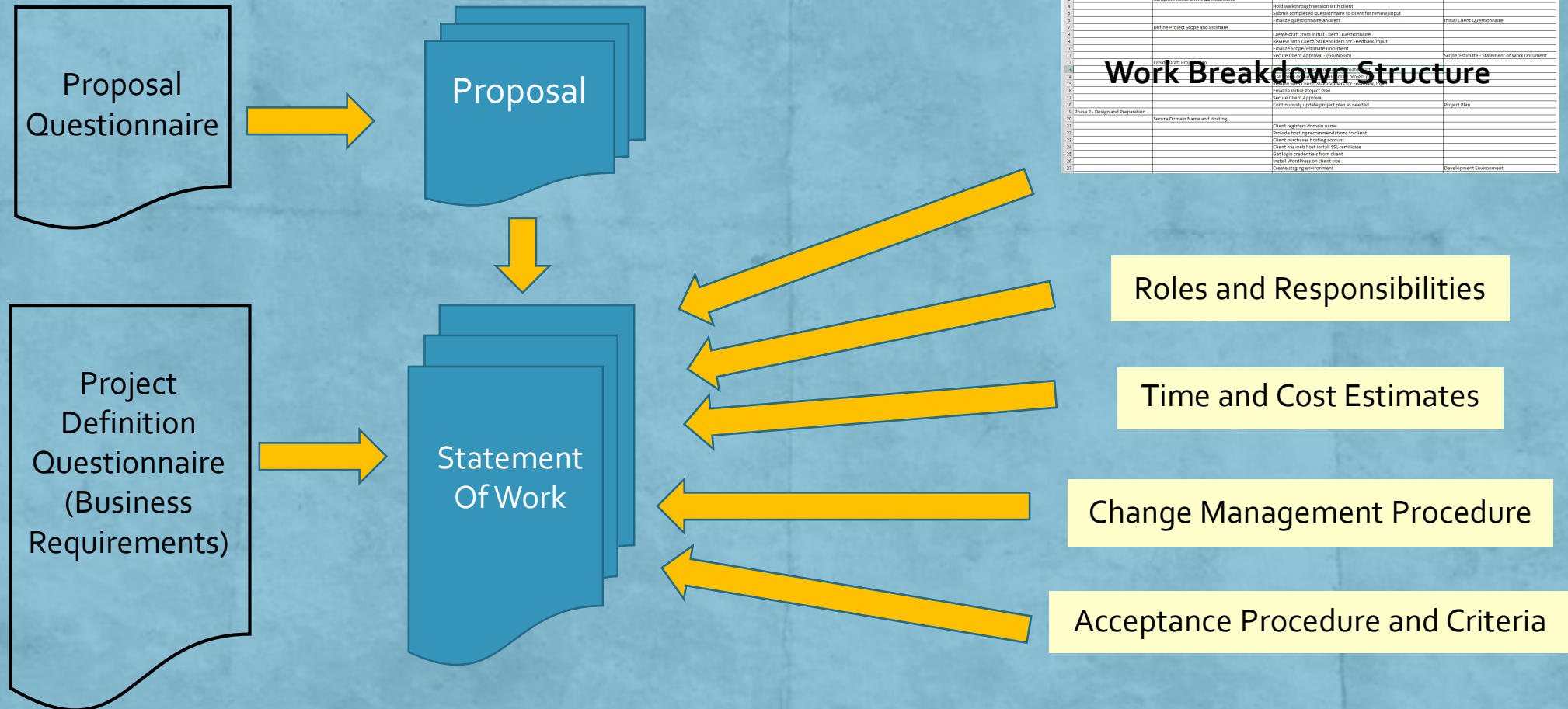
# How to Define the Job in Detail

- Proposal Questionnaire
- Proposal
- Project Definition Questionnaire
- Statement of Work
- Work Breakdown Structure
- Content Gathering Forms





# How the Project Definition Process Works







# How to Define the Job in Detail

- Proposal Questionnaire



## *Existing Web Site*

If you have an existing web site, what is the URL?

In what ways is this site falling short? What would you like to change, add or subtract?

## *Purpose and Goals for Web Site*

What are the purposes of this web site? Who is your target audience, and what will they be able to learn or do there?

## *The WordPress Platform*

Have you decided you would like a website based on the WordPress platform? If so, why? If you're not sure, do you have any questions we can answer?

## *Domain Names and Hosting*

Do you have a domain name or names registered? What are they? Who is the Registrar (GoDaddy, Register.com, etc.)?

Do you or those you work with currently use any **email addresses** based on the above-mentioned domain names, such as [something@yourdomain.com](mailto:something@yourdomain.com)?

If you currently have a live website, who is the website host? Are you OK with changing website hosts if we recommend it?

## *Text and Graphic Content*

Please make a list of planned website pages, or simply list or describe the information you want to present on your new website.



# How to Define the Job in Detail

## Proposal

- Project Request/Snapshot
- Background/Business Requirements
- Scope
- Proposed Solution/Deliverables
- Time and Cost Estimates
- Change Management
- Acceptance Management
- Frequently Asked Questions
- Next Steps







# How to Define the Job in Detail

- Project Definition Questionnaire

Deliverables		
Major Activity	Deliverable	Approver?
Define the Project	SOW	
Plan Management	Baseline Project Plan Updated Project Plan	
Communication Management	Status Reports Status Meetings	
Issues Management	Issues Log	
Quality Approach	Quality Plan	
Risk Management	Risk Profile	
Change Management	Change Requests Change Budget Usage	
Acceptance Management	Approval/Acceptance Forms	
Technical Approach	Business Requirements Document Technical Architecture Functional Requirements Test Plans System and User Documentation	





# How to Define the Job in Detail

## Statement of Work

- PROJECT IDENTIFICATION
  - Project Request/Business Problem
  - Background
  - Project Objectives
  - Critical Success Factors
- SCOPE OF EFFORT
  - In Scope – Responsibility of <your company name>
  - In Scope – Responsibility of <client name>
  - Out of Scope







# How to Define the Job in Detail

## Statement of Work

- **MANAGEMENT APPROACH**
  - Required Management Resources
  - Productivity Management
  - Plan Management
  - Communications Management
  - Issues Management
  - Team Roles & Responsibilities
- **TECHNICAL APPROACH**
  - Hosting
  - Development Environment
  - Work Approach and Deliverables
  - Technical Plugins





# How to Define the Job in Detail

## Statement of Work

- **DEVELOPMENT APPROACH**
  - Business Requirements
  - Quality Assurance Approach
- **TIME AND COST (SCHEDULE AND BUDGET)**
  - Time Estimates
  - Cost Estimates
  - The Change Budget
- **CHANGE MANAGEMENT**
  - Change Procedure
  - Change Criteria
- **ACCEPTANCE MANAGEMENT**
  - Acceptance Procedure
  - Final Acceptance







# How to Define the Job in Detail

## Statement of Work

- APPENDIX A – PROJECT PLAN (WBS)
- APPENDIX B – SAMPLE CLIENT STATUS REPORT
- APPENDIX C – CHANGE REQUEST FORM
- APPENDIX D – ACCEPTANCE FORMS
- APPENDIX E – AVAILABLE WEBSITE CARE PLANS





# How to Define the Job in Detail

## Work Breakdown Structure


1	Phase	Activity	Task	Deliverable
2	Phase 1 - Project Definition			
3		Complete Initial Client Questionnaire		
4			Hold walkthrough session with client	
5			Submit completed questionnaire to client for review/input	
6			Finalize questionnaire answers	Initial Client Questionnaire
7		Define Project Scope and Estimate		
8			Create draft from Initial Client Questionnaire	
9			Review with Client/Stakeholders for Feedback/Input	
10			Finalize Scope/Estimate Document	
11			Secure Client Approval - (Go/No Go)	Scope/Estimate - Statement of Work Document
12		Create Draft Project Plan		
13			Use this project plan template to create draft	
14			Use Scope document to tailor draft project plan	
15			Review with Client/Stakeholders for Feedback/Input	
16			Finalize initial Project Plan	
17			Secure Client Approval	
18			Continuously update project plan as needed	Project Plan
19	Phase 2 - Design and Preparation			
20		Secure Domain Name and Hosting		
21			Client registers domain name	
22			Provide hosting recommendations to client	
23			Client purchases hosting account	
24			Client has web host install SSL certificate	
25			Get login credentials from client	
26			Install WordPress on client site	
27			Create staging environment	Development Environment






# How to Use a Content First Approach

## Content Gathering Forms




**WP Roadmaps**  
Content Collection Templates




**Page Content Collection Template**

Page Title	
Slug	
Page Type	(landing, blog, regular, etc)
Content Type	(info, form, product, etc)
SEO Keywords	
Images	
Featured Image?	
Plugin Required?	(such as for a form)
Sidebar?	
1 <sup>st</sup> Paragraph	
Meta Snippet	
Body Content	(include headings)



**WP Roadmaps**  
Content Collection Templates



**Testimonial Content Collection Template**

Type of Testimonial      Product ☐      Service ☐

Person's Name	
Company	(if applicable)
Name of Product or Service	
Full Testimonial	



# How to Establish and Stick to a Change Procedure

1. Anyone (<your company name> or <client name> personnel) may request a change. This request is given to the Project Manager.
2. The Project Manager, or designee, analyzes the change request and completes the Change Request form (included in Appendix). All change requests are logged, tracked, and reported in status reports and meetings.
3. The Project Manager presents the change request to the individuals responsible for approving change as designated in this SOW (in the Roles and Responsibilities) for review, discussion, and disposition.





# How to Establish and Stick to a Change Procedure

4. The change request must be approved or rejected in writing within **<THE NUMBER, TYPICALLY 3-5>** business days after submittal. The Change Request form lists the specific timeframe so there will be no confusion about schedule.
5. If **<client name>** does not respond to the change within the timeframe, the change request will be added as an item on the issues log and fall under the issues management process.
6. The **<your company name>** Project Manager will maintain the original Change Control documents, along with the Change Request Log.





# How to Establish and Stick to a Change Procedure

7. No work associated with the change request will begin until formal approval is received. When a change is approved, the project plan will be adjusted and the amount authorized (dollars and/or hours) will be subtracted from the change budget and added into the project budget. (See the Time and Cost section for more information on the Change Budget.)







# How to Establish and Stick to a Change Procedure

## Change Criteria

- Any change to the SOW, such as:
  - Modifications to the technical or management approach
  - Personnel identified in the Roles and Responsibilities
  - Any other change or contradiction to information that is defined in the SOW
  - Addition of a deliverable not defined in the SOW
  - An additional task or activity not defined in the SOW and/or project plan for a planned deliverable
- Changes to an accepted deliverable
- Time lost due to reasons such as:
  - System downtime
  - Unavailability of client personnel
  - Missing the target date for an issue





# How to Stop Scope Creep Once and For All

## Summary

- All 6 productivity principles, developed by John Keane, contribute in some way to controlling scope creep
- I have modified them slightly to apply to a WordPress project
- The 2 most critical principles are Define the Job in Detail with a Content First Approach and Establish and Stick to a Change Procedure.







# How to Stop Scope Creep Once and For All

## Summary

- At WPRM, we use 6 tools to define the job in detail using a drill down approach. They are:
  - Proposal Questionnaire
  - Proposal
  - Project Definition Questionnaire
  - Statement of Work
  - Work Breakdown Structure
  - Content Gathering Forms
- Your change control process should be outlined in the project definition documents and reviewed with the client in detail to ensure understanding. A good change control process also establishes the criteria for change.





# *How to Stop Scope Creep Once and for All*



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