



WP Roadmaps *presents*

How to Leverage Your Project Management Methodology to Set Yourself Apart from Your Competition

VERSION 2



Who Am I?



Beth Livingston, M. Ed.

wproadmaps.com
beth@wproadmaps.com



25+ Years Experience in the
Financial and IT Consulting
Industries



Winner – 3rd Place
Triad Startup Weekend 2013



*Real-Life Project Management
Skills for WordPress Practitioners*



What You Will Learn Today

- The importance of the PM Methodology
- Key elements of a PM Methodology and how to craft them
- How to use your PM Methodology as a Unique Value Proposition





In order to leverage your Project Management Methodology, first you **MUST**...



1. A set of guiding principles and processes
2. Defines how you work and communicate



Because...

1. Random Processes = project overruns





Because...

2. Repeatable Processes =

- increased efficiency
- more precise estimating
- better informed client
- clearer understanding of the tasks ahead
- higher quality clients
- sets you apart from the competition





Because... you want to be like....



A TRIPLE THREAT



The WordPress Triple Threat



Designer of Websites



Builder/Developer of
Websites



Manager of Website
Projects



But Let's Make a Distinction Between...

1. A pure Project Management Methodology

- A set of guiding principles and processes that define how you work and communicate

- Examples

- PMI/PMBOK
- Six Sigma
- SEI CMM



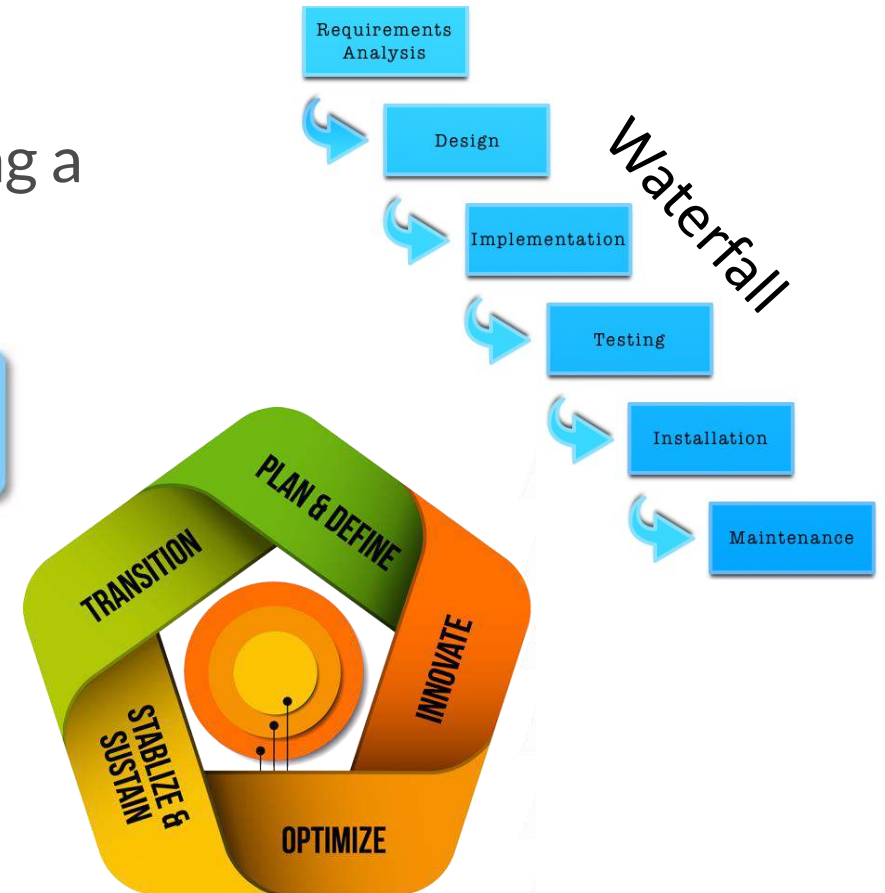
Carnegie Mellon University
Software Engineering Institute



But Let's Make a Distinction Between...

2. A pure Development Methodology

- The lifecycle for developing or maintaining a product, application, or service
- Examples
 - Waterfall
 - RAD
 - Application Maintenance





But Let's Make a Distinction Between...

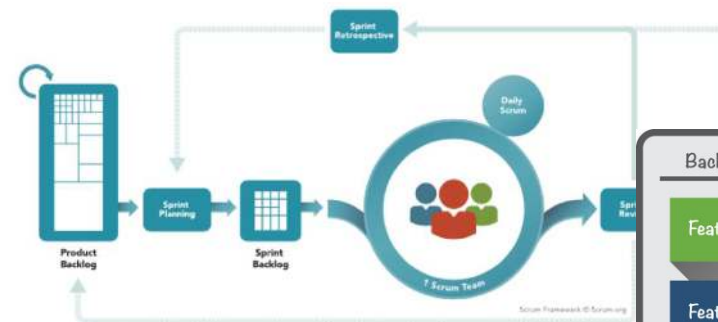
3. A combination PM/Development Methodology

- Where the project management and development methodologies are merged and work in tandem with each other

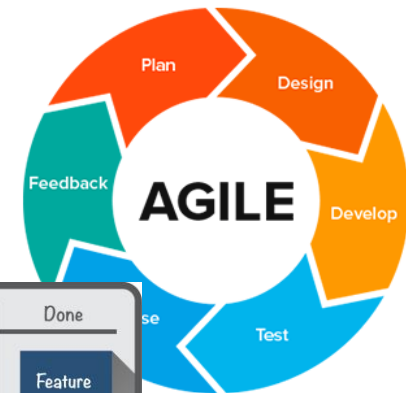
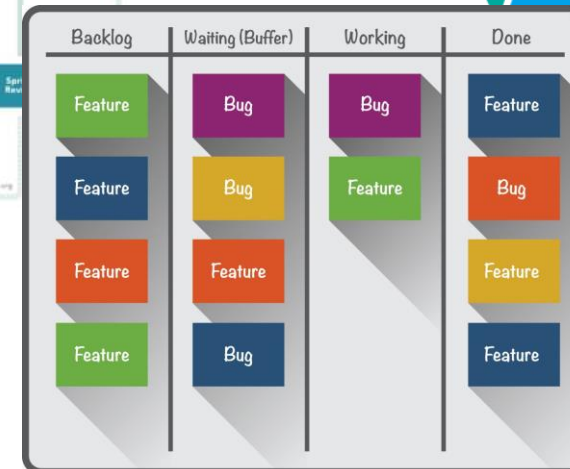
- Examples

- Agile
 - Kanban
 - Scrum

SCRUM FRAMEWORK



Kanban





6 Productivity Principles for WordPress Project Success

Define the Job in Detail with a Content First Approach

Get the Right Resources Involved

Estimate the Time and Costs OFTEN

Break the Job Down

Establish and Stick To a Change Procedure

Establish Interim and Final Acceptance Criteria



Key Elements of a Good PM Methodology

1. Proper Estimating
2. Resource Management
3. Work Breakdown Structure
4. Approach to Content Collection
5. Change Management
6. Acceptance Management





Proper Estimating

1. Abandon the crystal ball approach
2. Don't try and estimate what you don't know
3. Get rid of the “pad” as “change control”
4. Never provide a precise estimate in your proposal





Resource Management

Define your approach to get the RIGHT:

1. People involved
2. Plugins involved
3. Hosting involved
4. Blocks involved
5. Other resources involved





Work Breakdown Structure

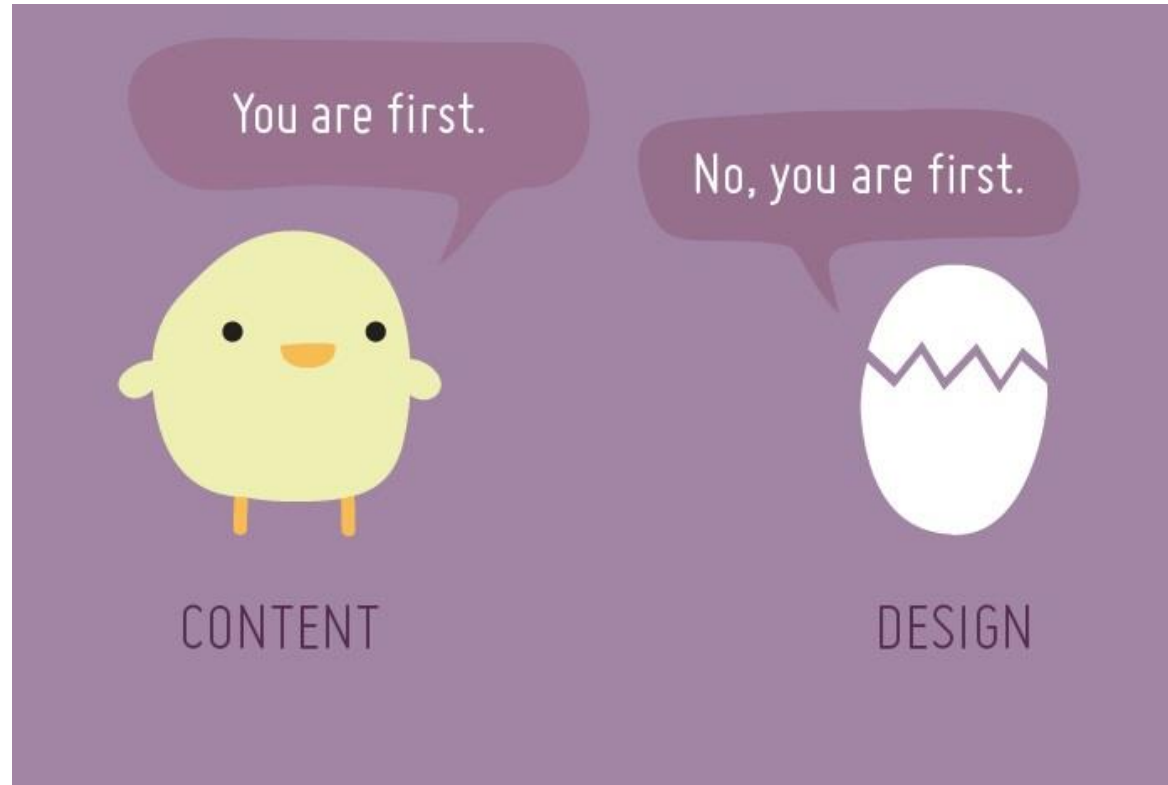
1. Phases, Activities, and Tasks
2. Milestones
3. The 80 Hour Rule
4. Incremental Approvals





Approach to Content Collection

1. Content first?





Approach to Content Collection

2. Define how you will:

- Determine content requirements
- Estimate content
- Set client expectations regarding content
- Manage content collection activities





Change Management

1. Acknowledge change as inevitable
2. Plan for change
3. Manage change
4. Use a change budget
5. Implement change control without exception





Acceptance Management

1. Formal process of acceptance
2. Incremental
3. Define acceptance criteria





Why does any of this matter?

- Typical WordPress Solution
 - Theme
 - Plugins
 - Design elements
 - Maybe some custom CSS
 - Maybe a little coding



You need something else as a Unique Value Proposition



Your PM Methodology as a UVP

- Detailed 2-step approach saves money

Phase 1 – Project Definition



Phase 3 – Development





Your PM Methodology as a UVP

- We don't estimate what we don't yet know

*We don't pad estimates...
because we don't have to.*



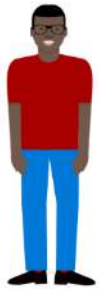


Your PM Methodology as a UVP

- We ensure we get the right resources involved



Information Architect (IA)



User Experience (UX) Designer



Web Developer



User Interface (UI) Designer



Web Content Specialist



Change Management Specialist



Trainer



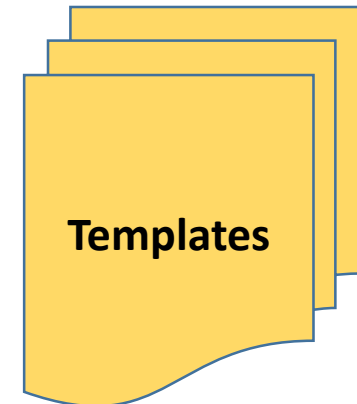
Evangelist



Business Analyst (BA)



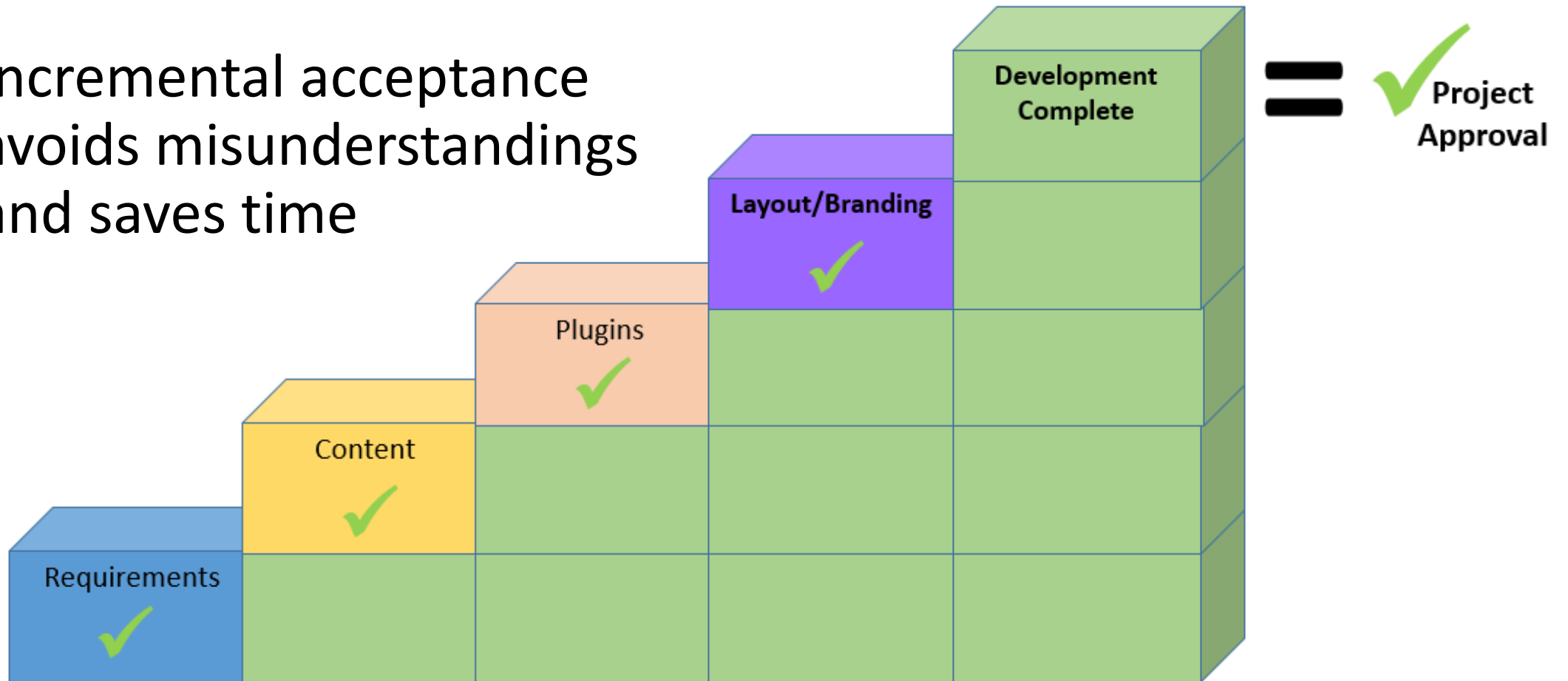
Help desk / Support





Your PM Methodology as a UVP

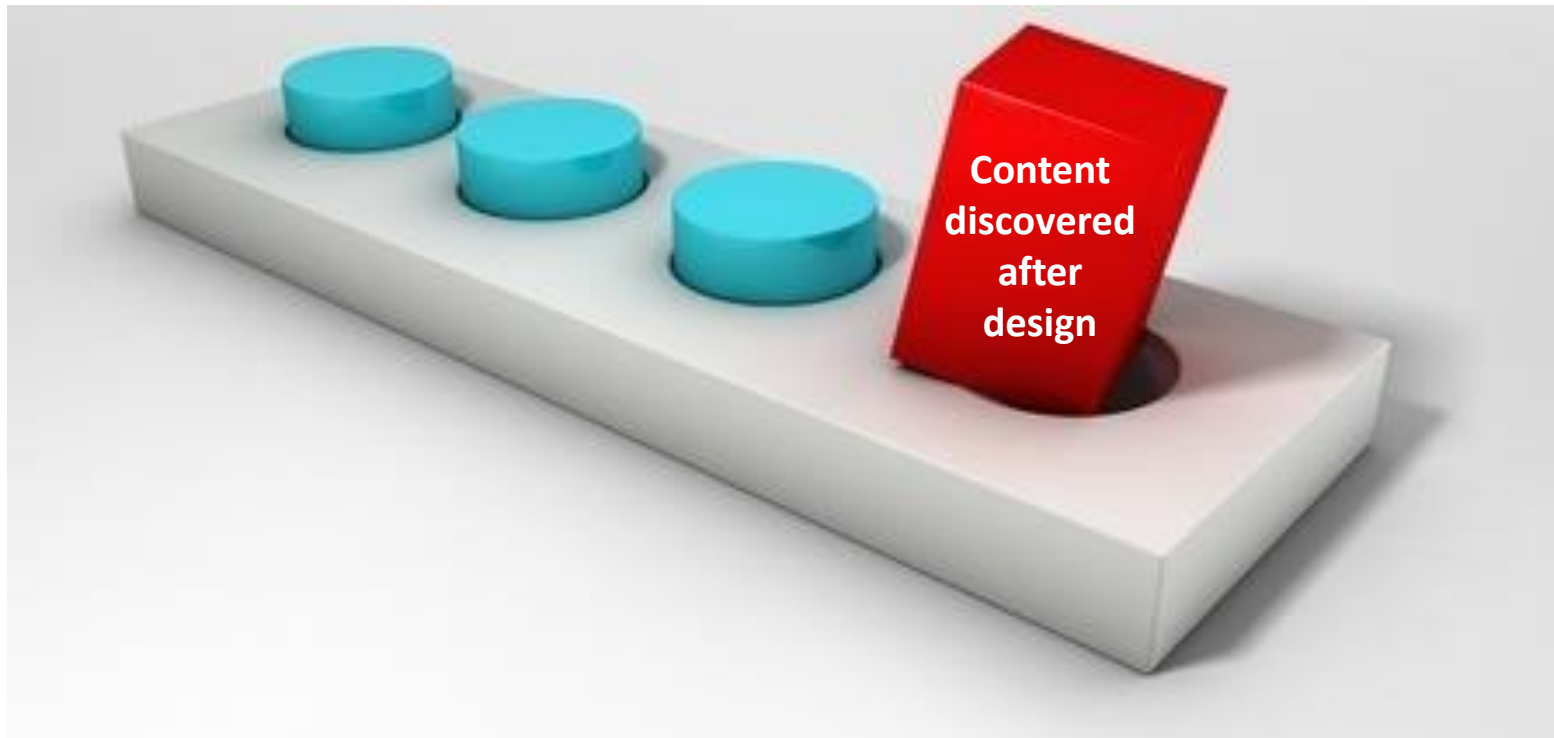
- Incremental acceptance avoids misunderstandings and saves time





Your PM Methodology as a UVP

- We design around content which increases efficiency





Your PM Methodology as a UVP

- We acknowledge change, plan for it, and let you manage it



*We never penalize
you for change!*

How it Sets You Apart



You



1. 2-Step estimating/approval process
2. Functions address business requirements
3. Content First
4. Manage change with the client in charge
5. Use a change budget
6. Precise acceptance criteria
7. Use proven productivity management techniques = on time, within budget, with features that meet the BRs

The other guy



1. Attempts a precise estimate without a deep dive
2. Functions cannot always be tied to a BR
3. Content bottlenecks and project delays
4. Has no plan for managing change or a poor one
5. Pads the quote to cover any unknowns
6. Doesn't precisely define what "done" means
7. Has no distinct process for completing the project on time, within budget, with features that meet the BRs



Questions Your Client Should Ask the Other Guy

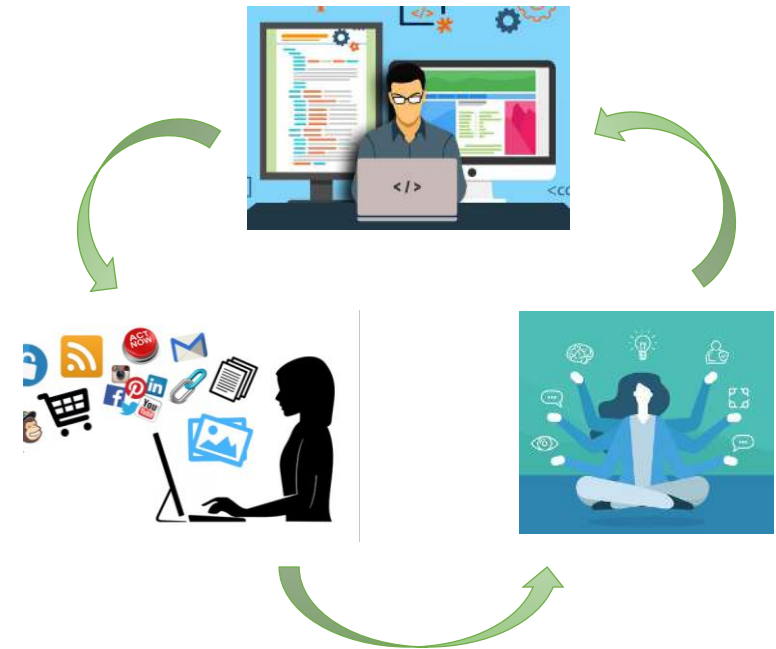
1. How did you arrive at this estimate?
2. How do you discover and document the business requirements?
3. How do you manage the content activities?
4. How do you plan for and manage changes?
5. How is the cost for change determined?
6. What are the criteria for approval of the project? What about interim deliverables?
7. How can we be sure the project will be completed on time, within budget, and that it has all the features we requested?



In Summary

To be a WordPress “Triple Threat” and set yourself apart from your competition, you need a set of repeatable processes that describe how you plan and manage:

1. Requirements discovery
2. Content activities
3. Change requests and scope creep
4. Deliverable Approvals
5. Estimates and Timelines
6. Client Expectations and Training





In Summary

Be Like This



Not Like This





How to Learn More

Go Here: wproadmaps.com



Or here:





Thank You!

Slides available at wproadmaps.com/wordcamp



@wproadmaps

#WCOC

Notices about free webinars: Text ROADMAPS to 444999