

6 WordPress Best Practices to Ensure Project Success





Which are you?

A WordPress Solution Provider



VS.

Website Builder





What You Will Learn Today

- 6 Productivity Principles for WordPress Project Success
- Where they came from
- 6 Best Practices stemming from the Principles
- How the Best Practices increase project success





About Me





- M. Ed. in Instructional Design
- Training Specialist
- Technical Writer





- IT Business Analyst
- Project Manager





Now

- WordPress “Solution Provider”
- WP Roadmaps and Coaching
- WordCamp Speaker
- Local Educator

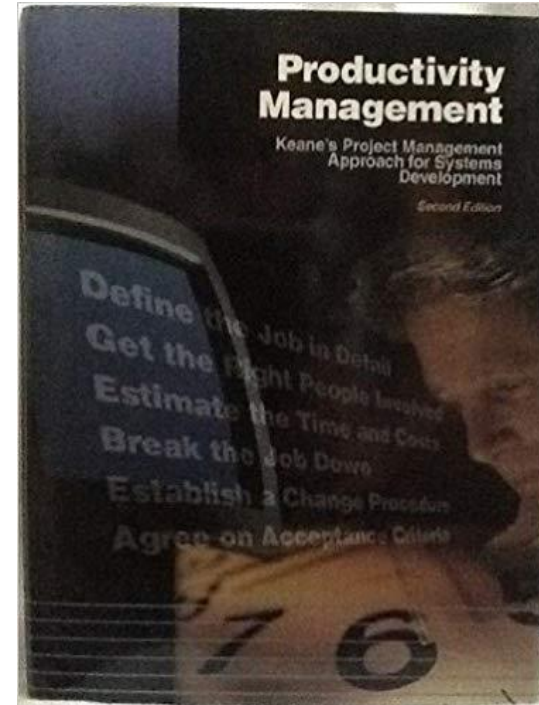




- Keane, Inc



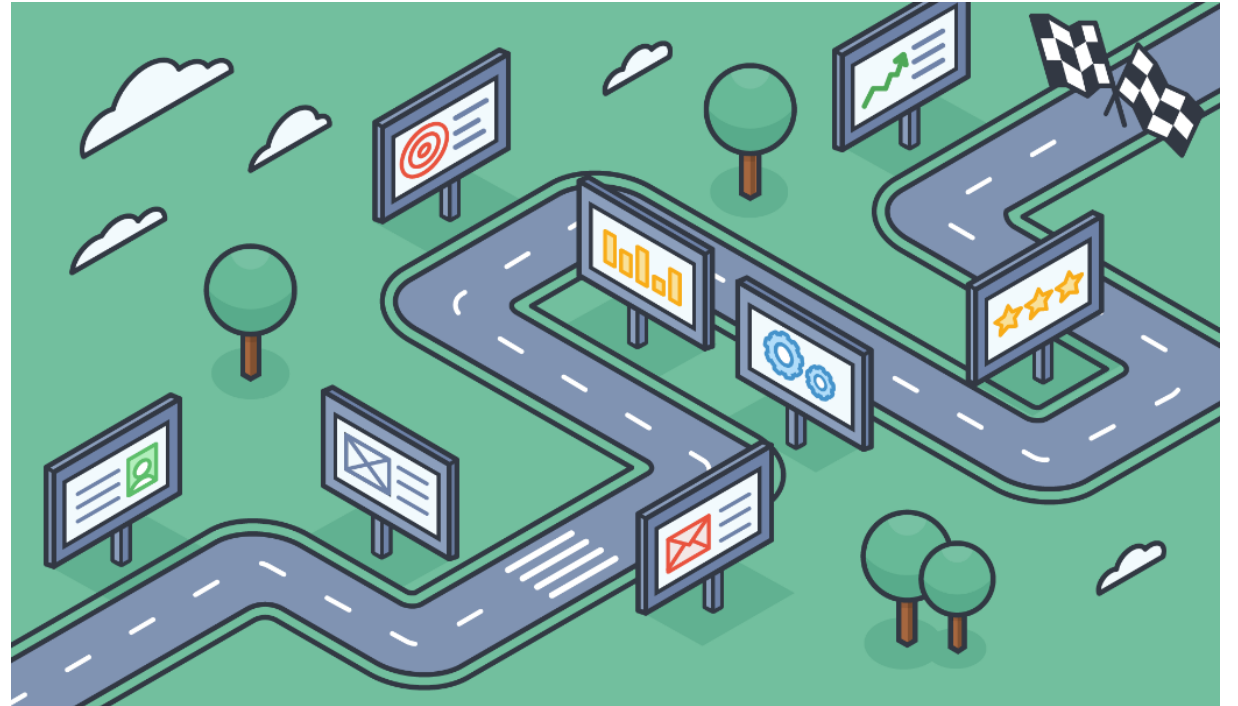
That became our bible!!!

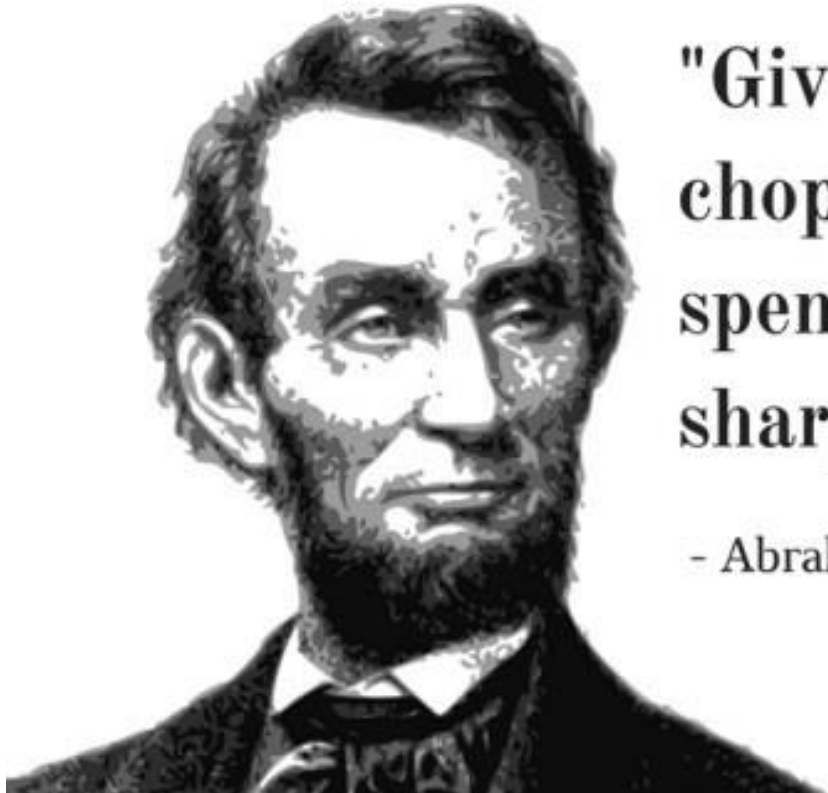




The principles are based on the premise ...

... a plan is just a plan.





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

- Abraham Lincoln



6 Productivity Principles for WordPress Project Success

Keane's Original Principles	For WordPress
Define the Job in Detail	Define the Job in Detail with a Content First Approach
Get the Right People Involved	Get the Right Resources Involved
Estimate the Time and Costs	Estimate OFTEN
Break the Job Down	Break the Job Down
Establish a Change Procedure	Establish and STICK TO a Change Procedure
Establish Acceptance Criteria	Establish Interim and Final Acceptance Criteria



What is WordPress Project Success?

- Little to NO scope creep
- On time
- Within/under budget
- You get paid for ALL you do
- You retain your planned profit margin
- The client is happy/satisfied
- End product meets the client's **Business Requirements**





Best Practice

01

Make the Customer Part of the Project Team

Principles

Get the Right Resources Involved

Get Resources Involved “Rightly”



Position Correctly

This



NOT This





Set Expectations





Become the Guide



“Incentive-ize”





Develop a Client Management Plan

1. With what type of clients are you willing to work?
- 2. How do you manage client activities?**
3. What incentives do you offer for compliance?





Project Success Factors

- Increased client understanding of their role
- Fewer project delays (and associated cost) caused by the client





Best Practice

02

Use a 2-Step Proposal Process

Principles

Define the Job in Detail with a Content First Approach
Break the Job Down



Stop giving the
solution away in the
proposal





Stop giving quotes!





*You CANNOT estimate what
you do not yet know!*





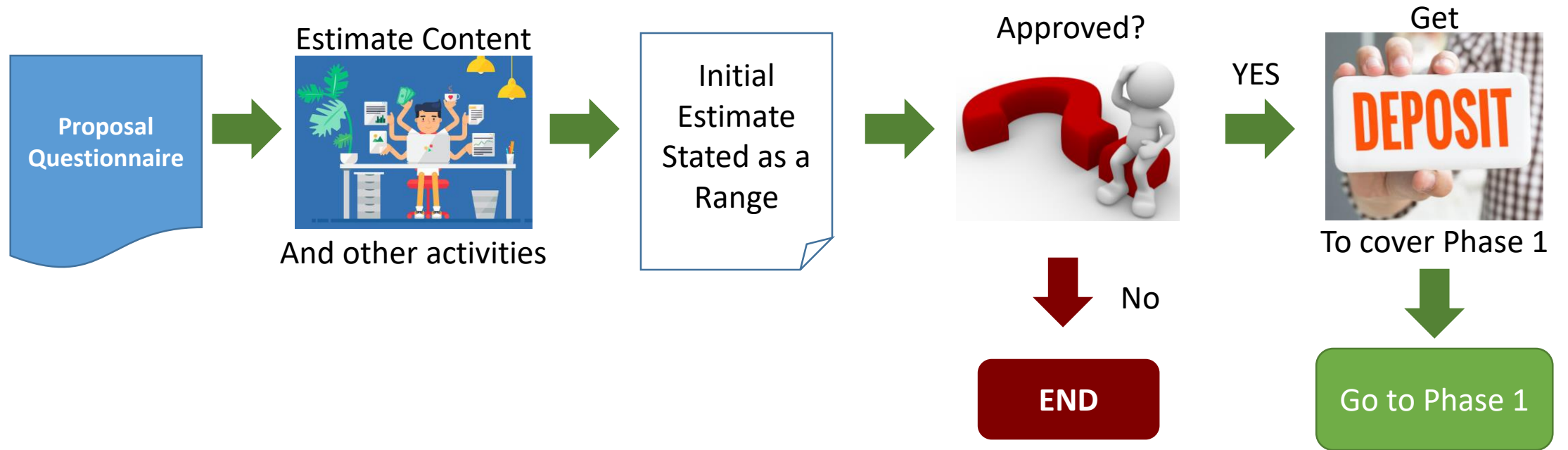
Position Phase 1 as
the “Discovery”
phase





2-Step Proposal Process – Step 1

PHASE 0 – PROPOSAL CREATION





2-Step Proposal Process – Step 2

PHASE 1 – PROJECT DEFINITION

Perform the
Deep Dive Discovery



Add any new



Adjust for any



Changed
Requirements



Detailed SOW



With more precise
estimate



Go to Phase 2



NO

Does new estimate



exceed the proposal
estimate?



YES



Did client elect
to cancel?



YES

Deliver

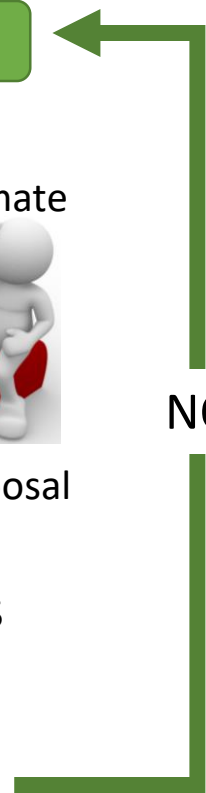


To client

END



NO





Project Success Factors

- Not giving away your solution
- You get paid for discovery
- Controls Scope Creep
- **And...**





Extra Advantage

Allows you to
off-load clients
who are not a
good fit





Best Practice

03

Use a Repeatable, Measurable Estimating Process

Principle

Estimate **OFTEN**
Break the Job Down



Abandon the Crystal Ball Approach





Use a Work Breakdown Structure

Phase		Activity		Task
Phase 0 - Proposal Creation				
	0-1	Complete Proposal Questionnaire		
			0-1.1	Provide Proposal Questionnaire To Client
			0-1.2	Hold Walkthrough Session With Client
			0-1.3	Update Questionnaire Per Walkthrough
	0-2	Estimate Content		
			0-2.1	Create Initial Visual Site Map
			0-2.2	Review Site Map with Client
			0-2.3	Update Site Map Per Client Feedback
			0-2.4	Determine Content Rough Order of Magnitude (ROM)
	0-3	Create Initial Proposal		
			0-3.1	Identify Who Should Perform Content Activities
			0-3.2	Estimate Time and Cost
			0-3.3	Create Proposal Draft
			0-3.4	Present Proposal to Client
			0-3.5	Finalize Proposal
			0-3.6	Secure Client Acceptance
Phase 1 - Project Definition				
	1-1	Refine Project Requirements		
			1-1.1	Conduct Project Definition Meeting with Client
			1-1.2	Create Draft of Functional Requirements
			1-1.3	Review Functional Requirements with Client
			1-1.4	Finalize Functional Requirements per Client Input
			1-1.5	Secure Client Acceptance for Functional Requirements
	1-2	Refine Content Needs		
			1-2.1	Review ROM with Client
			1-2.2	Assign Project Plan Content Activities
			1-2.3	Re-Estimate Time and Costs
			1-2.4	Organize Initial Content Specification Document
			1-2.5	Specify Site Wide Content
			1-2.6	Specify Home Page Content



PROPOSAL

*Estimate at the Activity
Level*

DEEP DIVE DISCOVERY

*Estimate at the Task
Level*





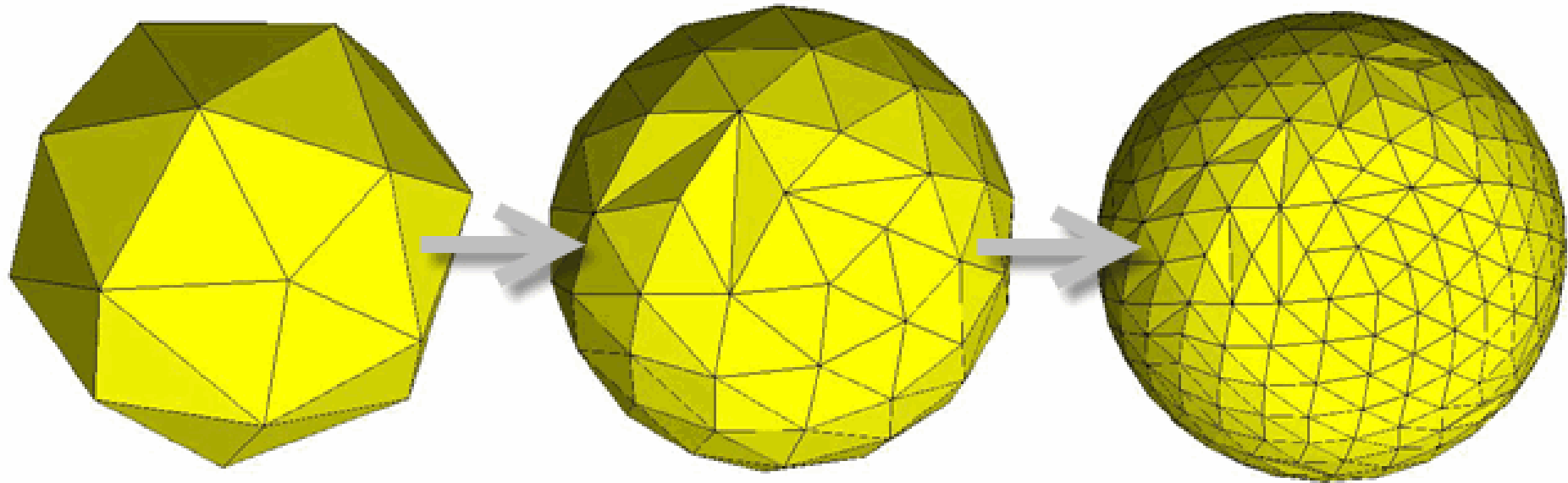
Estimate content first



Rough Order of
Magnitude



Estimate OFTEN

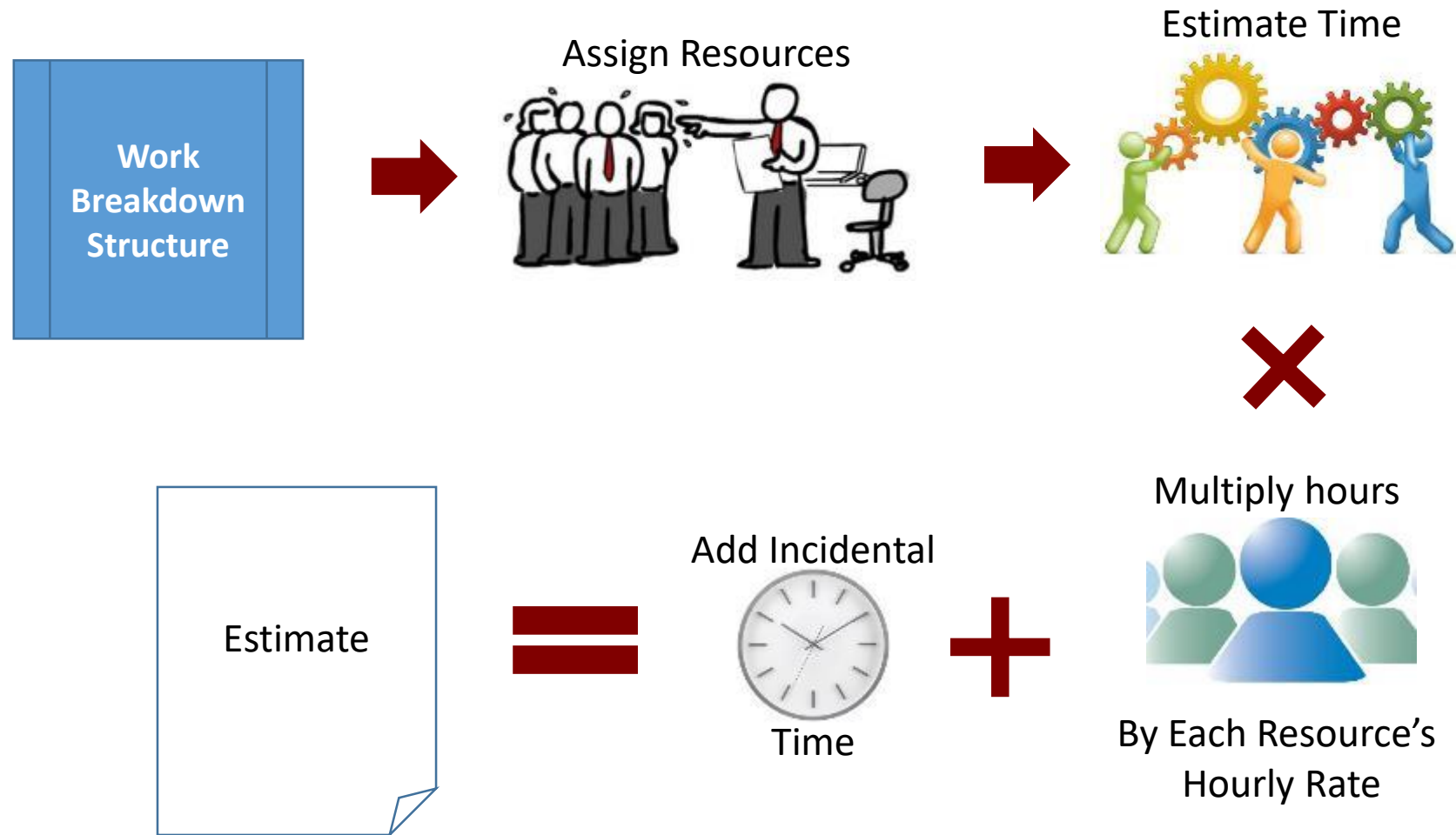


Always review your last estimate before
doing the next.





Estimation Basics





Project Success Factors





Best Practice

04

Use a Content-First Development Approach

Principles

Break the Job Down

Define the Job in Detail with a Content-First Approach



Why Content First?

- Improves Design
 - ❖ Speeds Development
 - ❖ Reduces Scope Creep
 - ❖ Prevents the Content Collection Bottleneck





Improves Design





Speeds Development

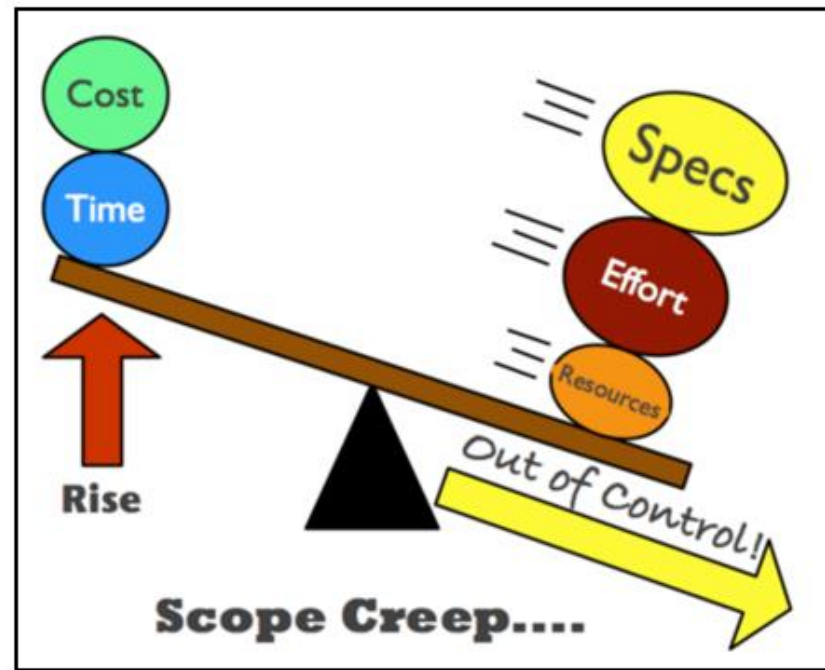
- How long will it take you to develop a website if the pieces and parts are at your fingertips?





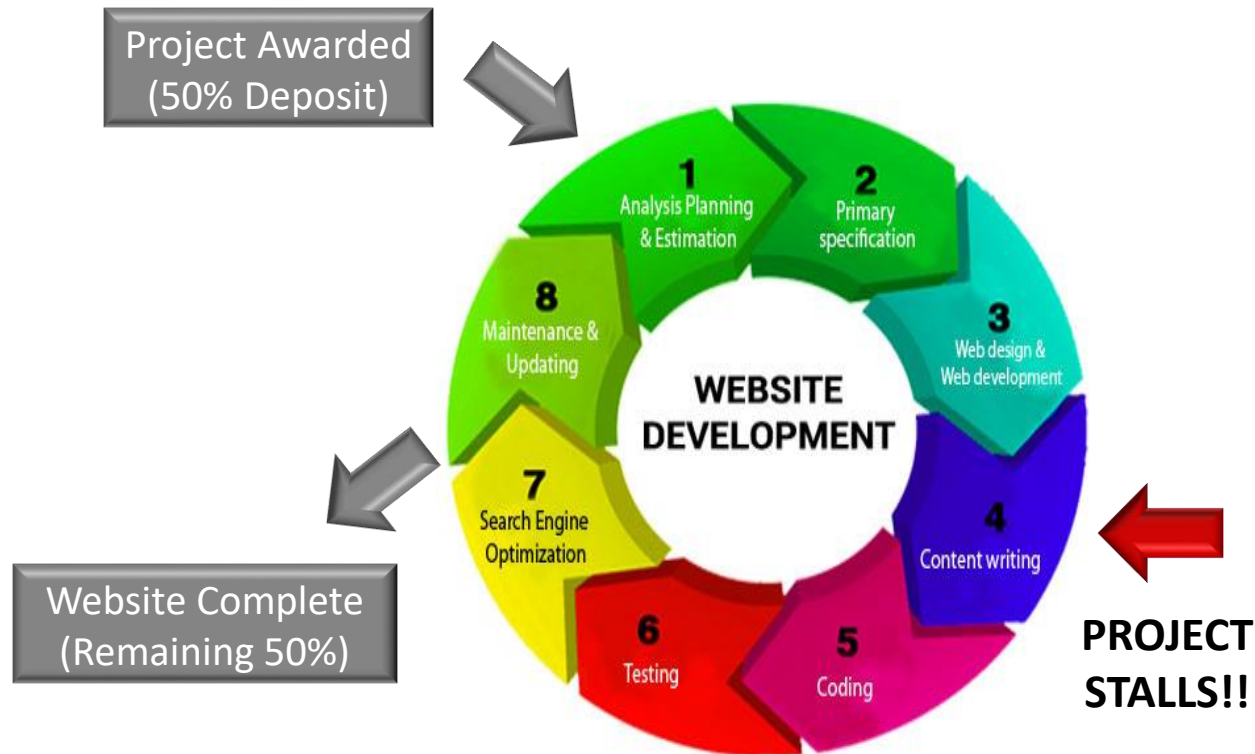
Reduces Scope Creep

- Content and other changes found early can be incorporated with little extra cost or time (if any).





Prevents the Content Collection Bottleneck





How to Implement a Content-First Approach

- **Re-structure your Payment Schedule**

- Upon Acceptance of the Proposal – <\$XXXX> deposit
- Upon Acceptance of the Statement of Work – X% of remainder

CLIENT (or whoever) PROVIDES CONTENT

- At the completion of Testing – X% of remainder
- At the completion of Training – all remaining funds due



How to Implement a Content-First Approach

- **Structure the Project Plan for Content-First**

Phase 0 - Proposal Creation (*estimate needed content*)

Phase 1 - Project Definition (*identify who and when*)

Phase 2 - Design and Preparation (*collect all content*)

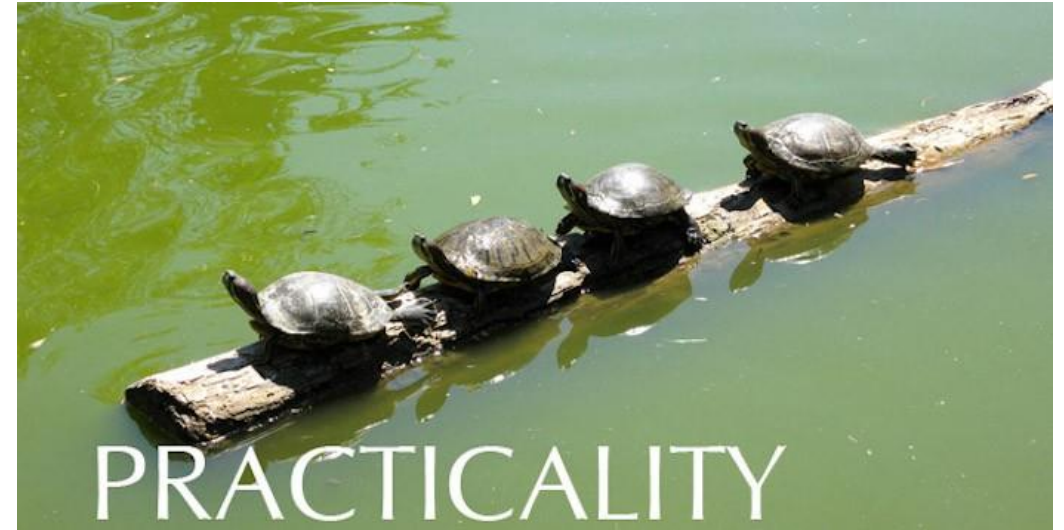
Phase 3 - Development and Testing

Phase 4 - Deployment and Training



Project Success Factors

- Improves Design
- ❖ Speeds Development
- ❖ Reduces Scope Creep
- ❖ Prevents the Content Collection Bottleneck



Completed on Time!



Best Practice

05

Use Incremental Acceptance

Principles

Break the Job Down

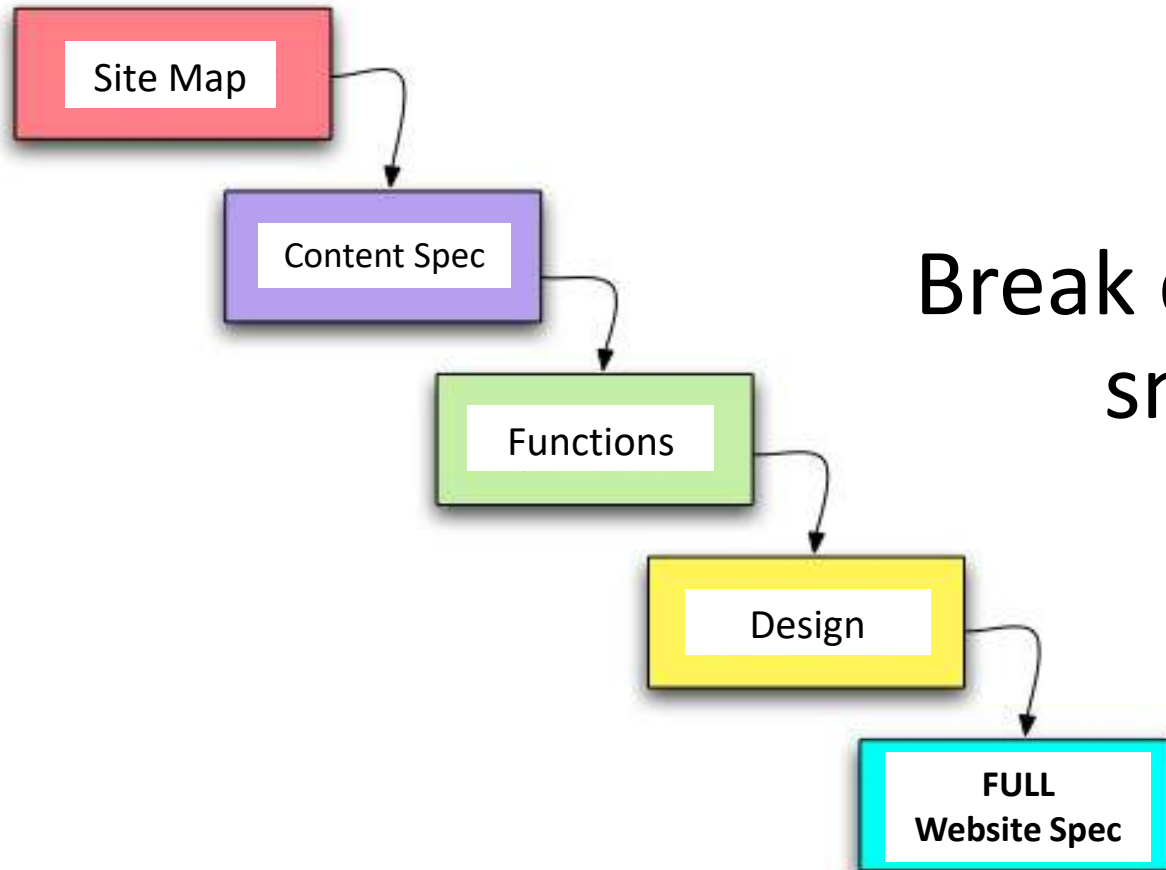
Establish Interim and Final Acceptance Criteria



Acceptance vs. Approval

The client might not approve of something on the site, but if it meets the agreed-upon acceptance criteria, it must be accepted.





Break deliverables into
smaller parts



Elements of a Good Acceptance Management Plan

Identifies all deliverables to be approved.





Elements of a Good Acceptance Management Plan

Specifies acceptance criteria for each deliverable and the final project.





Elements of a Good Acceptance Management Plan



Identifies who is responsible for reviewing deliverables and who has the authority to accept them.



Elements of a Good Acceptance Management Plan

Specifies the turnaround time for review and acceptance





Elements of a Good Acceptance Management Plan

Clearly states what happens when the turnaround time is not met





Elements of a Good Acceptance Management Plan

Defines “rejection with cause”

...and when and
how “rejection
with cause” is
applied

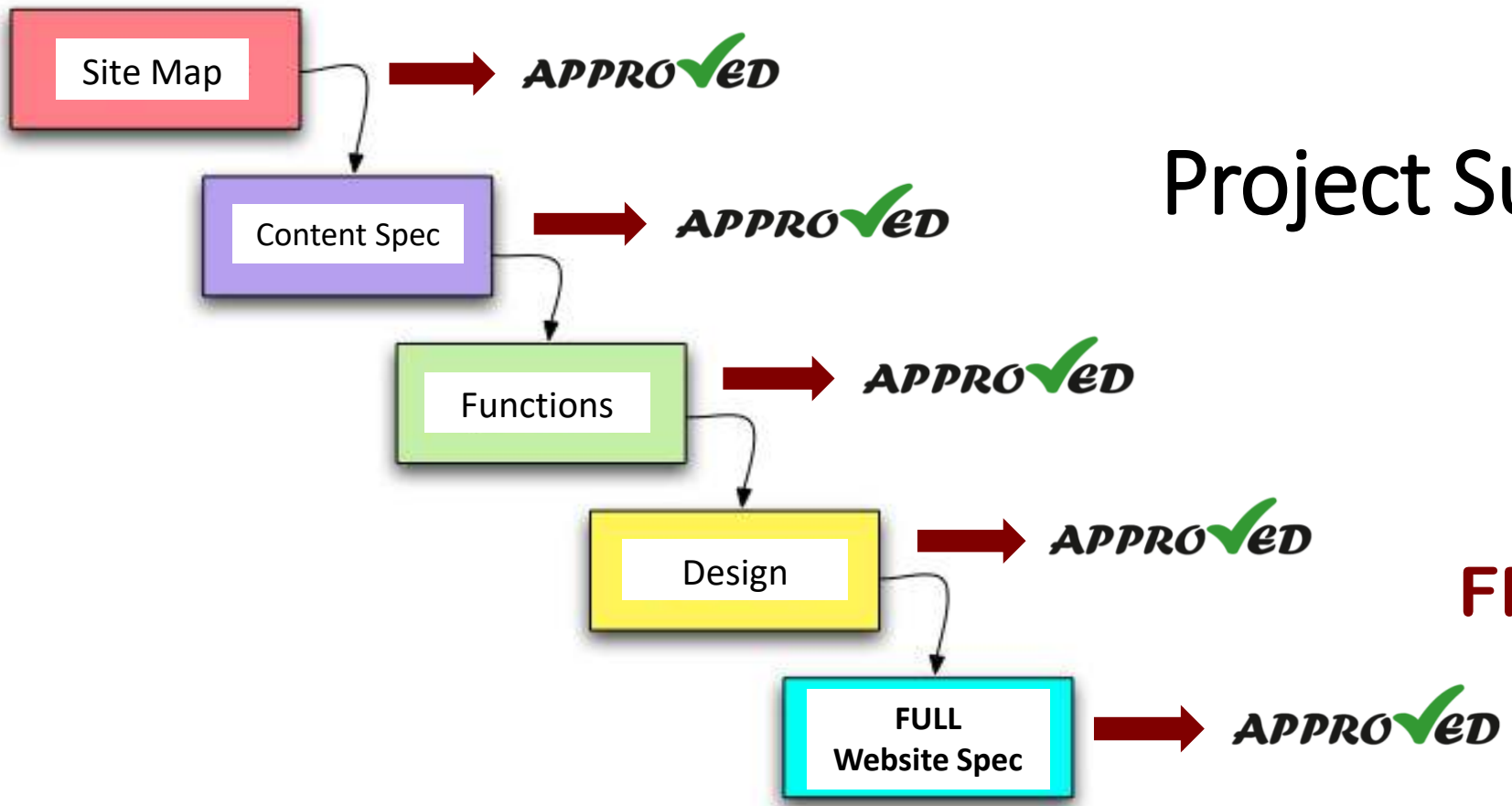




Elements of a Good Acceptance Management Plan

Uses Incremental Acceptance





Project Success Factors

In a
FRACTION
of the
time!!





Project Success Factors

- Clients gain vested ownership up front
- Increases team satisfaction
- Controls Scope Creep
- Streamlines final project acceptance





Best Practice

06

Invoke Your Change
Control Process

WITHOUT EXCEPTION

Principles

Establish and **STICK TO** a Change Procedure
Break the Job Down

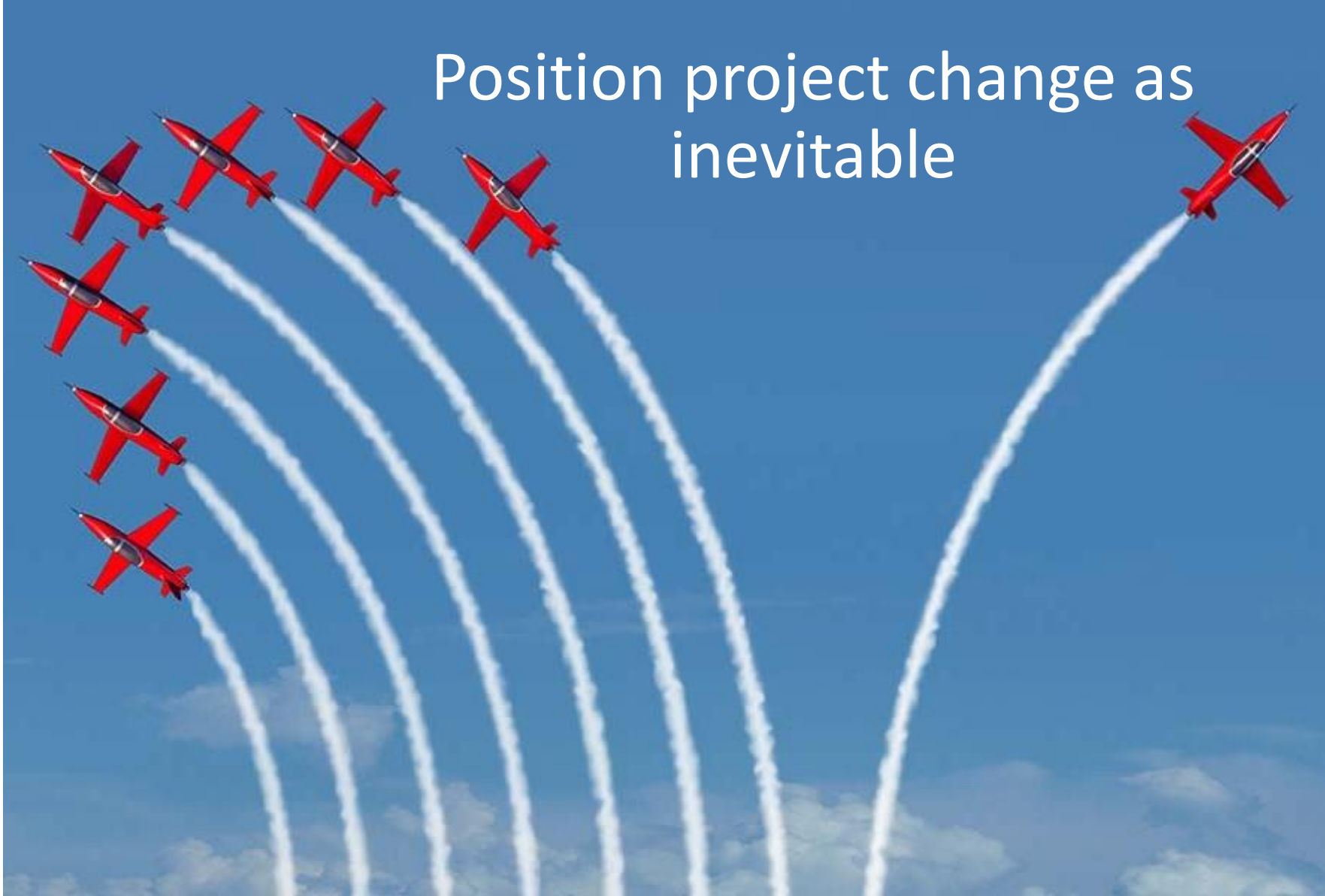


Not actively managing
inevitable change
inevitably results in
lost revenue.

Beth Livingston



Position project change as
inevitable





Elements of a Good Change Control Procedure



1. Is invoked without exception
2. Defines change
3. Uses a Change Budget
4. Establishes that all change requests are in writing
5. Identifies **who** can initiate a change request
6. Identifies **who** will assess impact to the project



Elements of a Good Change Control Procedure

7. Identifies **who** will accept or reject the change request
8. Specifies the change request turnaround time and what happens if the client does not respond.
9. Specifies when payment for the change request is due





Elements of a Good Change Control Procedure

2. Defines change





Elements of a Good Change Control Procedure

3. Uses a Change Budget





Using a Change **BUDGET**
means you don't need to
pad your estimate





Using a Change **BUDGET**
reduces frivolous change
requests





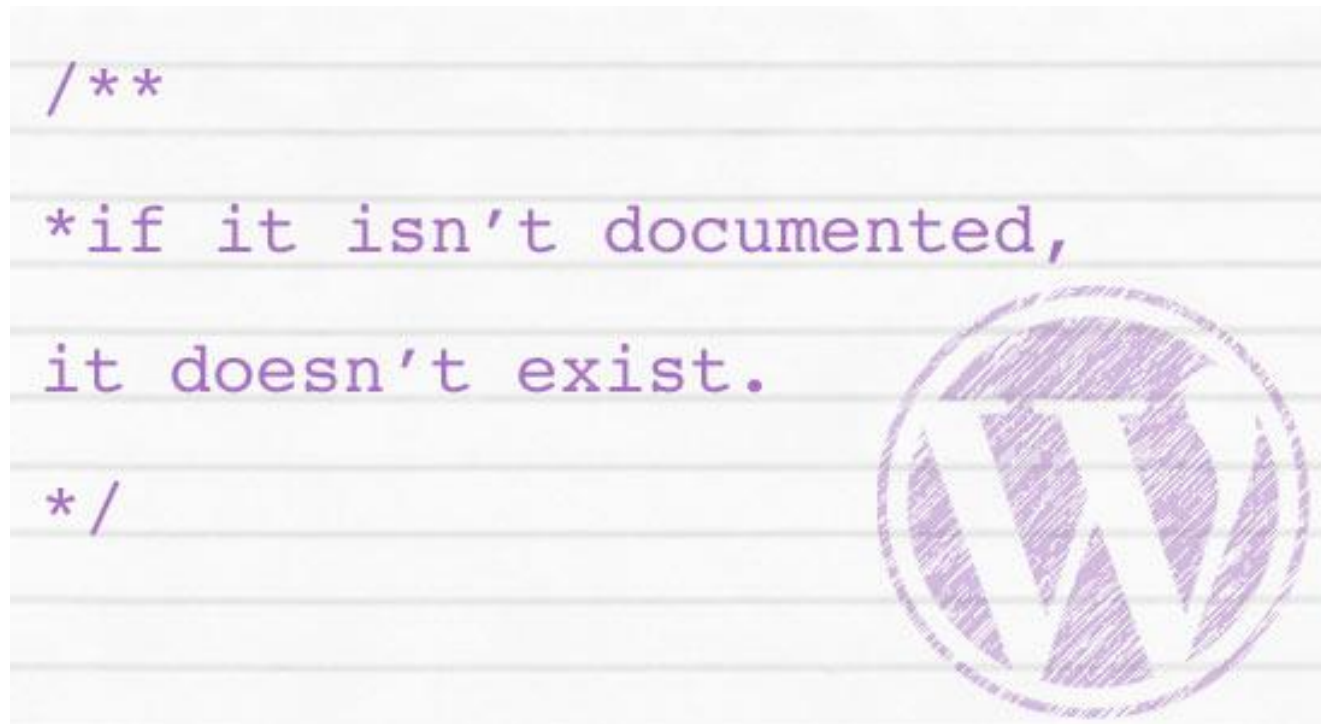
Using a Change **BUDGET**
means you *magically*
ALWAYS come in under the
total project budget





Elements of a Good Change Control Procedure

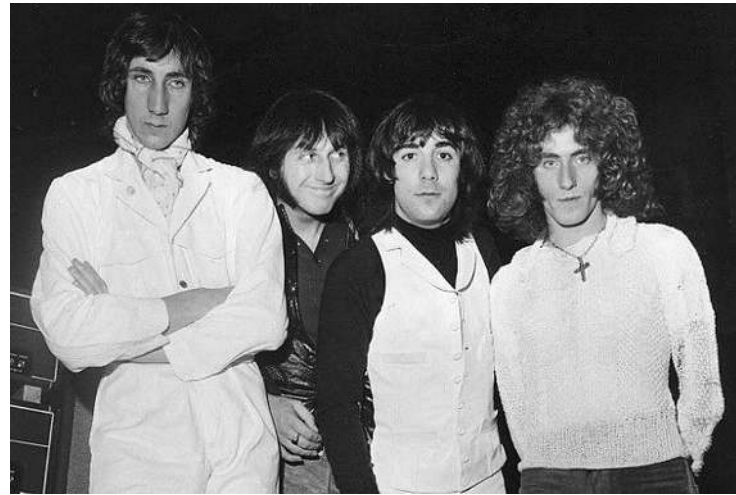
4. Establishes that all change requests are in writing





Elements of a Good Change Control Procedure

- 6. Identifies **who** can initiate a change request
- 7. Identifies **who** will assess impact to the project
- 8. Identifies **who** will accept or reject the change request





Elements of a Good Change Control Procedure

8. Specifies the change request turnaround time and what happens if the client does not respond.





Elements of a Good Change Control Procedure

9. Specifies when payment for the change request is due



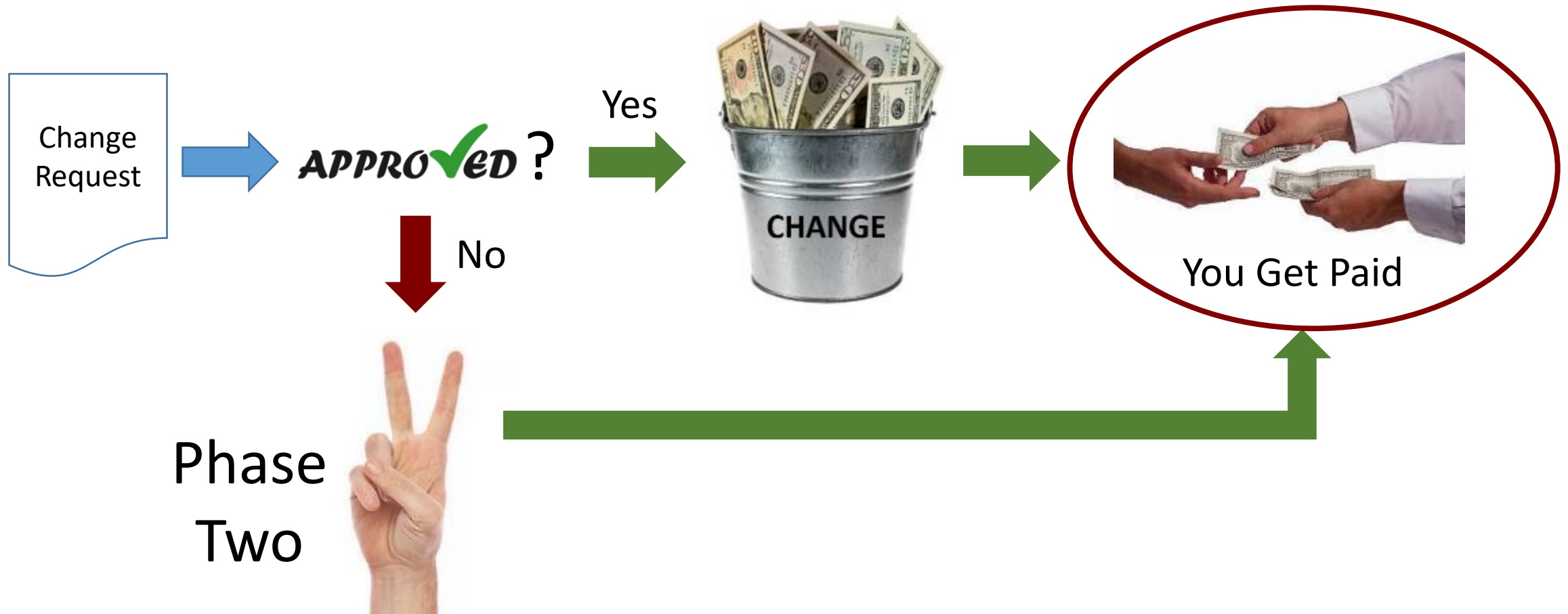


Project Success Factors

Virtually eliminates the Scope Creep!



Project Success Factors





- 01 Make the Customer Part of the Project Team
- 02 Use a 2-Step Proposal Process
- 03 Use a Repeatable, Measurable Estimating Process
- 04 Use a Content-First Development Approach
- 05 Use Incremental Acceptance
- 06 Invoke Your Change Control Process Without Exception



How to Learn More

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How to Learn More



Coming later this year...

**A Free Membership Site to
learn to manage WordPress
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Thank You!

Beth Livingston

Slides available at [**wproadmaps.com/wordcamp**](https://wproadmaps.com/wordcamp)



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