Why the Pad is Bad

A Practical Guide to Estimating WordPress Projects

About Me

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

- IT Business Analyst
- Project Manager

Now

WordCamp Raleigh @wordcampraleigh · 54m

Can barely believe @BethLivingstoNC is sharing the SECRET SAUCE to setting yourself apart from the competition through project management! Don't miss what's sure to be a great talk & get your tickets today! buff.ly/2RVJ7Wm

BETH LIVINGSTON

speaker

WP Roadmaps and Coaching

- WordPress Solution Provider
  - Online Educator
  - WordCamp Speaker
    - Local Educator

6 Productivity Principles for WordPress Project Success

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

2. Get the Right Resources Involved

3. Break the Job Down

4. Estimate the Time and Costs OFTEN

5. Establish and STICK TO a Change Procedure

6. Establish Acceptance Criteria

Which are you?

A WordPress Solution Provider   Website Builder

 VS.

Why Do You Pad?

- Fear of the Unknown

Why Do You Pad?

- As a way to cover Scope Creep

Why Do You Pad?

- Not enough information

Why Do You Pad?
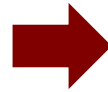
- To try and come in early and under budget

Why Do You Pad?

- To ensure you retain your planned profit margin

Why the Pad is Bad

Pad $1000
1 Week

Initial Estimate $4000 3 Weeks

+

What was it used for?

=

Actual Time 4 Weeks

Actual Project Cost $4900

Why the Pad is Bad for your Business

Padding your estimate means you cannot measure.

You cannot improve on what you cannot measure.

Instead of Padding

- Fear of the Unknown

- Not Enough Information

  - Find out what you need to know BEFORE providing a precise estimate

  - Position Phase 1 as the Deep Dive Discovery

  - Consider a 2-Step Proposal Process

Instead of Padding

- As a way to cover Scope Creep

  - Position Project Change as Inevitable
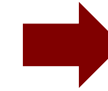
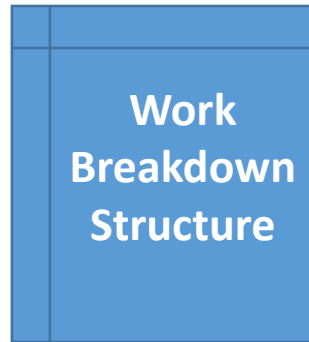 - Establish and STICK TO a Change Procedure

Instead of Padding

- To try and come in early and under budget

- To ensure you retain your planned profit margin

  - Use a Change Budget

Instead of Padding

Change Budget Example

- Project Work Estimate = $5000
- Change Budget (30%) = $1500
- Total Project Estimate = $5000 - $6500

 = If you don't use all the change budget, you came in under budget!!

Using a Change Budget…

- Sets the proper expectation for the client regarding potential change

Using a Change Budget…

- Puts the client in charge of change

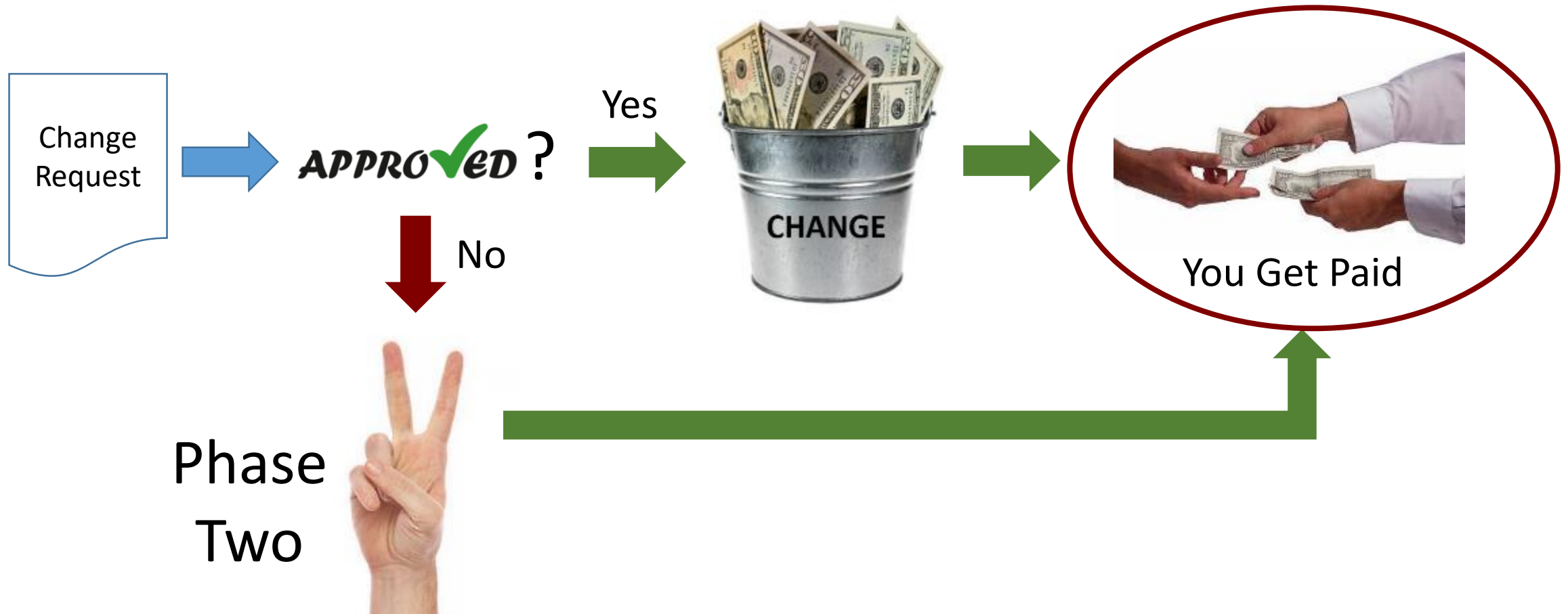# Using a Change Budget…

- Allows you to measure and improve

Using a Change Budget…

- Allows you to ALWAYS come in UNDER budget!

How Change Control Works

Change Request → APPROVED? —Yes→ CHANGE → You Get Paid

APPROVED? —No→ Phase Two → You Get Paid

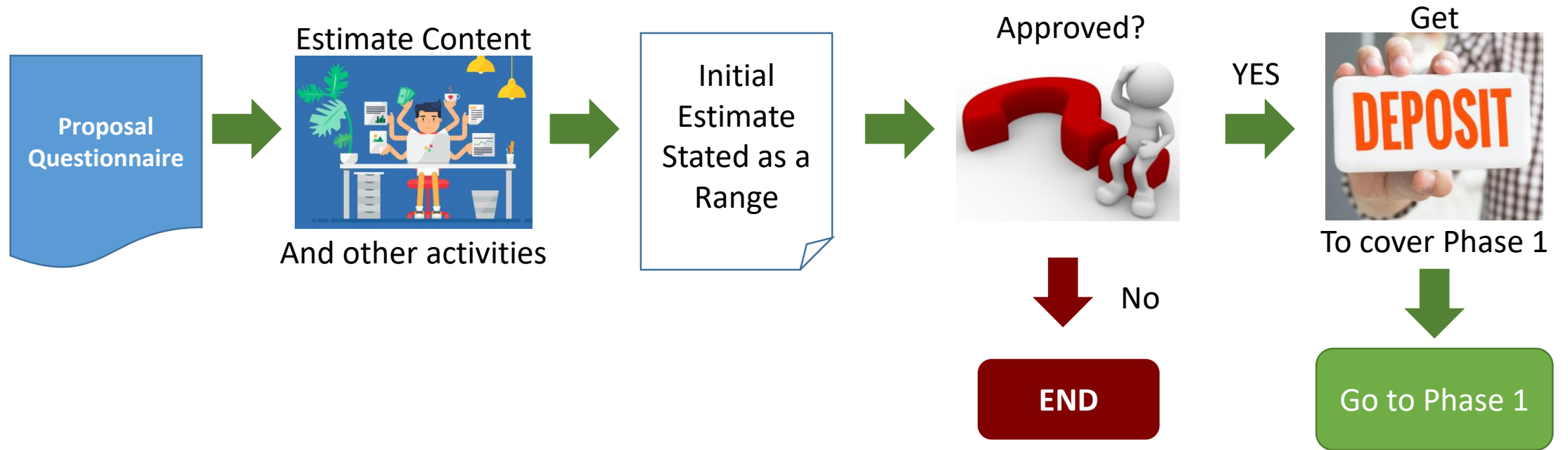# When to Invoke the Change Control Process

- After Proposal Acceptance

Or

- After Phase 1 – Deep Dive Discovery

Consider a 2-Step Proposal Process

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

Requirements

+

Discovered

Adjust for any

Updated WBS

Changed Requirements

Detailed SOW

With more precise estimate

Does new estimate

exceed the proposal estimate?

Go to Phase 2

NO

NO

YES

Did client elect to cancel?

YES

Deliver

SOW

To client

END

WordPress Estimating Best Practices

1. Define the Job in Detail

   • Position Phase 1 as Deep Dive Discovery

2. Estimate Content First

   • Create a Rough Order of Magnitude

3. Break the Job Down

   • Start with a Work Breakdown Structure

WordPress Estimating Best Practices

4. Estimate the Time and Costs OFTEN

   - The only way to improve is to practice and review

5. Establish and STICK TO a Change Procedure

   - Use a change budget

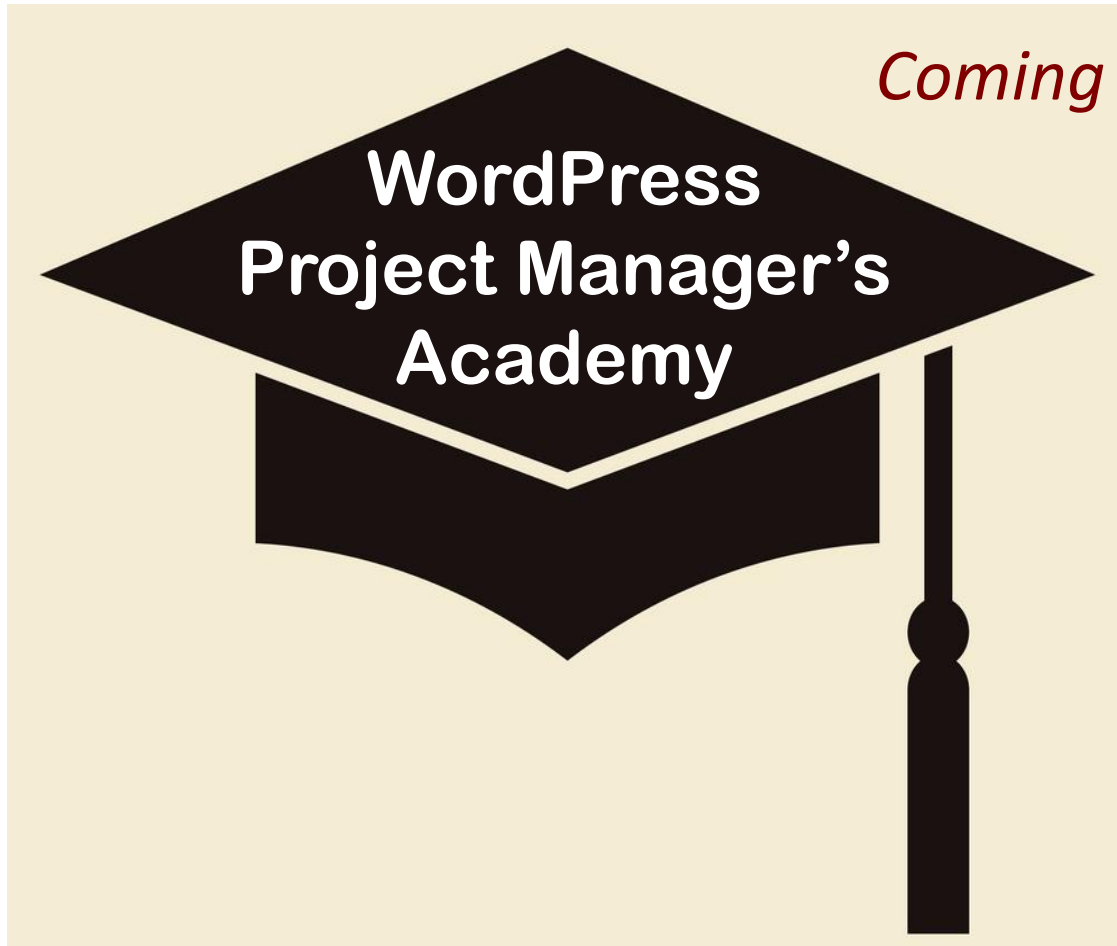   - Must be invoked without exception

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Thank You!

Beth Livingston

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