6 Proven Best Practices to Make Your WordPress Projects Run More Smoothly

Beth Livingston

- First grade teacher
- M. Ed. in Instructional Design
- Training Specialist
- Technical Writer

- IT Business Analyst
- Project Manager

Now

- WordPress **Solution Provider**

- WordCamp **Speaker**

- Local **Educator**

- WP Roadmaps and Coaching

- GoDaddy Pro Ambassador

Beth Livingston

Slides available at wproadmaps.com/wordcamp

@WPRoadmaps or @BethLivingstoNC

#WCORL

Which are you?

A WordPress Solution Provider

Website Builder

vs.

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**

What are the problems you are struggling with today?

- Getting the requirements right
- Scope Creep
- Getting Content from the Client
- Overall Client Management
- Project takes longer than planned
- Project costs more than planned
- Getting paid for ALL you do
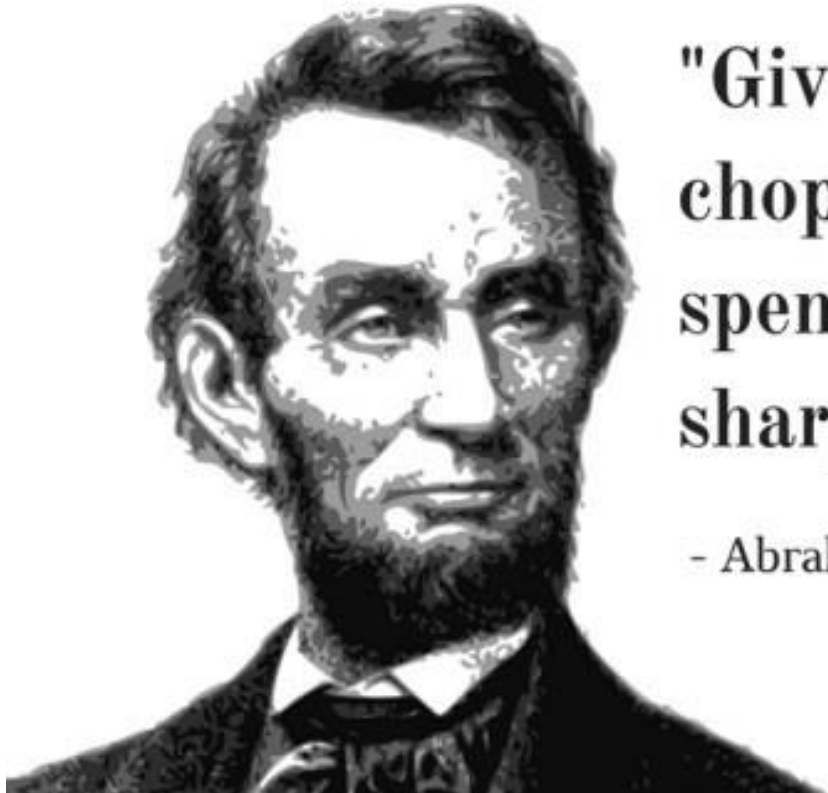- Getting client approvals and payment

What is a "Best Practice?"

A commercial or professional procedure that is accepted or prescribed as being correct or most effective.
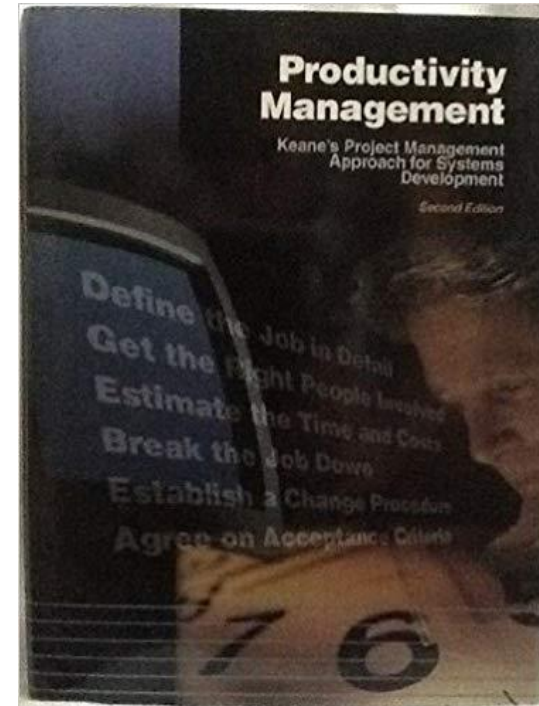
This became our bible!!!

"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

Define the Job in Detail with a Content First Approach

Get the Right Resources Involved

Estimate OFTEN

Break the Job Down

Establish and STICK TO a Change Procedure

Establish Interim and Final Acceptance Criteria

Principle

01

Define the Job in Detail with a Content-First Approach
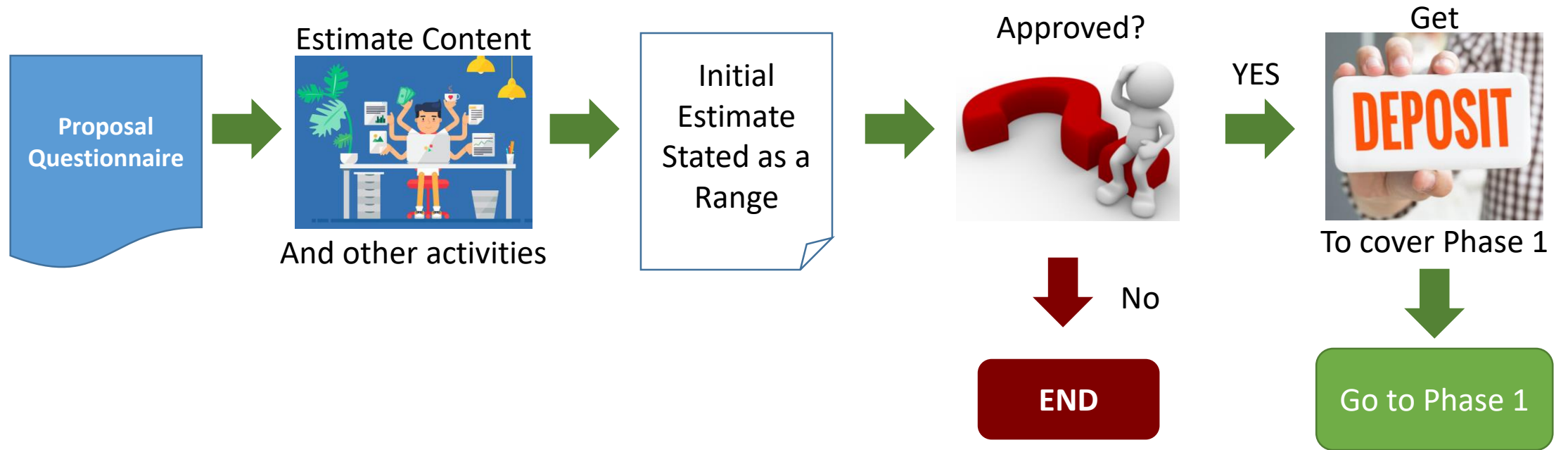
Detailed Discovery comes BEFORE a precise estimate!

Position Phase 1 as the "Discovery" phase

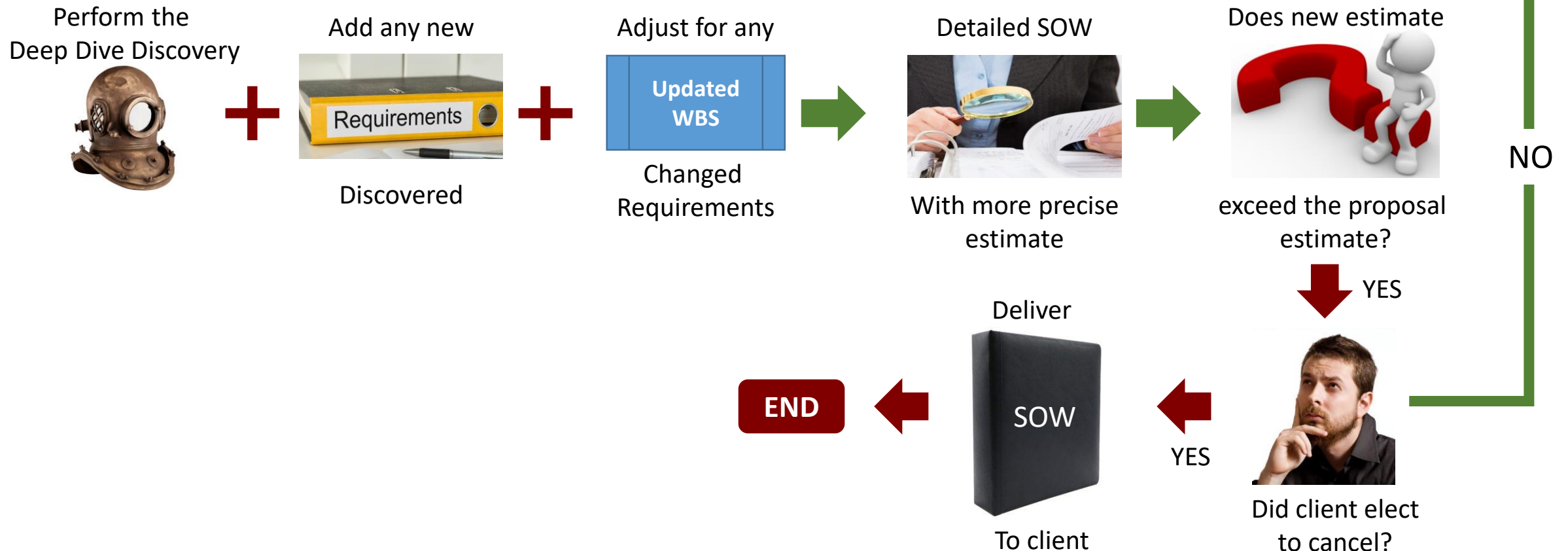# 2-Step Proposal Process – Step 1

PHASE 0 – PROPOSAL CREATION

Proposal Questionnaire → Estimate Content (And other activities) → Initial Estimate Stated as a Range → Approved?

- No → END
- YES → Get DEPOSIT (To cover Phase 1) → Go to Phase 1

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

Go to Phase 2

NO

exceed the proposal estimate?

YES

NO

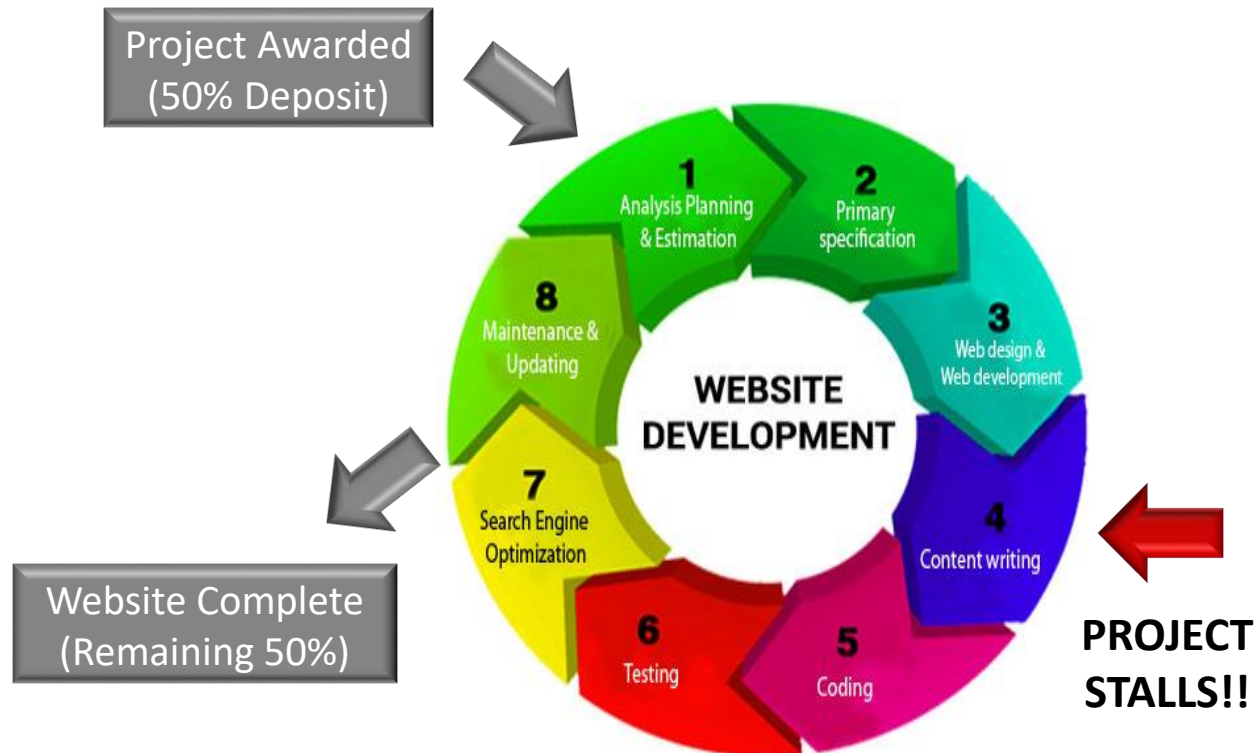Deliver

SOW

To client

END

YES

Did client elect to cancel?

Why Content First?

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

PRACTICALITY

Prevents the Content Collection Bottleneck

Project Awarded
(50% Deposit)

Website Complete
(Remaining 50%)

WEBSITE DEVELOPMENT

1 Analysis Planning & Estimation
2 Primary specification
3 Web design & Web development
4 Content writing
5 Coding
6 Testing
7 Search Engine Optimization
8 Maintenance & Updating

PROJECT STALLS!!

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

How to Implement a Content-First Approach

- **Re-structure your Payment Schedule**
  - Phase 0
    - Upon Acceptance of the Proposal – ***<$XXXX>*** deposit
  - Phase 1
    - Upon Acceptance of the Statement of Work – X% of remainder

  CLIENT (or whoever) PROVIDES CONTENT

  - Phase 3
    - At the completion of Testing – X% of remainder
  - Phase 4
    - At the completion of Training – all remaining funds due

Principle

01

Define the Job in Detail with a Content-First Approach

Problems Addressed

Getting the requirements right

Controlling scope creep

Getting content from the client

Overall Client Management
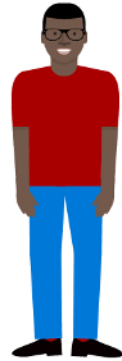
Principal

02

Get the Right Resources Involved

People

Information Architect (IA)
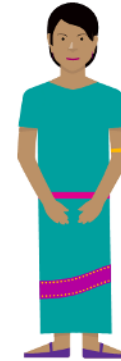
User Experience (UX) Designer

Web Developer

User Interface (UI) Designer

Web Content Specialist

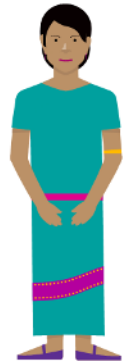Quality Assurance (QA) Tester

Server Administrator

Project Manager (PM)

Change Management Specialist

Trainer

Evangelist

Business Analyst (BA)

Help desk / Support

Site Collection / Farm Administrator

Site Owner / Super User

End User

Typical Roles

- Project Sponsor
- Project Manager
- Business Analyst
- WordPress Environment Manager
- Content Developer/Manager
- WordPress Web Designer
- WordPress Web Developer
- SEO Analyst
- Testers

Plugins

- Have a standard stack
- Research thoroughly
- TEST!

Tools

- Project Management
- Site Map
- Estimating Spreadsheets
- Content Collection Mechanism
- Page Builder Plugin
- CSS Editor Plugin
- Templates/Blocks
- Site Management

Host

Principal
02

Get the Right Resources Involved

Problems Addressed
Getting the requirements right
Getting content from the client
Overall Client Management
Project takes longer than planned
Project costs more than planned

Principle

03

Break the Job Down

Use a Work Breakdown Structure

Phase		Actvity		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 Requriements	
	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	

Site Map → Content Spec → Functions → Design → FULL Website Spec
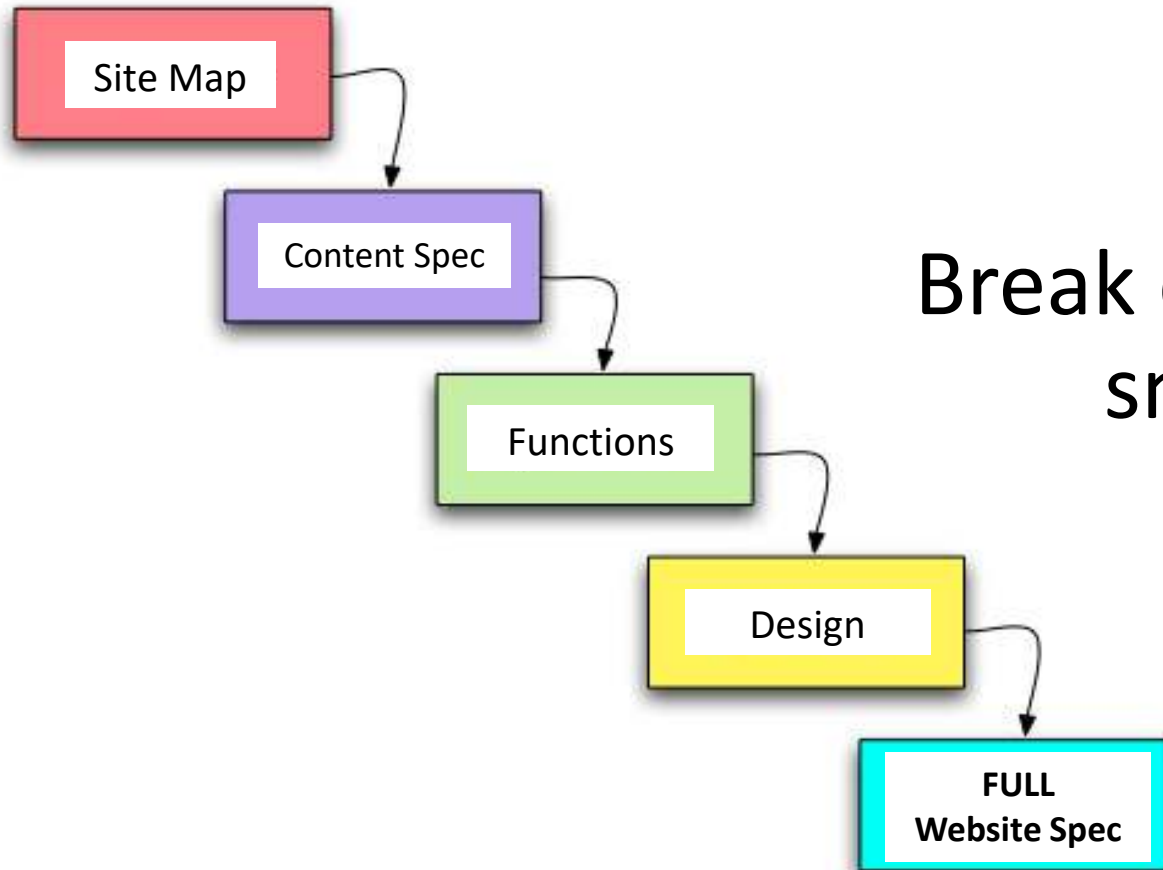
Break deliverables into smaller parts

Principle

03

Break the Job Down

Problems Addressed

Getting the requirements right

Controlling scope creep

Getting content from the client

Overall Client Management

Project takes longer than planned

Project costs more than planned

Getting paid for ALL you do

Getting client approvals and payment

Principle
04
Estimate the Time and Costs
Often

Abandon the Crystal Ball Approach

PROPOSAL

Estimate at the Activity Level

DEEP DIVE DISCOVERY

Estimate at the Task Level
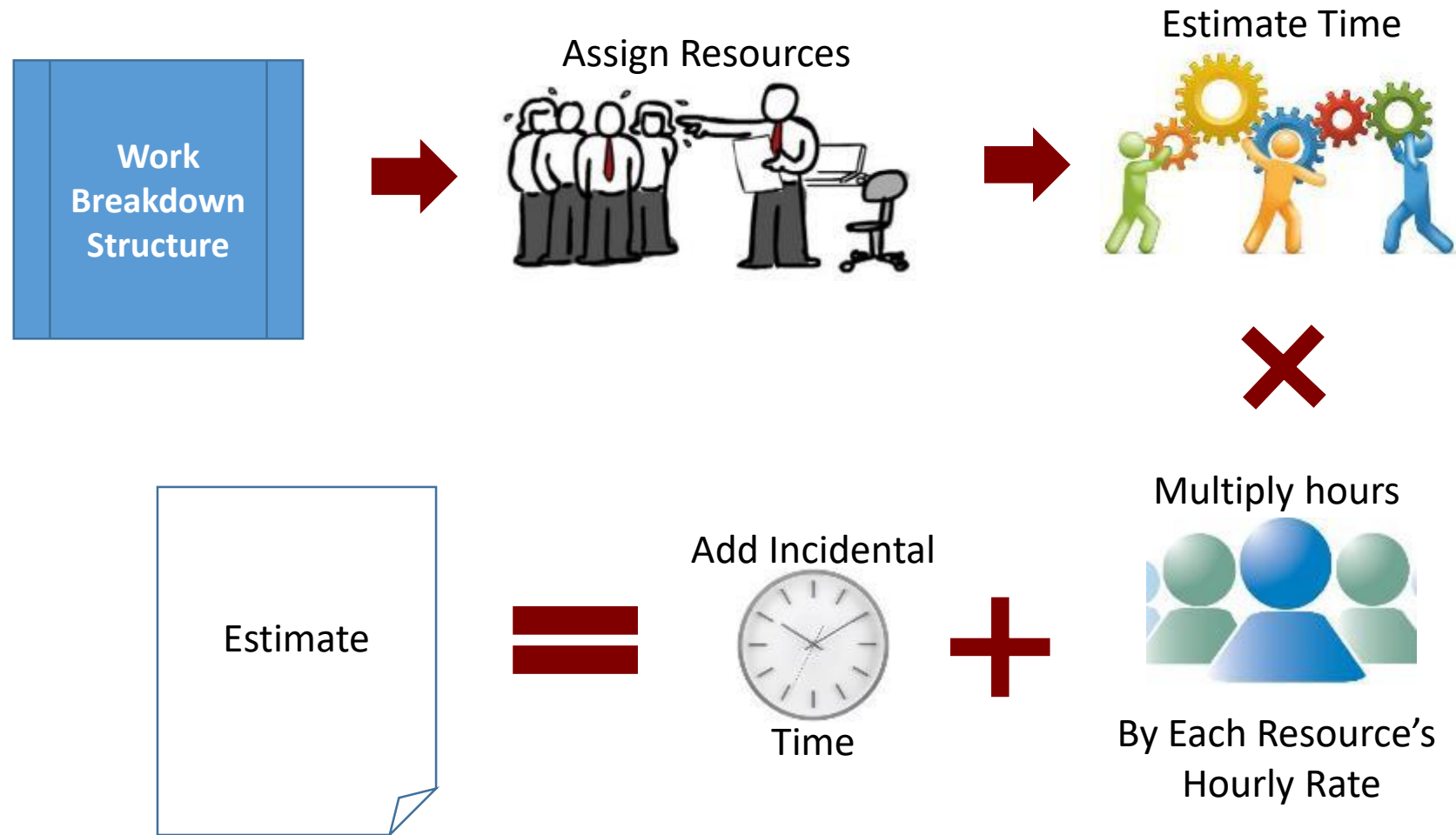
Estimate content first

Rough Order of Magnitude

Always review your last estimate before doing the next.

Estimation Basics

Work Breakdown Structure → Assign Resources → Estimate Time

×

Estimate = Add Incidental Time + Multiply hours By Each Resource's Hourly Rate

Principle

04

Estimate the Time and Costs
Often

Problems Addressed
Project takes longer than planned
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Principle

05

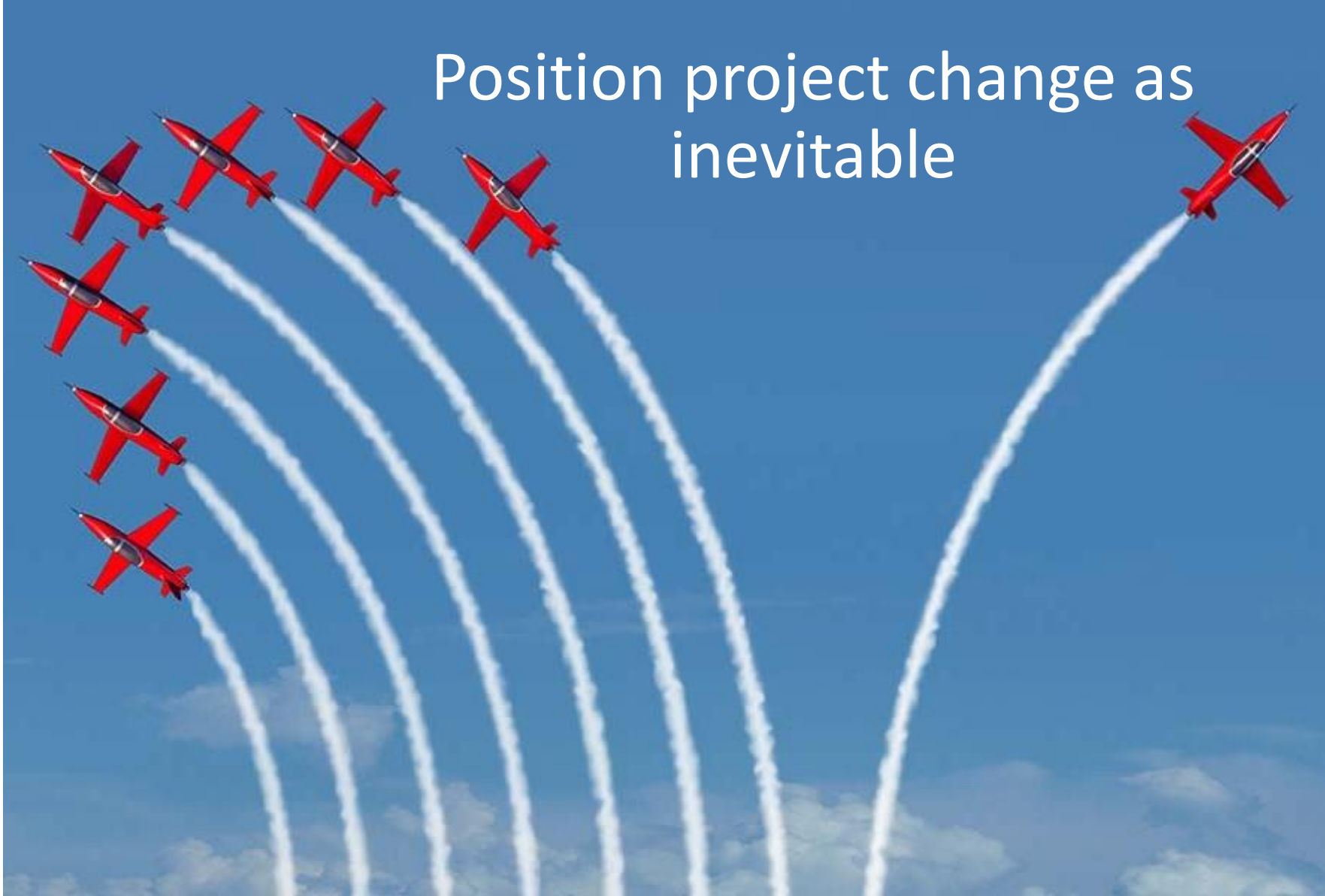## Establish and Stick to a Change Procedure

Not actively managing inevitable change inevitably results in lost revenue.

Beth Livingston

Position project change as inevitable

Use 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
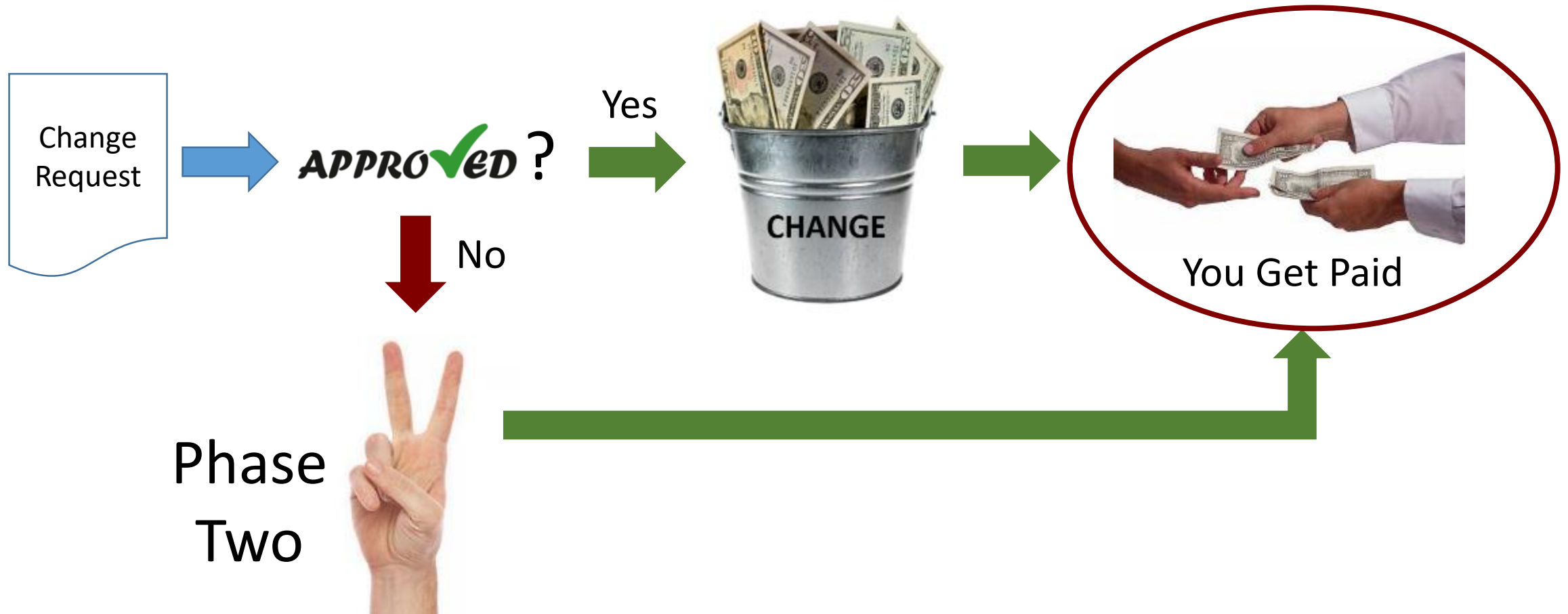
Elements of a Good Change Control Procedure

1. Is invoked without exception
2. Defines change
3. Uses a Change Budget
4. Spells out the process for initiating and approving change
5. Specifies when payment for the change request is due

How it Works

Change Request → APPROVED?

Yes → CHANGE bucket → You Get Paid

No → Phase Two →

Principle
05

Establish and Stick to a Change Procedure

Problems Addressed
Getting the requirements right
Controlling scope creep
Project takes longer than planned
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Getting paid for ALL you do

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06

Establish Interim and Final Acceptance Criteria

Problems Addressed
Getting the requirements right
Scope Creep
Getting client approvals and payment

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**.

Elements of a Good Acceptance Management Plan

Specifies acceptance criteria for each deliverable and the final project.

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"

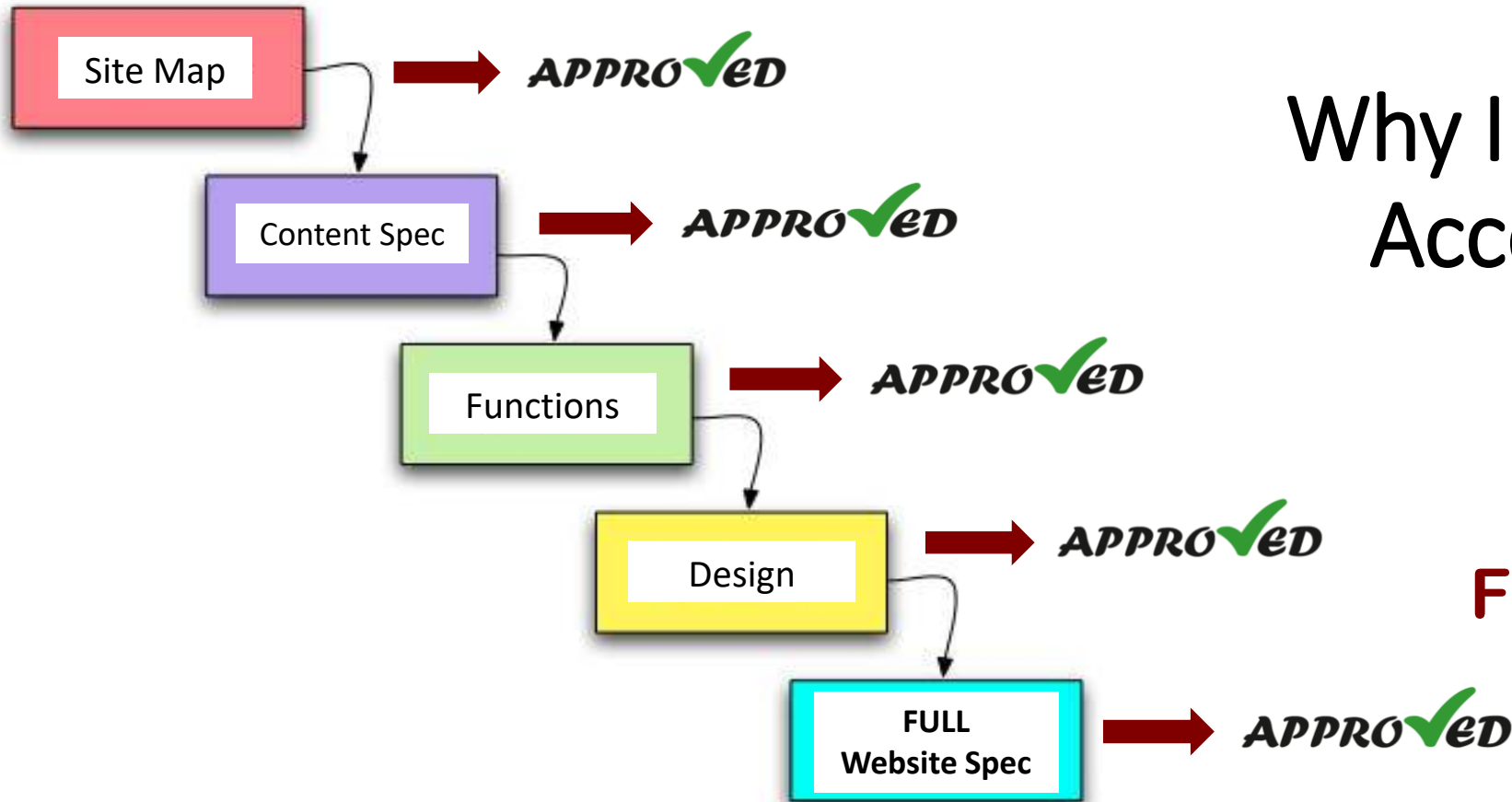...and when and how "rejection with cause" is applied

Elements of a Good Acceptance Management Plan

Uses Incremental Acceptance

Site Map → APPROVED

Content Spec → APPROVED

Functions → APPROVED

Design → APPROVED

FULL Website Spec → APPROVED

Why Incremental Acceptance?

In a FRACTION of the time!!

=

Principal
06

Establish Interim and Final Acceptance Criteria

Problems Addressed
Getting the requirements right
Controlling scope creep
Getting client approvals and payment

At a Minimum, you need…

01 Requirements Definition Process

02 Change Procedure

03 Acceptance Management Plan

wproadmaps.com/templates

01 Define the Job in Detail with a Content-First Approach

02 Get the Right Resources Involved

03 Break the Job Down

04 Estimate Often

05 Establish and STICK TO a Change Procedure

06 Establish Interim and Final Acceptance Criteria
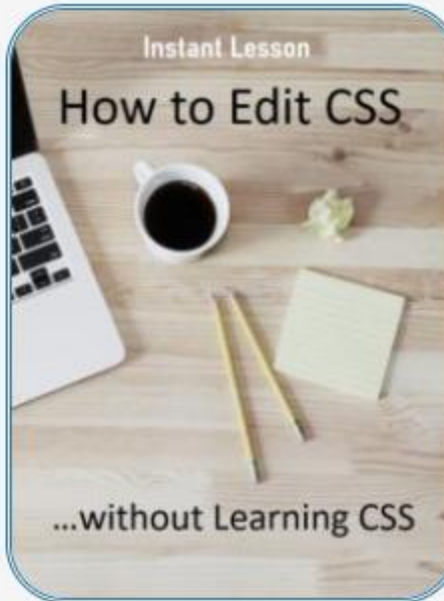
How to Learn More

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FREE TRAINING

How a Simple
Project Notebook
Can Help You Plan,
Estimate, and Deliver Better
WordPress Projects

Yes. I want this Tip Sheet!

Instant Lesson
How to Edit CSS

...without Learning CSS

Watch the Video Lesson

A WordPress Project
Productivity Roadmap

6 Principles
8 Video Snippets
Free Template Downloads

In Revision
Not Currently Available

How to Learn More

WordPress Project Manager's Academy

Coming later this year…

A Free Membership Site to learn to manage WordPress projects more effectively

Sign up to stay informed
wproadmaps.com/wppma

Thank You!

Beth Livingston

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