

Six Productivity Principles for WordPress Project Success

Brought to you by:





For those who don't know me...

- 25+ Years as IT Business Analyst and PM
- Master's Degree in Instructional Design
- WordPress agency owner
- Director of The WP Project Manager's Academy
- Recently lost 60 pounds





What is project success?

- On time
- Within budget
- With features that meet the client's business requirements
- Retaining your planned profit margin





What USUALLY Happens

- Too precise an estimate too early
- Scope Creep
- Content-Related Delays
- Un-ending review cycles



All result in LOWER PROFIT MARGIN



What are the 6 Principles?

- Common sense methods for being productive when carrying out a task or set of tasks
- 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!!

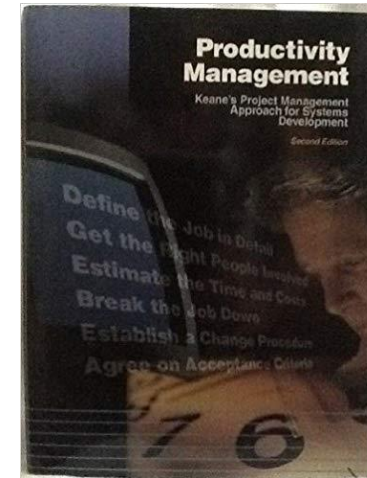


Where did they come from?

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

These Productivity Management principles:

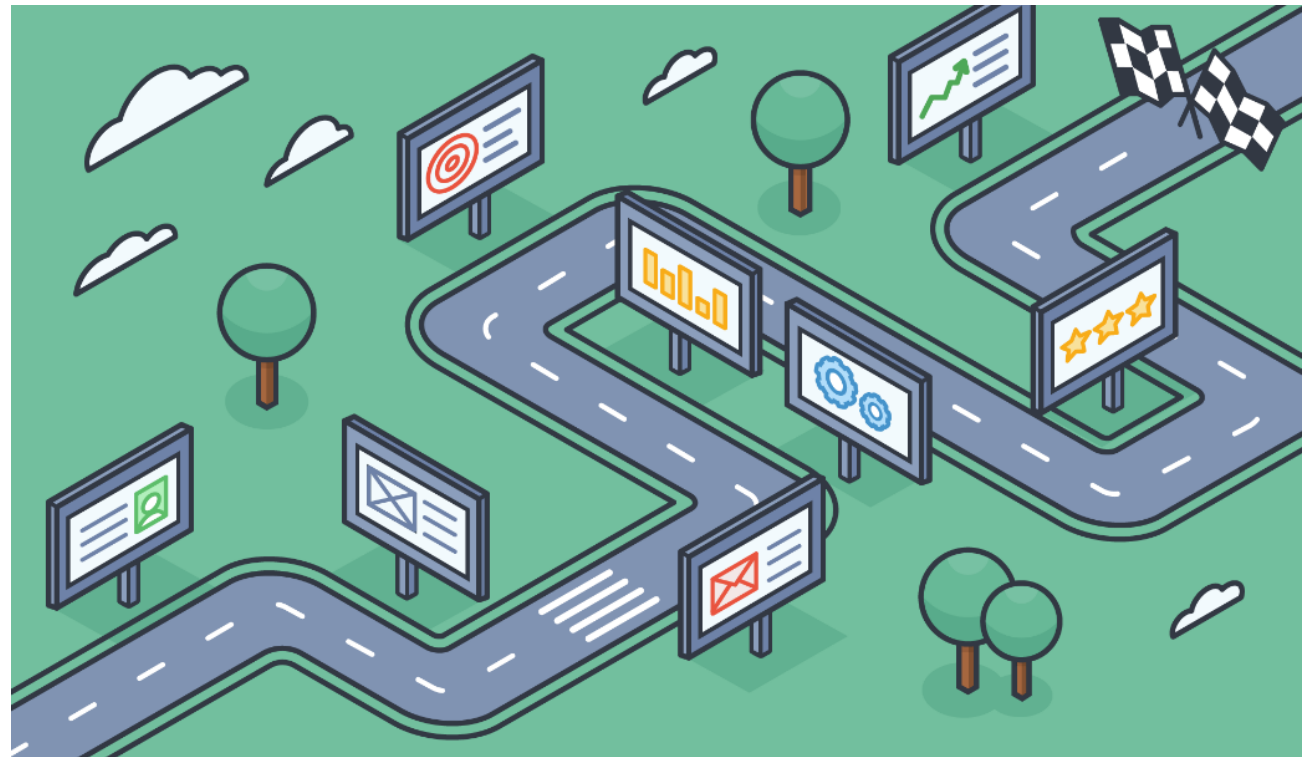
- Run **THROUGH** your project management approach





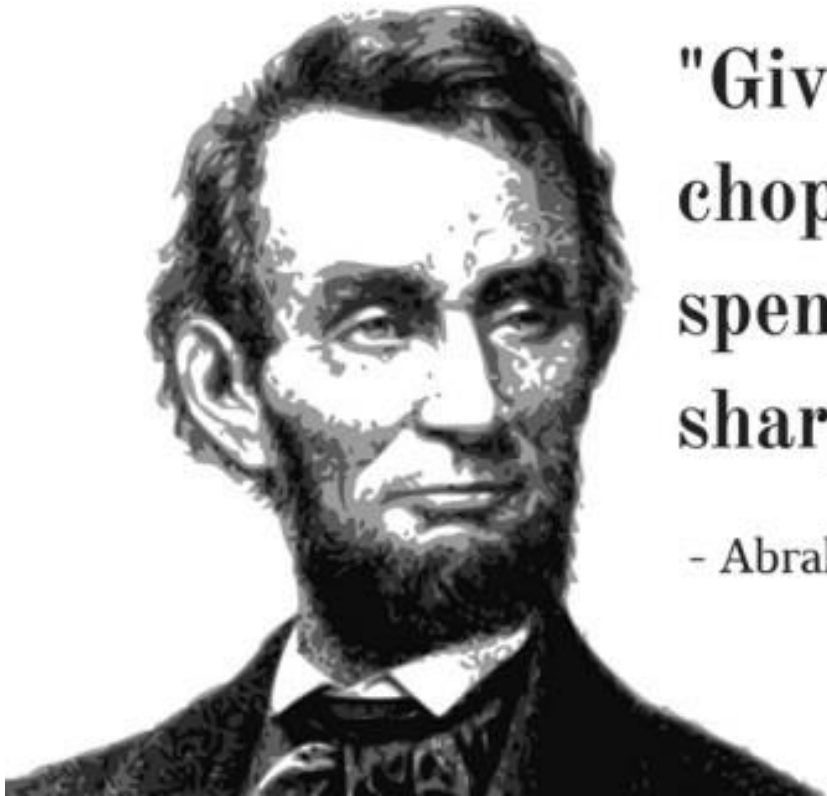
The Principles – Are based on the premise ...

... 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.





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



The Principles – Applied to WordPress Projects

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 the Time and Costs OFTEN

Break the Job Down

Break the Job Down

Establish a Change Procedure

Establish and Stick To a Change Procedure

Agree on Acceptance Criteria

Agree on Interim AND Final Acceptance Criteria



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.





Define the Job in Detail with a Content First Approach

Advantages

- Get paid for discovery
- Speeds development
- Prevents scope creep
- Prevents content-related delays





Define the Job in Detail with a Content First Approach

Best Practices

- Focus on BUSINESS requirements
- Never give too precise an estimate too early
- Always estimate content
- Position the project plan for content first
- Structure the payment schedule with proper milestones
- Never begin design or development until the content-related activities are complete





Define the Job in Detail with a Content First Approach

Processes

- 2-Step Proposal Process
- Repeatable Estimating Process
- Content-First Approach
- Requirements Definition Process
- Risk and Issues Management





Get the Right Resources Involved

Resources =

- Hosting
- People
- Plugins
- Blocks and Templates
- Outsourcing
- Etc...





Get the Right Resources Involved

Advantages

- Sets proper client expectations
- Speeds development
- Prevents wasted time





Get the Right Resources Involved



Best Practices

- Define ALL Roles and Responsibilities
- Make the client part of the team
- Identify Management Resources
- Starter site + plugin stack



Get the Right Resources Involved

Processes

- Proposal process
- Client Management
- Technical Approach
- Communication Plan





Estimate the Time and Costs **OFTEN**

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





Estimate the Time and Costs **OFTEN**

Advantages

- You get better at it
- Increases accuracy
- Reduces surprises





Estimate the Time and Costs **OFTEN**

Best Practices

- Stop giving quotes
- Do not attempt to estimate what you do not **KNOW**
- Use a repeatable, defensible process
- Never use a pad
- Always estimate content
- Use a change budget



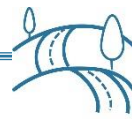


Estimate the Time and Costs **OFTEN**

Processes

- Estimating process
- Proposal Process
- Change Control Process (change budget)
- Acceptance Management



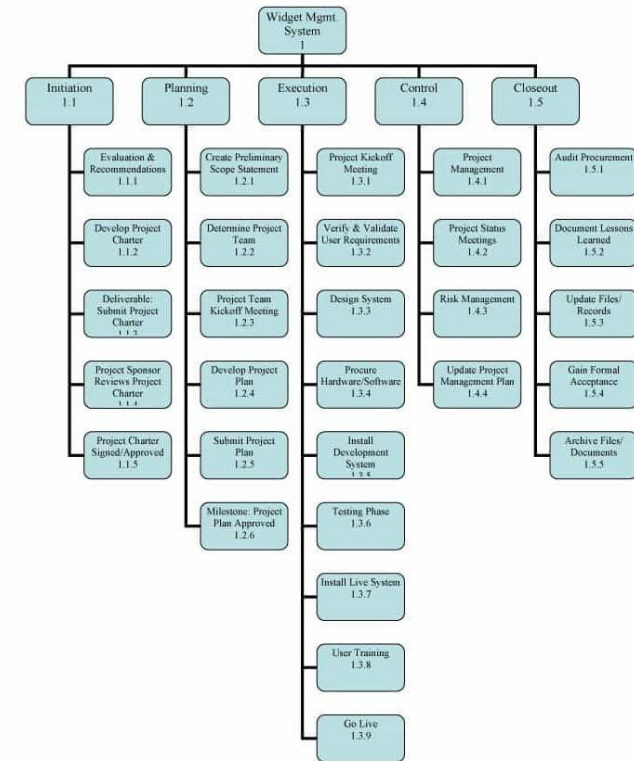


Break the Job Down

Use a proven project plan with pre-determined milestones 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					





Break the Job Down

Advantages

- Reduces client overwhelm
- Speeds development
- Speeds final approval

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Break the Job Down

Best Practices

- Phases, Activities, and Tasks
- Use some form of the 80-hour rule
- Use incremental approvals

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Break the Job Down

Processes

- Requirements Definition Process

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Establish and Stick To a Change Procedure

Establish a method to actively manage change throughout the project and invoke it without exception.





Establish and Stick To a Change Procedure

Advantages

- Eliminates scope creep
- You get paid for all you do
- Reduces frivolous change requests





Establish and Stick To a Change Procedure

Best Practices

- Embrace change
- Educate the client
- Position change as opportunity
- Use the Minimum Viable Website approach
- ALWAYS use a change budget





Establish and Stick To a Change Procedure

Processes

- Requirements Definition Process
- Estimating process
- Change Management/Control
- Acceptance Management





Agree on Interim and Final Acceptance Criteria

Agree on the rules that govern acceptance BEFORE the deliverable is created.





Agree on Interim and Final Acceptance Criteria

Advantages

- Sets proper client expectations
- Helps control scope creep
- Eases the approval process





Agree on Interim and Final Acceptance Criteria

Best Practices

- Establish project criteria in the proposal
- Establish criteria for others before creation
- Use test plans
- Acceptance is ALWAYS provided in writing





Agree on Interim and Final Acceptance Criteria

Processes

- Requirements Definition process
- Change Management/Control
- Acceptance Management
- Testing Approach





The Principles – Applied to WordPress Projects

- 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
- Agree on Interim AND Final Acceptance Criteria

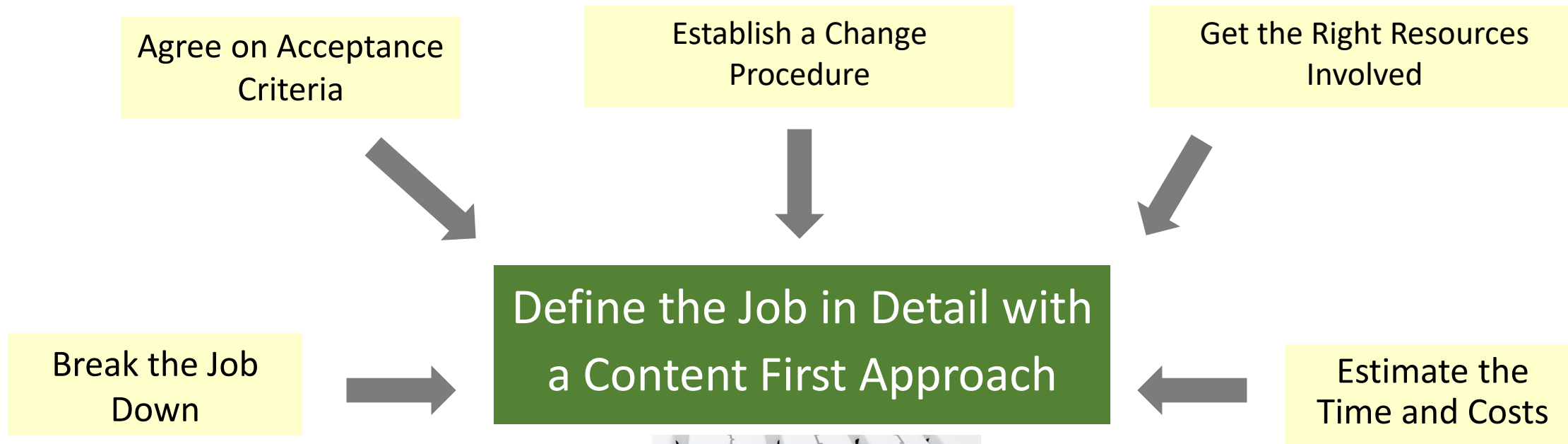


The Processes

1. 2-Step Proposal Process
2. Estimating Process
3. Content-First Approach
4. Requirements Definition Process
5. Risk and Issues Management
6. Client Management
7. Technical Approach
8. Change Control Process
9. Acceptance Management
10. Communication Plan



The Single Most Critical Principle

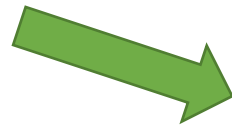
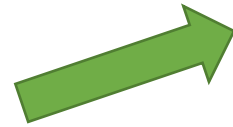




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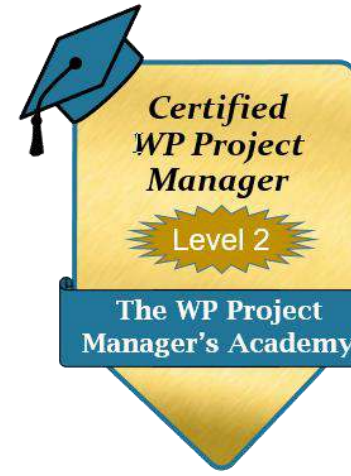


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Roadmap for WordPress**



***Both included with
your monthly
subscription***



[**WPRoadmaps.com/joinus**](https://WPRoadmaps.com/joinus)

How to Learn More



This individual has completed the **Entry-Level** Project Management course of the **WP Project Manager's Academy** and now has the **capability** to complete WordPress website development projects on time, within budget, with features that meet their client's business requirements. More precisely, they have:

Completed the **WordPress Project Management 101 Roadmap** course work (8-10 hours)

Scored **80% or above** on all 8 Module **Quizzes**

Scored **80% or above** on the Project Management 101 Roadmap **Final Exam**

Beth Livingston

12-01-2020



How to Learn More

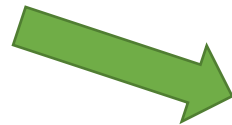


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thank you



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