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

what I planned.

what happened.
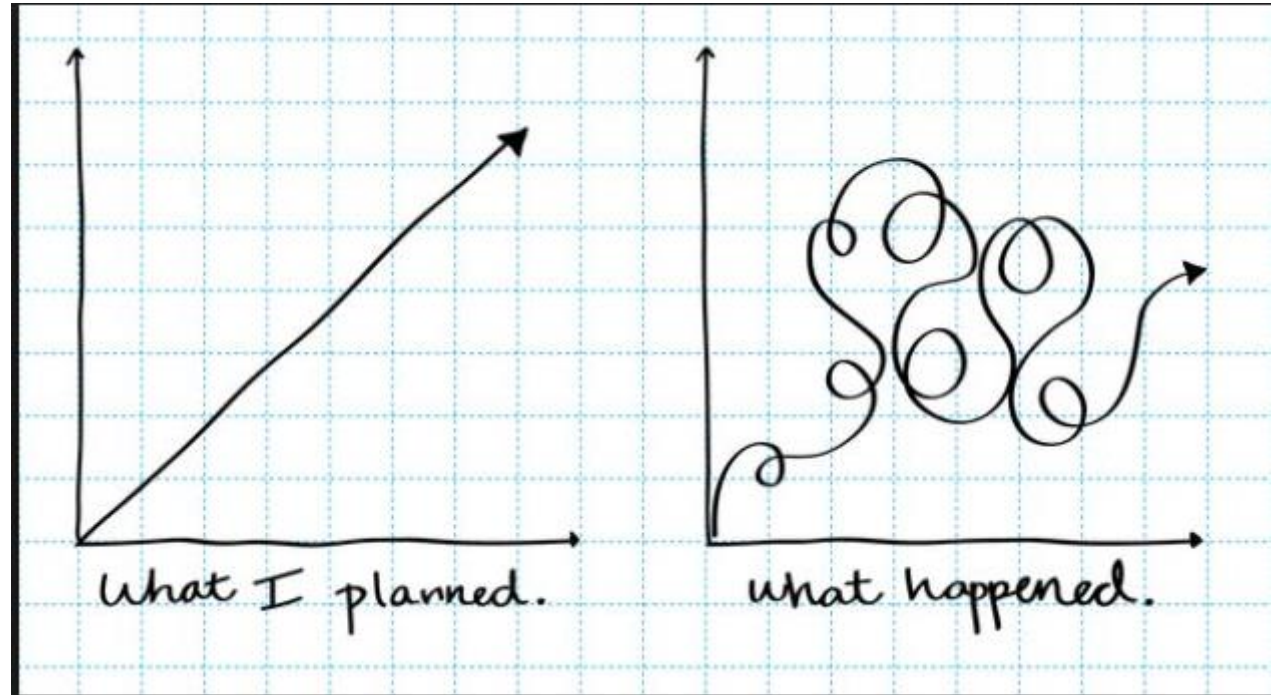
For those who don't know me…

- 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 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 project success?

- On time

- Within budget

- With a quality outcome

What is WordPress project success?

- On time

- Within budget

- With features that meet the client's business requirements

- **Without sacrificing profit**

What is a project?

- Temporary endeavor
- Has a beginning and an end
- A sequence of tasks
- Carried out to attain a certain outcome

EVERYTHING

is a

Projects

- Weekly grocery shopping

- Tiling the kitchen floor

- Losing 60 lbs

- Building a website

NOT Projects

- Caring for your lawn

- Keeping a tidy home

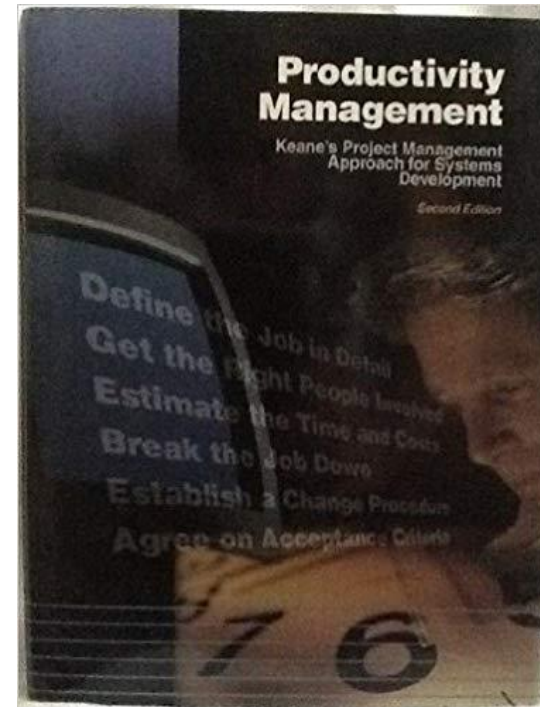- Improving your business

- Providing care plans

What is a "Best Practice?"

A commercial or professional procedure that is accepted or prescribed as being correct or most effective.

These Best Practices are based on…

The 6 Best Practices

Define the Job in Detail

Get the Right Resources Involved

Estimate the time and costs

Break the Job Down

Establish a Change Procedure

Agree on Acceptance Criteria

Grocery Shopping

- Agree on acceptance criteria

- Define the job in detail

- Estimate the time and costs

- Break the job down

- Get the right resources involved

- Establish a change procedure

- Get all that is needed for meals

- Your grocery list

- Enough available money?

- Organize your trip by grocery aisle

- The store, sales flyer

- "Your" brand is not available

Losing 60 lbs.

- Agree on acceptance criteria

- Define the job in detail

- Estimate the time and costs

- Break the job down

- Get the right resources involved

- Establish a change procedure

- Reach the goal weight by XX/XX/XX

- Determine plan, toss/buy food, etc.

- Cost for better food vs. eating out

- What are the small changes?

- Accountability partner/coach

- What if it takes longer than planned?

The 6 Best Practices When Applied to Website Development

Define the Job in Detail with a Content First Approach

Get the Right Resources Involved

Estimate time and costs OFTEN

Break the Job Down

Establish and STICK TO a Change Procedure

Establish Interim and Final Acceptance Criteria

Best Practice

01

Define the Job in Detail with a Content-First Approach

Detailed Discovery comes BEFORE a precise estimate!
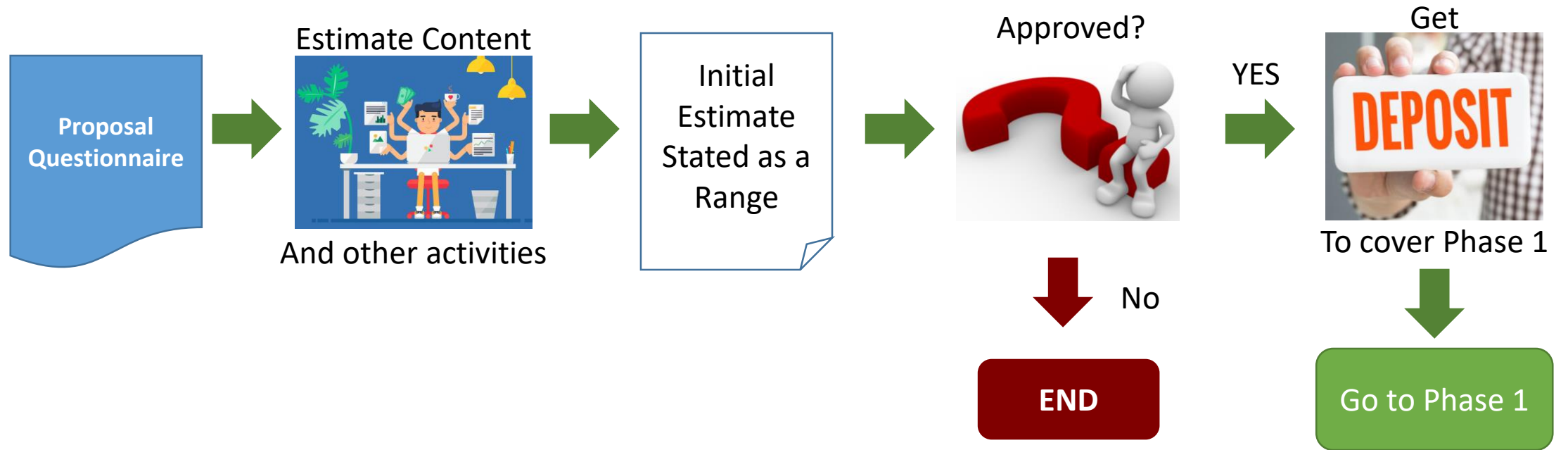
Position Phase 1 as the "Discovery" phase

2-Step Proposal Process – Step 1

PHASE 0 – PROPOSAL CREATION

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

Approved? — No → END

Approved? — 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 exceed the proposal estimate?

Go to Phase 2 — NO

NO

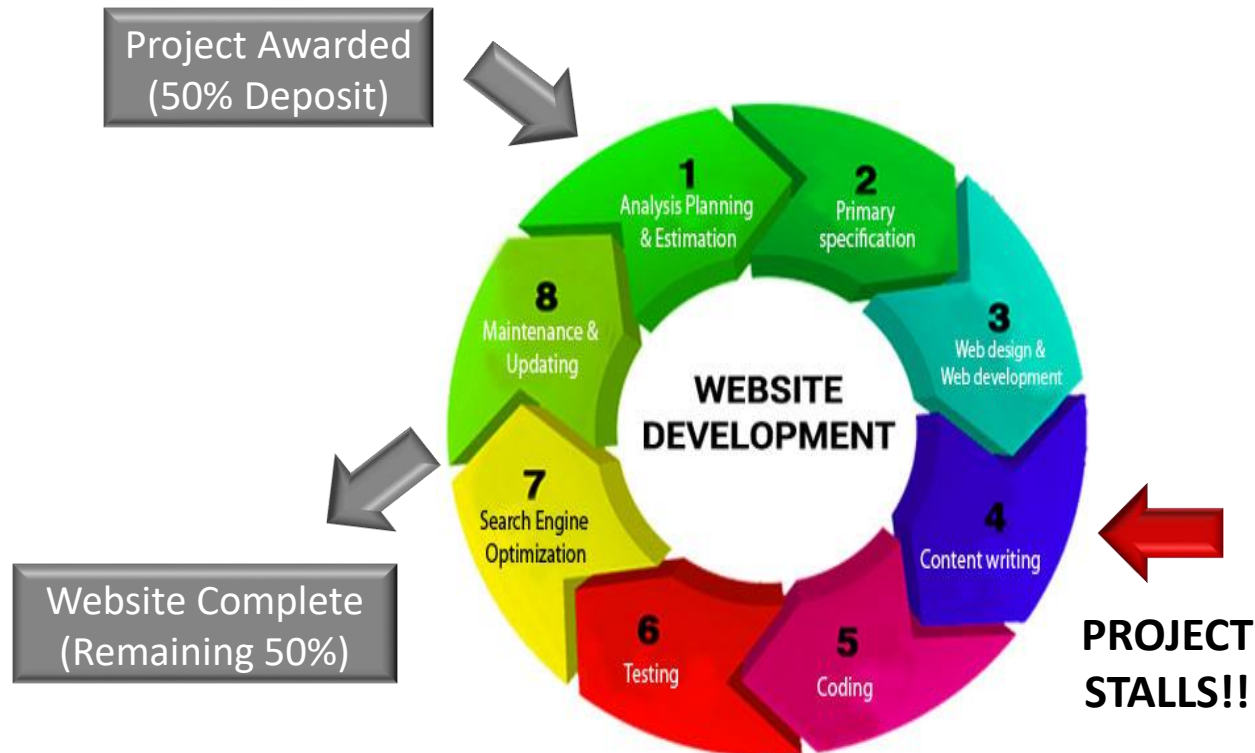YES → Did client elect to cancel?

YES → Deliver / SOW / To client → END

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%)

PROJECT
STALLS!!

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

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

Best Practice
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
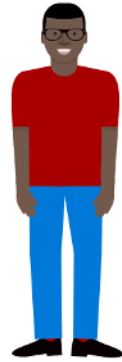
Best Practice

02

Get the Right Resources Involved

People

Information Architect (IA)

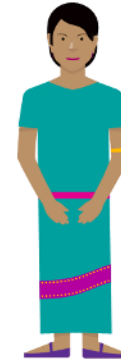User Experience (UX) Designer

Web Developer

User Interface (UI) Designer

Web Content Specialist

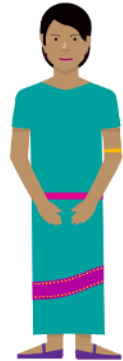Quality Assurance (QA) Tester

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

Best Practice

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

Best Practice

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
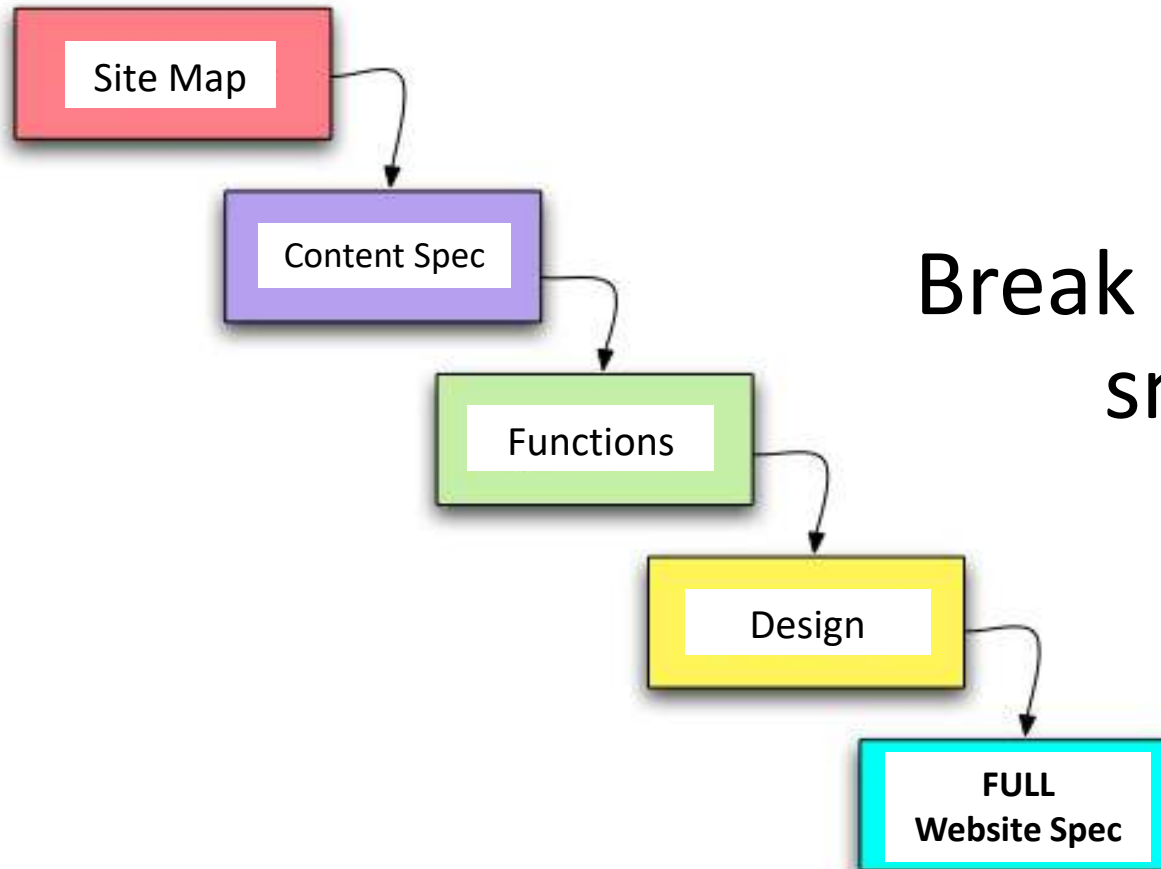
Break deliverables into smaller parts

Best Practice

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

Best Practice

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
- At each status reporting period
- After each deliverable signoff
- Every single change request
- When resources unexpectedly change

Always review your last estimate before doing the next.

Best Practice

04

Estimate the Time and Costs
Often

Problems Addressed
Project takes longer than planned
Project costs more than planned
Getting paid for ALL you do
Getting client approvals and payment

Best Practice

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
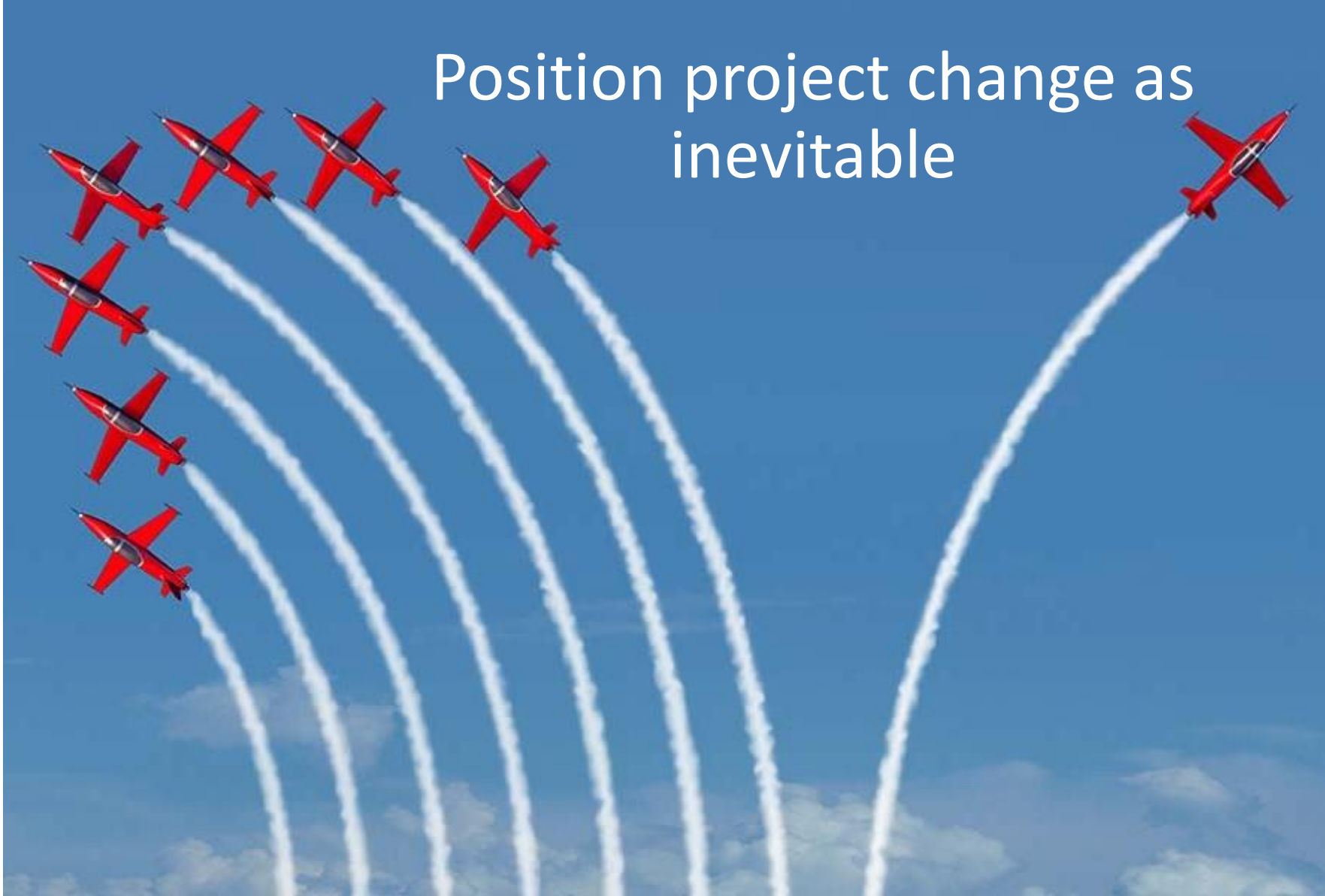
Use a Change Budget

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

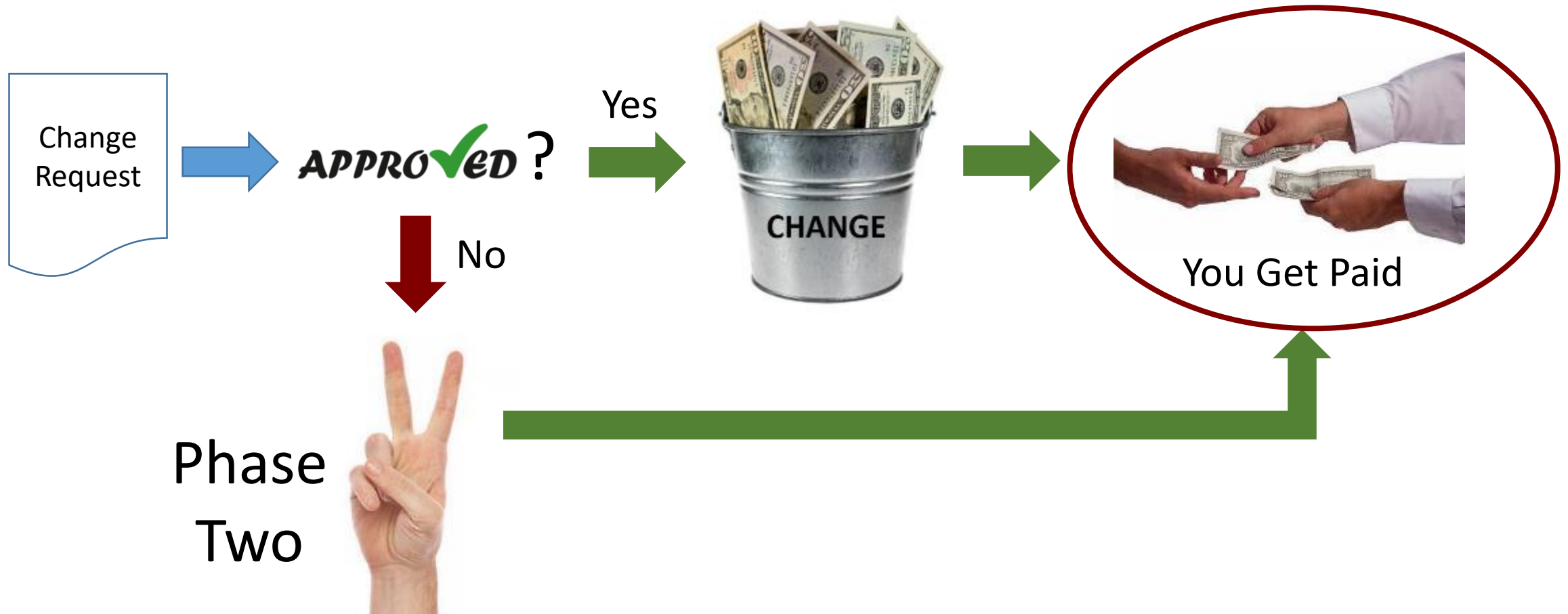Using a Change **BUDGET** reduces frivolous change requests

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

How it Works

Change Request → APPROVED?

Yes → CHANGE (bucket of money) → You Get Paid

No → Phase Two → You Get Paid

Best Practice

05

Establish and Stick to a Change Procedure

Problems Addressed

Getting the requirements right

Controlling scope creep

Project takes longer than planned

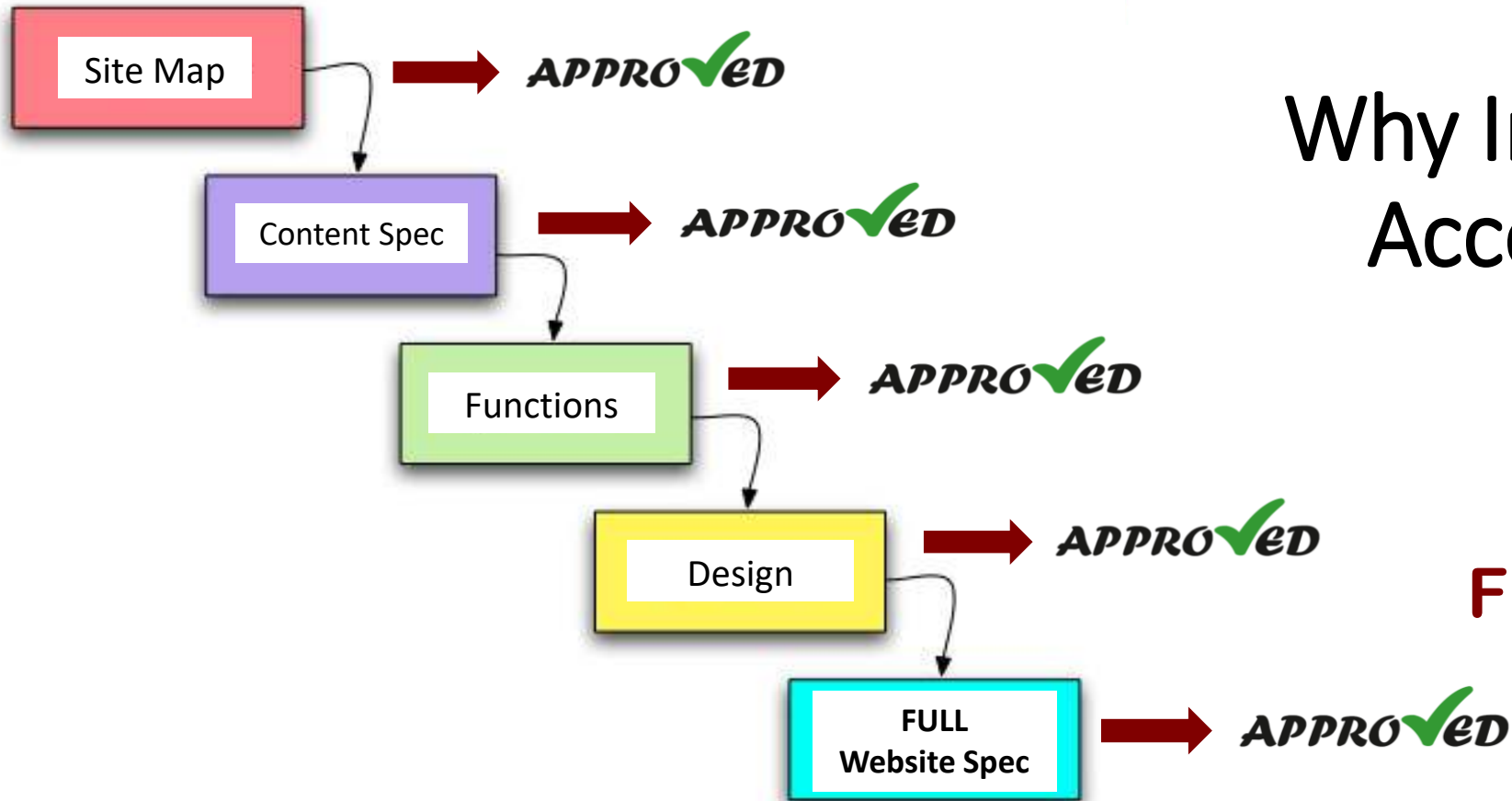Project costs more than planned

Getting paid for ALL you do

Best Practice

06

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**.

Best Practice

06

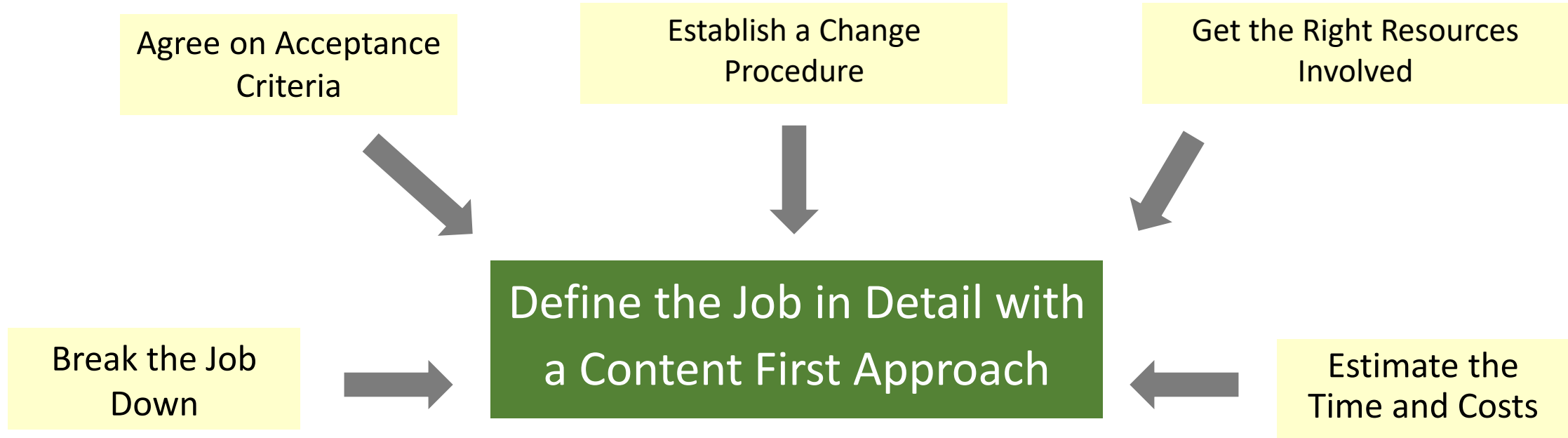# Establish Interim and Final Acceptance Criteria

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

The Single Most Critical Best Practice

Agree on Acceptance Criteria

Establish a Change Procedure

Get the Right Resources Involved

Define the Job in Detail with a Content First Approach

Break the Job Down

Estimate the Time and Costs

At a Minimum, you need…

01   Requirements Definition Process

02   Change Procedure

03   Acceptance Management Plan
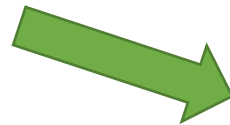
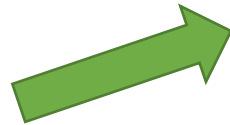# wproadmaps.com/joinus

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

02 Get the Right Resources Involved

03 Break the Job Down

04 Estimate time and cost Often

05 Establish and STICK TO a Change Procedure

06 Establish Interim and Final Acceptance Criteria

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thank you

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