

6 Proven Productivity Principles for Project Success

brought to you by...





Beth Livingston

- 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





What is WebDev 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 gets in the way of that success?

- 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



6 Productivity Principles for 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



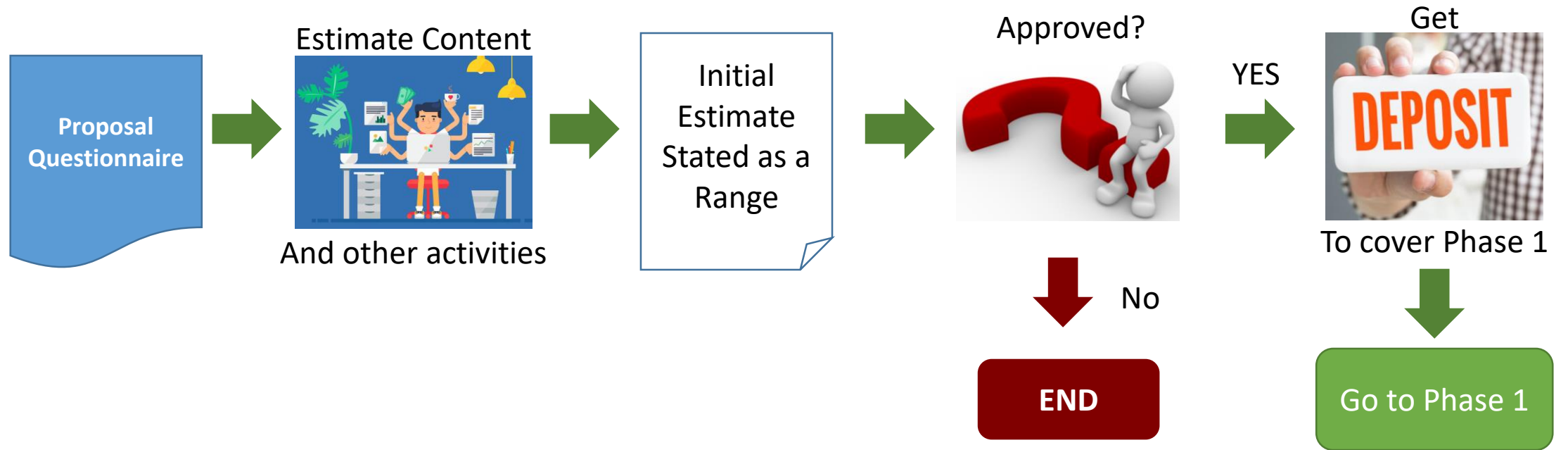
*Detailed Discovery comes
BEFORE a precise estimate!*





2-Step Proposal Process – Step 1

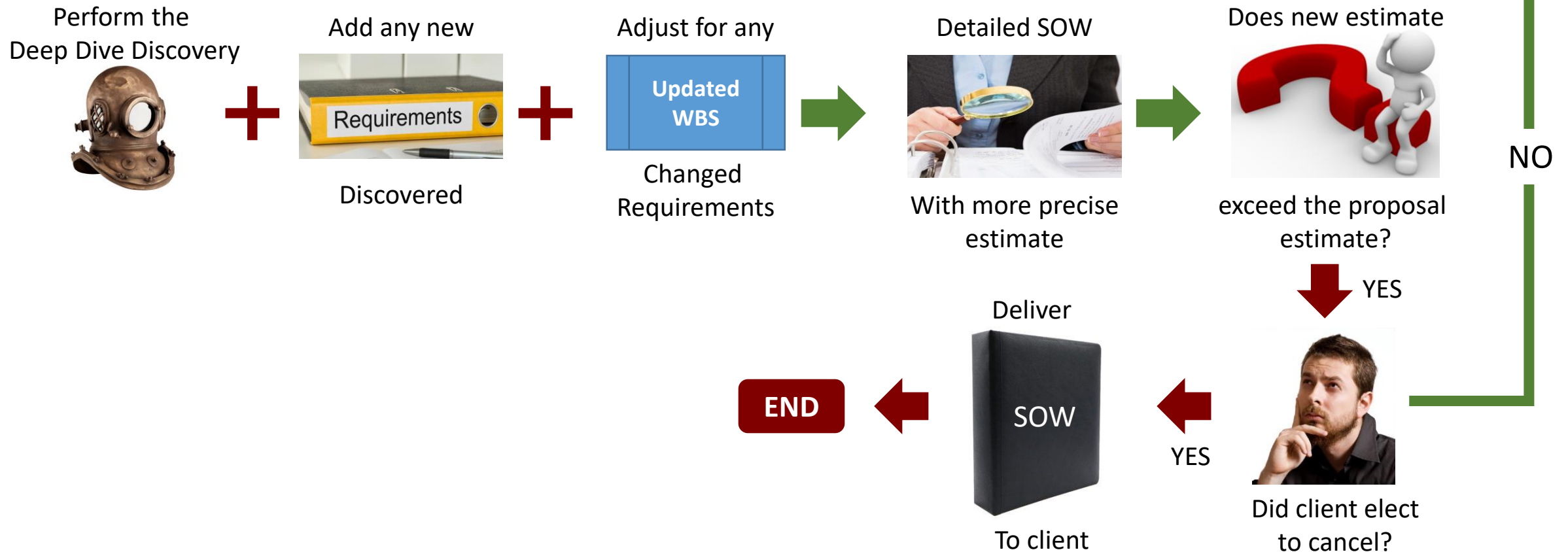
PHASE 0 – PROPOSAL CREATION





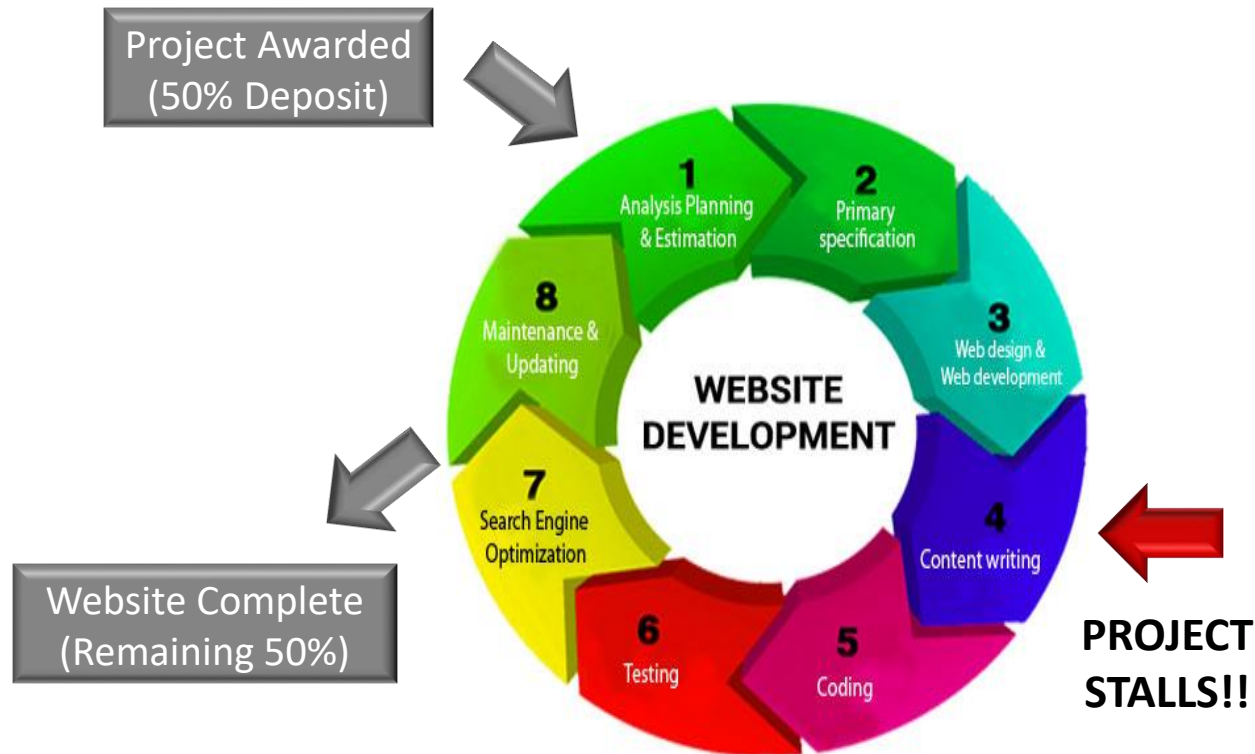
2-Step Proposal Process – Step 2

PHASE 1 – PROJECT DEFINITION





Prevents the Content Collection Bottleneck





Principal

02

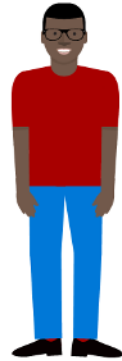
Get the Right Resources
Involved



People



Information Architect (IA)



User Experience (UX) Designer



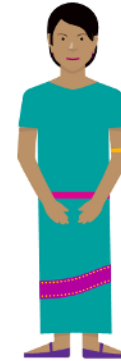
Web Developer



User Interface (UI) Designer



Web Content Specialist



Quality Assurance (QA) Tester



Server Administrator



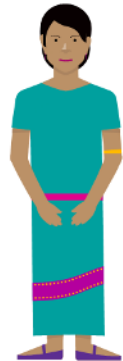
Project Manager (PM)



Change Management Specialist



Trainer



Evangelist



Business Analyst (BA)



Help desk / Support



Site Collection / Farm Administrator



Site Owner / Super User



End User



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





Principle

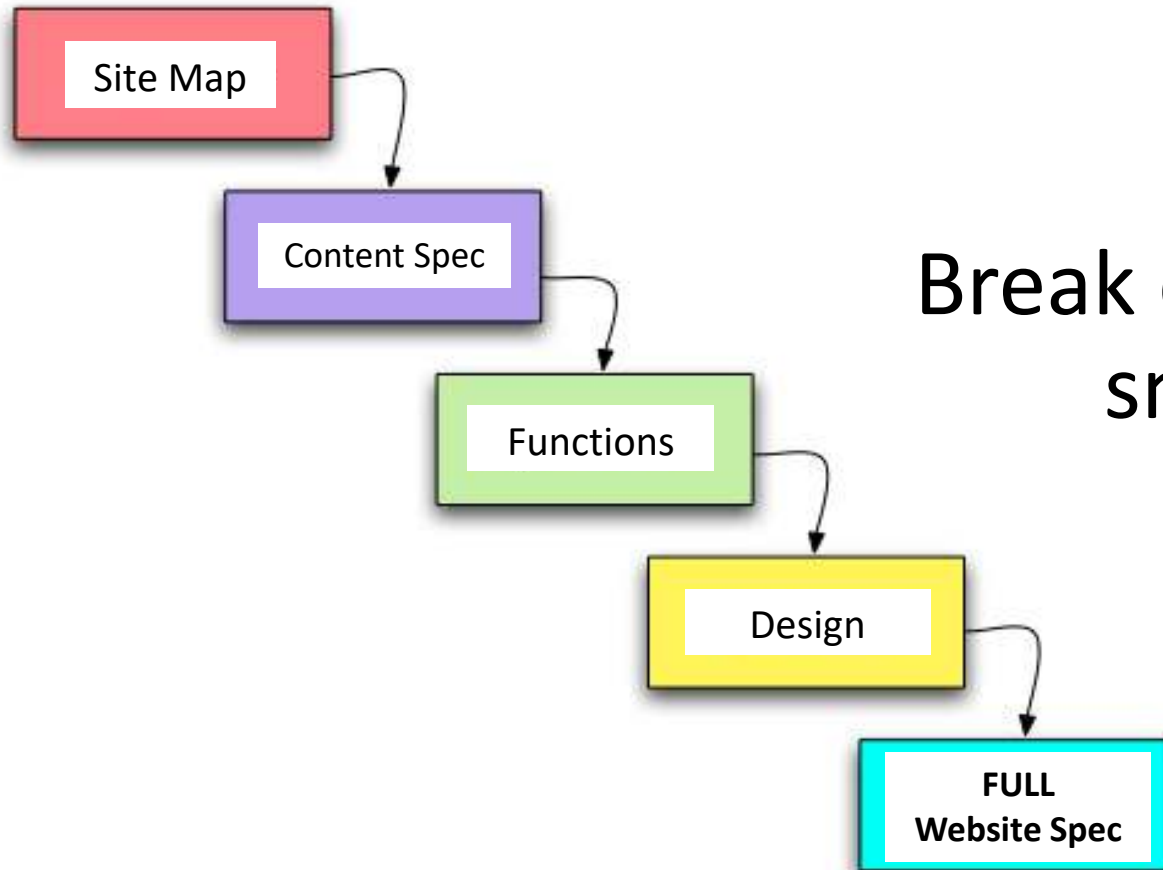
03

Break the Job Down



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



Break deliverables into
smaller parts



Principle

04

Estimate the Time and Costs
Often



Abandon the Crystal Ball Approach





Estimate content first



Rough Order of
Magnitude



Principle

05

Establish and Stick to a Change
Procedure

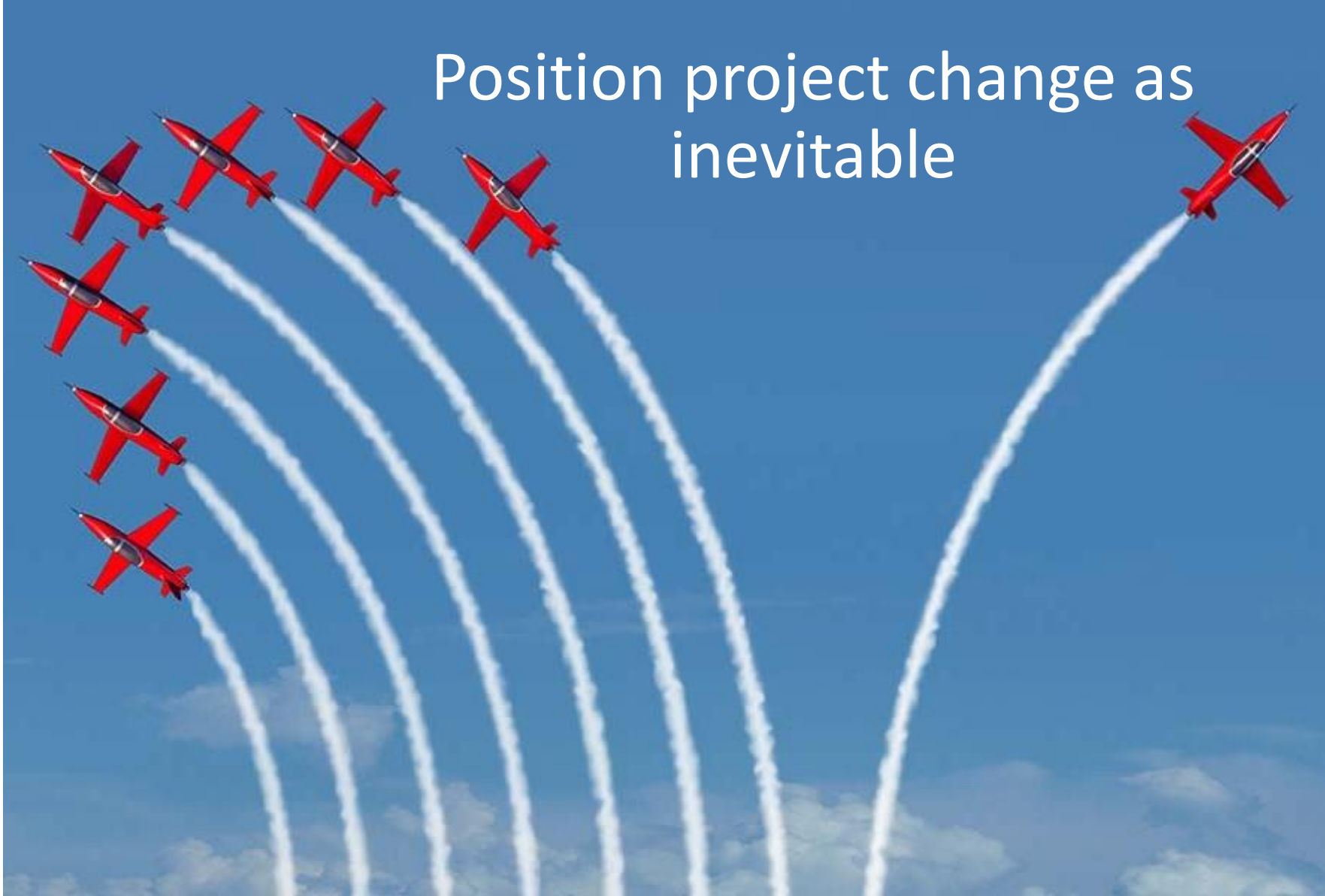


Not actively managing
inevitable change
inevitably results in
lost revenue.

Beth Livingston



Position project change as
inevitable

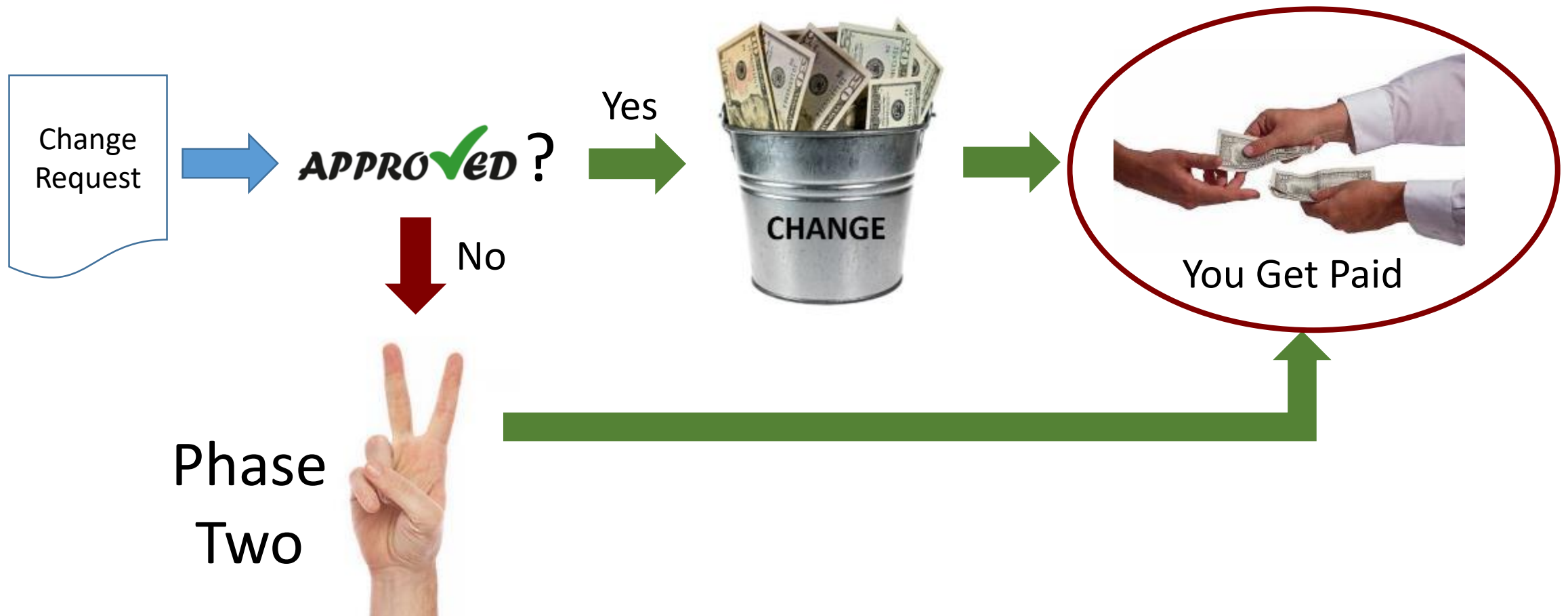




Use a Change Budget



How it Works





Principal

06

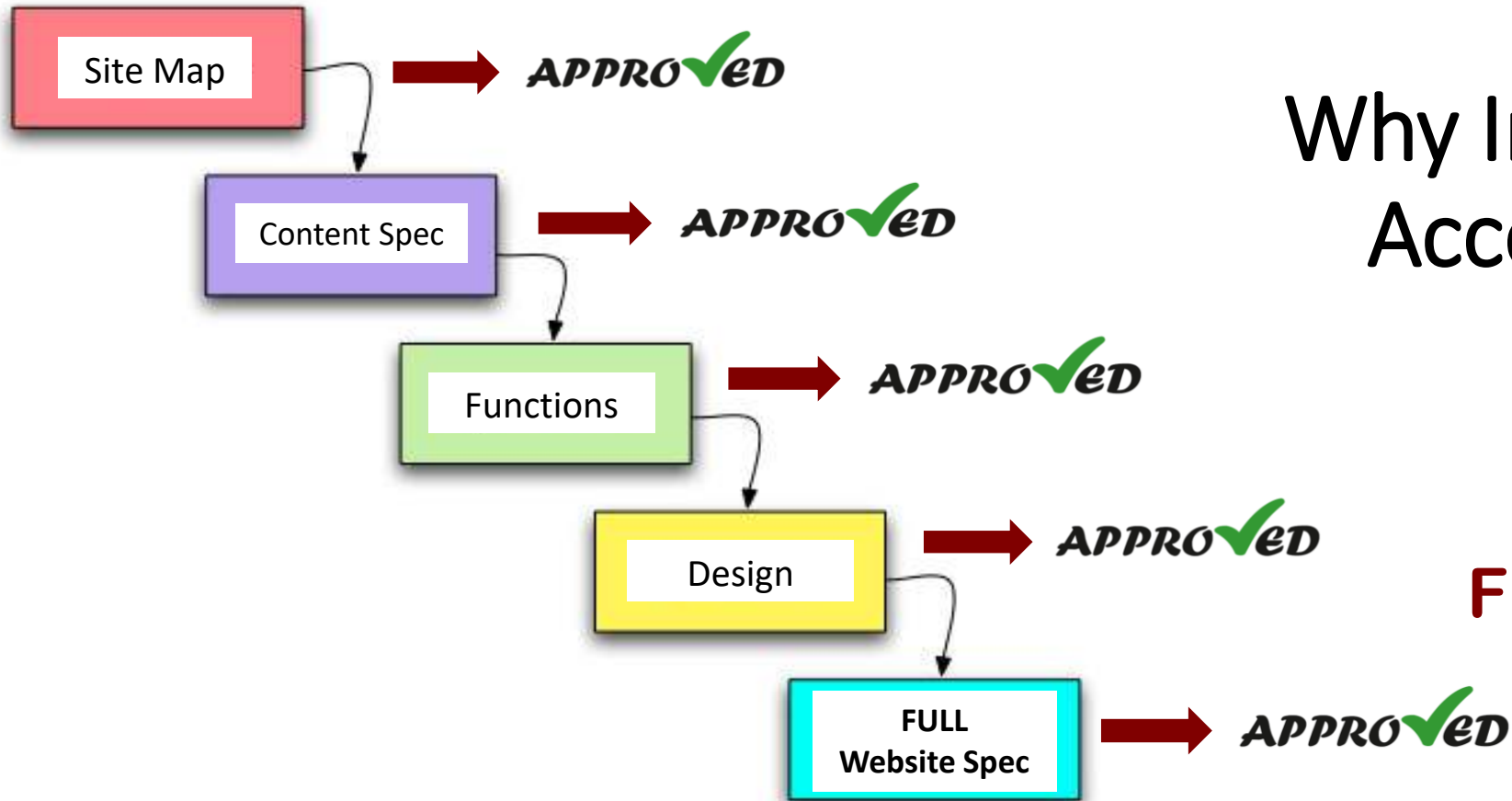
Establish Interim and Final
Acceptance Criteria



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**.





Why Incremental Acceptance?

In a
FRACTION
of the
time!!





6 Productivity Principles for WordPress Project Success

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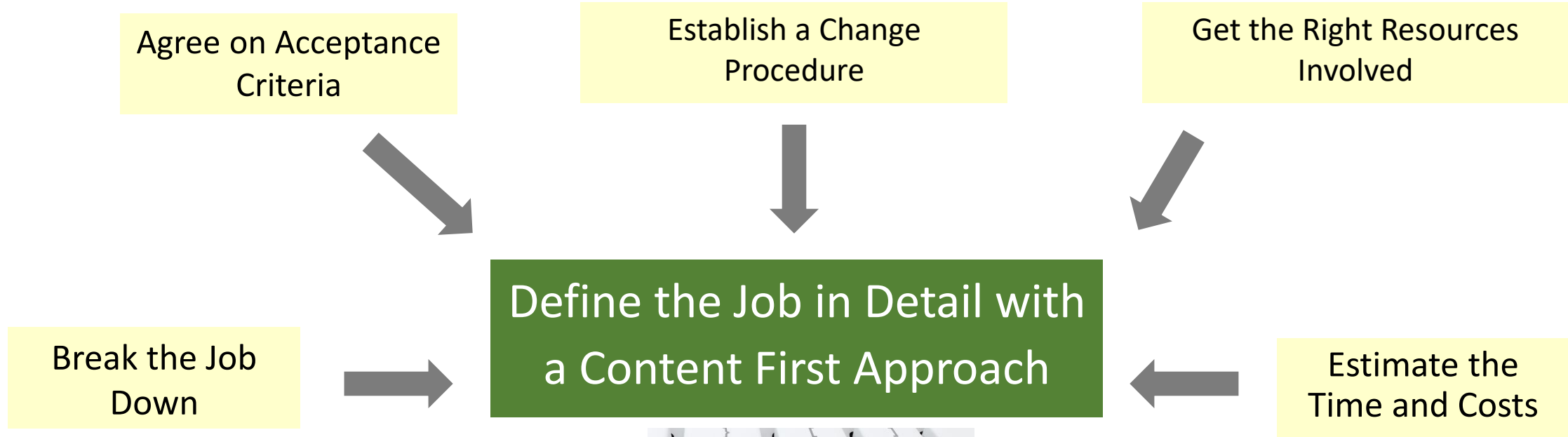
Break the Job Down

Establish and **STICK TO a Change Procedure**

Establish Interim and Final Acceptance Criteria



The Single Most Critical Principle





How to Learn More

Join our Facebook Group

facebook.com/groups/WordPressPM



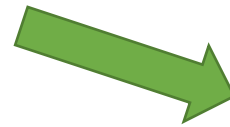


How to Learn More



FREE
**The WordPress
Project Management
101 Roadmap**

Fundamentals



Premium Membership
**The Complete
Project Management
Roadmap for WordPress**

*Everything you
need*

WPRoadmaps.com/joinus



Get Certified for More Social Proof



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**The WordPress
Project Management
101 Roadmap**



A small one-time fee

Premium Membership



**The Complete
Project Management
Roadmap for WordPress**



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your monthly
subscription***



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thank you



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