



Presents

How to Get Paid for Every Little Thing You Do!



About Me



Beth Livingston, M. Ed.
beth@wproadmaps.com
Twitter: @wproadmaps

Beth Livingston

- Master's in Instructional Design
- 25+ years as a Business Analyst and Project Manager

Owner



Director



***“I hate Project Management! I will
NEVER be a Project Manager!”*** *Beth Livingston*

Said in 1997 when asking a
former manager about
working for him again.



In order to get paid for every little thing you do, you need to:

- **KNOW** every little thing you do



- **MEASURE** every little thing you do



- **CONTROL** every little thing you do



Why Folks Don't Get Paid

- Giving quotes instead of estimates
- Too precise an estimate too soon
- Inadequate Discovery
- Scope Creep
- Project Delays



Know – Measure – Control

- **To KNOW** every little thing you do, you need a **project plan**.
- **To MEASURE** every little thing you do, you need a **time tracker**.
- **To CONTROL** every little thing you do, you need **proven processes**.



Your Project Plan

- Phases, Activities, Tasks
- Write down every single thing involved in each activity

Phase		Activity
Phase 0 - Proposal Creation		
Phase 1 - Project Definition		
	1-1	Design and Validate Layouts
	1-2	Refine Content Needs
	1-3	Create Functional/Technical Requirements
	1-4	Specify Styling and Branding
	1-5	Create Statement of Work (SOW)
Phase 2 - Design and Preparation		
	2-1	Acquire Paid Web Elements
	2-2	Manage/Monitor Content Collection
	2-3	Prepare the Development Environment
	2-4	Create/Collect/Submit Website Content
		ALL CONTENT RECEIVED FROM CLIENT
	2-5	Add Branding and Style to Website
	2-6	Create Test Plans
Phase 3 - Development and Testing		
	3-1	Build the Website
	3-2	Perform Testing
Phase 4 - Deployment and Training		
	4-1	Train Client (if applicable)
	4-2	Secure Final acceptance and Payment
	4-3	Move Site to Live Environment

Your Project Plan

- What's missing?

1-1	Design and Validate Layouts		
		1-1.1	Secure Formal Client Acceptance of Site Map
		1-1.2	Select and Define WordPress Theme
		1-1.3	Agree on Acceptance Criteria for Wireframes
		1-1.4	Create Wireframes
		1-1.5	Review Wireframes with Client
		1-1.6	Update Wireframes from Client Feedback
		1-1.7	Secure Client Acceptance
		1-1.8	Update Project Plan and Notebook

Your Project Plan

- What's missing?
- Drill down to the sub-task level

	Activity		Task
1-1	Design and Validate Layouts		
		1-1.1	Secure Formal Client Acceptance of Site Map
			Prepare acceptance form
			Submit form to client
			Store form in Project Notebook
		1-1.2	Select and Define WordPress Theme
			Review business requirements
			Review notes from pre-proposal meeting
			Select theme
			Record reasons theme was selected
		1-1.3	Agree on Acceptance Criteria for Wireframes
			Create draft of acceptance criteria
			Schedule meeting with client
			Review acceptance criteria with client
			Incorporate Client Feedback
			Finalize acceptance criteria
			Acquire written approval
			Store criteria in Project Notebook
		1-1.4	Create Wireframes

Your Project Plan

			HOURS		RATE		TOTALS	
	Activity	Who?	Low	High	Low	High	Low	High
1-1	Design and Validate Layouts		5	12	100	125	\$500	\$1,500

- Take a best guess
- Refine later – after you measure

Measuring What You Do

- Time trackers

The best time tracking apps

- [Toggl Track](#) for a free time tracking app
- [HourStack](#) for integrating with your team's project management software
- [Timely](#) for automated time tracking
- [TrackingTime](#) for visualizing time differently
- [RescueTime](#) for reducing distractions

<https://zapier.com/blog/best-time-tracking-apps/>

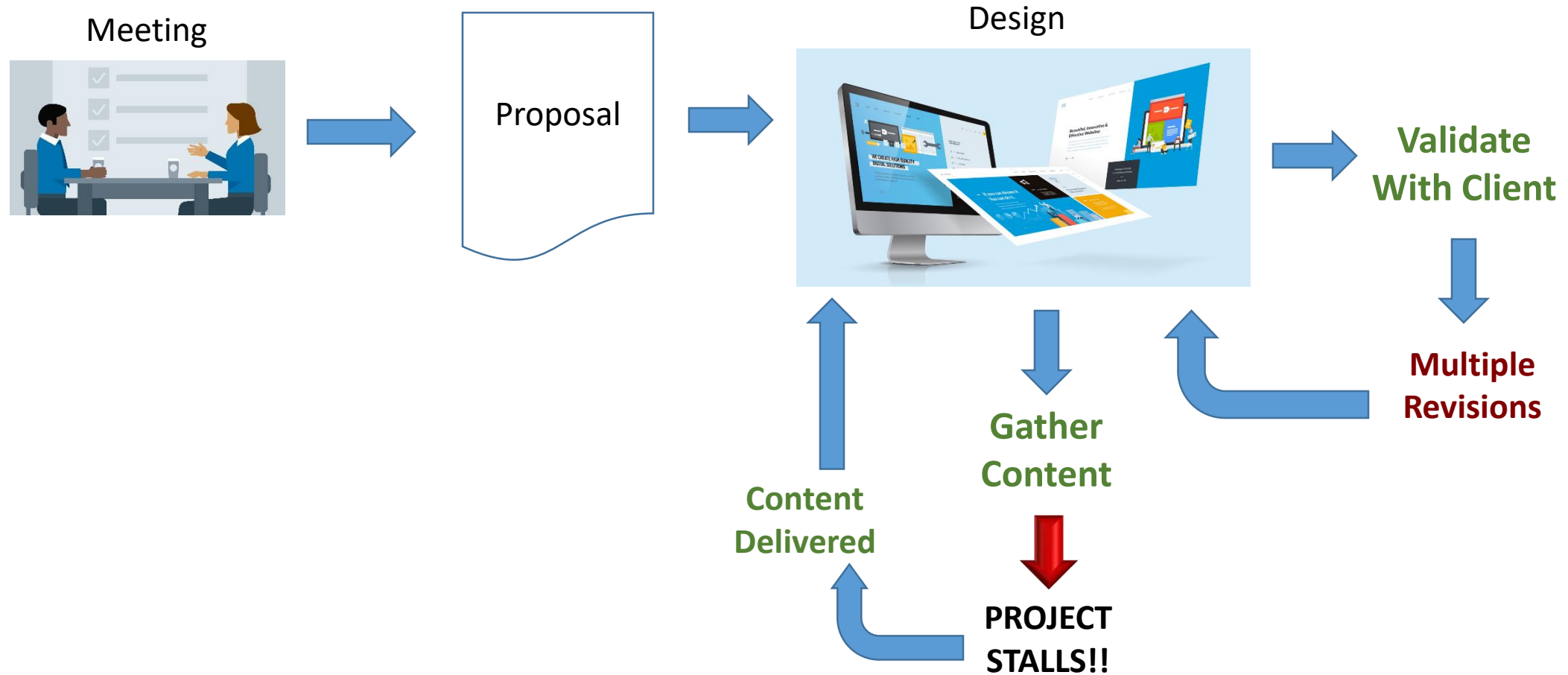


Essential Processes

1. 2-Step Proposal Process
2. Estimating
3. Deep Dive Discovery
4. Change Management
5. Acceptance Management

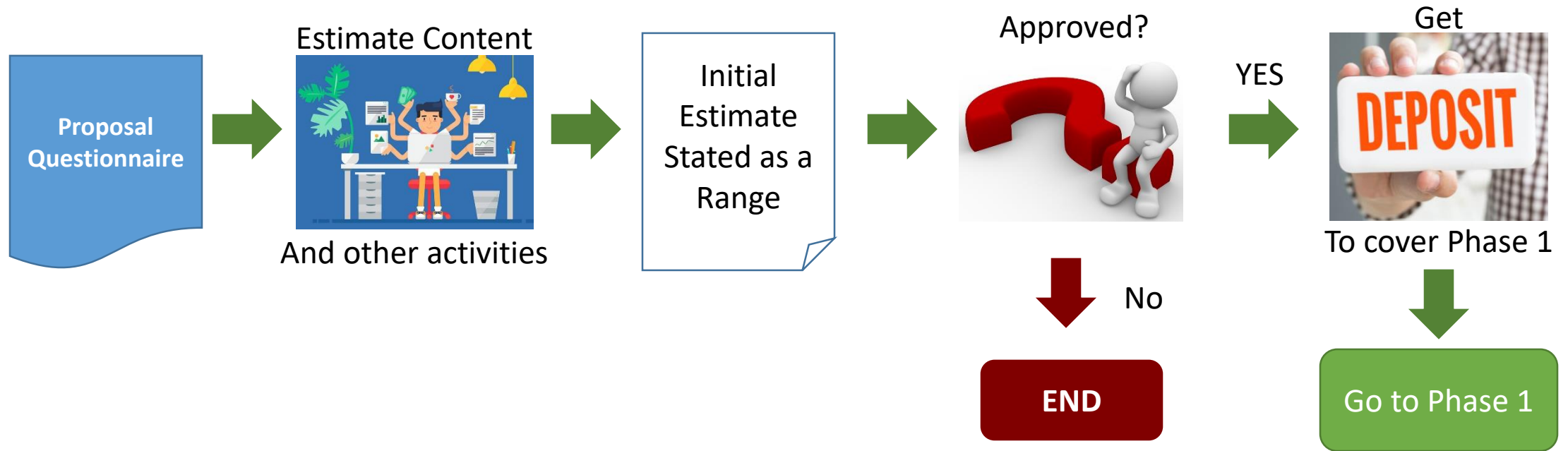


How It's Typically Done



The WPPMA 2-Step Proposal Process - Step 1

PHASE 0 – PROPOSAL CREATION



The WPPMA 2-Step Proposal Process - Step 2

PHASE 1 – PROJECT DEFINITION

Perform the
Deep Dive Discovery



Add any new



Discovered



Adjust for any



Changed
Requirements



Detailed SOW



With more precise
estimate



Go to Phase 2

NO
↑

Does new estimate



exceed the proposal
estimate?

YES
↓



Did client elect
to cancel?

YES
←

NO
←

END



Deliver



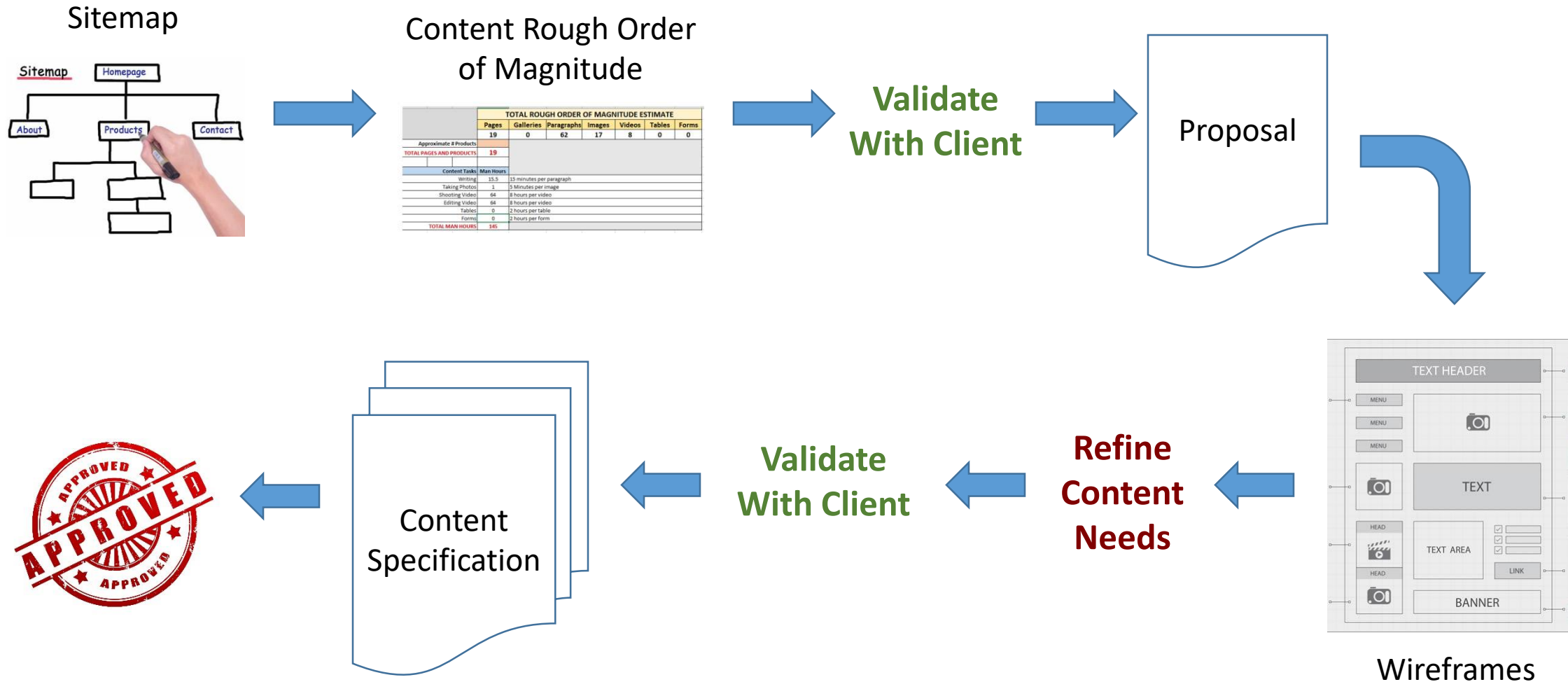
To client

Essential Processes

- ~~1. 2-Step Proposal Process~~
- ~~2. Estimating~~
3. Deep Dive Discovery
4. Change Management
5. Acceptance Management



Breaking Down the Discovery Activity



Breaking Down the Discovery Activity



Essential Processes

- ~~1. 2-Step Proposal Process~~
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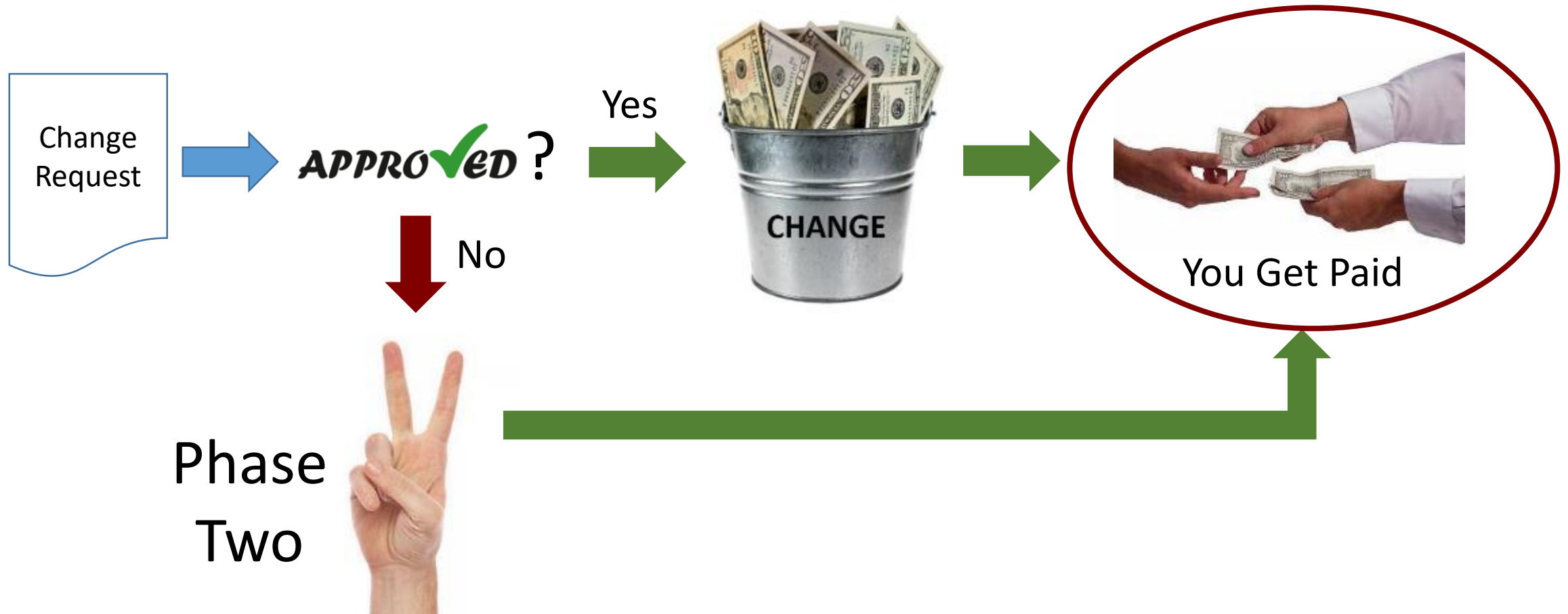


To Control Scope Creep, you need to:

- Establish a solid **Change Control procedure** that:
 - ✓ Controls change to cost, timeline, requirements, or resources
 - ✓ Uses a change budget
 - ✓ Is invoked without exception
 - ✓ Is part of your contract
 - ✓ Is discussed with the client up front and repeated as necessary
 - ✓ IS INVOKED WITHOUT EXCEPTION!!!!



Getting Paid for All the Work



To Control Scope Creep, you need to:

- Adopt an **Acceptance Management Process** that:

- ✓ Focuses on “acceptance” rather than “approval”
- ✓ Defines “rejection with cause”
- ✓ Requires establishing acceptance criteria UP FRONT
- ✓ Is part of your contract
- ✓ Is discussed with the client up front and repeated as necessary



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To prevent Project Delays, you need to:

- Include the client when determining the timeline
- Use a content-first development approach
- Provide incentives for meeting the dates
- Clearly lay out penalties for not meeting the dates
- Invoke your Change Control procedure without exception
- Ensure your Acceptance Management process specifies turnaround times and consequences for non-compliance



Elements of a Good Change Control Procedure

1. Uses a change budget
2. Defines what constitutes a change
3. Identifies who can initiate a change request
4. Establishes that all change requests are in writing
5. Identifies who will assess impact to the project
6. Uses a change request log
7. Specifies where the change requests will be maintained
8. Identifies who will approve or reject the change request
9. Specifies how long a change approval or rejection should take
10. Clearly states what happens if the client does not respond
11. Specifies when payment for the change request is due



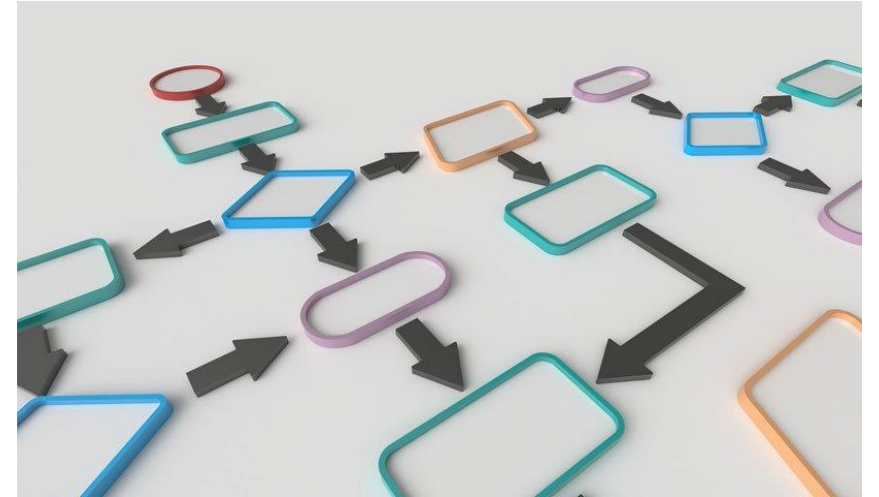
Elements of a Good Acceptance Management Process

1. Identifies all deliverables to be approved
2. Specifies acceptance criteria for each deliverable and the final project
3. Identifies who is responsible for approving or rejecting deliverables
4. Specifies the turnaround time for review and approval
5. Clearly states what happens when the turnaround time is not met
6. Defines “rejection with cause”
7. Describes when and how “rejection with cause” is applied



Essential Project Management Processes

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



How to Learn More



You're invited to join our Academy!

Learn how to consistently complete WordPress Projects on time, within budget, with features that meet your client's business requirements (without sacrificing your profit).

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

How to Learn More

The Basic Membership is FREE. Upgrade to Premium at any time. Cancel at any time.

Basic Membership - Free

Enrolled




WordPress Project Management 101 Roadmap

[Follow the Roadmap](#)

Premium Membership


Enrolled



WordPress Project Management 101 Roadmap

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NEW and Improved

The NEW Complete Project Management Roadmap for WordPress

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How to Learn More

Get Certified!



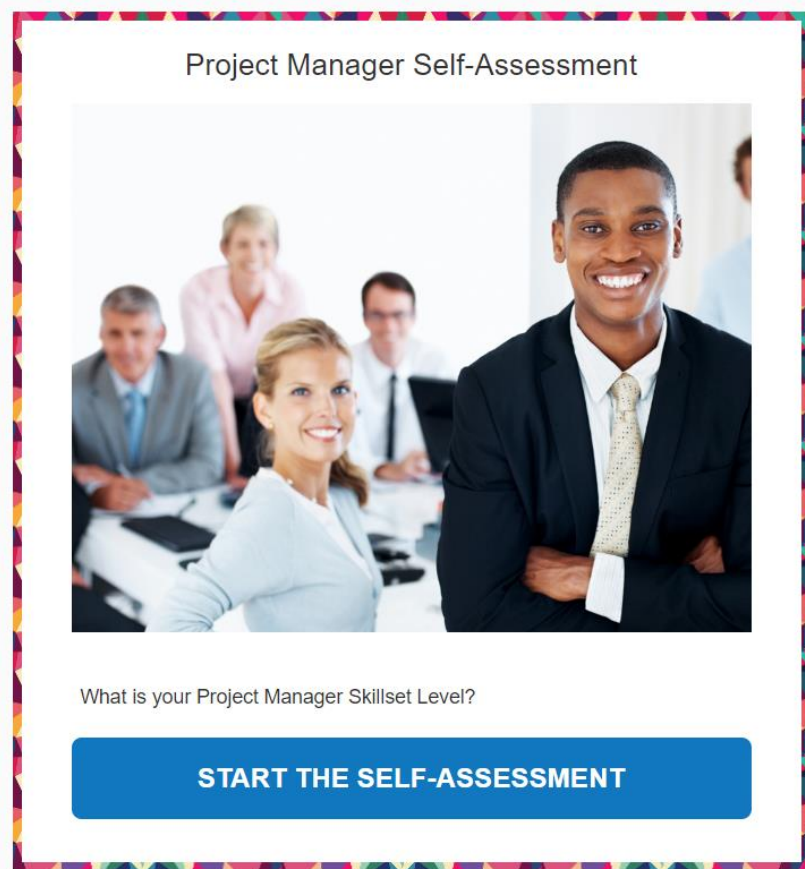
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How to Learn More

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How to Learn More



You might already BE a project manager.

Take the free Project Manager quiz on our home page to find out.

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Let's Review

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- **MEASURE** every little thing you do



- **CONTROL** every little thing you do



Let's Review

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Thank You!



Twitter: @WPRoadmaps
beth@wproadmaps.com

To take the PM quiz...
wproadmaps.com

To get the slides...
wproadmaps.com/speaking

To join the Academy...
wproadmaps.com/joinus

Project Manager Self-Assessment



What is your Project Manager Skillset Level?

START THE SELF-ASSESSMENT

WP PROJECT MANAGER'S ACADEMY
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