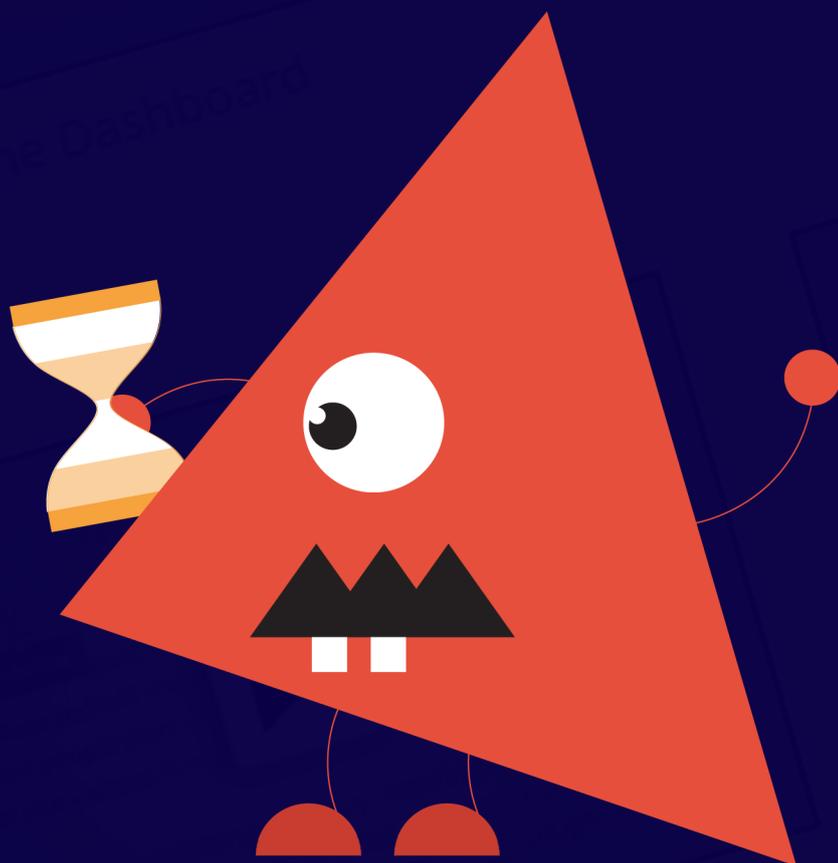
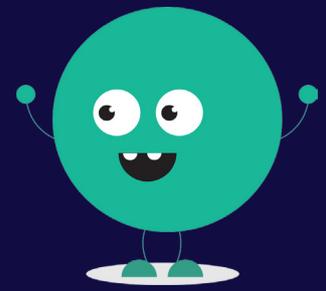


# A BETTER WORDPRESS FOR CLIENTS

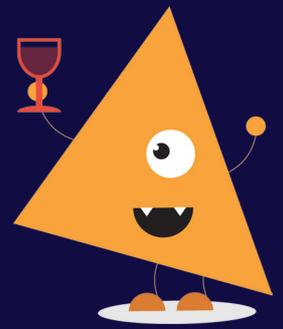


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CHAPTER ONE

# OBJECTIVE

*Work with people you like, on projects you enjoy and get paid what you're worth. Life is too short to do otherwise.*

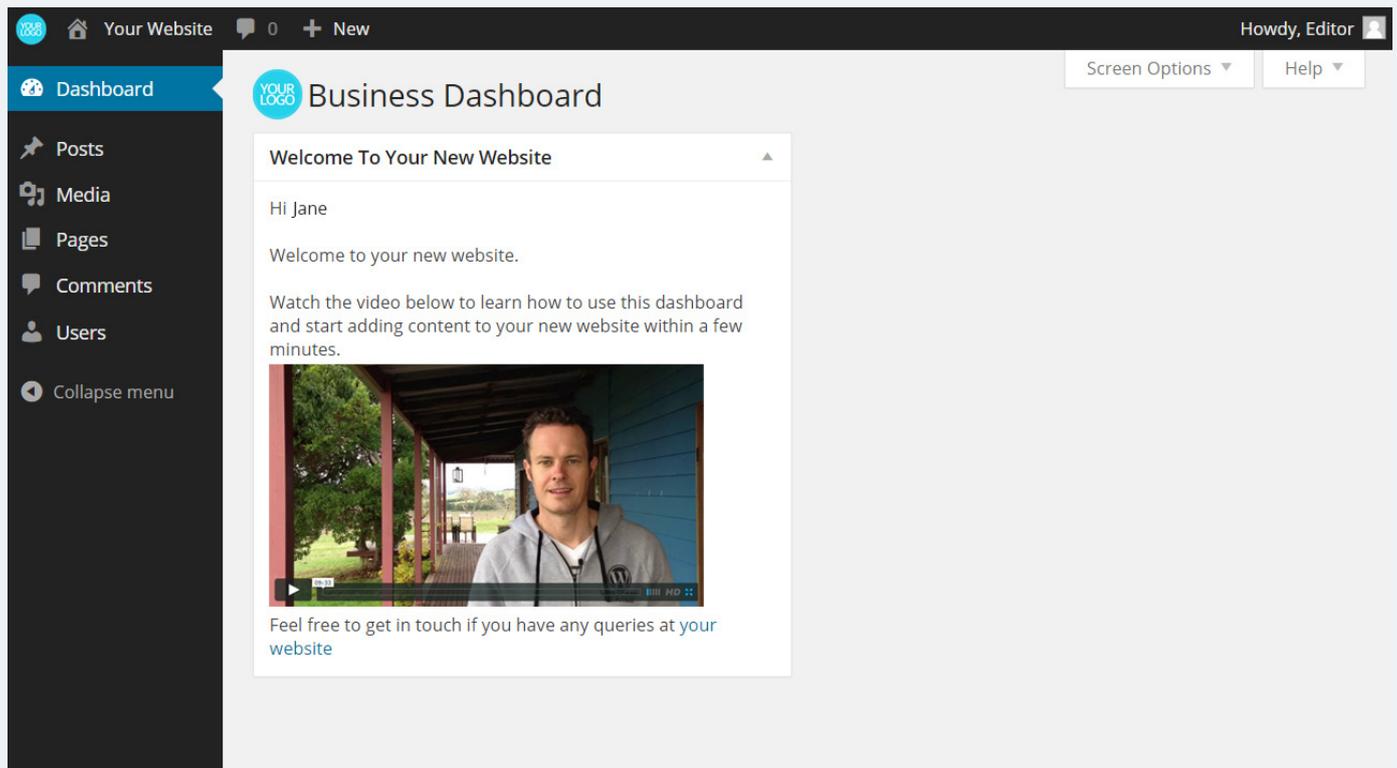
I paraphrased Dan Kennedy for that quote. It has become my motto. It's helped me get where I am. It helped me focus on “wowing” clients and making their life easy, instead of being a pain in the ass and a disappointment.

If you're building websites for clients using WordPress, then you're already doing a pretty good job of “wowing” them I'd bet. Let's go one – or quite a few – steps further.

Let's go from this:

The screenshot shows the WordPress dashboard for a user named 'Howdy, Editor'. The interface includes a top navigation bar with 'Your Website', '0' notifications, and a '+ New' button. A left sidebar contains a menu with items like 'Dashboard', 'Posts', 'Media', 'Pages', 'Comments', 'Appearance', 'Plugins', 'Users', 'Tools', 'Settings', and 'Collapse menu'. The main content area is titled 'Dashboard' and features several widgets: 'At a Glance' showing 1 Post, 6 Pages, and 1 Comment; 'Activity' showing a 'Recently Published' post titled 'Hello world!' from July 11th; 'Comments' showing a comment from 'Mr WordPress' on the 'Hello world!' post; 'Quick Draft' with a 'Save Draft' button; 'Drafts' listing three drafts from 'vum-admin' dated August 27, 21, and 19, 2014; and 'WordPress News' featuring an article about 'WordPress 4.1 "Dinah"' from December 18, 2014.

To this :



A smart, useful, beautifully branded website dashboard with built-in training videos, Google Analytics and a simple menu of options. I also make a point to add in making the site, fast, secure, backed up, easy to use and search engine friendly. The bare minimum every web developer should be doing.

Let's add so much value to our client that they will never think of using any other web developer, they will refer clients to you and they will apologise if they ring you with annoying little questions.

Let's do this.



CHAPTER TWO

# INTRODUCTION

Even though you know WordPress is a world-class content management system, chances are your clients will not have the faintest idea what to do with it. I'd like to begin with a quote from Steve Krug about usability from his inspiring book, *Don't Make Me Think*:

*After all, usability really just means making sure that something works well: that a person of average (or even below average) ability and experience can use the thing—whether it's a Web site, a fighter jet, or a revolving door—for its intended purpose without getting hopelessly frustrated.*

One of the things I love about Apple products is that they ship with very clear instructions on what to open first and where to start. You are not left to your own devices to figure out how to use your new MacBook Pro or iPhone. You are guided through the experience with intuitive design, simple instructions and easy to use software. This is because the user of the product has been considered with every decision made. On the flip side, if you've ever used a piece of hardware or software that was shipped by an engineer without any user experience consideration, hopeless frustration is inevitable.

WordPress is an awesome piece of open source software and I am grateful to Matt Mullenweg and the entire community for making it what it is today. However, if you use WordPress to build websites for clients, you may have realised that its "usability" struggles by Steve Krug's definition

I posit that this is because WordPress was originally a blogging platform and us developers have dragged it kicking and screaming into a full-featured content management system. Therefore there is a hybrid of both blog and CMS features competing for attention and screen real estate. No one is to blame, as Howard Jones once sang, it's just that the Internet moves so fast, and the WordPress contributors are focussed on making WordPress an awesome platform for developers. It's the role of us developers to make WordPress as easy for our clients to use as an Apple product.

There is a very simple way to do this. I'd like to offer you tips and advice based on my experience and that of my business partner Brian Porteous. Nothing is set in stone, and I am constantly evolving my own processes, but contained within this document is over 10 years of our combined experience building websites for clients using WordPress as a content management system.

In this document you will learn:

- how to provide a simple and beautiful login experience
- why you should restrict your client's dashboard access
- how to build a simple and powerful website dashboard
- how to train your clients to use WordPress fast
- how to manage your client's questions more efficiently
- how to add value with basic search engine optimisation strategies
- the essential suite of plugins you need to know

There's also a WordPress Deployment Checklist at the back of this document that you can use to make sure nothing falls through the cracks from here on.

If you implement just a few of these recommendations, you will provide a more seamless experience for your clients and will save yourself time and money on every project you deliver.

## Disclaimer

*In this document I make a lot of references to three plugins: **White Label CMS** and **Google Analyticator**, which are freely available from the WordPress plugin repository and the **Video User Manuals** plugin, which is a premium plugin. My company makes these plugins. However, all of my recommendations are achievable without the use of any plugins or by using different plugins. I just use these because they make my life easier.*

Even though a lot of this document is based on the use of plugins, the plugins are merely tools that allow us to achieve our goal. It's not about the plugins; it's about what they do. The philosophy behind this entire strategy is to add enormous value to the client, therefore strengthening the relationship and differentiating ourselves from the pack. This in turn helps us demand higher fees and attracts a higher calibre of client.

*I would love to hear your feedback on this document as well as your methods and processes for building websites with WordPress for your clients. Share your feedback regarding this document at our [feedback page](#).*



CHAPTER THREE

# FIRST IMPRESSIONS

*When you login you'll notice a lot of information on the dashboard.  
You can ignore all of it.*

Sound familiar?

I grew tired of repeating this every time I delivered a new website to a client and then explaining what all that information was on the dashboard. So I started exploring ways of simplifying the entire WordPress experience for my clients. This was primarily a selfish exercise designed more to save me time rather than make it easier for my client.

I considered every step my client took, from the time I sent them the login URL with their username and password, until they were ready to write their first blog post. There are some really simple steps we can take to make our client's first experiences with their website go much more smoothly.

## **Friendly Login**

There are a couple of ways that users can login to a WordPress site. I have found that for clients, the easiest one to remember is the URL of `http://website.com/login` (please note that you need to be using permalinks for this to work). I make sure this is the only one I mention to them.

An easy way to give clients a warm fuzzy feeling from the start is instead of showing them the standard WordPress login page which looks like this:



Username

Password

Remember Me

[Lost your password?](#)

[← Back to WordPress](#)

Figure 2 The login page with a standard WordPress installation as of version 4.



YOUR LOGO

Username

Password

Remember Me

[Lost your password?](#)

[← Back to WordPress](#)

Figure 3 Provide them with a personalised login page, like this:

This saves any unnecessary questions like “What’s WordPress?”

More importantly though, it makes the client feel comfortable because they are dealing with something familiar. Login pages are ubiquitous on the Internet, so the concept of a user name and password is not a foreign one; but seeing their own logo puts them at ease and makes them feel at home.

This is very easily achieved using the [White Label CMS](#) plugin.

Branding Login Dashboard Menus Settings Save

## Logo and Background

### Login Logo

[Upload](#)

Replace the WordPress logo on the login page. Max width 320px

### Retina Login Logo

[Upload](#)

Replace the Retina WordPress logo on the login page. Please make sure you use the standard retina format of x2

## Advanced

**Hide "Register / Lost your password?" link**

Hide the "Register / Lost your password?" link which appears below the login form.

**Hide "Back to" link**

Hide the "Back to" link which appears below the login form.

### Form Background Color

[Select Color](#)

Background color of the login form

### Form Label Color

[Select Color](#)

Color of the labels on the login form

Figure 4 Customise the login screen with the White Label CMS plugin



CHAPTER FOUR

# NEED TO KNOW BASIS

*I really don't have to worry about a client not seeing border-radius generated rounded corners if they themselves use Internet Explorer or Opera, because they simply do not know that something is missing. — Andy Clarke*

[As far back as 2008](#), one of my web design heroes, Andy Clarke, was advocating that we stop showing clients static designs and instead get them to sign off on designs in the browser. I strongly recommend you read this article to understand why this is a great idea. The takeaway point is that clients do not know something is missing if they've never seen it.

So if I give my client administrator access to their website and they log in to a standard WordPress installation, they will see the following:

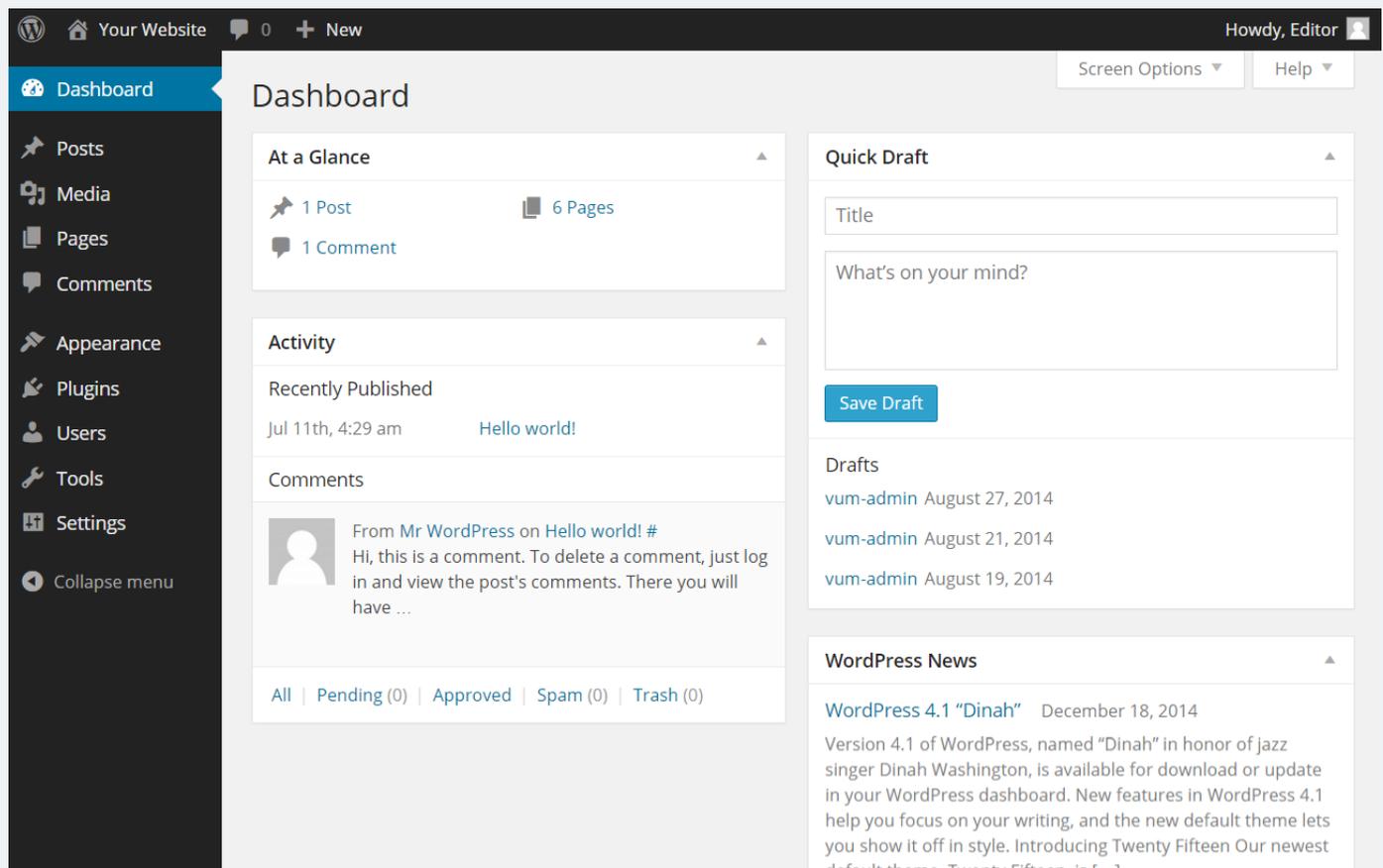
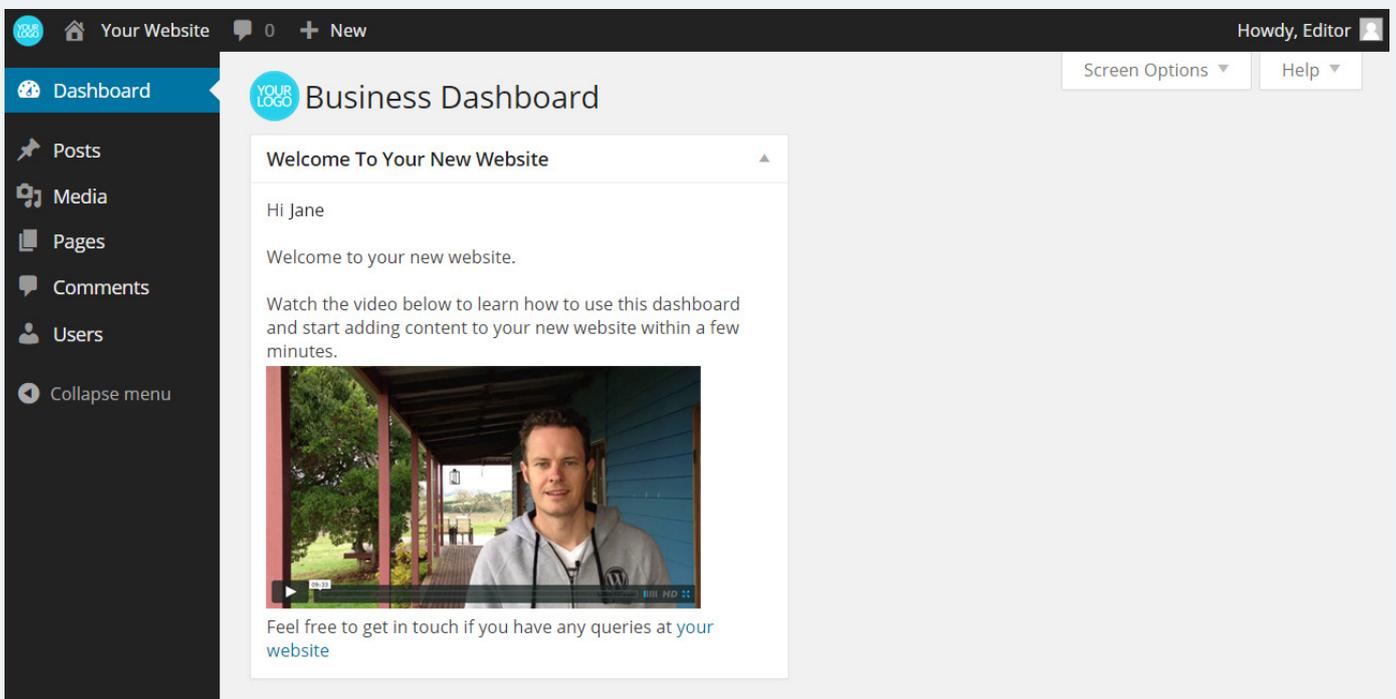


Figure 5 The administrator's dashboard with a standard WordPress installation

In the interest of saving my client a lot of confusion and myself a lot of time, I like to do two things:

1. I only give my clients “Editor” access to their website, and
2. I simplify the dashboard by removing everything they will not know is missing and leaving only what they need to know. I call this the “Website Dashboard”.

Let me show you what that looks like and then I’ll explain how and why.



*Figure 6 A simplified Website Dashboard is far more useful to the client*

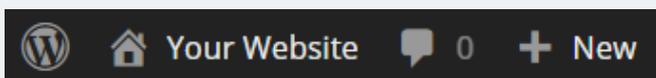
## Restricted Access

That’s right. In case you missed it, I only give my clients “Editor” access to their website. Why? Because the majority of my clients do not have the technical ability to install plugins, modify their theme or add widgets.

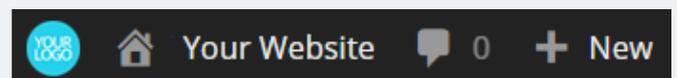
They also don't know there is such a thing as an "Administrator". On the rare occasion that a client actually asks for administrator access, I make it very clear that if they break anything there will be a fee involved for me to fix it. That usually scares most people off. Anyone who does request administrator access must know there is such a thing and therefore they usually have a good enough understanding of how WordPress functions and are an advanced user, not just a content editor. However, over 90% of my clients only have Editor access to the system—which makes everyone's life a lot easier.

### **What if the client absolutely needs admin access?**

In some cases there will be a particular plugin you are using which means the client will have to have an admin access. In this case, I recommend using a combination of two plugins. First, the User Role plugin which duplicates the admin capabilities to a new user role of Client Admin. Then I use the Adminimize plugin to customize the experience of the Client Admin's access. Either way the end goal is the same, the client's user experience should be curated and simple.



*Figure 7 The standard WordPress admin bar*



*Figure 8 A re-branded WordPress admin bar*

## The Website Dashboard

Now let's take a closer look at the features of the "Website Dashboard". The first thing I do is replace the WordPress logo at the top left of the admin bar with the client's logo—16px by 16px. This saves them asking the question "What does that little 'W' in the corner mean?"

This is achieved very simply via the White Label CMS plugin by turning off the WordPress logo and uploading a 16px x 16px version of the client's logo for use in the WordPress dashboard.

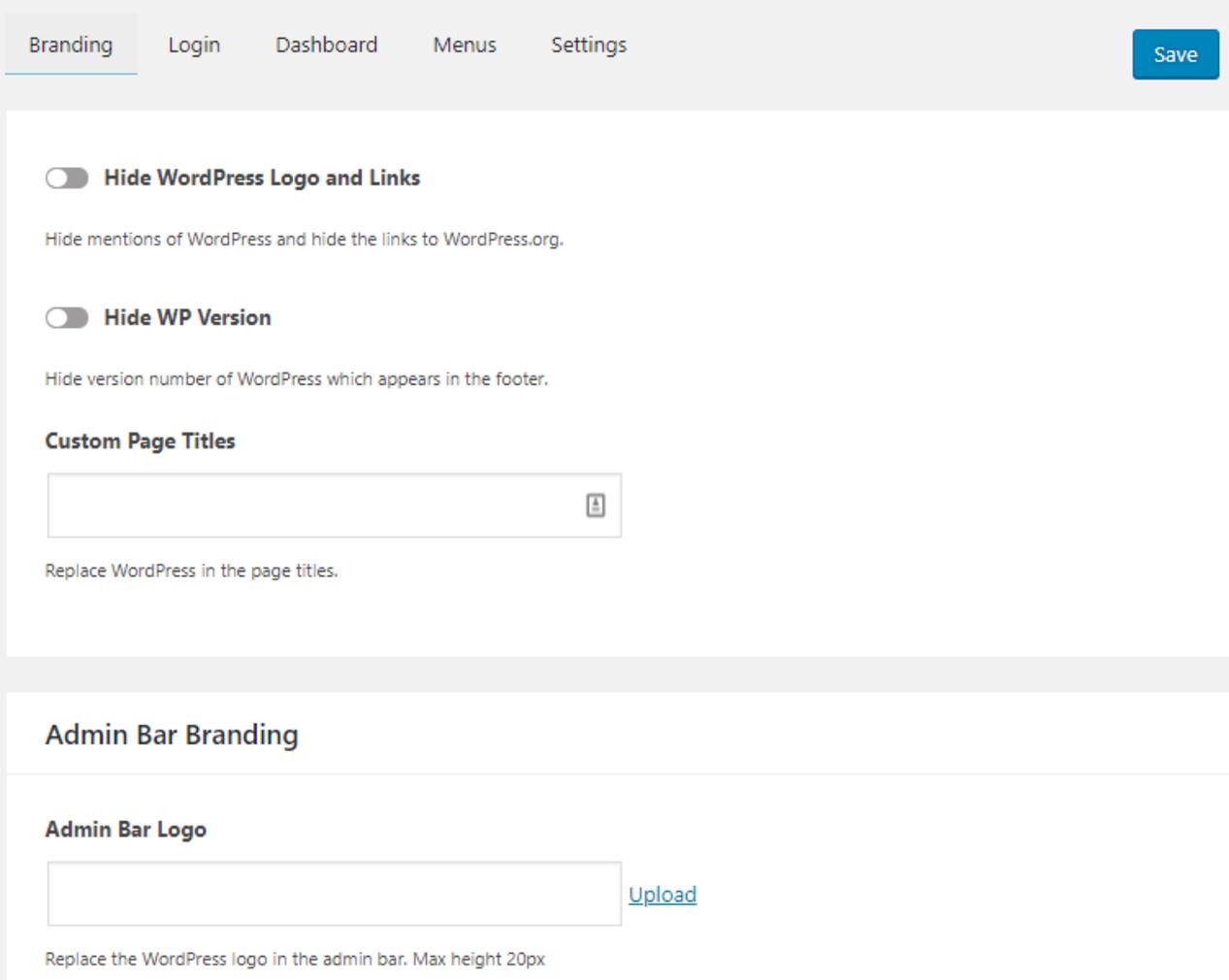


Figure 9 The admin bar settings in the White Label CMS plugin

## A More Meaningful Title

Next, I rename the dashboard to something more enticing to the client, like “Website Dashboard” or “Online Shop Dashboard”. I also replace the default “Home” icon with my logo so every time my client logs in they are reminded of my company and the excellent job we did.

The image shows the standard WordPress dashboard interface. At the top left, the word "Dashboard" is displayed in a large, bold, black font. To the right of the text, there is a small, circular icon representing the home page.

Figure 10 The standard WordPress dashboard title and icon

The image shows a re-branded and custom dashboard interface. On the left, there is a circular logo with the text "YOUR LOGO" inside. To the right of the logo, the text "Business Dashboard" is displayed in a large, bold, black font.

Figure 11 A re-branded and custom dashboard title and icon

Again, this is all very easy to do using the White Label CMS plugin.

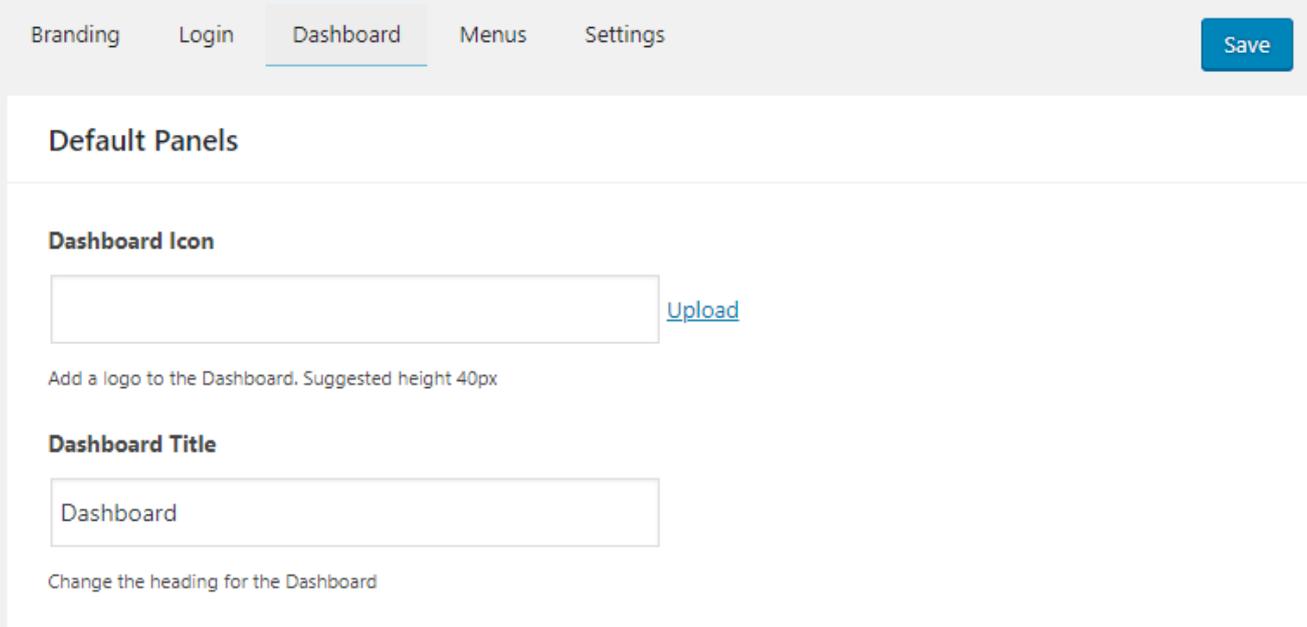
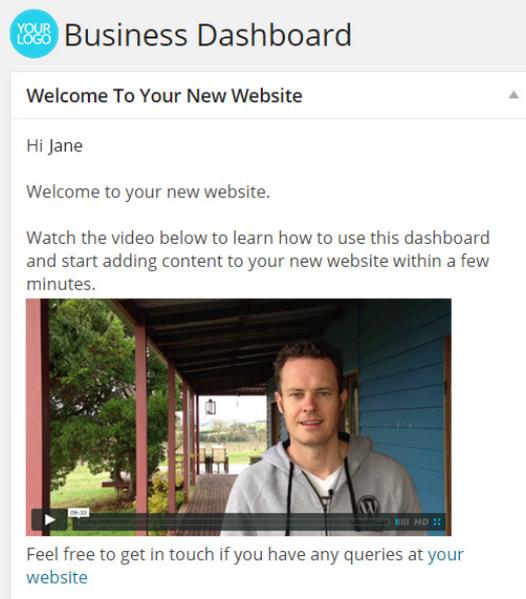
The image is a screenshot of the White Label CMS plugin settings page. At the top, there is a navigation menu with tabs for "Branding", "Login", "Dashboard", "Menus", and "Settings". The "Dashboard" tab is currently selected. To the right of the navigation menu is a blue "Save" button. Below the navigation menu, there is a section titled "Default Panels". Under this section, there are two settings: "Dashboard Icon" and "Dashboard Title". The "Dashboard Icon" setting has a text input field that is currently empty, followed by a blue "Upload" button. Below the input field, there is a note: "Add a logo to the Dashboard. Suggested height 40px". The "Dashboard Title" setting has a text input field that contains the word "Dashboard". Below the input field, there is a note: "Change the heading for the Dashboard".

Figure 12 Add Dashboard Logo

## A warm welcome

The next thing you'll notice about my customised dashboard is that it does not include any of the standard panels that WordPress throws up out of the box, like "Right Now", "Recent Comments", "Incoming Links", "Plugins", "QuickPress", "Recent Drafts", "WordPress Blog" or "Other WordPress News". This has saved days of my life not having to explain what these all mean.

Instead, I include my own welcome panel that addresses my client by name, introduces them to their dashboard and shows a brief video explaining how to use the dashboard and how to start making changes to their website straight away.



*Figure 13 A custom welcome panel on the dashboard*

Shooting a video is easier than ever these days. Using your computer or your phone is good enough for the web. Clients want to see your face and connect with you. Most people don't like being on camera. Do it anyway. It makes a difference to your bottom line.

I use [Vimeo](#) to host the videos I use for this purpose. There's a free version to get started, but I use Vimeo Pro myself. YouTube is another option.

The video I made is generic enough that I can reuse it for every client. If there are any specific quirks I need to cover off, like custom post types, I can just shoot an additional video, add it to my Vimeo Pro account, and embed the iframe code back into the dashboard.

**Tip:** Now that the WordPress dashboard is iPad compatible, using Vimeo means your videos will be iPad friendly too.

**Custom Welcome Dashboard Panel**

Add your own Welcome Panel to the Dashboard page. This will appear on the dashboard. We recommend providing your contact details and links to the help files you have made for your client.

**Add Your Own Welcome Panel**

You can add your own welcome panel.

**Select the Roles the Welcome Panel Will Be Visible To**

Administrator  Editor  Author  Contributor  Subscriber

Select the user roles this will be visible to.

**Template Type**

**Basic HTML**  Elementor  Beaver Builder Pro

**Title of Welcome Panel**

Title of the Welcome Panel

**Welcome Panel Description HTML**

Figure 14 Add a custom welcome panel to the dashboard with the White Label CMS plugin

There are three key elements to consider here:

1. use the White Label CMS plugin to remove all the standard dashboard panels (except for Administrators),
2. add your own welcome panel via the White Label CMS plugin, and
3. create a snippet of HTML for your welcome panel, which includes the video that you can reuse over and over again.

I have snippet of HTML stored in a Google Doc that I reuse for every project. All I need to do is change the first name and paste it into the White Label CMS plugin and click save.

Here is my HTML snippet :

```
Hi [First Name],<br/><br/>
Welcome to your new website.<br/><br/>
Watch the video below to learn how to use this dashboard
and start adding content to your new website within a few
minutes.<br/><br/>
<iframe src="http://player.vimeo.com/video/xxxxxxx"
width="330" height="185" frameborder="0" webkitAllowFullScreen
mozallowfullscreen allowFullScreen></iframe><br/><br/>
Feel free to get in touch if you have any queries at <a
href="http://your-website.com">your website</a>
```

Obviously you need to update this with your details, such as your own Vimeo iframe code and the link to your own website.

## Feed the Fire

Directly underneath my custom welcome panel, I include another dashboard panel that displays the most recent three posts from my company blog. This is a great way to automatically nurture the relationship you have with the client by constantly feeding them new information every time they login. This helps position yourself as an expert in your field and generates new business from the client in the future.

It's also very easy to setup by adding an RSS panel to the dashboard using the White Label CMS plugin.

### RSS Dashboard Panel

**Add Your Own RSS Panel**

<http://websites.training/feed/rss/> This will appear on the dashboard. If you want your client to be kept up to date with what you are doing in your business, set up your RSS feed.

**RSS Title**

The title of the RSS Panel

**Add Your Logo**

 [Upload](#)

Add a logo to appear on the panel before the title.

**RSS Feed**

The RSS feed address. For example `feed://websites.training/feed/`

**Number of Items to appear**

Figure 15 Adding an RSS widget to the dashboard with the White Label CMS plugin

You will need to authenticate the plugin with a Google account. I prefer to let clients take ownership of their data, so I either help them get the information needed to set it up, or set it up for them in their name, using an account that then belongs to them.

## Remove Temptation

To save even more confusion, I like to remove any tempting dashboard menu items that the client does not need. If the client has been given Editor access only, most of the unnecessary menus will already be hidden. However, the “Posts”, “Comments” and “Tools” menus are still visible and I want to remove these. I will leave the “Posts” menu if the client is going to be writing blog posts. Hiding menus is easy using the White Label CMS plugin.

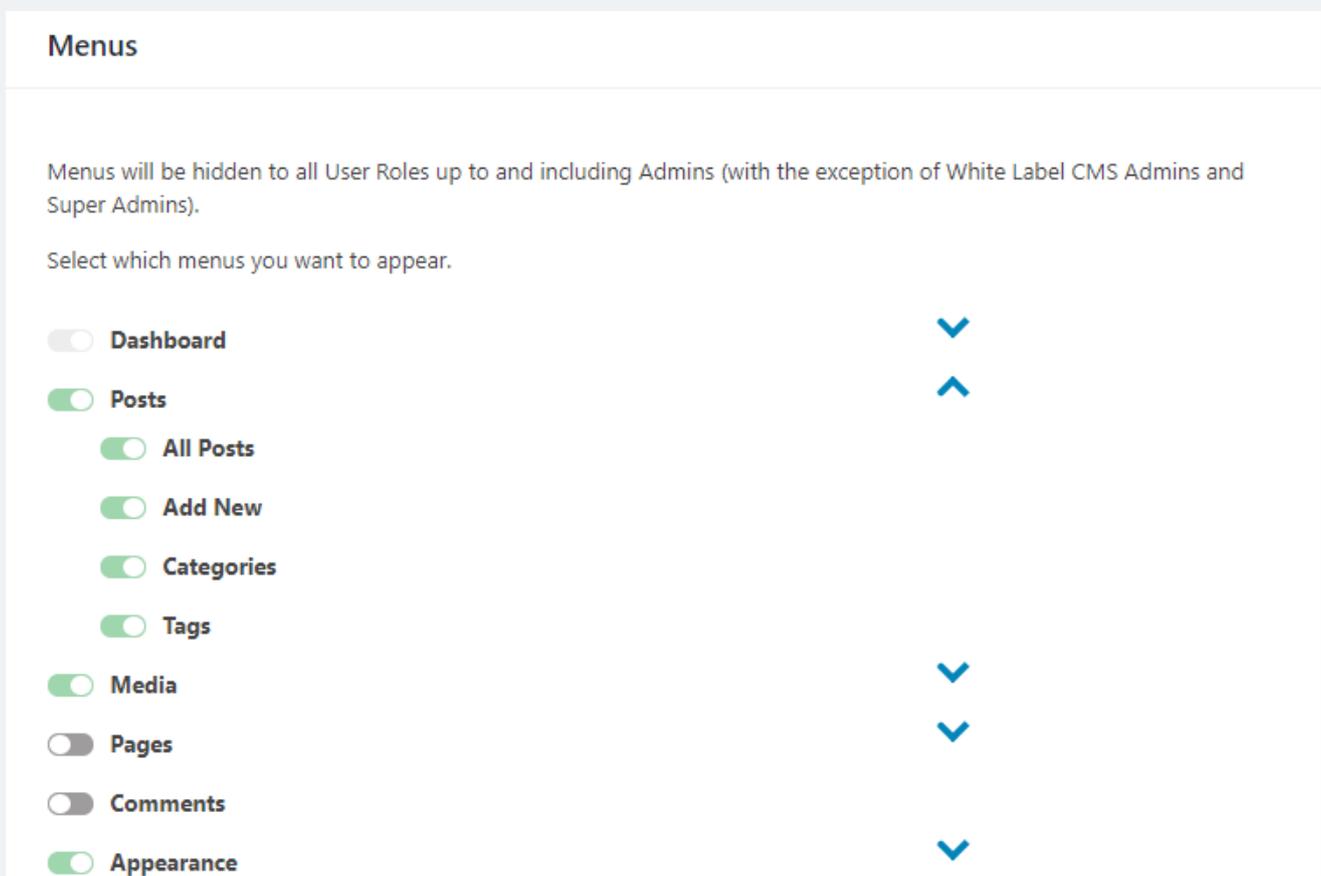


Figure 16 Hiding menus using the White Label CMS plugin

Hang on a minute! What about the fabulous WordPress custom menu system? How do I give my clients access to that so they can add pages to their main navigation or footer menu?

Fear not. There's an option for that.

Simply give your Editors access to the Appearance menu and then hide the other options.

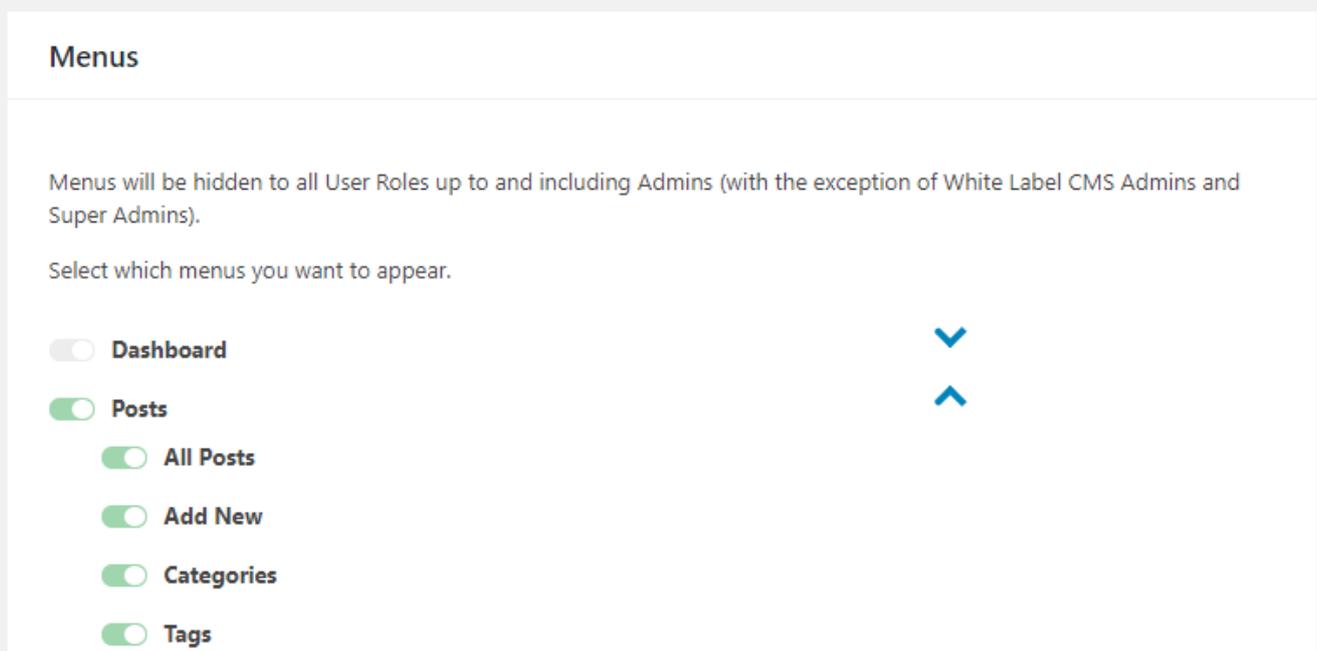


Figure 17 Give Editors access to the Menus menu item with the White Label CMS plugin

## Useful is the new cool

Finally, I like to add something really useful to my client's navigation menu: the ability to edit their home page without having to dig into a template. There are a couple of ways you can do this. You could base the homepage template on custom post types, or you could build your own admin page to allow your client to change certain aspects of the homepage. I developed my own plugin and admin options page based on this [excellent tutorial](#) by Rohan Mehta at Net Tuts+.

Whichever option you choose, adding a new item to the menu so your client can edit their homepage requires you to use the `add_menu_page` function built into WordPress. There is a full explanation of this function in [this article](#) in the WordPress Codex.

I'll share the function I use when I build a homepage based on a custom post type. This lives in my theme's `functions.php` file:

```
add_action( 'admin_menu', 'my_custom_menu' );
function my_custom_menu () {
if ( function_exists( 'add_menu_page' ) && ! current_user_can(
    'manage_options' ) ) {
    add_menu_page( 'Homepage', 'Homepage', 0, 'edit.php?post_
type=td_home_slides', 'vseoha_admin', '/wp-admin/images/generic.
png', '3' );
} }
}}
```

This function adds a new menu to the WordPress admin menu called “Homepage” which takes the user to the edit screen for a custom post type called “td\_home\_slides” (see [custom post type naming conventions](#)). Using the position of ‘3’ places this new menu page directly underneath the “Dashboard” menu.

Now I have hidden all the unnecessary menu items from my client and am only showing them “Dashboard”, “Media”, “Pages”, “Appearance” (so they can access the custom menu feature), “Profile” and “Homepage” (my custom post type editor).

## The order of things

Now let's put the remaining menu items in some kind of order that makes sense based on how often our client is likely to use them. My preferred order is "Dashboard", "Homepage", "Pages", "Media", "Appearance", then a separator and finally "Profile".

Thanks to Mike Schinkel for this excellent WordPress menu API, it's as simple as dropping his `wp-admin-menu-classes.php` file into your theme's directory and then placing this small function in your theme's `functions.php` file:

```
require_once('wp-admin-menu-classes.php');
add_action('admin_menu','my_admin_menu');
function my_admin_menu() {
    swap_admin_menu_sections('Pages','Media'); // Swap location
    of Pages Section with Media Section
}
```

So all I'm doing here is swapping the "Pages" and "Media" sections. Go ahead and try it out. It's pretty nifty. Now you have a simple, clean, easy to understand menu structure that will not cause any confusion. Let's take a look at the menu before and after our customisation.

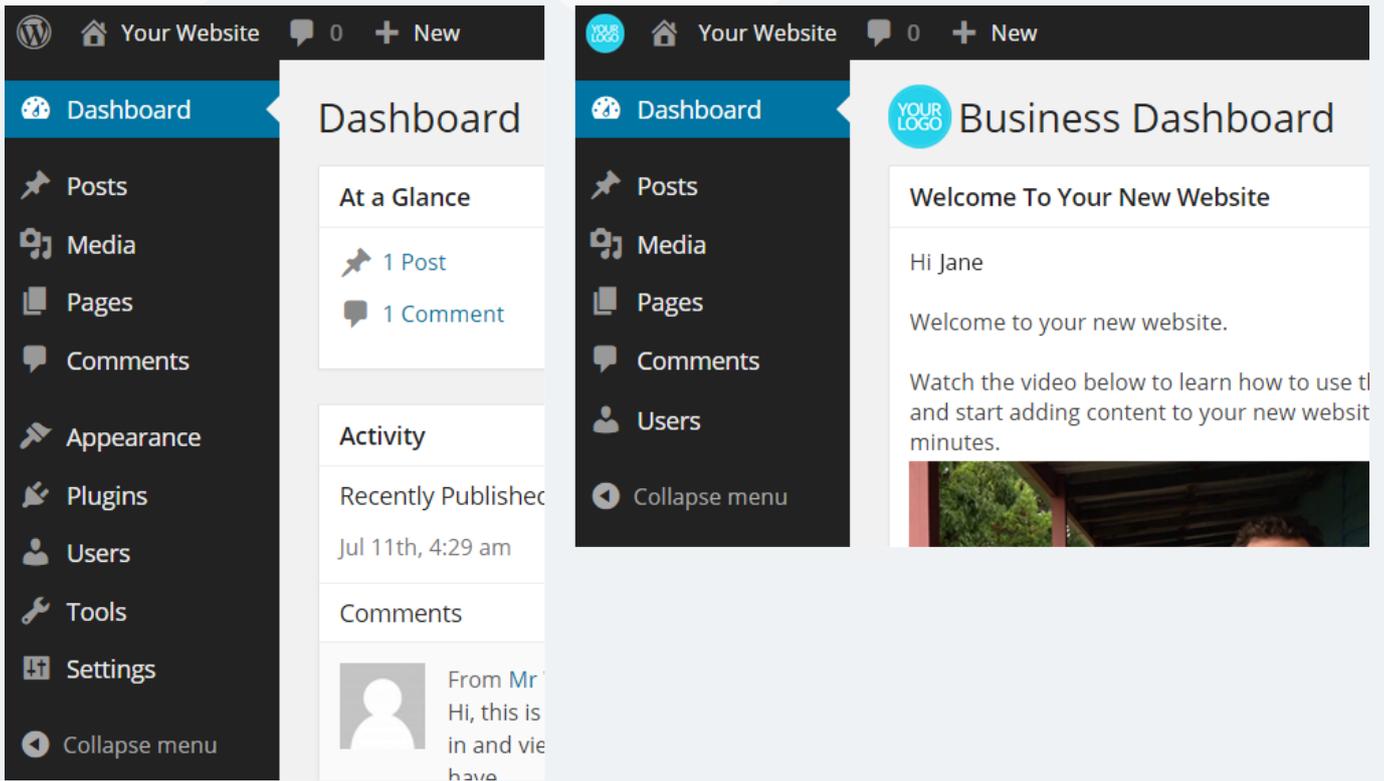


Figure 18 The WordPress admin menus before and after customisation

## Thank you for creating with whom?

We all know WordPress is awesome, but our client most likely doesn't know or care what WordPress is. They just think we are awesome for making their new website so easy to update. So I like to get rid of the WordPress mention and version number in the admin footer and replace it with something more useful—like my logo and a link back to my website.

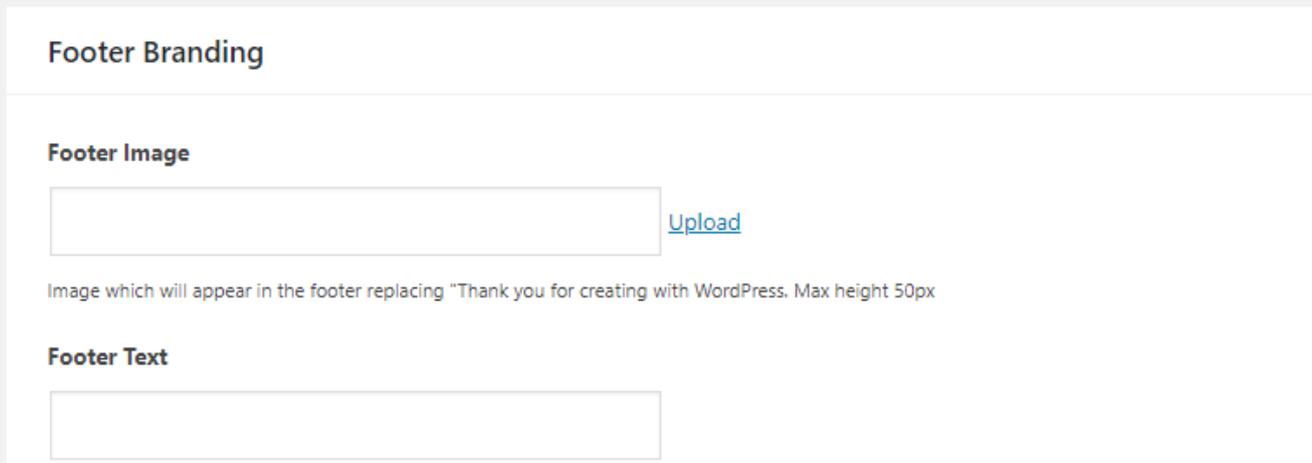


Figure 19 The standard WordPress admin footer



Figure 20 A re-branded footer using the White Label CMS plugin

Again, this is easily achieved using the White Label CMS plugin.



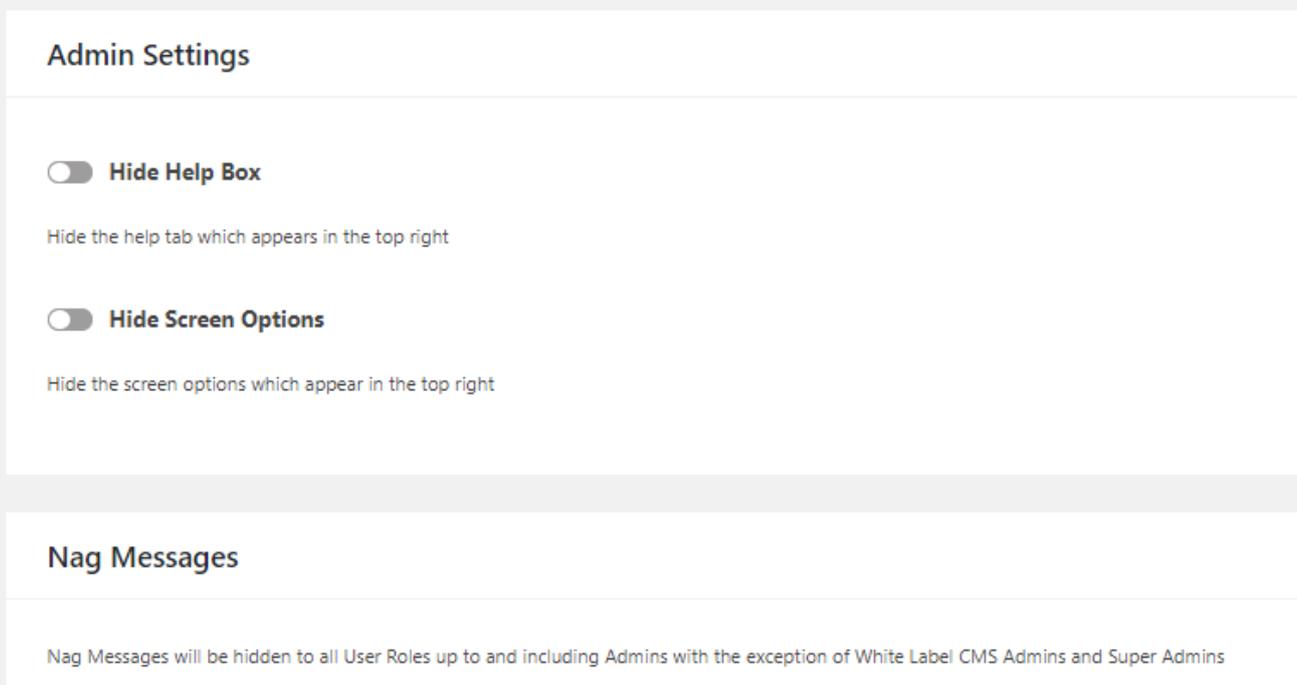
The screenshot shows the 'Footer Branding' section of the White Label CMS plugin settings. It features a 'Footer Image' field with an 'Upload' button and a text description: 'Image which will appear in the footer replacing "Thank you for creating with WordPress. Max height 50px'. Below this is a 'Footer Text' field.

Figure 21 Customising the footer in the White Label CMS plugin

## The not-so-obvious

Finally, in an attempt to eliminate 95% of incoming phone calls from newbie clients asking irrelevant questions, there are three other things I want to remove from the dashboard...

1. The screen options drop down
2. The help drop down
3. Any version update nag notifications whenever a new stable release of WordPress is set free



The screenshot shows two sections of the White Label CMS plugin settings. The 'Admin Settings' section has two toggle switches: 'Hide Help Box' (checked) and 'Hide Screen Options' (checked). The 'Nag Messages' section has a text description: 'Nag Messages will be hidden to all User Roles up to and including Admins with the exception of White Label CMS Admins and Super Admins'.

This can all be achieved with three little radio buttons in the White Label CMS plugin.

This means that whenever you or other administrators login you will still see the WordPress version update notification under Dashboard > Updates, but anyone without Administrator access will not be notified.

## **Let's Recap**

This is what my client will now experience when I hand over the keys to their new website:

1. an easy to remember login URL of `http://website.com/login`
2. a clean and simple login page with their logo
3. a simple "Website Dashboard" once they login that has their logo, a welcome video, RSS feed of my blog, and Google Analytics widget
4. a simple menu of items to choose from including a Homepage editor, Pages, Media Library, custom menus and Profile settings
5. no mention of WordPress, version numbers or any other distractions

My client now has an awesome content management system they can start using immediately to manage the content on their website.

*Phew!*

CHAPTER FIVE

# WHERE'S THE MANUAL?



*Well, I would have read the manual before I called you, but there is no manual. That's why I'm calling you.*

Televisions ship with user manuals. Automobiles ship with user manuals. Computers ship with user manuals.

WordPress does not.

There are a several good reasons why you should provide a user manual for your clients -

- It will save you lots of time answering the obvious questions about the visual editor, the media library, how to upload images and how to paste in text from that dreaded Microsoft Word program that people still use.
- It will make you look more professional and strengthen the relationship you have with your client, which could lead to more business or referrals to new clients.
- It allows you to get on with doing what you do best without being interrupted by a dozen phone calls when the client forgets something.
- It's the right thing to do!

Web development is a very competitive space these days with prices for websites generally going south. This is a way to differentiate yourself from the standard, "we will give you an hour's worth of onsite training, then you're on your own."

So without giving you too much of a sales pitch, here are the basic features of the Video User Manuals plugin.

## Video User Manuals

The Video User Manuals plugin adds a menu item to the dashboard called “Manual”. It contains over 60 high quality, professionally produced, screencast video tutorials that cover everything an “Editor” can do in WordPress. The videos are iPad compatible too.

It also contains a 100-page written manual that uses a WP-style navigation and includes over 100 screenshots, a search tool and an index for those who prefer to learn by reading. The written manual and videos explain every button on the visual editor toolbar, the Media Library, Image editing, basic text formatting, adding Pages and Posts, Categories, Tags, Comments and more.

You can customise the plugin to only show the videos your client needs and you can re-brand it with your own logo for a very professional training solution. You can also add your own custom videos for each client.

At the time of writing, the videos are available in native US, English and Australian accents. Oh, and all the videos and screenshots get updated automatically with every stable release of WordPress, which means new videos get added and updated via the cloud so you’ll continue to look good to your clients.

In addition to covering all the basic WordPress functions and tasks, the videos also cover off WooCommerce and WordPress SEO, which I think are essential plugins.

The plugin also contains Google Analytics training by using the official Google Analytics Academy videos. As I'll discuss later, I think this is crucial when handing over a website to a client – that they truly understand how their website is performing.

Here are some screenshots of the plugin in action.

The image displays the plugin's configuration interface and its front-end output. On the left, the settings panel includes:

- Change Menu Name:** A text input field containing "Your Company".
- Heading on the videos page:** A text input field containing "Your Company".
- Custom Introduction Text:** A text area containing the text: "Hi, welcome to your new website! The following are some quick video tutorials which will help you get started. If you want to read the manual for some more in depth explanations on how your content management system works".
- Custom Logo For Plugin Pages:** A text input field containing the URL "http://www.example.com/custom-logo.png".
- Custom Logo above video player:** A text input field containing the URL "http://www.example.com/video-logo.png".
- Custom Video Placeholder:** A text input field containing the URL "http://www.example.com/video-placeholder.png".
- Custom User Manual Heading:** A text input field containing "Your User Manual".
- Custom Ebook Image:** A text input field containing the URL "http://www.example.com/ebook-image.png".

On the right, two screenshots show the plugin's front-end output:

- Top Screenshot:** Shows a sidebar menu with "Your Company" as the menu name. The main content area displays "Hi, welcome to your new website! The following are some quick video tutorials which will help you get started. If you want to read the manual for some more in depth explanations on how your content management system works". Callouts point to the "Menu Name", "Logo and Title", "Introduction Text", and "Video Logo".
- Bottom Screenshot:** Shows a sidebar menu with "Your Company" as the menu name. The main content area displays "Your User Manual" with a video player. Callouts point to the "Manual Heading" and "Ebook Image".

**Change Menu Name**  
Your Company  
*Change the menu name in the sidebar from Manual to what ever you want.*

**Heading on the videos page**  
Your Company  
*Change the heading of the plugin from Manual to what you want.*

**Custom Introduction Text**  
<p>Hi, welcome to your new website! The following are some quick video tutorials which will help you get started. If you want to read the manual for some more in depth explanations on how your content management system works </p>  
*Change the introduction text for your clients if you want.*

**Custom Logo For Plugin Pages**  
http://www.example.com/custom-logo.png  
*Appears top left of pages next to heading. 32px high will look the best*

**Menu Name**  
Your Company

**Videos**  
User Manual  
Manual Options

**Posts**  
**Media**  
**Pages**  
**Comments**  
**Appearance**  
**Plugins**  
**Users**

**Logo and Title**  
CUSTOM LOGO Your Company

**Introduction Text**  
Hi, welcome to your new website! The following are some quick video tutorials which will help you get started. If you want to read the manual for some more in depth explanations on how your content management system works click [here](#).

**Dashboard**  
The Dashboard  
The Adn

**Editor**

This plugin was originally written as a 100-page PDF for me to give to my clients. Over the years it has evolved into the premium video tutorial plugin for WordPress developers to give to their clients. It now even includes three different accents of spoken English: US, UK, and Australian.

It saves us hours every month and is a real talking point with clients who are blown away at the professional level of support they receive from us via this plugin.

They can get up and running and managing content on their own website within 30 minutes of logging in and they rarely call us with questions about how to use WordPress.

They have never had an experience with a web developer like this before.

Thousands of WordPress developers all over the world use this plugin to train their clients quickly and easily. It's something you can use to set yourself apart from the pack and provide a better WordPress experience for your clients.

Learn more about the [Video User Manuals](#) plugin here.

## Incoming Distractions

Now that you have your client up and running and managing their own website with a simple Website Dashboard and a built in video tutorial user manual, you can get on with building your next WordPress website.

That is until your client calls you or sends you an email with a query about one of those custom post types you wrote or some new feature they realise they need.

How do you manage these incoming queries so that they don't distract you when you're in the middle of some awesome CSS ninja moves?

### [Desk.com](#)

No, I'm not an affiliate.

Desk.com is a hosted help desk software-as-a-service solution that is simply awesome. It allows you to effectively manage and keep track of all your incoming questions (called "Cases") in a time efficient manner. It frees up your email inbox, has a beautiful user interface and prevents things falling through the cracks.

You can re-brand Desk.com and set it up to map from your own domain by simply adding a CNAME record to your DNS, so your clients can visit <http://support.your-domain.com> and see a beautiful, easy to use support desk.

*Tip: One of the best features of Desk.com is that it allows you to store articles (including videos and screenshots) in a knowledge base. This means, once you answer a common question, you can store it your knowledge base and Desk.com will attempt to answer your clients' questions in the future from the articles in the knowledge base before distracting you with a new "Case".*

I could go on for days about how powerful Desk.com is and how much time it saves me.

It is essential to building a long-term relationship with your clients beyond just the website. Desk.com will allow you to provide both a personal touch and handle your clients in a professional manner, plus help you be more productive.

CHAPTER SIX

# DIRECTING TRAFFIC



You've done your best to make the site's dashboard user-friendly for your client, now it's time to make it friendly for the site's visitors. No doubt you've done an excellent job of designing and developing the site to exceed expectations. But there's one other expectation that both your client and their visitors have that you should address to set yourself apart from other developers. That's being able to find the site in the first place.

Basic search engine optimisation is not a luxury. It's a must have. Handing over a website to a client without it is lazy, irresponsible and unnecessary.

Search engine optimisation has bewildered web developers for a long time and all the conflicting and changing opinions about how the Google algorithm works and the best practices to adopt make it difficult to know where to start. I believe this is why most web developers don't bother.

I am no expert, but I have had some very good results in-house by following a basic process of making sure the fundamentals are in place.

This guide will help you implement some basic SEO tactics that will get your client's website indexed by Google and start to appear in search results quickly.

There are no guarantees with SEO, but this is a good place to start. A lot of these recommendations are based on the work of Joost De Valk from the Netherlands and his excellent [WordPress SEO](#) plugin.

## The Perfect Permalink

There's been a healthy debate for a long time now about the best permalink structure to use on a WordPress site. I've always preferred using the very simple Post Name option, which means your URL looks something like this:

```
http://your-website.com/postname/
```

This is achieved by setting your permalink structure to: `/%postname%/`

There is an argument that on a large site you might end up with two posts with the same name, so you should use Category > Post Name as the structure. This means your URL looks like this:

```
http://your-website.com/category/postname/
```

This is done by using this permalink setting: `/%category%//%postname%/`

Dion Hulse, a core contributor to WordPress, gave a presentation at WordCamp in Melbourne 2011 and demonstrated that this permalink structure can slow down your page load time quite dramatically due to the structure of the WordPress database. So I jumped on the recommended permalink structure of Month > Name which results in URL's like this:

```
http://your-website.com/2012/08/postname/
```

This is set by choosing the following permalink structure:

```
/%year%//%monthnum%//%postname%/
```

More recently, [Eric Mann](#) did a comparison of a handful of permalink options (not including Category however), and in his test found that the Post Name option actually was the fastest. Under a more demanding configuration, he found essentially no difference between Day > Name and Post Name.

However, our friend Joost De Valk has spoken and written about this at length on his website. He's even had email conversations with Matt Cutts, The search expert from Google itself, and in the end Joost concludes that either Post Name or Category > Post Name is the ideal permalink structure.

Showing dates in your URL's can decrease your click through rates from search engine result pages as your posts age. The extra load on the WordPress database by using the Category in the permalink only applies to large websites with hundreds of pages and this can be overcome with a good caching plugin, which we'll talk about later.

I use `/%monthnum%/%postname%/` on our sites and leave it to the caching plugin to take care of the performance issues associated with it.

I suggest you read [this excellent article](#) and watch the videos with Matt Cutts from Google on Joost's website.

## SEO 101

Speaking of Joost, the next thing I recommend is installing his [WordPress SEO plugin](#). Unless you know what you're doing, you can leave all the default settings as they are and enjoy the benefits of this excellent plugin.

For each page or post, it allows you to write custom SEO titles and descriptions (which I recommend you get into the habit of doing), it suggests related keywords based on your focus keyword and it shows you what your page will look like on a search engine results page so you can make sure your entry is as enticing as possible to encourage click-throughs.

Based on your focus keyword for a page or post, the plugin then analyzes your content and gives you hints on how you can improve your page. The analysis is based on SEO fundamentals like making sure the focus keyword is in the page title, URL, heading, description, body content of your article and image ALT tags. The results of the analysis are given a red, yellow, or green indicator showing the severity of the SEO deficiency on the page. Doing your best to eliminate the red ones will have the greatest impact on improving that page's SEO and giving your client's site the maximum search visibility.

The plugin also gives you granular control over meta robots, 301 redirects, canonical URL's and sitemap exclusions for every page and post, and allows you to write custom page descriptions for Facebook.

In addition, I also recommend you take the time to setup your client's domain in Google's Webmaster Tools and verify the sitemap using the XML Sitemaps page in the **WordPress SEO** plugin. It only takes a few moments and is essential for good SEO.

This is a truly outstanding plugin that is a must-have for any website. It's easy to use, powerful and your clients will love you for it. And it's free.

[Read more](#) about the plugin on Joost's website and brush up on your SEO skills with this excellent [The Beginners Guide to SEO](#) by Moz.com.

Finally, this [great article](#) from the New York Times website way back in 2006 explains why writing headlines for search engines is important. It's still as relevant today as ever.

## Redirecting Traffic

A rookie mistake for inexperienced web developers is to re-develop a website for a client and pay no attention to any existing pages that may be attracting organic search traffic from Google. If your client has pages that have been attracting a few thousand visits a month from search engines you want to make sure you redirect that traffic to the new website once it goes live.

The best practice for redirecting traffic is to use a 301 permanent redirect, which tells Google that a page has permanently moved to a new location. The WordPress SEO plugin allows you to setup 301 redirects for individual pages or you can setup a series of redirects in your .htaccess file.

The correct syntax for a 301 redirect in your .htaccess file is:  
`redirect 301 /old/ /new/`

For example, if I need to redirect traffic from an URL of  
`http://www.my-website.com/resources/uploads/article-103.html`  
to a new URL of  
`http://www.my-website.com/blog/post-name-103/`

then the entry in my `.htaccess` file would look like this:

```
redirect 301 /resources/uploads/article-103.html http://www.my-website.com/blog/post-name-103/
```

Redirecting traffic can be tricky, but you can't just ignore it if your client's existing URL's are pulling in visitors. I suggest you read up on [redirection](#) over at Moz.

## Page Headings = <h1>

It's very common for WordPress themes to use the `<h1>` tag for the logo or name of the website in the header of the template. This is not good practice from an SEO point of view. Search engines want to know what each individual page is about. So if your website is titled "Video User Manuals" and a particular page is titled "SEO for WordPress Newbies" then you need the page heading to read "SEO for WordPress Newbies" not "Video User Manuals". Having the `<h1>` tag wrapped around the website name in the header will tell to Google that every page in your website is called "Video User Manuals" and that that's it's the subject of your entire website.

The best practice is to make sure your theme template files, such as single.php, page.php, home.php etc., include the following <h1> snippet:

```
<h1><?php the_title(); ?></h1>
```

This will ensure that whatever your client enters into the Page or Post title field in the WordPress edit screen will be read by Google as the first level heading on that page or post.

## Ping Them An Update

A little known, but very powerful feature in WordPress is the Update Services feature. This feature sends out an XML-RPC ping to a bunch of blog aggregation services whenever a page or post is created or updated. [This article](#) on the WordPress Codex explains the benefits of this in greater detail. By default, WordPress pings just one service:

```
http://rpc.pingomatic.com
```

However, we've discovered there's a whole list of other services you should ping too. You can find the entire list [here](#) and just copy and paste it into the Update Services field in the WordPress dashboard under Settings > Writing.



CHAPTER SEVEN

# ESSENTIAL PLUGINS

*So many plugins, so little time.*

This document has shown how plugins can be used to add value for your clients and make you stand apart from experiences they may have had with other WordPress developers in the past.

However, the world of free plugins is a wild ride. Many free plugins are also free from support, free from awesome features, free from thorough testing but NOT free from headaches. NEVER start with a general web search for free WordPress plugins and install them on sites. You don't want to be responsible for inserting malware on your client's site!

I recommend you ONLY download free plugins from the official [WordPress Plugin Repository](#). When choosing a plugin from there, you should check to see how recently the plugin was updated, which version of WordPress it is compatible with, and how well serviced the support forums are for the plugin (but sometimes support is offered someplace beside the repository). When you find a plugin that works really well and does exactly what it promises, make sure you vote for it and rate it. It helps all of us choose more wisely.

And yes I pay for plugins. They make our lives easier and add enormous value to our clients. They are cheap for the benefits they provide and their cost is quickly recouped. There are premium plugins I install on every site, without question.

So which plugins do you put on your clients' sites? That's for you to decide. However, on most sites you to have will want SOME plugins to cover the following functions:

- Caching
- Security
- SEO
- Analytics
- Training / Help
- Content
- Client-Focused Improvements
- Editing Tools
- Backups
- Remote Site Management

Once you get your own selection of favorite plugins built, consider bundling them into a “starter set” that you use to begin every site you build. Check out WPCore.com for a service that helps you with that.

## Caching

[WP Super Cache](#), which is co-authored by Automattic (the company behind WordPress.com). With over 6.5 million downloads and excellent reviews, it's worth using if you just want to cache static HTML versions of your pages to speed up your site's performance. You can pretty much install it, turn it on and forget it.

However, there is one small setting you'll likely want to go in and change to make sure the plugin does not cache the pages for known users. That way you will save a phone call from the client asking why the change they made is not appearing. That's not a good client experience, so let's avoid that.

## Security

While you may or may not include security as part of your WordPress consultancy service, security is everybody's business and you should provide a minimum level of protection. There are many best practices to help keep WordPress sites secure and you should be following them. Adding a plugin or two to provide some additional barriers can't hurt and is just one more thing you can do to set yourself apart from the pack.

Consider using plugins such as the iThemes Security plugin that covers the basics for hardening site including brute force protection, file change detection, hiding the login and admin areas, 404 monitoring, strong password enforcement and email notifications. New features are being added to this plugin, so it's just going to get better over time.

Another good option is the [Sucuri Security](#) plugin. It is a multi-faceted plugin that addresses a number of security issues including monitoring site activity and scanning for malware. It's amazing that this plugin is free. (Sucuri.net has premium services available – something you might consider offering to your clients as part of a maintenance package.)

If the site allows for commenting, you'll also want to include an anti-spam plugin such as [WP-SpamShield](#). It does its work behind the scenes so there's no inconvenient captchas that site visitors must deal with.

If you really want to wow your clients, add the [Clef](#) plugin for two-factor authentication and logging-in without using a password. It uses an animated waveform instead of the usual numeric code – it's amazing!

## SEO

If you build it, they will come, right? Not exactly. While WordPress has many built-in features that help with search engine optimisation, it is highly recommended to include a dedicated SEO plugin on every site.

[WordPress SEO](#) is the cornerstone of an out-of-the-box SEO strategy. I covered this plugin at length in the SEO portion of this document. It's the bomb. Install it; use it.

[All-In-One SEO](#) is another good plugin option for SEO.

## Analytics

[Google Analyticator](#) provides a quick overview of the site's analytic data right in the dashboard. Clients can quickly get a snapshot of their site's traffic and its sources. I discussed this plugin in detail in the Post Launch section.

## Training / Help

I think I've made a case for the [Video User Manuals](#) plugin already, but just in case you missed it, this plugin gives your clients over 35 60 video tutorials and a 100-page written manual right in their dashboard so they can learn how to use WordPress to manage the content on their site without bugging you. It starts at \$70 for a single site, or better yet, you can install it on all your client sites' for around \$24 per month.

[WP Help](#) is a free plugin that allows you to create site-specific documentation that appears as a widget in the dashboard if you want to add a few notes of your own.

## Content

Nearly every site needs a contact form, and [Gravity Forms](#) is much more than a contact form plugin; it's a full-featured form generator with an easy drag and drop interface, multi-page form support and conditional logic built in. Add-ons allow you to extend it to email marketing, ecommerce, and surveys & quizzes, plus, you can add notifications. It's the only form plugin I use. A personal license is \$39 per year for support and updates on one site, and of course there are other licenses available too.

If ever there was any doubt about WordPress being a content management system, the [Advanced Custom Fields](#) plugin singlehandedly puts those doubts to rest. Among its many awesome features, it gives you complete control over the Edit screen for Pages and any type of Post, including custom post types.

This means you can remove unnecessary fields from the Edit screen and only show what is necessary. Fellow Melbournian Elliot Condon created this plugin, so I'm extra fond of it. Check out the full list of features and documentation on the [official Advanced Custom Fields website](#).

If you also need to create custom posts types on your site, the [Custom Post Types UI](#) plugin is a simple way to get those added.

## Client-Focused Improvements

[White Label CMS](#) is the cornerstone of my strategy to improve the WordPress experience for clients. I have covered this plugin in great detail throughout this document. I love it. You will too.

[CMS Tree Page View](#) is a really handy plugin which provides a nice tree view of all the pages in a website, so your clients can easily understand the structure of their site. You can edit, search and drag-and-drop to reorder pages within the tree view giving your client a very intuitive way of managing their pages. [Admin Column View](#) is another option for this too.

## Editing Tools

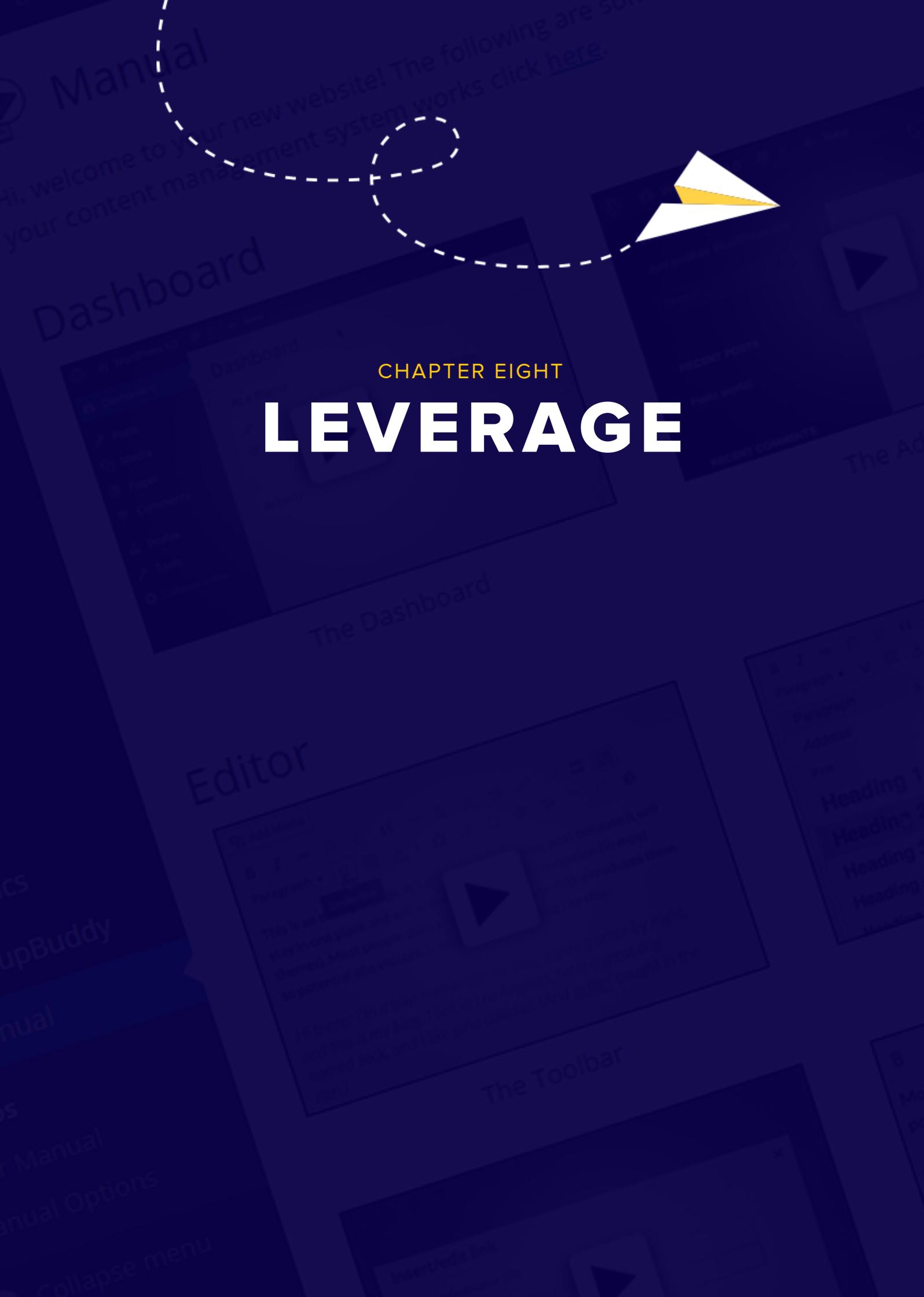
If your client will be doing any editing on their site, especially if they will be writing blog posts, there are a couple of very handy plugins that will make their lives easier.

The [Duplicate Post](#) plugin adds a “Clone” option directly below the title of each item in the “Edit Page” and “Edit Post” screens allowing you to duplicate an existing page or post with one click. The new clone is created as a draft, which can then be edited and published. It’s very handy and can save a ton of time and errors.

The [Save With Keyboard](#) plugin is really helpful for those folks who are used to working in Microsoft Word and expect the Ctrl+S (Cmd+S) key combination to save their work.

So if you have to hold me to a list, here are my favorites:

- Security – iThemes Security, WP SpamShield, Clef
- SEO – WordPress SEO
- Analytics – Google Analyticator
- Training/Help – Video User Manuals
- Content – Gravity Forms
- Client-Focused – White Label CMS
- Editing Tools – Duplicate Post, Save With Keyboard



CHAPTER EIGHT

# LEVERAGE

## Rinse And Repeat

Once you have your essential plugin list sorted out, you are going to be using them on every site. So you want to make sure you have a system in place to be able to quickly repeat the WordPress setup process over and over again.

<https://wpcore.com/>

This has many advantages. Obviously it is quicker. It is also a good idea to become very familiar with your plugins to understand how they work and how they should be used optimally. Sticking to one caching plugin or one forms plugin are great examples of this. You could even develop your own training material for your favorites as well.

If you're going to be installing the Video User Manuals plugin on multiple sites you'll want to setup your Master Profile so you can install the plugin and have it rebranded and customised in 5 seconds. Of course you can still customise every setting via the Manual > Manual Options page, but setting up your options in the Master Profile means you can set it up once and forget it.

Once you have installed the plugin and activated it for the first time, set it up the way you like it with your logos and titles, and set which videos you'd like to show or hide.

Then, navigate to the "Set Master Profile" tab, tick the "Set as Master Profile?" box and check the box to save your changes.

Now that you have your master profile set, the next time you install the plugin, simply enter your serial number and tick the "Apply my Master Profile" button and the plugin will automatically be setup just the way you like it.

Incidentally, I use a Photoshop thumbnail file to produce custom thumbnails so our videos look consistent with the videos that ship with the plugin.



CHAPTER NINE

# POST LAUNCH

## Set up Google Analytics

If this is a new site, then you should be setting up Google Analytics for your clients. We have a special email address that we use for just clients' sites, which we use to first setup analytics and then share admin access with the client's email.

Once you have done this, obviously you want to use the Google Analyticator plugin to display the analytics data on the client's dashboard.

The official Google Analytics training videos from Google itself are included in the Video User Manuals plugin. We highly recommend that our clients watch them. Yours should too.

Google Analytics is a great way of building a long term relationship with clients. SEO, AdWords, social media management and web page optimization are all conversations that can be started with Analytics and will lead to more work in the future for you.

## Set up Webmaster Tools

Go ahead and setup Webmaster Tools for the client. Don't forget to submit the sitemap (the WordPress SEO plugin will make this for you) in the process.

Log back in to Google Analytics and make sure you share the keyword data with Webmaster Tools.

## Get Indexed

One of the quickest ways to get your client's new website indexed by Google is to get the domain name out into the social sphere, unsurprisingly using Google's own social network, Google Plus. When you are ready to launch, simply "plus-1" the site and you will probably see it indexed the same day.

Your client will love you once they see their website appearing in Google search results.

## Remote Site Management

The only other plugin I like to include for sites that will be under a maintenance agreement is [Manage WP](#). Manage WP allows me to keep an eye on all my sites in one place. It tells me which sites need updates and allows me to do it from one screen. There are other such services out there including WP Remote and Infinite WP, but I prefer the feature set of Manage WP.

That's all folks. Of course there are many other plugins that are used from time to time to achieve different things, but these are the standard ones that ship with every website I build.

Now get out there and make a better WordPress for clients!

# Appendix

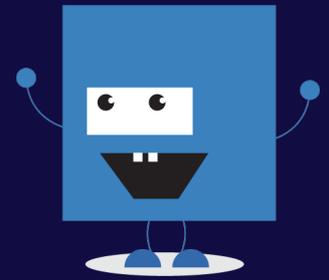
## WordPress Deployment Checklist

This checklist comes straight from my intranet and is designed to help deploy WordPress sites consistently. Feel free to use it, modify and improve it as you wish.

1. Create a new subdomain
2. Password protect the subdomain
3. Install WordPress on the subdomain
4. Create Editor user account
5. Upload our theme and activate the theme
6. Install WP Core plugin
7. Install preferred plugins package using WP Core then activate/setup each plugin
8. Change permalinks to read Post Name, Post Id > Post Name, or Year > Post Name
9. Go to Settings -> Miscellaneous and uncheck “Organize uploads by month”
10. Change title name in the SEO plugin
11. Go to White Label CMS
  - a. Re-brand with client logos
  - b. Add custom panel to dashboard with standard text.
  - c. Set CMS profile to website
  - d. Enable Menus for Editors
12. Go to the security plugin and enter email address for notifications and set Admin Alert to “No”

Incidentally, I use and love [Basecamp](#) from 37 Signals to manage my projects.

# DISCLAIMER



Do your due diligence and take responsibility for your own business.

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This document was created for subscribers of the “Video User Manuals Plugin”. Subscribers of the plugin are hereby given the right to use this content to their own benefit or to give away the document to their customers, subscriber list or anyone they think might benefit from it. You do not, however, have the right to sell this document or make changes to it.

The more end-users who have an awesome experience with WordPress, the more developers will be attracted to it as a CMS solution which will only serve to strengthen the WordPress ecosystem.



## **Troy Dean**

Co-Founder of Video User Manuals

I sincerely hope this e-book helps you provide awesome websites to your clients and speeds up your development process. Most of the information contained in this publication was initially documented for our own internal purposes to help us systemise our business, deliver consistent results and free up some of our time.

In “The E-Myth Revisited”, Michael E Gerber talks about the importance of having systems that any unskilled person could follow in order to replicate a business. In response, Seth Godin wrote in “Linchpin: Are You Indispensable?”, that a business built on systems that cheap labor can follow will result in products without humanity and personal connection.

I think they are both right. WordPress is a toolbox full of systems that allow us to replicate websites fast. Keeping our focus on the client experience results in a personalised service where everybody wins.

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