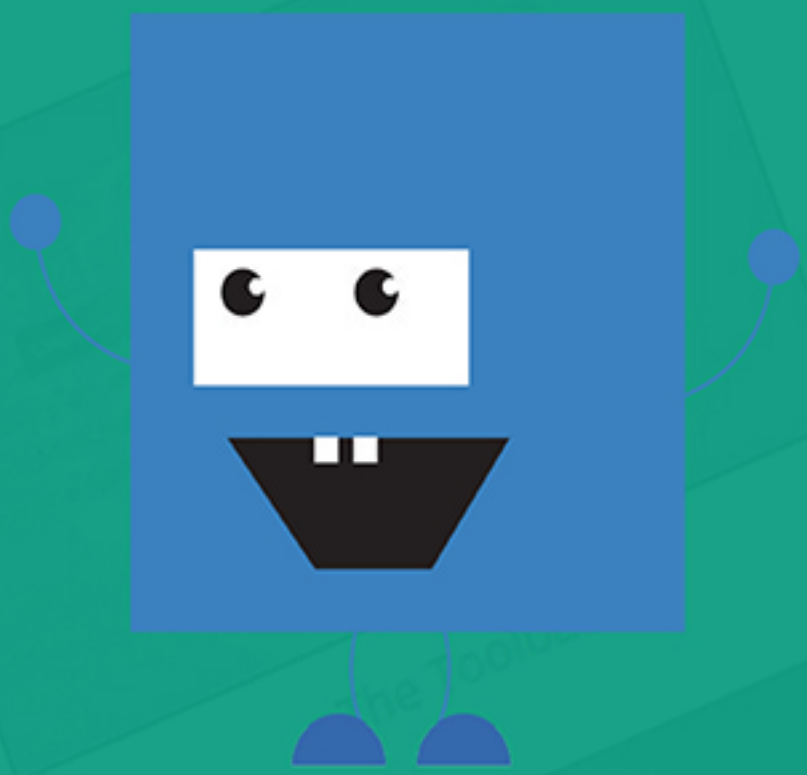
A Better WordPress Business

For Web Developers



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The Complete Journey From Lead to Delivery

This document is designed to help you better manage your small business so you can spend more time building awesome websites or backpacking around Asia.

The following process is based on the assumption that you have an incoming enquiry or a word of mouth referral.

In this case, our prospect is called Barney.

This is the exact process we follow. We hope it helps you.

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Send Your Website Worksheet To Qualify The Lead

The website worksheet is designed to get everybody on the same page quickly and tell you some key factors about your potentials new client. The two main things you want to identify as part of this process are:

- **Who are the decision makers**
- **What's the budget**

I know it might sound a little harsh but if you can establish these two things right up front you will save yourself a lot of time in the long run. If you're not dealing with the decision maker you will end up having to explain yourself and your recommendations more than once, which consumes valuable time.

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If you don't establish the budget you will end up writing a great proposal with awesome suggestions and get really excited about the project just to find out the client was expecting top pay half what you have quoted. This wastes valuable time and deflates your confidence, both of which need to be avoided where possible.

I recently approached a mobile app developer to partner with me on a project and before he was prepared to give me a quote he asked me for a brief of the project and an indicative budget. After a ten minute phone call he politely said, "That's just not enough money to get done what you have indicated you need to get done." I respected his honesty and the fact that he valued his time and my time enough to establish this right up

front. I already know that when a project comes along and the budget permits I will definitely go back to this developer and ask for a quote.

The other advantage of using a website worksheet to get information about the project is that it gives you a chance to identify opportunities for up-selling additional services you might offer like SEO, social media or email newsletters.

Most importantly, the website worksheet allows you to get a clear picture of the business needs as well as the target audience needs of the website. This helps you make recommendations such as a blog, FAQ's page or email newsletter sign up forms to make sure the business and it's customers get the most out of the website. This will dramatically increase your client's satisfaction.

There is a sample website worksheet included along with this document.

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Determine How You Will Proceed Based On Needs And Budget

Once you have an understanding of what Barney wants and what his budget is, you can make an educated guess as to how realistic it is that you are going to be able to *manage his expectations*. At this point we make a decision to do one of three things:

- Call Barney on the telephone to explain that we just can't achieve what he wants with the budget he has allocated and perhaps recommend him to someone who might be able to help (this is not always possible if the budget is just unrealistic). This saves valuable time.
- Submit a proposal and quote for the job based on the information we have in the website worksheet. This is usually the approach if Barney has a realistic budget but sits at the lower end of the types of jobs we want.
- Call Barney and arrange a meeting to further qualify his needs and then submit a proposal and quote for the job.

You don't need to be a genius to figure out that if Barney has an interesting project, healthy budget and realistic needs, putting the extra effort into option 3 is worthwhile.

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Send Proposal

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Once you decide we want to work on the project, send Barney a proposal with a quote for the website. It will save you a lot of time if you have a rate card for all of the components you might be required to quote on. For example, we have a rate card for individual elements of a website like a homepage carousel or slideshow, a blog, lead capture forms, image gallery, SEO and social media integration and email marketing integration.

We work out our rate card based on the *value these components add to the client, not the time it takes to plug them in.*

We also have rate cards in place with external designers so we know how to quote accurately and consistently.

Our proposals usually include the following sections:

1. Overview or Snapshot of the Project

This is a paragraph or two that outlines the type of business the client is and the main reasons for requesting a new website.

2. Business Needs

The business needs as per the website worksheet

3. Target Audience Needs

The target audience needs as per the website worksheet

4. Our Solution

Our suggestion of the features required to fill the business and target audience needs. EG: If the business needs to reduce admin costs and the target audience needs to research product information we will recommend a FAQ's page.

5. Pricing

Usually broken down into project management, design and development. We don't itemise individual features of the website.

6. Timeframe

We provide a realistic timeframe for the project, which includes what is required from the client by particular dates.

7. Terms

Our terms outline the payment schedule and any conditions around the project.

We like Andy Clarke's Contract Killer at http://stuffandnonsense.co.uk/blog/about/contract_killer_the_next_hit

However you breakdown your proposals it is essential to use a template so you can prepare them quickly and accurately. We started off my writing the monster of all proposals which included everything we thought we would ever be required to quote on, saved it as a template in Google docs and then just duplicated it and removed the sections that were not relevant for each project. There are dozens of excellent proposal tools available online that let you use templates.

We use Bidsketch - http://www.bidsketch.com/

Once the proposal has been sent, set a reminder in your calendar to follow up with a phone call in 5 working days.

No sooner, no later.

Keeping it at 5 working days for every proposal follow up helps to stay consistent.

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Payment Terms

Incidentally, the payment terms we stipulate in our proposals are:

- 40% deposit before we begin
- 30% payment once the designs have been approved
- 30% balance before we transfer the site to the client domain

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This single change we made to our business has had a huge impact on our cash flow.

Let me explain.

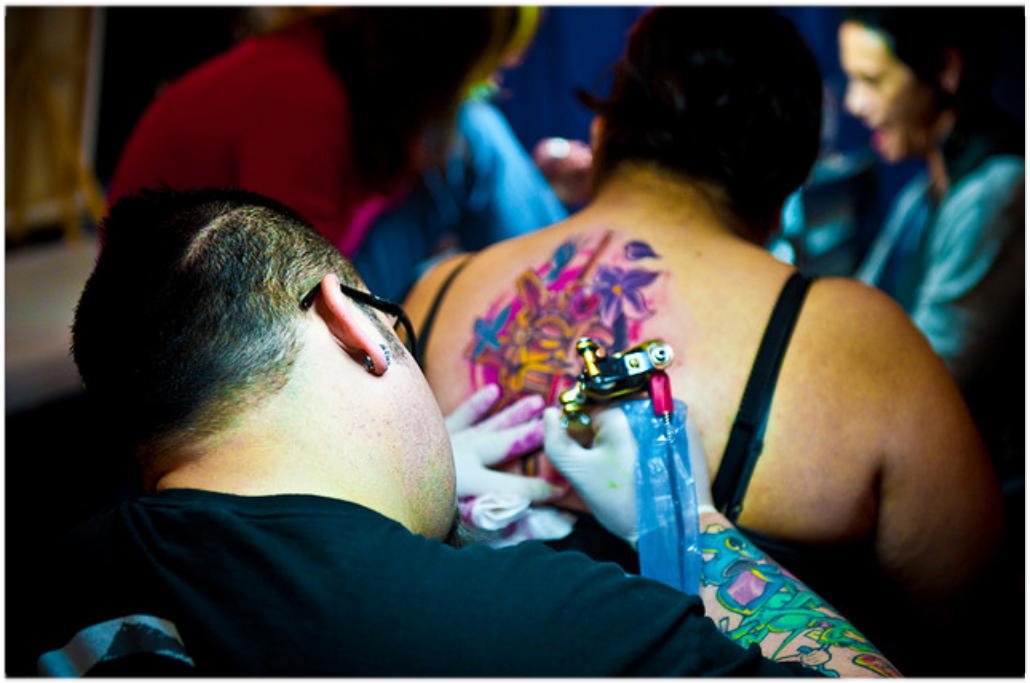
We do not begin work; I mean we don't even start a project in Basecamp (our project management system), until Barney has paid the 40% deposit. This sorts out the serious clients from the difficult ones and gives you an early signal as to how difficult their expectations might be to manage throughout the project.

The next 30% payment is required once the designs have been approved. We do not start development until this payment is made. This assists in Barney “buying in” to the designs and gives us the confidence that we are developing a website that he has effectively “bought” by making the payment. It minimises any feature creep later on.

The final invoice is sent once Barney has approved the website on our staging server, regardless of whether or not he has organised his content. The client is also made aware that the final invoice must be paid within 7 days. After 30 days of the final invoice going out the website also needs to be moved to their hosting provider as our staging server is required for development of new projects. The website cannot be moved to their hosting provider unless the final invoice has been paid and if the final invoice is not paid within 30 days then we are under no obligation to keep the website on our staging server. I know

this sounds harsh, but it works. We have very few, if any clients that owe us money that is older that 30 days.

We also have very few projects that get held up because of feature creep.



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Renegotiating

Invariably Barney will want to negotiate on price. Our golden rule is to never, ever, ever discount the price without removing something from the website or at least slating it for a future update.

EG: “If you want to save some money then perhaps the social media integration can wait a few months?”

Or “Maybe you don't need the email marketing database integration just yet.”

If you discount the price without removing any features just because the client says they don't have the budget there are two consequences:

1. Barney subconsciously thinks your prices were inflated to begin with

2. You set a dangerous precedent that gives Barney all the power for your future relationship.

Don't do it. Your price is your price and if Barney wants a discount they can remove some features or get someone “cheaper” to do it.

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Green Light

Once Barney has approved the proposal and paid the 40% deposit into your bank account it's time to flick the switch on your project system.

The first thing to do is send Barney a congratulations email and request any visual elements he might have on file such as logos, company colour palettes, branding documents, existing websites as well as any Google Analytics or other web stats for any existing websites.

Also reiterate the timeframe and important dates to Barney to make sure he is preparing content and other information you might need throughout the project.

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Wireframe or Mockup

Once the deposit is in the bank, produce wireframes or a mockup to then present to Barney to establish functionality only.

We use Protoshare (protoshare.com) for interactive wireframes or Balsamiq (balsamiq.com) for simple mockups.

We don't even think about design until Barney has agreed on all the functionality of the site. This helps keep the designers and developers on the same page and avoids Barney getting into feature creep later on.

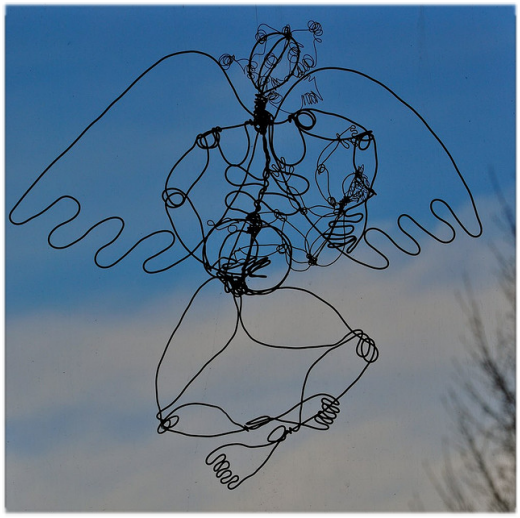
I have also become very fond of using the WooThemes Canvas Theme recently for developing a prototype of the website for the client to sign off on.

It's fast and flexible.

Oh yeah - we don't write functional specification documents. Ever.

If this confuses you read this article from Jason Fried at 37 Signals:

http://37signals.com/svn/archives/001050.php



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Design

Once the functionality has been agreed upon design the interface and present it back to Barney with the option for 2 rounds of revisions.

Not 3.

Not 4.

Not 2 and then a little tweak.

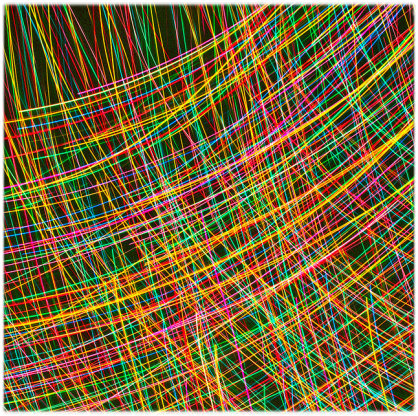
Why? Because if Barney still wants to tweak the design after two rounds of revisions, they're not getting it and we'll be here until Easter. In our terms (kindly borrowed from Andy Clarke) if the Barney wants to tweak the designs after 2 rounds of revisions they can buy them from us and tweak until their hearts content.

On his time, not ours.

If Barney decides he hates the designs after he has tweaked them you can start again and bill him accordingly. At this point Barney has had plenty of opportunity to check out your portfolio and see your work so he either trusts you or he doesn't.

Once Barney decides he likes the designs, send him an invoice.

When the invoice has been paid, start developing the website.



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Development

Now I'm sure you know how to develop WordPress sites so we're not here to insult your intelligence, but I can tell you this is our basic procedure:

1. Setup sub-domain on staging server

2. Install WordPress on staging server

3. Install essential plugins via Plugin Central - our standards are Yoast SEO, Backup Buddy, White Label CMS, Video User Manual, WP File Monitor and Gravity Forms.

4. Install our theme which has css reset and multiple column layout options baked in to save development time

5. Add custom css for design

6. Test and get approval from client

The most valuable thing you can do is document your process! If you have to do something once for a client site chances are you'll have to do it again sometime, so write it down in a Google document or a spreadsheet or task manager or to do list template.

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If you get hit by a bus half way through a project, another developer can come in and take over and keep the project on track.

This also helps you deliver consistent and profitable results when you need to hire extra hands to help with a high workload.

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Get Client Final Sign Off

Once the site is ready for testing, ask Barney to visit the staging server and test it. Invariably at this point Barney will want to make some changes or add extra features. If any feature requests are in addition to what was previously agreed and paid for after the wireframe and design process we politely let Barney know we will have to provide a quote for these additional features after the final invoice has been generated for the website that was agreed upon.

This single tactic will sometimes be difficult to deploy but will save you from re-jigging and tweaking a website for three months before you get paid the balance.

So this is how it rolls:

Barney checks the website and says “Yeah it's great, but the thing-a-majig that was on the designs is missing from the homepage. Also can you add a search bar up the top because it would be really helpful.”

Our response is “Oh cool Barney, yes we will get the thing-a-majig added to the homepage - sorry about that. Regarding the search bar - can we get the rest of the site fully tested and signed off before we add any features? It just helps us stay clear on what is working and what's not. It also stops us accidentally breaking anything while you're still testing it. Once the site is fully tested and signed off as per the designs we'll be happy to look at any additional features you'd like and give you a quote for what's involved.”

Do NOT add any features until the site has been fully tested and signed off. I have made this mistake before and it starts a dangerous process of just adding one more thing here and one more thing there which then breaks that thing that was working before and then all of a sudden it's Xmas and Barney goes on holidays for two months and you have no money to buy your Mum a Xmas present because John doesn't think the site is finished and therefore hasn't paid you.

So, once Barney has fully tested the site and agreed that it is the website he bought when he paid for the designs, send him an invoice for the final 30%. Once that invoice has been paid, open up a conversation about any additional features Barney would like.

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“But what if Barney hasn't got his content ready?” I hear you ask.

Not your problem.

Does the website work with stock images and dummy text? Yes.

Does it do exactly what we said it would do and look exactly as we agreed it would look? Yes.

Then send the final invoice and expect prompt payment.

Barney can faff about for months in iStockPhoto if he likes and choose all sorts of lovely images to play with.

On his time, not yours.

His website is built on a content management system after all so he can manage the content on his site until he his happy with it.

Once he has paid for it.

Oh yeah - don't hand over any login details until the final invoice has been paid.

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Transfer Live

Now that Barney has agreed that the site is finished we need to get it off our server and onto his - or someone else's.

Anybody's. Just not ours.

We don't host.

Now Barney might say “we'll we don't have our content ready so you can't transfer it just yet.”

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We would respond by saying “Barney , we run a pretty lean ship here so we only have limited resources. The fact is we have new websites to develop and we need the space on our server to do that. I'm sure your hosting company will set up a temporary staging server for you so you can tweak your content until you're happy. If you don't have hosting sorted out we can recommend someone but we need to move all finished websites off our server within 30 days.”

This sends a loud and clear message to Barney that the site is now his. Not still in development. Not still under construction. Not open to being tweaked at our end. It's his. He owns it. Take responsibility for it.

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Oh yeah - just don't transfer it until they've paid the final invoice.

You can't drive a car off the lot without making the final payment can you?

The mechanics of transferring a site form your server to the clients will depened on the actual servers but our preference is to use BackUp Buddy. It rocks! (And we are not affilliated).

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Client Training

So Barney has paid his final invoice and now wants the keys to the content management system so he can get in and try and break things.

He's obviously going to need some help so our client training consists of showing him how to use the WordPress Video User Manual Plugin. Yes it's a premium plugin that we make and yes this is a shameless plug for it.

It takes two minutes to show Barney how to use it and we do it over the phone or by Skype. No more half-day sessions sitting around the computer drinking bad coffee talking about reality TV showing them how to upload an image and watching them destroy all your hard work by pasting a heap of text in from Microsoft Word (Ugh!).

Client training over in two minutes. Boom!

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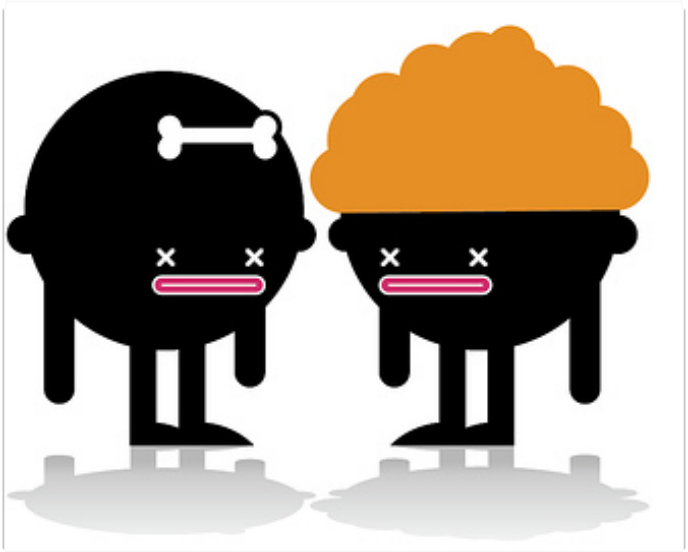
Follow ups

Set a reminder for one month after Barney receives the keys to WordPress to see how he is tracking along. There are always opportunities to talk about SEO or social media or email newsletters or, if John is really happy and all is going well, ask for a testimonial or a referral.

Setting the reminder for exactly one month helps keep you consistent and more often than not leads to more work.

Another nice touch that we have found helps keep us top of mind with our clients is to set up an automated email every Monday morning from their Google Analytics account that comes from our email address. (You need to be an administrator in their Google Analytics account to do this.)

They love seeing the statistics every week and you get to drip feed them on autopilot.



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Conclusion

I know I might sound a bit grumpy throughout this report but I used that tone to drive home some key points.

You are not actually doing your client any favours by adopting the “customer is always right” rule. The customer is not always right because the customer has no idea how to do what you do. Just like you are not always right when dealing with a mechanic, or plumber, or any other technician.

Keeping the client on a short leash will actually help you do the best job you can for them. You will be paid on time (which saves all sorts of stress), you will be clear about what is expected of you (which saves confusion and time) and you will be free to create a great solution for the client and make a profit in the process.

I sincerely hope this report has given you some food for thought and helped you think about how you can streamline your processes to make sure you can continue to grow your small business as a WordPress developer.

And if you think I'm grumpy about clients - check out this guy:

http://vimeo.com/22053820