



BONUS

WordPress Proposal Checklist

This checklist is not hierarchical. You should combine sections or use subsections where appropriate for your project/client. The **details and examples** for what to include in each section (and how to use certain verbiage to set the proper client expectations) are included in Module 4 – Phase 0: Proposal Creation.

Project Request/Snapshot

- High level description of the project and the final outcome
- Why, when, and from whom did the request come?

Background/Business Requirements

- Description of key events and decisions
- Business requirements in very high-level common business language
- Demonstrate a basic understanding of the business problem(s)
- Specific business problem being addressed should be included in each business requirements statement
- Does not contain technical information or specifications

Project Scope

- Includes major activities
- What is out of scope
- What is in scope – and our responsibility
- What it in scope – and the client's responsibility
- Assumptions made as scope was defined



Management Approach

- Your overall management approach
- Set yourself apart from the competition
- Reinforces client involvement is critical to project success

Requirements Definition Process

- When and how the deep dive discovery will take place
- Who will be involved

Team Roles and Responsibilities

- List them all – even if you are doing all of them
- Make sure the list sets the proper expectation regarding your skill set
- Include client roles and responsibilities as well as yours
- If possible, include the names of the individuals filling the role on this project
- Include required management resources by name – on the client side and your side

Communication Management Process

- How project progress and other project details will be communicated between team members
- What will be communicated
- When communication will occur

Change Management Process

- Establishes change is an expected part of the project
- Includes the complete procedure
- Describes the management process for handling changes
- Indicates the process is to be followed without exception
- Describes the Change Budget (if using one)



Issues Management

- Defines “issue”
- Establishes that this is an on-going process throughout the life of any project
- Includes the complete procedure
- Describes the escalation process – with names of who will be involved

Risk Management Process

- Defines “risk”
- Includes the complete procedure
- Acknowledge any known risk
- And indicate how that risk will be mitigated should the event occur

Content Collection and Management

- How content will be specified
- Why you handle it this way
- Includes recommendation for who will be responsible for content-related activities
- What activities are dependent on this being completed
- What happens if due dates are missed
- Includes a description of a Minimum Viable Website (if you plan to use one)

Development Approach

- Describe the project phases
- What will be accomplished in each phase

Technical Approach

- Very high level
- Describes the platform
- Why you’re using WordPress



Acceptance Management Process

- Includes a description of review cycles, in general
- Defines of acceptance
- Who has approval authority
- Expected timeline for acceptance.
- Identifies all deliverables to be approved
- Specifies acceptance criteria for each deliverable and the final project
- Includes the complete procedure

Proposed Solution

- Addresses how each business requirement will be met
- The solution at a high level
- No technical jargon
- Lists principal deliverables with initial acceptance criteria
- Acceptance criteria will be more defined during discovery
- Will become more defined during the discovery activities

Time and Cost Estimate

- Clearly states that an estimate is an estimate
- The estimate may be updated during/after discovery
- Lists the project phases and how long each will take
- Does not include dates
- Estimate for website development
- Estimate for change budget (if applicable)
- Estimate for additional services (if applicable)
- Includes the total estimate for the project



Why Use Us

- Summary of proposal details that make you or your agency the best choice
- How you define requirements better
- How you manage change better
- How you keep projects on track better

Contractual Agreements

- “Legal-eze” provided by your lawyer
- Summary of what is being agreed to with this proposal
- What YOU are agreeing to or promising
- What the client is agreeing to or promising
- Specifies the agreement concerning content-related activities if the client is performing them (re-state content management process)
- Specifies the agreement regarding review cycles – re-state their responsibility
- Specifies the agreement regarding acceptance
- Specifies the agreement regarding the payment schedule

FAQ

- lists the questions you are asked frequently with answers
- written so the client has a better understanding of how you work
- use some questions for cross-selling

Next Steps

- Instructs exactly how to accept this proposal and move to Phase 1
- Reiterates accepting this proposal is a contract/promise to work with you
- Reiterate what payments are required for you to begin work
- Other legal language your attorney recommends for your contracts