Streamlining the Custom WordPress Design Process

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About Me

- Building websites since 1998
- Building websites exclusively with WordPress since 2008
- Started [EfficientWP](#) (Efficient Websites LLC) in 2009
- Spoken at a few WordCamps
- One of the organizers of the Portland WordPress Meetup

What We'll Cover

- Questions and Preparation

- Site Setup

- Design and Customization

- Going Live

- Theme

- Plugins

- Software

- Services

- Best Practices

- Time Saving Techniques

Questions and Preparation

- Is WordPress the right choice?

- Should we modify an existing theme or build a custom design?

- Are there any major considerations, such as e-commerce or membership?

- Where will the site be hosted?

- Who will maintain the site?

- Get an idea of the design and functionality needed

- Get content to add (text, images, etc.)

- Get hosting account and SFTP access

- Tell site owner to hold off on making changes (if it's an existing website)

Site Setup

- Create new installation (or a staging site, if it's an existing website)
- Make sure search engine visibility is off, password protection on (optional)
- Upload theme(s) and plugins via SFTP
- Activate theme and plugins
- Add license keys
- Upgrade if necessary
- Import saved plugin settings
- Configure plugins (SEO, forms, backups, etc)

Design and Customization

- Add content
- Import design template and CSS snippets
- Customize the design
- Test mobile responsive design, different browsers, forms, and other behavior
- Go through approval process with client

Going Live

- Turn off password protection, turn on search engine visibility
- Set up SSL
- If using a staging site, copy design and new content over to live site manually (don't push staging to live)
- If using a new host, change DNS records
- Clear the cache

Theme

- Genesis is a premium theme framework by StudioPress (owned by WP Engine)
- Dynamik is a premium child theme for Genesis

Plugins

- [Advanced Custom Fields](#) (premium, but they have a free version)
  - Complex or structured layouts
- [Antispam Bee](#)
  - Reduce comment spam, better than Akismet
- [ARVE Advanced Responsive Video Embedder](#)
  - Responsive video embeds with a shortcode
- [Beaver Builder](#) (premium, but they have a free version)
  - Page builder
- [Better Search Replace](#)
  - Serialized search and replace in database

Plugins

- Black Studio TinyMCE Widget
  - More advanced visual editor widget
- Blubrry PowerPress
  - Podcasts
- Classic Editor
  - Disables Gutenberg
- Custom Post Type UI
  - For different data types
- Disqus Comment System
  - Separately hosted comment system, better engagement

Plugins

- [Display Posts](#)
  - Display lists of posts in a configurable shortcode
- [Duplicate Post](#)
  - Fully copies pages and posts
- [Genesis Simple Edits](#)
  - Tweaks for Genesis themes
- [Google Analytics Dashboard for WP](#)
  - GA with additional options
- [Google Analytics for WordPress by MonsterInsights](#)
  - GA with additional options

Plugins

- [Gravity Forms](#) (premium)
  - Reliable forms with many configuration options
- [Paid Memberships Pro](#) (premium, but they have a free version)
  - Memberships
- [Post Snippets](#)
  - Repeat content with a shortcode, embed code within a page
- [Redirection](#)
  - Advanced redirects
- [Related Posts for WordPress](#)
  - Automatically show related posts at the bottom of your posts

Common Plugins

- ShortPixel Image Optimizer
  - Image optimization
- Simple 301 Redirects
  - Easy redirects, including basic wildcard redirects
- Simple Custom CSS
  - Add custom CSS without editing theme files
- Simple Social Icons
  - Simple icons linking to common social profiles
- Table of Contents Plus
  - Generate a table of contents on your long pages

Plugins

- [TinyMCE Advanced](#)
    - Adds buttons to the WordPress editor
- [UpdraftPlus](#) (premium, but they have a free version)
    - Backup/restore plugin
- [WP101](#) (premium)
    - Basic tutorial videos accessible from backend
- [WP Rocket](#) (premium)
    - Speed optimization
- [Yoast SEO](#)
    - The most popular SEO plugin

Software

- Evernote (premium, but they have a free version)
  - Keep CSS, JS, PHP, SQL, .htaccess code snippets, SOPs, license keys
- LastPass (premium, but they have a free version)
  - Password management
- Sublime Text (free, with occasional nag to purchase)
  - Text editor with color coding, different color themes, advanced features
- Transmit (premium, for macOS only)
  - A faster FTP/SFTP program than FileZilla, Cyberduck, etc.
  - Also connects to Amazon S3, Dropbox, etc.

Services

- [Amazon S3](#) (premium)
  - Get cheap backup storage (my usage: ~800GB for ~$10/mo)
- [GitHub](#) (premium, but they have a free version)
  - Use version control
- [Google Analytics](#) (free)
  - Get advanced site traffic analytics
- [Google Search Console](#) (free)
  - Monitor Google indexing/crawling issues
- [GTMetrix](#) (free)
  - Check and monitor site speed

Services

- **Uptime Robot** (free)
  - Monitor uptime for up to 50 sites
- **WebPageTest** (free)
  - Check site speed
- **What's My DNS** (free)
  - Check DNS propagation
- **Why No Padlock?** (free)
  - Check for SSL errors

Best Practices

- Always get hosting account and SFTP access before editing a site, in case something breaks
- Use staging sites for new designs, never push staging to live
- Keep search engine visibility off if demo content is accessible, or if the site is not ready to be indexed yet
- Set up SSL as soon as possible, 301 redirect http to https
- Use GitHub for sites with significant development customizations

Time Saving Techniques

- Use the same themes and plugins, and get really good with them
- Write down procedures, copy down code you might reuse later
- Use a spreadsheet to keep track of upgrade dates, WP versions, PHP versions
- Browser bookmarks for logins and pages to test after upgrading
  - 2 copies of each bookmark
- Load themes and plugins via SFTP instead of manually installing
- Export general and design settings in Dynamik, forms in Gravity Forms, etc.

Thanks!

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