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## Print Friendly Project Plan for -----.com

■ May 16th, 2018  
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■ Last Update: May 16th, 2018

■ Plan Status: Needs Approval

- By approving this Project Plan, you are agreeing to everything it contains, as well as the additional links provided in this section. An electronic verification link will be sent to you when you are ready so that you can easily approve this Project Plan.
- All work occurs under the general contract detailed here. This page also explains how I invoice:  
<https://flextechmedia.com/company/universal-general-contract/>
- How I work is detailed here:  
<https://flextechmedia.com/company/how-i-work/>
- This project will generally proceed according to my web build process detailed here:  
<https://flextechmedia.com/company/my-web-build-business-process/>  
However, in this case we are already beyond the Architectural Phase and can begin as soon as you provide the items mentioned in *Needed In Advance* above.
- If this Project Plan is not approved within 30 days of the date of transmittal it will need to be reviewed again prior to being approved using the selected FlexSupport plan.

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## 01: Overview

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A new website is needed for ---.com. It will contain both an e-commerce capability and a membership portal capability working together to cross-sell. This project will create a website that supports the client's business model of an online financial motivation and guidance resource with an e-commerce store for selling e-books. It will also implement tiered membership pay walls for accessing premium content in the form of PDF files, a financial calculator created with special software, Videos, article posts, and podcasts.

The site will sell access to premium content and allow the site owner to maintain the content with some training. It will also help promote e-books the site owner has written. Some e-book purchases will happen at another web store.

We will secure the membership sign-up experience with SSL and a specialized validation procedure verifying the member signing up is real, and not a bot.

We will use pop-up leads forms to capture basic visitor information prior to granting access to free resources. Once we have an optimized click path defined, we will place leads forms along it. When a visitor submits a leads form, the system notifies the site owner, and their information is retained according to GDPR standards.

The client has posted hundreds of blog articles in another WordPress site. We need a large blog archive with sub-categorical navigation to let visitors navigate these posts intuitively. We will be importing them from the current website at ----.net. Due to time and financial constraints, the client has elected not to assign an individual thumbnail image to each blog article post.

Blog posts on this website should also post automatically to a third party blog provider at blogspot.----.com when they match a specific category.

We will use an AWeber E-mail newsletter sign-up widget, tied to the client's current account, and positioned within the layout for maximum visibility.

All navigation and layouts, for both members and non-member experiences, must be mobile compatible. The desktop layout must be expansive and inviting, making use of large background images with spacious user interface elements.

The client needs a white paper written that ties together several key financial concepts with specific FDA approved devices that are germane to the identified market space. This white paper is a free resource accessible via a specific click-path and leads form. The branding of this white paper needs to be consistent with the corporate branding of the website. I will provide ghostwriting services in this regard, interview device Subject Matter Experts, and provide the graphic design required to communicate

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complex concepts visually. Technical Writing projects are different than web integration projects, and so that project will have its own Project Plan and Timeline.

## Cost Schedule

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In our meeting on May, 8th I provided a Basis of Preliminary Minimum Estimate using the Foundation Package with a complexity multiplier resulting in a figure of around \$4900.00. I transmitted this in the Proposal. However, during the Architectural Phase (concluded on May, 14th) we discovered new requirements that increased the complexity rating, resulting in a Basis of Verified Estimate of \$5400.00 shown in the table below. This did not increase any other estimated component costs.

### *Verified Estimates from Architectural Phase*

1	Basis of Verified Estimate: Foundation Package <sup>1</sup>	\$5400.00
2	FlexSupport: Continuity of Care	\$180.00
2	Recurring Component License Estimate	\$550.00
3	Live Content Mgt Training	\$680.00
4	Annual Web Hosting w/SSL (Direct to Provider)	\$360.00
5	<b>Web Subtotal</b>	<b>\$7,170.00</b>

<sup>1</sup> Anticipated 10% Margin of Error

Please [visit this page](#) for details on some of the items in the above table.

The *Basis of Verified Estimate* includes some consideration for Cognitive Services such as meetings, reviews, research, or other requests that are not web design and systems integration work. The timeline will show milestones with fixed costs for web design and systems integration work. Cognitive services are not fixed costs, and are estimated to consume 30% of the *Basis of Verified Estimate*.

## Next Steps (Example)

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*NOTE: When this document is a Proposal, this is the last page it contains. It will provide guidance on how to begin the Architectural Phase if you wish to move forward. As mentioned above, in this case the client has completed the Architectural Phase, allowing us to transform the Proposal into an actual Project Plan. Subsequent pages demonstrate what such a plan contains, as does the text below.*

We have successfully concluded the Architectural Phase originally estimated at \$2,610.00 (30% of Project Grand Total when the Basis of Preliminary Estimate was \$4900.00), which has produced this Project Plan, along with any demo videos, site maps, or other planning materials. These now belong to you. Of that figure, \$310.00 remains. I will apply these funds toward the next phase of the project.

If, for some reason, you decide not to move forward with the project, then I keep the remaining funds as previously disclosed here. However, you are still in full ownership of the Project Plan. You can use this customized, professional blueprint of your website needs to get more ideas or competitive bids; with immediate understanding by other industry professionals.

## 02: Requirements Architecture

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I will build your website using WordPress and the theme from iThemes called "Foundation Blank", implemented in a secure manner using SSL, along with a variety of techniques that have proven effective, to satisfy [Article 25 of GDPR requirements](#). I will furnish the details of this configuration upon request as an Appendix addendum to this Project Plan once the site build is completed and all invoices paid. Please be aware that such information can subvert your website's security profile if known by malicious actors.

This project's complexity requires the creation and maintenance of a Site Integration Map. A sample of such a map has been included as Appendix A: Site Integration Map. *The Basis of Verified Estimate* includes the cost of creating the Site Integration Map the first time. Updating it as things change incurs an hourly rate dependent on the selected [FlexSupport Plan](#).

### Overall Design

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[As stated on my website here](#), I do not test my designs for display on Mac OSX Safari or on desktop screen resolutions lower than 1440 x 900. While all my designs are mobile compatible, if you want very specific layout configurations for some devices, regardless of browser or platform, then that will add a non-budgeted cost increase at design time which I can only roughly estimate based on the nature of the display. If we already know about this need, then the budget already includes it.

You have verified these screen resolutions for reviewing my work:

- 1280 x 1050
- 1680 x 1050
- 1920 x 1080

Please make sure to use the latest versions of the following browsers for reviewing my work on a non-mobile device:

- Mozilla FireFox
- Google Chrome

- Internet Explorer

Please make sure to use the latest versions of the following browsers for reviewing my work on a mobile device:

- Apple Safari (if you have an iOS mobile device)
- Google Chrome

The site should make generous use of large fonts, colorful negative space, and customized changing background images on the home page that reinforce the core value proposition your marketing team has communicated in writing. The budget includes the cost to create the required imagery using licensed visual assets.

The actual site's detailed home page content can peek just above top of fold on desktop resolutions of 1650 x 1050, with the large intervening space occupied by the site's header navigation, rotating background images, and associated customer testimonials.

## Theme Selection for Foundation Package

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Just as flextechmedia.com is predicated on the iTheme™ theme called "Parker", your website will begin with a theme that is then customized to suite the budget and needs of this project. The differences can be dramatic. [Take a look at the Parker theme here](#), and compare it [flextechmedia.com](http://flextechmedia.com), which was built from it.

I am suggesting the use of the ThriveTheme™ theme called Pressive for this engagement, but it will be highly customized. You can view that theme's starting design here: <https://thrivethemes.com/themes/#themes>

The Pressive theme contains the basics required to create the expansive design our analysis of your content and imagery have suggested. This is also a "theme system" that provides a lot of the leads generation capabilities for embedding sophisticated, customized GravityForms components for tracking responses to them throughout the various sections of the site. By using a theme with an integrated feature set that closely

matches what our analysis has shown you need, the maintenance and support of this system will be far more efficient.

Note the distance between the top of the site and the main home page content that peeks above the fold on the screen resolution previously mentioned.

---ADDITIONAL INFO OMITTED FOR THIS EXAMPLE---

## Site Map

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<sup>1</sup>Option-to-Fill Leads Form Displayed.

<sup>2</sup>Required-to-Fill Leads Form Displayed.

<sup>3</sup>To view beyond the excerpt requires a free membership.

<sup>4</sup>To view beyond the excerpt requires first a free membership, then paid as an add-on.

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- Home<sup>1</sup>
- Our Approach
  - The Advantage
  - Free Video<sup>2</sup>
  - What They Are Saying
- Financial Techniques
  - Next Level Awareness<sup>3</sup>
  - Finance Videos<sup>4</sup>
  - Strategies for The Future<sup>4</sup>
  - Seminar Archives<sup>4</sup>
  - Interactive Financial Analyzer<sup>4</sup>
- E-books
- Archive
  - Elite Financial Acumen
  - Financial Guru Podcasts
- Resources
- My Account
- Sign-in
- Get An Account

## Membership Paradigm

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A free membership account provides access to some content. Add-ons to the free membership account provide paid access to different areas of premium content. The only thing that is tiered is that a free account is required first. No paid content area restricts or determines access to another paid content area.

Once logged in, members arrive at their own private portal page. This page will allow the site owner to push files to it for member access across multiple portal pages at the same time, or on an individual basis. The portal page will also contain the primary navigation to other paid areas of the site.

---ADDITIONAL INFO OMITTED FOR THIS EXAMPLE---

## UX Design, Workflow, and Microcopy

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Screen states need to be prototyped to make sure we are capturing all possible opportunities to communicate with the visitor before, during, and after membership signup. This aspect asks the questions, "What do users see on page x which causes them to want to sign-up? What do they see on screen during the sign-up process? What do they see on the screen once they have completed the sign-up process? What do they see if the system returns no search results?"

### *HUB Page Configuration*

The Hub page is where all validated users arrive at once logged in. The following elements will be available on that page:

*---(5 pages of additional info omitted in this example)---*

### *Member Registration Workflow*

Registration always begins with a free account. Paid access to more content occurs as add-ons to the free account. The client's HUB page will contain the UI for selecting premium content areas, but will not indicate if those areas are in their current membership schedule. A separate page will provide an account overview of all items in their current membership schedule.

- Member submits registration form
- The system sends a confirmation e-mail to the registration e-mail address in order to validate the account. This e-mail contains next-steps instructions required to activate their account.
- The member follows the account validation instructions, activating their account. The instructions read as follows *---(omitted in this example)---*
- The member signs-in and arrives at their Hub page.
- The system sends a notification e-mail to the site admin regarding the registration event once the user validates their account.

*At <https://www.xyz.com/financial-techniques/finance-videos>*

Screen State: *Initial*

- **(Heading)** \$47.00/mo Recurring Membership Add-on Fee
- **On-page graphic** from design service
- **Call-To-Action:** [Get Your Free Membership Account](#) or [Login](#) to purchase this membership add-on directly from your privat Hub page.
- **Core Value Proposition:** With all of the items available within this subscription, including our Finance Videos, Tele-seminars, and Interactive Financial Analyzer for just \$47 per month, can you afford not to subscribe? I look forward to being of service to you soon!

Screen State: *Clicked on Get Your Free Membership Account*

- **(Heading)** Client Registration
- **Body:** Client Registration Form with these fields and elements
  - Business or Client Name
  - Contact Name
  - E-mail
  - Phone
  - Username
  - Password
  - Confirm Password
  - Optional Button: Generate Password
  - Password Strength Indicator
  - Password Requirements Guidance: The password should be at least 8 characters long. It must trigger the Weak level on the Strength indicator. It should contain numbers.
  - Optional Checkbox: Send this password to e-mail? (Check to enable)
  - Required Checkbox: I agree to the [Terms and Conditions](#)

- ReCaptcha
- Button: Submit Registration
- Error message displays for missing information by field missed.
- Hands of to ***Member Registration Workflow.***

---20 PAGES OF ADDITIONAL WORKFLOWS OMITTED FOR THIS EXAMPLE---

## Content Storage and Streaming

We will be using a Content Delivery Network (CDN) provided by Amazon Web Services® to provide offsite storage and delivery of video and audio media. The plugin (omitted for example) will provide the optimization technology required to display the video correctly by form factor and connection speed.

END OF EXAMPLE PROJECT PLAN REQUIREMENTS

## APPENDIX A: Site Integration Map Example

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NOTE: The Site Integration Map is created once the site is finished. For more information on why this is so valuable, see my published article [here](#)

For this example, a site map from a different engagement is used.

### OVERVIEW

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This website is constructed in WordPress using the iThemes Builder “Thrifty” theme and a variety of plug-ins, all tested for compatibility with each other and common security practices.

The website supports two different user role experiences, one for Customers and one for Distributors. Customers are businesses that own and use the company’s machines. Distributors are businesses that sell to Customers.

When Customers login, they get an option to go to Machine Management (MM). The MM page is a customized construct that shows machines at the top (only 2 were originally requested, but after implementation this was expanded to 10, see Change Request 1022) and parts related to their machines (automatically filtered through code) on the main body of the page; which itself is furnished through a WooCommerce shopping configuration.

Distributors are taken to a landing page containing the option to visit their Hub Page. This is furnished through WP-Client. The system requires that company staff add Distributors manually (Requirement 32.5), and then invite them to their hub page. As requested, there is no secure mechanism in place for Distributor or Customer self-sign-up. Instead, a simple workflow allows company staff to bring the client to the website and perform the remaining actions that will grant them the required access themselves.

## USE CASE: SELF-REGISTRATION PROHIBITED

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The site is configured at a very deep level NOT to allow user self-registration. This includes security approaches to prevent such a thing.

In functions.php this code removes UI elements that could allow someone to attempt self-registration:

```
/** * remove the register link from the wp-login.php script */
```

```
add_filter('option_users_can_register', function($value)
{ $script = basename(parse_url($_SERVER['SCRIPT_NAME'], PHP_URL_PATH));
if ($script == 'wp-login.php') { $value = false; } return $value; });
```

WP-Client and WordPress are also set NOT to allow clients to self-register.

END OF EXAMPLE SITE INTEGRATION MAP