

# *Small Business Guide to Websites*

*How Small Businesses can:  
Get Online  
Stay Current  
Succeed*



Anphira | Web Design &  
Development

This book is intended for small businesses who have or are considering having a website. It will also work well for individuals and non-profits who want to set up a website.

I'm going to assume that you have internet access, a computer that you can competently use, and at least some budget for hosting & maintaining your website. If you don't have at least \$10/month for hosting and about an hour a month, you shouldn't be building a website.

### **What if I know nothing about web hosting?**

As long as you are willing and able to learn, you won't need to learn a ton about it to have your own site.

### **What won't be covered?**

This is an introductory eBook, so I'm going to cover a lot of topics for your website, but not go into a lot of detail for specific topics. I will however provide several links for where you can get more specifics.

# Table of Contents

<b>Table of Contents</b>	<b>3</b>
<b>Why Use a CMS?</b>	<b>5</b>
An Example	5
Which CMS is right for me?	6
Why Should You Use WordPress?	7
Why Shouldn't You Use WordPress?	7
WordPress.org vs WordPress.com	7
General Definitions	8
<b>Website Budget &amp; Expectations</b>	<b>10</b>
Essential Costs: Web Hosting	11
Essential Costs: Domain Registration	11
Essential Costs: Website Maintenance	12
Essential Costs: Content	12
Upfront Costs: Website Plan	13
Upfront Costs: Website Design	14
Upfront Costs: Website Development	15
<b>Planning Your Website</b>	<b>16</b>
Basic Website Pages	17
Which Standard Features Do You Need?	18
Should You Have a Blog?	20
Responsive Website Design	20
Which Extended Features Do You Need?	21
Sitemap	22
Content	22
<b>Designing Your Website</b>	<b>24</b>
Communicating with Your Designer	24
Understanding Developers vs Designers	26
Providing a Useful Design Brief	27
Design Revisions	30
Getting the Final Design	31
<b>Developing Your Website</b>	<b>32</b>
Picking a Hosting Company	32
Installing WordPress	32

Initial Settings	33
Selecting Your Theme	34
Selecting Your Plugins	36
301 Redirects	36
404 Pages	37
Security on WordPress	37
<b>Common Additional Features</b>	<b>40</b>
eCommerce on WordPress	40
Image Galleries	41
Online Chat	41
Membership Sites	42
Event Calendars	43
Real Estate	43
Integrations with Other Platforms	44
<b>Launch Checklist</b>	<b>46</b>
<b>Maintaining Your WordPress Site</b>	<b>48</b>
<b>Next Steps</b>	<b>49</b>
Did you enjoy this eBook?	49
Need help implementing these topics & more?	49
Want news & updates on websites, Small Business tools, SEO & more?	49
Did you get this eBook from a friend?	49

## Why Use a CMS?

CMS stands for Content Management System. It's a program that runs on your web server and provides a lot of convenience features to make editing content (images & text) on your website easier. The goal of most CMSs out there is to prevent the everyday user from having to deal with any programming code.

The reason to use a CMS is very similar to the reason that you use a word processor on your computer to write something instead of pen & paper. Your word processor has a number of functions that make editing easier.

Now at some point in your life you had to learn how to use a word processor. You learned where save was, how to create a new document, where the header & footer inserts were. The same is true of a CMS, you are going to have to spend some time learning where the different functions are in it.

## An Example

Let's say you were writing a document several pages long. You'd like a header at the top with your company name and a footer at the bottom saying you are on page 3 of 8. Your word processor has a header function where you can enter the header once and it replicates over every page. It also has a function to insert the actual page number and the number of pages. So your footer is automatically updated. Want to add a table of contents? There's a function to automatically generate that for you.

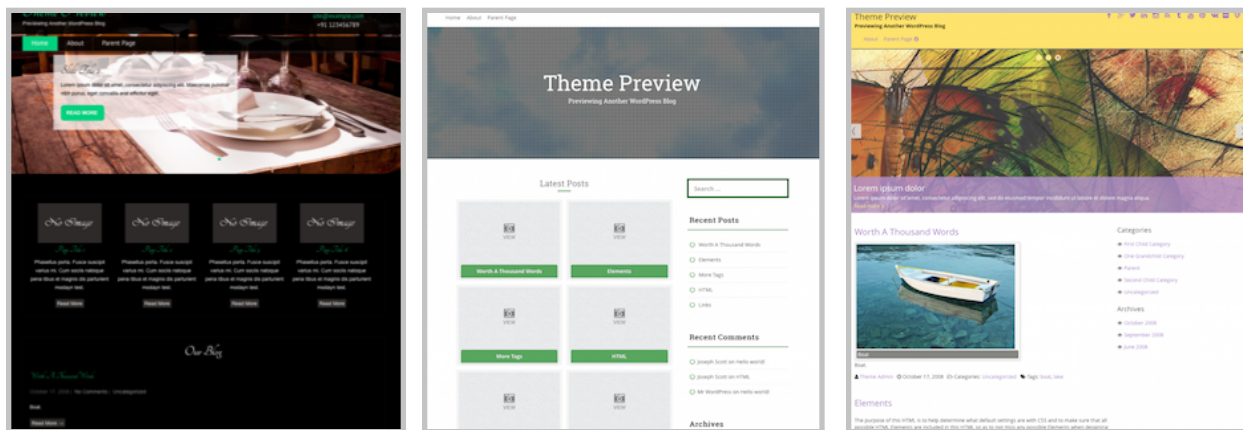
These convenience functions may save you only a little time the first time you write the document, but every time you change it they can save a lot of time.

Now, the first time you used a word processor, you were probably a little clunky and awkward. You didn't know where the functions were and you had to go hunting for them. But after a while you learned how to do things and life got a lot easier.

**On the web, a CMS is very much like a word processor.** It has a learning curve, but the time saved in the long run is worth it.

### So what does that mean?

Well, the easiest way to show you is a default install of WordPress with 3 different themes applied. These sites have the same content, but different themes (or style templates).



That is the power of a CMS. The ability to completely change the display of your content with just a couple clicks.

### Which CMS is right for me?

The majority of small businesses are going to fit very well with WordPress. The reason is pretty simple. WordPress powers a quarter of all websites, from small sites to major publications. In fact the next largest CMS powers less than 3% of websites.

## Why Should You Use WordPress?

WordPress has become so popular for a reason: it's a very well supported and versatile system. Its popularity means there are the most developers, designers, themes, plugins, and copywriters out there who know WordPress.

WordPress is free and open source. That means that you can install it on your web server easily and modify it as you see fit.

It's a great platform for new websites to be built on and there are a lot of ways that you can extend it.

## Why Shouldn't You Use WordPress?

If you have an in house developer who is very experienced with a different CMS, that may be a better choice for you.

If the only thing you will be doing is eCommerce, then you may be better off with a platform like Shopify.

And if you have almost no time for site maintenance, then a hosted platform like WordPress.com may be the best choice.

## WordPress.org vs WordPress.com

The big difference between WordPress.org (also known as self-hosted WordPress) and WordPress.com is who owns & controls what. If your website is on WordPress.com, they control what you can have on your site and you are rather limited in terms of what you can and can't put on your site.

On the other hand when you use self-hosted WordPress, you are able to do most anything with your website. That means you can add

extended functionality, sell things and most importantly if WordPress.com decides to change their terms of service, you aren't affected.

**This eBook is going to focus on self-hosted WordPress only.**

## General Definitions

**Theme** is an essential part of your WordPress website and controls how the site is displayed. In more technical terms themes are a mix of PHP, HTML, CSS, and JavaScript which display information from your WordPress database in various locations. There are thousands of themes out there and we'll cover picking one later the book.

**Child Themes** allow a developer to customize a theme without actually modifying the code of the original theme. The benefit to child themes is that when the parent theme (or original theme) is updated, your changes are not lost. Any customizations should always be done in a child theme.

**Plugins** are additional tools that you install on your WordPress site to add extra features. Some are small and perform one specific functions, while some have a huge impact on your site. Some plugins even come included with particular themes.

**Pages** are a section of your website which are normal web pages. These are frequently your home page, about your company page, contact page, privacy policy, etc.

**Posts** are a section of your website specifically for blogging. Posts are normally displayed with their date, their author, their categories and tags. Typically posts also allow for comments to be added to them by site visitors.



**Templates** are specific to Pages. A simple example is one page template might have a slider at the top, while another template does not. Templates are defined in the code of your theme, so changing themes changes your available template options.

**Categories** are a way to assign groupings to posts. Most websites will have 3-10 categories of content. These are generally broad groupings for your posts.

**Tags** are a way to assign specific attributes to a post. Tags are optional, some sites use them, some don't. For example if you had a food blog "dinner" might be a category and "thanksgiving" might be a tag.

**Widgets** are a specific type of content in WordPress and are generally used in sidebars and footers, although they can go other places. Widget numbers and placement are frequently defined in your theme.

**Media** is where your images are stored. You can also upload other files such as PDFs or Word Documents to the media section for use within your site.

**Content** refers to both written text and graphics of a website. Text only content is frequently referred to as "copy".

# Website Budget & Expectations

As the old saying goes, *time is money*.

You're going to need some of both, and if you are short in one area, you're going to need a lot in the other.

**I've broken down costs into two areas: Essential costs which you are going to need to deal with continually; and Upfront costs which are more of a one time thing** (although given how much the web changes, some of these costs may need to be addressed every few years).

## Budgets:

Individual freelancers will frequently have the lowest rates, followed by design/development companies, while full marketing agencies will have the highest.

If you go with multiple individual freelancers, you will have to act as project manager.

If you have a design/development company or marketing agency, they will handle project management for you.

Just because someone can do it for a lower price, doesn't mean they are the better value.

## True Story:

People have purchased very cheap labor on sites like fiverr. They have then paid hundreds to thousands in copyright violations, hack clean-outs and complete redoes of their sites. They always wish they paid for a professional the first time.

## Essential Costs: Web Hosting

In order to have a website, you need to have it hosted somewhere. Hosting can run from around \$3/month to hundreds per month. If you're a small business you don't need the kind of hosting that is hundreds per month.

### **But how much should you be spending?**

Well, hosting is a service comprised of web servers and customer service. If you are paying \$3/month you are not going to get high quality servers & customer service, in fact you're likely to get neither.

At around \$10-15/month and some care in shopping for hosting, you can get both. If your site consumes more resources than a basic small business site, you may be looking at \$30+/month for a quality hosting company. If you've got several domains and websites, you may pay more.

[Read More >](#)

Some people who have found very cheap hosting have ended up paying for it in Google Penalties and/or hack removals.

## Essential Costs: Domain Registration

Domain registration costs run about \$15 per year. If your hosting company is also your registrar, then you may get one domain included free of charge.

## Essential Costs: Website Maintenance

Something very important to understand about web hosting companies is that they are responsible for maintaining their servers. That's the service they provide. **Hosting companies are not responsible for maintaining your website.**

So that means you either need to do the maintenance yourself or you need to hire someone to do it for you. One of the big advantages to hiring someone else to maintain your site for you is that if something goes wrong, you already have a developer who knows your site and can help you.

**And the reality is, at some point something will go wrong.** It could be something like you deleted content that you really needed, or it could be something else. Either way, you'll be less stressed if you have someone who knows your website.

Maintenance for basic sites starts at \$20/month >

## Essential Costs: Content

You wouldn't go to a printing company and say I need 1,000 postcards done without having something to put on the post cards. **Well, you aren't going to get anywhere with a website without having content to go into it.**

This is a combination of both photos and text. To get your site design started, placeholder text and some quick smart phone pictures will probably be enough. But you need to make sure that you have the right amounts.

For example, if you've got 50 words for your intro, make sure that you aren't going to end up with 500 words later. These two sizes of content take very different designs.

For your final content **you will want professional photos** (if you're on a budget sometimes stock images will do the trick, other times you may be able to find a hobby or student photographer or be able to do a trade of some services).

**You'll also want professional copy, or text.** You'll want persuasive calls to action, and engaging text for your products or services. If you aren't a writer, hire one. Many design & development companies either have copywriters or know several.

Text content is what both visitors & search engines read.

## Upfront Costs: Website Plan

**The purpose of a website plan is to save you time, money and frustration during the design and development phases of your website.**

Think of it this way: you wouldn't go and tell someone you needed a bookcase. You'd tell them that you need the bookcase to go in a certain location, match the decor of the room, hold certain sizes of books, and have glass doors on the front.

Saying, "I need a website" is pretty much the same as saying, "I need a bookcase". Neither one is going to meet your actual needs, because you haven't figured out what your needs are.

If you're using a design & development company then your plan is usually going to be figured into the overall cost. If you are going a la carte for services, then you can expect a plan to start about \$300 and increase depending on size & complexity of your site.

## Upfront Costs: Website Design

Web design for just your home page (which isn't too complex or doesn't have too many revisions) will typically run you around \$300 for a simpler design with limited revisions. If you want more pages done, more revisions, custom elements, etc then it can easily run over \$1,000.

Some people like to go to Theme Forest or other theme stores and look for a theme demo that looks good. **A very important aspect to remember about theme demos is that designers & developers spent a lot of hours putting together that beautiful demo.** Some of the lovely demos for very popular themes have 50+ hours put into them.

There's a very common job posting on freelance websites: I bought theme XYZ and I can't make my site look like their demo.

**Your site needs to be designed around your needs and your content.** After all, that beautiful demo probably cost over \$2,000 so you shouldn't expect yourself to get the same results for \$50.

Finding a pretty example site is not the same as designing a site.  
A design needs to be tailored to your business.

## Upfront Costs: Website Development

Expect a new, very basic WordPress site to cost at least \$500. If you want a more experienced developer who does security, backups, etc add a couple hundred to that. As the complexity of your site & design increase, so will your cost.

Expect a basic planned, designed & developed site to cost at least \$1,100.

# Planning Your Website

*Those who fail to plan, plan to fail.*

So, before we jump into the design for your new site, we need a plan. A good place to start our plan is to ask some important questions.

## What is the goal of your website?

This is typically something like “increase sales”. The goal is the end game, an objective that you want accomplished. The goal gives a framework for the next question.

## What do you want visitors to do?

This is different from your end goal – this is normally a first step, something like “subscribe to mailing list” or “fill out contact form”. And you don’t need to have only one to do, different pages on your site could have different to dos. **But, each page should have only ONE to do item.**

## What type of visitors do you want?

This is your target audience. For example, if you are a plumber, you probably want “home owners in older homes with leaky pipes within 15 miles of location XYZ”. Your target audience should be specific. It shouldn’t be “people who need plumbing”.

And it also doesn’t have to be just one audience. Maybe you do both residential & commercial plumbing. You could have one page which specifically targets your residential customers and a different page that targets commercial customers.

However, just like your to do items, **each page should have one type of visitor it targets.**



## What do your visitors want from your site?

Now that you've defined who your visitors are and what you want them to do, what are they looking for?

The web has a lot of give & take. If you want something (like a visitor to sign up for your mailing list), **you need to give visitors something they want.** So your ideal visitor is probably looking for a specific piece of information. It could be an answer to a question or it could be that they really need a plumber right now to fix a broken pipe.

You will have different pages designed to target different pieces of information that your visitors want from you. Once they get what they are looking for, that's when you want to ask for something from them (such as signup for email list).

Plan your website up front, or expect a lot of wasted time & money.

## Basic Website Pages

There are a few of pieces of information that almost every website out there is going to have (they don't have to be on separate pages):

- About Company or Person
- Services or Products
- Contact Info
- Privacy Policy (yes, Google recommends that every site have one)
- 404 Page

## Which Standard Features Do You Need?

There are basic needs that almost every website has.

### Security Setup

WordPress is the most popular CMS out there by far. That means that it's the most targeted. So, just like you wouldn't leave a Windows computer connected to the internet in a high school cafeteria with no virus software or protections; your WordPress site needs security.

[Read More >](#)

### Contact Form

I'm assuming the reason you have a website for your business is that you want people to contact you. Well, you need a contact form for that to happen.

### SEO Ready

You should plan to include an SEO plugin like Yoast SEO in your website.

[Read More >](#)

### Backups

Just like you wouldn't have a computer without a backup drive (you do have a backup drive for your computer, right?), you need a backup solution for your website.

[Read More >](#)

### Social Media

Most companies have a social media presence and/or want their content to be able to be easily shared on social media. You need to consider if & where you want to display your social media presence.

You also need to consider which content (if any) you want to be easily shareable on social media.

## **Analytics / Webmaster Tools**

Putting up your website is good and all, but without any metrics for it how do you know if anyone even arrives?

Even if you aren't sure about how or when to use metrics, start collecting data – when you are ready to do something about the data, you'll be very glad you have it.

Sign up for Google Analytics and both Google & Bing's Webmaster Tools.

## **Mailing List Integration**

One of the things you want to consider collecting are visitor email addresses. Even if you aren't sure about doing a newsletter, including a signup form at the beginning can be beneficial later if you decide you do want to have a newsletter.

A free solution to get you started is [MailChimp](#), so head over there and sign up for a free account.

[Head Over to MailChimp >](#)

## **404 Page**

You should start thinking about what you want on your 404 page now. You need to have one, because at some point, someone will get an incorrect URL to some location on your site.

**If you have no 404 page or a poor one, then people just leave your site, most likely to never return.** You don't want that.

## Should You Have a Blog?

Maybe.

A focused blog with a purpose can be very beneficial to getting you ranked in search engines. However, you need to be able to commit to posting and to publicizing those posts.

A blog post with no publicity is pretty much like a tree in the middle of a forest. No one cares about it. But a quality post with the right publicity can be the Christmas tree in Times Square.

If you can't commit to the effort (or pay someone else to), don't have a blog.

Blogs require a regular time commitment.  
Either commit, pay someone else to, or don't have a blog.

## Responsive Website Design

You've got basically two options: a responsive site or a separate mobile site. I'm going to tell you right now, a separate mobile site is extra work.

**A responsive site is one that responds and adjusts itself to the size of the device it's on.** So on a desktop it takes up more space horizontally. On a smartphone it rearranges elements to be narrow and long.

With more and more smartphones out there, and more and more use of those phones, **you can't afford to ignore mobile.**

## Which Extended Features Do You Need?

WordPress has a lot of ways to extend its functionality. Some of the common ones include:

**eCommerce** - Selling products or services online

**Image Galleries** - Used for displaying portfolios or examples of your work

**Event Calendars** - Let's say your business is a coffee shop and you have community events at your location. An event calendar would let customers know when which events are happening.

**Online Chat** - If you do a sales through your website, online chat could help reduce the number of customer support emails, and improve sales.

**Membership Sites** - If you want to offer exclusive information to website members, then having a membership website with private, protected pages would require membership functionality.

**Real Estate Listings** - If you are a realtor, then you likely want to display real estate listings.

**Integration with Other Platforms** - If you have an existing CRM platform, then you may wish to have some integration with your new website.

These are by no means a complete list, just some examples of features or functionality that may be desired for your website.

The more features you want added to your site, the more likely you are to need the help of a professional developer.

## Sitemap

Ok, now that you've put some thought into your goals, your visitors and your features; it's time to put thought into your content.

You need to develop a list of pages that will compose your site. A tip here to is to search for websites which provide similar services or products to what you are going to have. You will likely end up with many of the same types of pages.

**The list of pages which compose your site is called your Sitemap.**

A good sitemap lists not only the pages, but their relationship to each other. Think about the sitemap as the table of contents to a textbook. The textbook is divided into chapters which designate the major sections of the book, and then into smaller sections inside each chapter.

You will mostly likely have pages and subpages. For example if you offer products for sale you would have a "Shop" page on your website. Within that you might have subpages for "Children's Clothes", "Women's Clothes", "Men's Clothes", etc. For larger websites, the subpages frequently have their own subpages.

## Content

Once you know what your pages are going to be, it's time to decide on content for them. For written content most people like to **hire a copywriter with experience in their industry**. You can ask your web designer or developer for references or you can try searching for freelancers via one of the many freelancing sites.

You (or one of your employees or friends) may be able to write your own content, but most people don't have experience in writing for

the web. Always remember, just like a doctor makes a terrible patient, a writer can rarely write well about their own business.

For graphical content you may wish to have stock images (for backgrounds) or you may need to have a photographer take photos for you. **If you are selling products, you want to have polished and professional looking photos of your real products done.**

The one exception is if you don't have finished product done yet, you may want to have your graphic designer create renderings of the product using the labels they designed. For most designers the renderings are pretty easy to do if they already did your labels.

If you will be using stock images, you should wait until the design or development phase to make sure that they match the overall look of your site. Many designers & developers buy a lot of stock images, so their per image prices are probably lower than yours.

**Stock images can be used to explain concepts, provide a visual reference, or just give an appealing background.**

Don't underestimate the importance of quality content.  
Content is what search engines & people read.

# Designing Your Website

The design phase is typically exciting. This is where your list of features, your list of pages, your visitor types and your goals are all put together into an actual visual design.

Something very important to remember during the design phase is that you only need to get to 90-95% of a finished site during this phase. **The site WILL change during development, so don't obsess over the small details.**

In fact, you don't want more than a 95% finished site going to development, because development is where ideas meet reality.

Design typically only includes your homepage and any pages which have unique layouts. **On most sites, only the homepage needs to be designed** because it includes the header, footer, colors, style, fonts and almost everything else a developer needs as a guide to build your site.

If your site is going to have specific landing pages or has more detailed goals which require custom designs, then you'll need to have the appropriate internal pages designed.

## Communicating with Your Designer

It's important to understand some of the basic language used in web design.

**PSD** - Photoshop is a very common choice for designers to use, and most designers & developers have it. Make sure to find out what version of Photoshop your designer is using and what version your developer has. If your designer has a newer version, they may need to do a specific "save as" for your developer's version.



Photoshop is not the only choice nor always the best choice for designing a website. So don't be shocked if your designer suggests a different format – just make sure that your developer can work with it.

**JPG & PNG** - These are the two most common file types on the web. JPG is best for very large images or those with a lot of color changes (like photos). PNGs are best for images with a lot of text or lines, or if you need to have portions of the image transparent.

**Mockup** - This is a draft of what your website could look like. These are normally delivered as JPGs (they tend to be quite large). No mockup is going to be 100% accurate as a mockup starts with a fixed size canvas to work from, whereas a web browser can be almost any size.

**Header** - This is the top part of your website, typically including your navigation, logo, and probably some contact info.

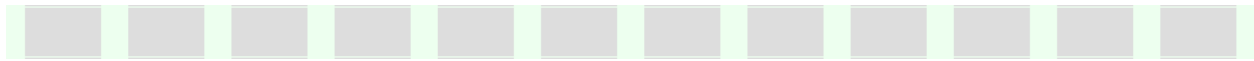
**Footer** - This is the bottom of your website. It may be small with just your copyright & privacy policy link, or it could be large and detailed.

**Sidebar** - Frequently internal pages of a website have a sidebar. This is an area on the left or right side of a page which is a narrow column. It's typical 1/3 - 1/4 the width of the overall page and contains supplemental information (such as contact info or links within your site).

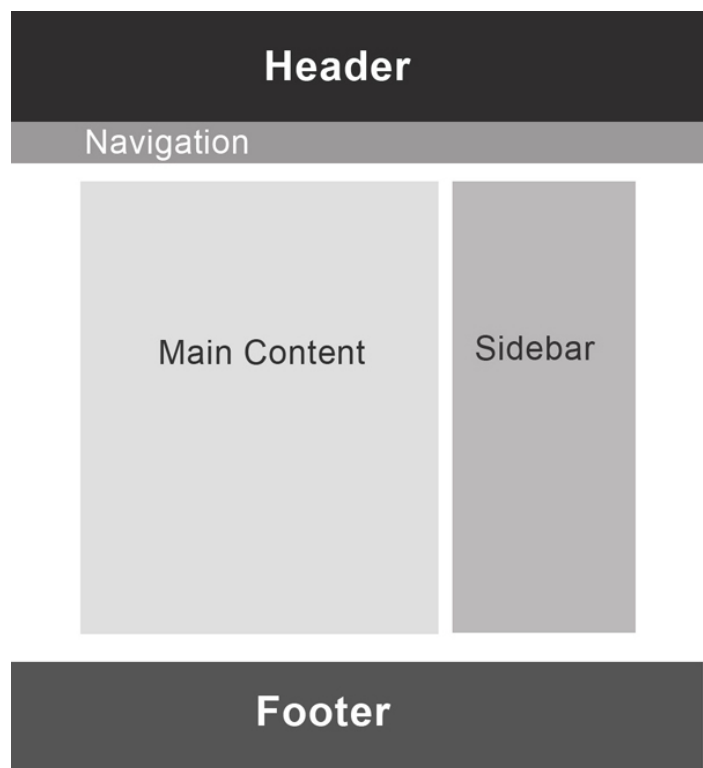
**CTA** - CTA stands for Call to Action. This is normally a combination of some catchy text and a button. The goal is to get your visitors to click on the button which normally takes them to a landing page or contact form.

**Landing Page** - This is a page which advertises one specific product or service. The goal of this page is to get a visitor to complete a specific action. This could be signing up for a mailing list, downloading a file, or purchasing something.

**12-column grid** - Typically a website is built on a 12 column grid.



The idea is that each website is first divided into rows and then each row is divided into columns. An example is the standard website layout. Here the header is a row, the navigation is a row, the content is a row and the footer is a row. The content is divided into columns with the Main content on the left and the sidebar on the right.



This works very well for development of responsive websites.

## Understanding Developers vs Designers

Most graphic designers have limited or no programming experience. They have probably seen a lot of sites, but they don't actually know what is involved on the development end to make certain things happen.

If you are working with a web design & development company, then there will be communication between the person designing your site and the one building it. This can save a lot of headache. But, if you already have a graphic designer that you've been working with, you may wish to have them design your website.

It's important to make sure that your developer gets to see initial drafts of your site, otherwise the designer may pick something that looks nice but is very expensive to implement. **Getting your developer involved early helps to correct any issues before they become serious problems.**

Get your developer involved in the design early,  
and save a lot rework later.

## Providing a Useful Design Brief

If you are working with a company who helped you through the planning stage of your site, you will not need a design brief. If you did your own planning phase, then you'll need to create a design brief.

**A design brief is a document that details your existing style guide and defines what content goes into the website and what organization it needs to have.**

### Name of Site

For most small businesses, the name of your site is the same as the name of your business. But just in case it isn't, or you want a specific spelling used, make sure to put it in writing.

## **Tagline of Site**

This should relate to your business. If you don't have a tagline, you will likely want to think of one. If nothing else, the tagline is frequently used in the <title> tag of your homepage.

## **Objective**

Back in the planning stage you figured out who your visitors were and what action you wanted them to do. Now it's time to let your designer know. If you are having multiple pages designed, be sure to tell your designer the specific visitors targeted by the page and the specific action you want them to do on that page.

## **Logo**

If you don't have a logo, your designer will need to design one for you. It doesn't have to be complex, but it should represent your business.

## **Branding**

Here's where you tell your designer your existing branding. If it's a designer you've worked with before, you can probably skip this step.

Included in branding are colors used and fonts. If your company only has one or two colors, you will likely need to provide some guidelines for an accent color that you want used for CTAs.

## **Content**

These are your images & text that you will want on your site (at least those for the pages that the designer will be doing designs for). You need to have your content decided before you start designing the site. A designer can make a lot of beautiful designs, but they are useless if they won't work for your content.

## **Current Site**

If you have a current site that you are updating, remodeling or moving to WordPress, provide the designer with the URL. Let the designer know if you'd like to keep the current structure or if you want to change it.

## **List of Pages**

The Sitemap that you created in the planning phase comes in here.

## **Features**

Provide your designer with a list of features that you want. If it's something that may not be obvious, provide an example.

## **Style**

Convey to your designer what your overall style is. Frequently with style a picture really is worth a thousand words.

Go to a website like [ThemeForest.com](http://ThemeForest.com) and enter your general area into the search. For example "Medical" would be a good search term if you are a doctor.

Look at the results you get (make sure to click on the View Demo link) and see which ones you like. You should be able to tell within 5 seconds of landing on the example if you like it or not. Take your favorite couple and send to your designer with reasons why you like them.

Remember your website style should be  
what appeals to your customers, not your personal style.

## Feel

Try to think of some adjectives that describe the overall feel you want your site to give. For example, “professional”, “modern”, “floral”, “textured”, “earthy”, etc.

You can also do an image search for “mood boards” and see if there are some that really feel right to you.

## Competitors

Send some of the websites of your top competitors to your designer and be sure to note things you think they are doing right and things you don’t like about their sites. **This helps to make sure you stand out from your competitors.**

## Design Revisions

Depending on the arrangement with your designer, you may have one initial design plus a couple of revisions or if you are paying them hourly you may get as many revisions as you wish (within the limits of their patience).

A very important part to remember when looking at the design and asking for revisions is that you only need to get to 90-95% completed design. You do not want a 100% complete design, because it’s guaranteed to have some changes as it goes to development.

The goal of design is a 90-95% complete website look. The design will always change slightly when implemented.

## Getting the Final Design

The majority of web developers have Photoshop, and the majority of designers like to design in Photoshop. But, Photoshop is not the only tool out there, in fact there are lots of tools for designing layouts.

**You'll need to communicate with your developer early to make sure that the format your designer provides is useful to them.**

You'll also need to make sure that any images chosen for the initial design you have the rights to use on the live site without needing to purchase them from stock photo sites. In fact your developer may even request the final images be saved for the web.

**If your designer is saving images for the web, make sure that the designer actually understands HOW to save images for the web.**

Not all designers understand exactly what works for web development.

Also make sure that if specific fonts were used in the design that the designer can include them (sometimes designers use premium fonts which can cost you \$100+ to purchase a license for). If the fonts aren't readily available, make sure that the designer provides alternatives from a source like google fonts.

Make sure everything in the design is included.  
You don't want to be surprised by license fees later.

# Developing Your Website

If you are working with a developer, this section just serves as a general checklist and an overview of the steps involved.

I'm going to assume that you already have your domain. If you don't, go ahead and read the post on [selecting & registering your domain](#).

## Picking a Hosting Company

If you already have a website, then you probably already have a hosting company. But, if you are remodeling your site or moving it to WordPress, this is a pretty good time to take a look at your hosting company and whether you want to keep them.

For WordPress you have two good choices: Managed WordPress and Linux cPanel.

There are other options out there, there are even people who run WordPress on Windows servers. If you want to save yourself a lot of frustration later, stick with the two good choices.

[Read More >](#)

## Installing WordPress

If you are working with a developer or using Managed WordPress hosting, WordPress will be installed for you.

If you are on cPanel and don't have a developer yet, [WordPress has a famous 5 minute install](#), or cPanel comes with some script installers (Fantastico or Mojo are most common) which will install it for you.



## Initial Settings

Once you have installed WordPress and gotten logged in to your site Dashboard there are a few settings you want to start with.

Before we get started, I will not say, “click the Save Changes button” for each section. But you need to save your changes before changing to a different page.

### General

Go to Settings on the left sidebar and you’ll arrive at the General settings page. This is where you will set your site name, tagline, email address, and timezone.

### Reading

Next go to the Reading settings (in Settings, below General).

The first choice is “Front page displays”. The choice of your posts or a static page will be determined by the theme you are using. But for most themes and small business sites you’ll want to select “static page”. Then select your front page (you will need to create this). If your site will have a blog, set the blog page as well.

I typically leave the next settings alone, except for “Search Engine Visibility”. If your site is under construction and not yet ready for search engines, you want to check this box to keep them out for now. You will need to remember to uncheck this box later when you want search engines to see your site.

### Discussion

The Discussion settings are for commenting on your site. It’s important to understand that every type of item within WordPress can have comments on it. This includes pages, posts, and media

files. Typically I start by unchecking the “allow link notifications from other blogs (pingbacks and trackbacks)” because they are just annoying.

Whether or not you allow people to post comments is up to you.

## Permalinks

You want to set useful permalinks for SEO purposes. While a whole blog post could be written about permalinks (and many have been), the easiest setting to select is “post name”. This will give you a starting useful set of links.

## Selecting Your Theme

Now that you have a WordPress installation and the basics setup it's time to decide what theme you will use for developing your site.

**If you are working with a developer, it's generally best to let them select the theme.** After all, the whole point of hiring a developer is to get their years of hard-earned knowledge about WordPress.

If you aren't working with a developer and need one, [click here](#).

If you are going to go it alone, then read on.

**There are thousands upon thousands of WordPress themes out there.** There are themes that are frameworks, themes from Theme Forest, themes from the WordPress repository, and still more themes from individual developers. It's a lot like going to a tree farm that covers about 100 acres and trying to pick out a tree.

The first thing you need to do is **filter themes based on functionality**. Do you need an advanced page builder for the layouts that your designer created? Do you need eCommerce? Some functionality

can be achieved easily by plugins, but other functionality you need integrated.

Once you've determined the needed functionality, you either want to use a multi-purpose theme designed for building a variety of layouts or you want to find a theme which matches your design closely.

The majority of the time you will need to either **create a child theme to put in customizations** to match your design or accept that your design is going to change to match the closest theme you found.

Small changes happen during the transition from design to development, but if you find yourself compromising on key elements, then you either have the wrong theme or you need a developer to create a child theme for you (or both).

Select a theme on functionality, not a pretty demo.  
Remember most demos have 50+ hours of work in them.

## Selecting Your Plugins

Once you have your theme installed, you may need to install some plugins to go with it. Certain themes come with required or highly recommended plugins. Generally you should install those. I say generally because if a theme comes with two different sliders, you probably only need one (or may need neither).

Once the theme related plugins are installed, here are some that I recommend for almost any website:

[BackWPup >](#)

[Contact Form 7 >](#)

[Comment Spam Prevention >](#)

[iThemes Security >](#)

[Yoast SEO >](#)

## 301 Redirects

If you have a brand new site and no previous site, you can skip this section.

However, if you have an existing site then you may need to worry about your 301 redirects. If you've hired a developer, then they should be taking care of this for you. If your developer is more "designer" or "marketer" then you should make sure that they are going to do this.

A 301 redirect is the web equivalent of filing a change of address with the post office. It tells browsers and search engines that you've moved a webpage from one location to another.

If you are migrating from a plain HTML site or another platform, your URL structure will almost certainly change. The best thing you can do is set up a spreadsheet with your old url in the left column and your new url in the right column. Once done, this spreadsheet can be uploaded to a plugin like Redirection to setup all of your redirects.

**Any time you change a URL on your website, you should be setting up a 301 redirect.** And by any change, I mean any change. Even if it's only one character.

## 404 Pages

404 is the error code for page not found. When someone tries to access a page on your site that doesn't exist (like example.com/isnel73h) they will be redirected to a 404 page. Most WordPress themes will come with a basic 404 page.

Your 404 page should have links to general information. For example you might suggest people check out your services page if they end up on your 404 page.

**Always have your 404 page be helpful.**

You don't want people to hit a dead end and leave your site.

## Security on WordPress

Just like you install virus software on your home PC, you need to install and configure security for your WordPress website. After all, it's online 24/7 and accessible by anyone connected to the internet. Without security it's not a question of if your site will be hacked, only when.

Here are a few of the biggest areas that you need to look out for. Also, a word of warning – **not all “marketing” companies know anything about security**. They may have great designers, but I’ve personally cleaned out a number of websites that were hacked because marketing companies set up NO security.

If you did end up with an unsecured WordPress site and want it fixed before it gets hacked, contact us. Security installs cost a lot less than hack clean outs do.

Security up front costs a lot less than a hack clean out later.

### **Security Threat: Usernames**

A default WordPress install comes with the username “admin”. That means that every hacker out there specifically targets this username. Changing your username is the first thing you should do.

The other risk is if you publicly display your username. For example, if you write blog posts, most themes will display a “Written by” line. This should be an actual name, or company name. It should not display your username. Displaying the username just tells hackers which username they should try to hack your site with.

### **Security Threat: Out of Date WP, Themes or Plugins**

New security issues can come up quickly, and once the hacker community finds out about them, they can spread like wildfire. This means you need to keep all of your themes & plugins up to date.

But be forewarned, not all of the plugins will tell you that they are out of date, and if they came included with a theme you may not have access to their updates (or know where to look to get them).

If you don't know how to update WordPress, don't have the time, or just can't seem to remember to, we have affordable maintenance plans which take care of the hassle for you.

[Read More >](#)

### **Security Threat: Not checking or having logs**

Security logs are a wealth of information, as long as you know how to read them. However, most people don't have any security plugins installed and therefore don't have any logs to check. A great plugin to get you started is iThemes Security.

[Read More >](#)

# Common Additional Features

There are a LOT of possible features that can be added on to WordPress. Here are a few of the more common ones.

## eCommerce on WordPress

**The most popular eCommerce solution on WordPress is WooCommerce.** It has all of the power to create everything from a simple store selling a few products to a complete online marketplace. As a bonus, WooCommerce is owned by Automattic, who are the folks that make WordPress.

A word of warning if you are building your site on your own: **make sure that your theme has support for WooCommerce and that it is regularly updated.** WooCommerce has made some pretty big changes in the past, so you need to make sure your theme can handle them.

Getting a website setup with eCommerce is not for the faint of heart. There are a lot of settings to get your site configured properly, so if you are not familiar with it, save yourself a lot of stress and get a professional developer with experience.

eCommerce can be trickier than it looks.  
Save yourself a lot of hassle and get help at the beginning.



## Image Galleries

They say a picture is worth a thousand words. So why not let your website tell a story? An image gallery can do just that.

Image galleries are great for any site that displays a selection of services. So if you're a carpenter, an artist or a safari guide; showing examples of work or trips you've done in the past can be a large part of getting new business.

There are a variety of plugins out there which offer image gallery functionality, including a [basic gallery built into WordPress](#). Some other common approaches:

- Nimble Portfolio - portfolios allowing for detailed case studies
- Global Gallery - just show off your best work
- Some themes offer integrated galleries

## Online Chat

If your business uses phone answering for scheduling appointments or providing customer service, then a chat tool may be a great fit for your website. Generally the easiest integration is to use a 3rd party tool like [PureChat.com](#) or [Olark.com](#). These tools are added to your website via a simple script addition and handle most management off of your site.

### **Why do I want off-site management of chat?**

Off-site management means you don't have to have a browser window open to chat. You can use smartphone apps, you can schedule your availability, and most importantly 3rd party tools

handle all of the heavy server load OFF of your website. Plus they frequently include metrics & reports.

## Membership Sites

Does your business have any protected information that you want available only to certain people? Maybe you have sales people who work on commission and you want information that only they can access. Maybe you've provide tutorials and only want to allow paid members to access them.

There are a variety of reasons that you may want to keep certain information private, but still on a website. The solution for this is a membership area. There are several plugins which allow for a membership area to be created and there are some themes which have membership-like functionality built in.

While membership sites can be quite powerful and profitable, they are not easy to set up. Even the "simpler" options frequently have 10+ pages of options to navigate and a variety of settings that must be configured properly to work.

Hire a developer at the beginning of the process and avoid having to pay them later to clean out whatever you screwed up and then redo it.

Membership sites can have a lot of complexity, and if not setup correctly at the beginning can cause a lot of headaches.

## Event Calendars

There are a number of ways to display events on your site, and one of them is to use a calendar. A couple of the more popular plugins are The Event Calendar and Sugar Calendar. These both allow you to automatically display upcoming events.

The Event Calendar is particularly useful if you want some custom functionality or integration with WooCommerce. It has an extensive API and quite a lot of ability to customize your results. Unfortunately that customization requires PHP programming.

Sugar Calendar provides a number of easy to use short codes which are a lot easier for the average person to understand and use. It also provides widgets that allow for easy display of filtered results in a sidebar.

## Real Estate

There are two popular plugins out there for integrating real estate listings with WordPress: dsIDXpress from Diverse Solutions and IDX Broker. I've had experience with both and I can say that I definitely prefer IDX Broker. It handles a lot more of the processing off of your site and gives a lot more customization with their back office area.

If you go search for themes you are going to see a ton of themes advertising dsIDXpress integration and practically no themes offering IDX Broker integration. There's a reason for this. dsIDXpress requires theme support and handles almost all customization on your WordPress site.

With IDX Broker you manage everything on their back office area so your theme doesn't need to provide any support.

Whichever plugin you pick, there is a bit of learning curve. The support for these plugins is only for their described functionality, so don't expect the company to help you integrate it into your site or solve issues with your theme. Having a competent developer with experience in the plugin is highly recommended.

There are also two other approaches for getting real estate listings into your site: frame-able and APIs.

Some MLS or Realtors Assn offer frame-able listings. These typically take very little to configure (because there are almost no options), but configuring the iframe properly on your site does require some HTML & CSS knowledge.

The API approach is generally a custom built solution. An API is basically a set of tools and materials from which a developer can build something. The quality of your result depends on the quality of your developer. Just like a master craftsman can build a beautiful piece of furniture, a master API developer can build a beautiful interface. With this, expect to pay more for a good developer.

## **Integrations with Other Platforms**

WordPress has integration for several common platforms, depending on your needs. Unfortunately there are so many other platforms out there to integrate with that I can't even begin to list them. The easiest way to check on integrations is to do a quick web search for your platform and WordPress. If it looks complicated, hire a developer.

Integrations and extended functionality can be a bit tricky.  
If you don't have the technical expertise, don't try it on your own.



# Launch Checklist

So it's the day, you're launching your new WordPress website. Here's a quick list of things to check once your site is launched:

## Contact Forms

Make sure to test all contact forms on your website to verify that they are working. You should also be storing your contact submissions in a database on your site. If you need to store them and aren't, try the [Contact Form DB plugin](#). If they aren't emailing you, you may need to [fix your WordPress mail](#).

## Turn Off Discourage Search Engines

If you had turned on the discourage search engines preference in Settings > Reading, make sure to turn it off.

## Submit Your Site to Search Engines

Just because you put your site on the web, doesn't mean the search engines know about it. Go to both Google & Bing and [submit your site](#). Make sure to also submit a sitemap to their Webmaster Tools.

## Add Analytics

If you don't already have analytics added to your site, make sure to add it. If you have added it, wait 24 hours after your launch and then check your analytics to make sure they are working.

## Check Domain Email

If there were any DNS changes involved in your launch make sure that your email associated with your domain is still functioning.

## eCommerce Orders

If you've got eCommerce, make sure that any "Sandbox" settings are set to live and that you've done a test order.

### **Broken Links Test**

Run your site through a [broken link checker](#) to make sure that your site doesn't have link issues.

### **301 Redirects are in Place**

If you've changed the locations of any content on your site, make sure that you've put in 301 redirects.

### **Make Sure Feeds are Working**

If you are using any RSS feeds (if you have a blog, you have an RSS feed) or social media feeds are working correctly.

Don't assume your developer did everything on the checklist,  
verify everything yourself.

# Maintaining Your WordPress Site

You have two choices for maintaining your site: go it alone or hire a professional. Many developers offer some sort of ongoing maintenance program.

[Read More About Maintenance >](#)

The first thing to do when it comes to maintaining your site is to keep it regularly updated. And by regularly I mean at least once a month.

[Click here for a basic guide for how to update >](#)

You should also do some periodic cleaning of your site. This includes checking your security logs (you did set up security, right?) and cleaning out your database and anything no longer in use.

[Read More >](#)

Maintaining a WordPress site has some tricks to it, you can save yourself a lot of hassle by [hiring a professional](#).



## Next Steps

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