

the ultimate

WORDPRESS FIELD GUIDE

FOR DESIGNERS

written by

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Content

THE ULTIMATE WORDPRESS FIELD GUIDE FOR DESIGNERS

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SECTION 1 - NOT TO-DO'S!

WHAT IS THEMEFOREST?

It is a collection of themes made by designers and developers from all over the world. It can be a good starting point for a new designer with no php, css, or other programming technology experience.

But one should move away from this as soon as possible.

As a personal example, we had 2 customers in 2012 who spent more than 9000 Danish Kroner each on getting their [Themeforest](#) themes corrected and then further developed, after upgrading WordPress, certain plugins, or as a result of their business just growing.

At that stage I could have built them a whole new website from scratch for the same amount.

The problem is that not all the people who build the themes are good developers, which can mean anything from security loopholes, to incompatibility with the newest version of WordPress.

Many of the themes look great on [Themeforest](#) and also when set-up to match the demo. However, when you want to add a customers' font/colour scheme or text, you can run into problems.

I have used more than 4 hours setting up a new theme to match the demo. Usually I can setup around 6 Genesis child themes within the same time.

Here's a list of reasons why you should use Themeforest

- Easy to find a cheap design that can match what a customer wants
- Good for low budget customers
- A lot of choices
- Good for beginners to learn WordPress and deal with how frustrating it can be if things are done wrong .

And here's a list of why not to use Themeforest

- Most (if not all) of the developers mix functionality with appearance. The right way is to have functionality (think portfolio items) in plugins, and appearance (portfolio template) in themes.
- It can be very costly, time consuming, and maybe not even possible, to further develop onto a Themeforest theme
- There is no way to check the code before you buy the themes
- It may not be possible to update the theme in future and it may not work with a new version of WordPress. This could leave you (or more importantly your customer) with a website that might not work properly if WordPress is updated, or else if it is not updated WILL be less secure and may be open to hacking.

INDIA AND ITS SELF-CONFESSED WORDPRESS EXPERTS

With long lists of websites to prove these guys have been building websites since they got out of their second IT degree, and they can be extremely convincing through negotiating and pricing.

Most people can fall into the trap of hiring Indians, especially if they can't read code.

For me, or many of my colleagues, partners, and competitors, just one quick look at few lines of code will tell us if it's written by an Indian ;)

I started working with Indian developers, for 2 weeks in 2011, and have actually tried a few times since with even highly rated and high paid Indians. I still stand strong! I won't work with Indians.

Here are the exact reasons why I don't recommend working with Indians for WordPress development (though I was in charge of 40 Indians in the stock photography industry for 3 years, and that was a success)

- They require more micromanaging than many others because of their hierarchical management. They are very bad at self-management, which means that you will be sitting all day on Skype with them.
- They say yes, yes, to everything (it doesn't mean they understand it, just that they heard you!)
- The technology level is a lot different to what it is in Europe, for example. The concepts of responsive, iPad, and compatibility on all devices is a very misunderstood area for Indians.

- Some of the written code that I have seen, would make a bowl of Italian spaghetti look like a straight line. They hack everything together to make it work.
- Things take longer... Because of the above point, adding a new functionality to your site could be a random mess of badly written plugins, and hacked plugins that they have bent to make work (at least until someone presses the update button of Word Press, (then it won't work anymore)

Sure, you can buy 40hrs for \$400 (or much less), but you will be using 20hrs yourself to micromanage them and your deadline will be a thing of the past. Whats your time worth?



HACKING PLUGINS AND THEME FILES!

Sorry guys, there is no other word for it.

80% of the customers I have had who have existing WordPress websites, have been terrified of updating their website (Updating is something that must be done to keep up with security patches and shiny new functionality)

When working with WordPress there are so many different ways to do things, that many people don't know where to start, so they dive right in, and start changing things in plugins and theme files to make the changes they need.

However, there is a right way to so this, which sometimes takes a little longer.

But in the long run, it pays off.

Here is a simple explanation of how this should be done:

- For editing a theme and its files, one should make a child theme (this child theme will override the parents theme files, without damaging them.
- For editing a plugin, one must make a new plugin, that overrides the main plugin

WOW, COOL! INSTALL WORDPRESS WITH ONE CLICK!! AWESOME.

NO, not awesome, it takes about 2 minutes yes, that's fast. But [doing it the manual way](#), can take just 5 minutes.

What's the difference?

Well, with 1-click, you won't have to touch FTP, or make a database.

Other than that, it's not too different

Except that with the 1 click install:

- It doesn't add in the unique security firewalls, that a manual install allows you to add.
- It can make you misunderstand your file structure and end up with a website at www.yourdomain.com/WordPress instead of www.yourdomain.com

With a [manual install](#), you get:

- Extra security
- A better understanding of your website and its structure



AN OCEAN OF PLUGINS, AWESOME, NOW I CAN BUILD ANYTHING!

WordPress being open source is great, with so many possibilities. But this also means that the aforementioned Indian spaghetti coders, can build a plugin and add it to the WordPress plugin repository. What this means to you:

You can find [hundreds of plugins to add sharing](#) to your WordPress website, but they may all add thousands of lines of code to your site, with these negative effects:

- Slower loading time
- Incompatibility with new versions of WordPress or other plugins
- Security loopholes
- A complicated solution

What I do, is use a few very flexible plugins that are built by reputable developers.

Here are a couple of examples:

- [Backupbuddy](#)
- [Gravity Forms](#)
- [Advanced Custom Fields](#)
- [WordPress SEO](#)

- Types, Views and CRED

When choosing plugins for your website, try stick to a couple like the ones mentioned above that can accomplish many things and are built by reputable developers.



SECTION 2 - WORDPRESS PROJECTS

Project management and team management can make a big difference to the stress and success of a project.

I personally use systems and processes inspired by large enterprise companies, that most people would say are overkill.

But it means I can keep my head out of my inbox, and focus on either growing my business or completing the deliverables of a project.

STAFF, SUBCONTRACTORS AND A NETWORK OF PARTNERS

While it's possible to be a one man army, its way cooler to have a team!

In my experience, I need certain skills in my team to ensure a successful completion of a project.

I hire Filipinos, Eastern Europeans and Danes to help me meet my objectives.

In my experience each nationality is better at one thing than another

A couple of examples:

- Danes - I use for design work as they have an excellent sense of design and quality
- Filipinos - They are very cheap, so I use them for Virtual Assistance and simpler WordPress admin or repetitive jobs.

- Eastern Europeans - While not being as cheap as Filipinos or as expensive as Danes, they are EXCELLENT programmers. I have heard that many learn to code while they are still kids.

I started off using Filipinos, but quickly found I needed a higher quality level and there were a few things that bothered me, such as internet speed, mentality around deadlines, and attention to detail.

So I tried people from everywhere! India, America, Australia, and Denmark. And settled on Eastern Europe.

I use Odesk to find and test people.

I have a process I go through when testing new people and here is what is entailed:

- Job application template
- Filtering based on certain details such as location and time on Odesk
- Testing on a closed dev site
- Skype interview
- then I throw them in the deep end on one of my personal projects or websites
- I then grill them pretty hard and smoothen their edges and try to find ways to fire them

- Once I find some good guys, I raise their pay a lot, and hang onto them.

I have many systems and processes that I teach my subcontractors and I have a guide that I use to achieve this quickly and save myself time

By having a large network of partners with different skills, and an “on call” team of developers and designers, it’s possible to very easily scale my business.

This is why I must use similar processes and systems as the large enterprise companies.

I use things like:

- Operations Manual
- Step by Step procedure guides/Standard Operating Procedures (SOP)
- Time tracking and reporting
- Project Management system
- Skype



PROJECT MANAGEMENT - TASKS AND TO-DO'S

It's important to keep an overview over what is to be done, who is doing it, where it is now, and when it will be done.

Let me clear one thing up: Email is not made for this!

I have tried about 50 different Project Management systems, and always fall back to 2:

- [Basecamp](#) (because it's easy for my customers to understand and use)
- [Activecollab](#) (because it allows me to have my whole online office in 1 area)

These features are what I believe are the minimum:

- Overview of different projects
- Tasks lists
- Discussions for each project
- Area to add info and VERY important images/video to tasks
- Deadline and date management
- Email integration
- Assignee (person responsible)

And these are nice-to-haves that I prefer:

- Customer access
- Different roles
- Time tracking and app for such
- Invoicing
- Reports
- Notification
- Global documents

By having a Project Management system I can easily see:

- Who has which tasks on their plate (so I can move tasks to teammembers with less work)
- What is left to do (so I can update customers and see things that would otherwise be lost if using email.
- Focus on the task (it's important to not mix things up and create misunderstandings)

The main reason I have a PM system is because if or one of my team or I were (excuse the expression) "Hit by a bus", then the rest of the team and project could continue business as usual without the project being affected negatively.



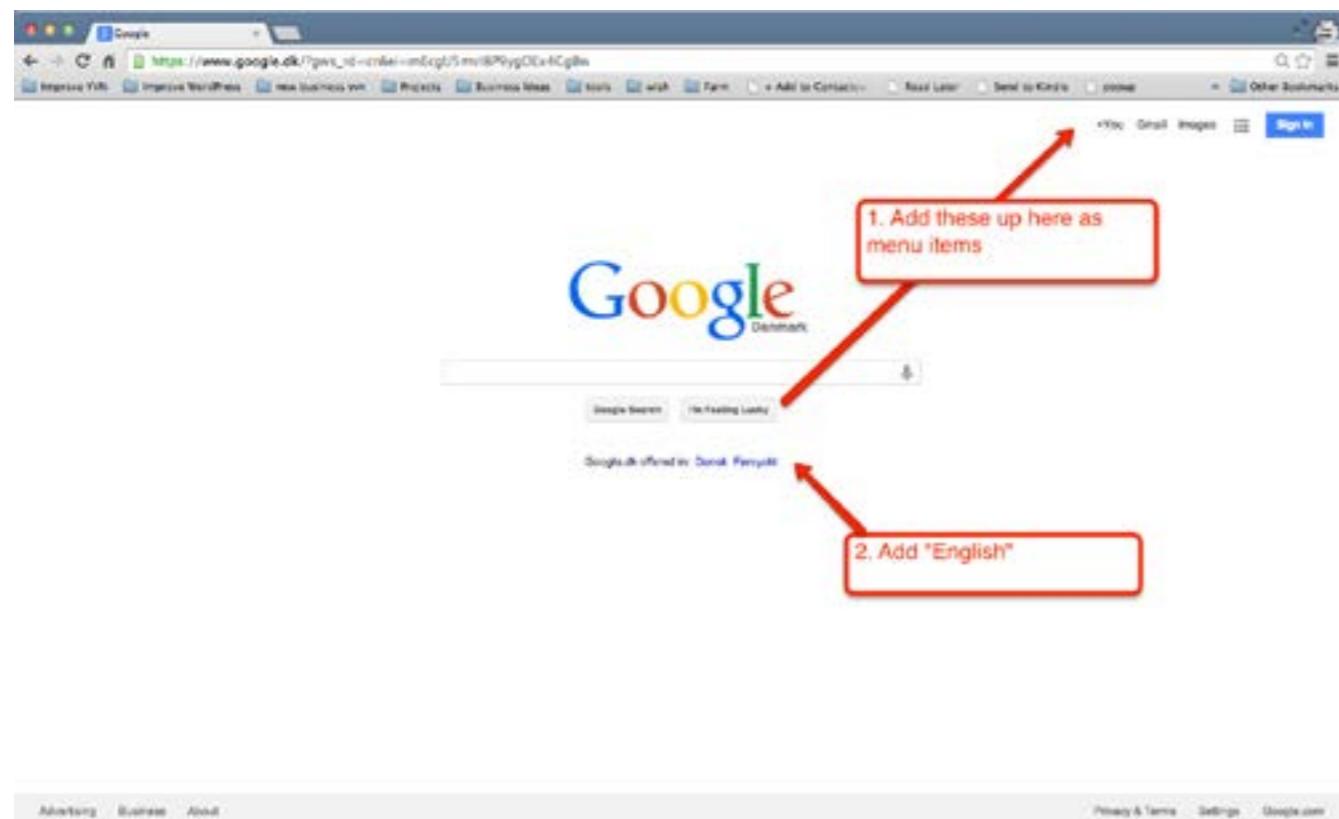
We store all login info, files, wireframes and designs, and project information in the system and it can be accessed anywhere with an internet connection.

TASKS AND HOW WE PROCESS THEM

I believe that visual communication is very important in this industry, and I never work over the phone or solely from written word.

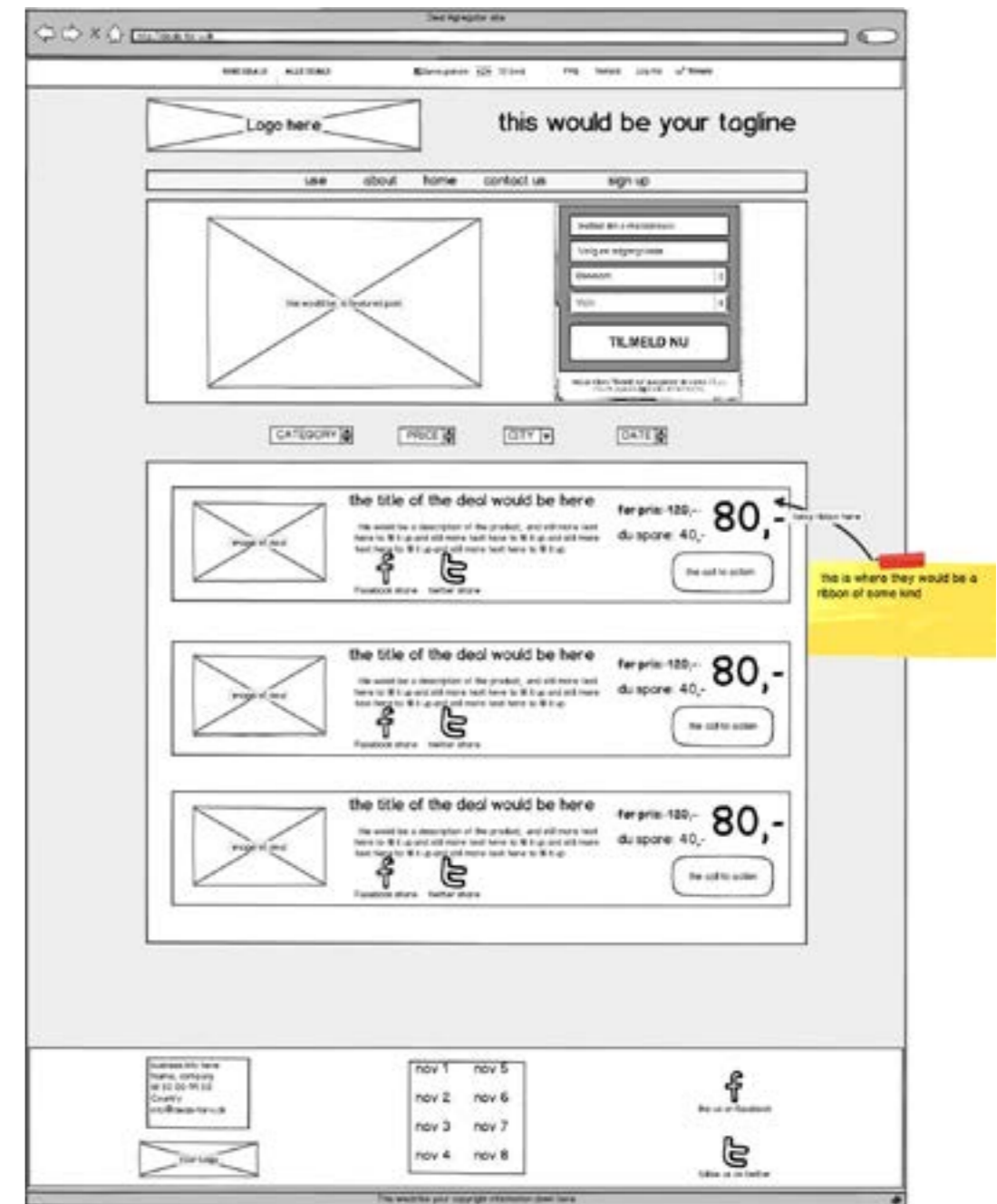
This is because my customer, myself, and my team all would have a different understanding of the task.

So I teach my customers and partners how to use Jing, and other cool screenshare/screen capture programs. So that they can visually explain what they are thinking.



Many times, we can't even describe what we want, so in such a case we can use video and describe it as if the person is right beside us.

If something is more complex, or needs more explanation, then I use flowcharts or wireframes.



By using tools like Jing and a project management system, we can ensure that everyone can see the big picture and understand things the way they were intended.

SECTION 3 - WORDPRESS DEVELOPMENT

Now for my favourite part - Sorry guys, I am a super nerd, I think this is mainly due to my huge thirst for learning.

If you do things the right way, and take you time to think about how your customer will use the website in the future, you can accomplish a lot very quickly and effectively.

However, if you just jump in and hack things, and try and do what you think is the easy way, you can create a huge mess for yourself, and a nightmare for your customer.

I would say that 80% of the people I know that use WordPress, (unless they are WordPress developers), are scared to update their plugins, themes and WordPress.

It should not be so. It is very important to keep things up to date.

Let's go through some things that I recommend doing and learning about.



INSTALLING WORDPRESS

Well, this should be an easy one, with most servers offering 1-click install, right? NO, I always do it manually (actually I have an even cooler and faster way of doing it)

But I won't be sharing that here, you will have to follow me up to get access to things like that!

You should learn to install WordPress manually and to ensure you add in the right settings to beef up the security.

Heres what to change,

- Salt
- Database prefix
- And sometimes the language

There are all kinds of guide on how to do it, and I will show it at a later stage too.

LOCAL DEVELOPMENT

This is something I have done pretty much since the day I heard about it.

It is running the website on my own computer's hard drive. I have a "copy" of all my customers' and my own websites on my Mac, so I can play with and test things without it hurting the live sites.

My whole team works like this, and it means that we can test that everything looks and works like it should, before touching the live site.

I am always testing plugins and new ways of working so I have a test site that makes this easy.

I also have an "initial setup" site, that I copy and paste when I build a new website. It allows me to quickly get going and saves me at least an hour on every project, sometimes more.

Here are some of the things done in it:

- Basic pages are added
- Basic page templates are added (portfolio, contact form and contact page, Gallery, Front page)
- Sliders added
- Basic plugins installed and basic settings added
- My standard users (the team and I) are added
- and some other things

MY DEVELOPMENT PROCESS

I have perfected my development process over the years, and the only thing I am missing now, is some automation.

The end goal for me, is to be able to have a form that I fill out with the project and website info and it should automatically setup a: domain, hosting, WordPress, theme, plugins, pages, and settings. I have most of the info for this, and just need some good hosting and a server admin to achieve it.

Here's how my current development process looks.

- I manually install WordPress locally and setup [version control](#), then I setup a development site on my server at fx. www.yvn.dk/dev/mysitename
- We work locally (on our own computers) for anything in the code and testing WordPress admin area settings (like setup of a plugin)
- We "push/deploy" the code to the development site and make final WordPress admin changes in on the development site

By working with Version Control we can see each and every change made by everyone to the code, allowing me to keep a close eye on quality, while making sure that everybody does their job right. It also allows us to not worry about overwriting each other's work and means we always have a backup of the code.

By working on a development site and taking regular database backups (we have BackupBuddy scheduled to backup to Dropbox once every hour) we can rest assured knowing we wouldn't lose more than 1 hour of work, if the worst should happen.

It also means we can see how things look before moving anything live (giving our customers peace of mind, knowing their reputation and business is safe).

That ought to have you lost for now - Or give you some good ideas to going forward.



WORDPRESS THEMES AND FRAMEWORKS

The term [WordPress theme framework](#) often refers to a code library that is used to help development of a theme.

In the old days of WordPress, there were some crucial problems with the way how themes were developed and maintained. There was no good way of upgrading WordPress themes without losing all the custom styling options. There was no way to prevent copying and pasting of the same functionality code in all themes.

While these two issues might not seem like a problem to an average user, these can be disastrous for a few reasons. What if you realised that the same code that you had been using in all of your themes had a security exploit?

Even more important, what if this theme was something that you publicly released for others to download and customise?

Yes, that's chaos waiting to happen. The core team and community decided to fix the issues mentioned above by introducing the concept of Parent Theme and Child Theme.



MY WORDPRESS ADVENTURE

I started using a framework called [Pagelines](#), but quickly started to learn just how bloated it was. When I was using it in 2011, I gradually moved away from it because it really slowed down our work and loaded so slowly.

I moved to [Headway](#), which I loved from the day I tried it. I would still use it today if we didn't build such custom websites for the bigger customers.

It's a drop and drag page builder that makes making layouts very fast and easy. Very useful for designers, and I would recommend it to you guys reading this book.

But here are a couple of minuses, with [Headway](#).

- You need to learn at least some CSS to be able to make the site good.
- It's hard to find a [Headway](#) developer that will build the site properly and to Headways best practice. I learnt this the hardway...
- It can be costly to get anything custom done, because developers aren't used to Headway, and take a lot longer to do things, and may not even be able to figure out how

For Designers, it's very good, because you can make banners, logo's and design elements, and then very easily and quickly add these into the layout.

There are a few awesome plugins for Headway, that really make it powerful! Sliders, webshop, maps, forms and other elements.

Well, back when I was using Headway, it was great! But I needed more, and became more of a coder than a WordPress admin user. So I tested out making my own themes from scratch, with no framework,

I found this was very slow and I lacked the opportunity to layout pages (I am bad at frontend and CSS) and I couldn't "see" what I was doing.

I tested [Genesis](#) at this stage, and loved it from the word go! I loved how clean and easy to read the code was. And I loved all the power and features that came with it.

Why you should use Genesis:

- You have a team of reliable/quality developers (Genesis is all code.
- You need to build anything custom
- You need a good base for developing websites
- You do a lot of PSD to WordPress work
- There are a couple hundred of awesome child themes to choose from that you can easily redesign and keep the layout of, to create custom websites

- It's easy for coders, to rework an existing child theme to be totally different from the demo.

Why you maybe should not use Genesis

- If you are best at designing elements and want to keep things simple
- You are not interested in code or managing coders
- You want to do it yourself, but words like hooks, filters, actions, and such are too nerdy for you.

I have settled with [Genesis](#) for developing websites now, and my company has moved to become true [Genesis Specialists](#).

But I am always looking to improve in different areas, and I am testing other frameworks, so we can have a flexible approach to building websites.

Recently, I partnered up with a designer, who has been using ThemeForest themes to build websites. Hiring subcontract developers to modify the templates to suit her needs. This gave me an idea, and I dug more into.

The way she would prefer to work is like this (and I imagine that many of you may also be inspired to work like this). She gets a customer, makes a layout/design, gets it accepted and sets about designing the elements (with her work mainly focused on the design elements).



Her strength is not in the layout/wireframing of a site, and that's why she likes [Themeforest](#) so much.

I found that this caused her a lot of problems, because of how those themes are built, and I knew from working with Headway, that there were better options.

So here is what I suggested:

- Get inspired by [Themeforest](#) and such.
- Find a nice layout
- Draw it up using a drag and drop/point and click theme like Headway or [Ultimatum](#)
- Modify the colours and fonts and such
- Make and add the Design elements (logo's, banners, sidebars etc.).
- Hire a developer for any custom changes (maybe there are some small changes for making the right responsive layout and such)

Ultimatum

I grabbed myself the latest copy of Ultimatum, (a lot like Headway) as I have wanted to test it for over a year. I tested it on a site for my design partner, to see if it could speed up development of those simpler builds.

I used 1 hour getting to know the theme and how it works. Then it took

me maybe another hour to setup the development site and make the changes to match the layout she needed. Now we need about 3-5hrs of custom coding to make the site look more like it should (There are some custom effects and functionality).

All this is about 6hrs, compared to god knows how long, editing a Themeforest theme.

Doing it this way, allows you to "just get going" and see how it is going to look right away.

There are many other good options out there, but this is the way I prefer:

- [Headway/Ultimatum](#) for simpler sites to build them fast
- [Genesis](#) for anything else



WORDPRESS PLUGINS

Now it gets fun guys!

I have some awesome plugins I use and recommend.

Now, I know there are many people that just need some functionality, so just go out and find a plugin for it, and thats it.

I don't work like that!

I have a couple of main powerful plugins I use.

- I use [Advanced Custom Fields](#), for making the pages/posts/and Custom post types easy to use for me and my customers.
- Gravity Forms is used for anything to do with forms, email sign-ups, and sometimes webshop functionality
- [BackupBuddy](#) I use for scheduled backup of all my sites to Drop box, I use it for backing up a customer's site and moving to our dev server. I actually have a couple of base websites built so I can just kind of copy paste them to a new server and be up and running very quickly (fx. a simple webshop with products, or a prototype for a new lead)
- [WordPress SEO](#) - For making sure my sites have all the SEO setting checked off.
- [White Label CMS](#) - for a cleaner WordPress admin area

- [Video User Manuals](#) - 50 video user guides and an always up-to-date user manual for WordPress
- [Jetpack from WordPress](#) - all kinds of useful functionality such as sharing posts to all social media and hiding and displaying different widgets
- [Ultimate Shortcodes](#) and [Intense Shortcodes](#) - for giving some visual options to the WordPress editor
- [Codestyling Localization](#) - I build a lot of sites in Danish, so the translation must be done properly
- [WPML](#) - I use this when a site must have multilingual options (multiple language)
- [My own Site Functionality plugin](#) - It has all the functionality for the website, such as portfolio, custom post types and other functionality specific to that site (oh and also our custom logo adder function)

And here are a couple of others:

- some of the [Genesis specific plugins](#)
- custom plugins, we make for customers (sometimes to extend an existing plugin)
- [Exchange](#), [Easy Digital Downloads](#), [Woocommerce](#) - for web-

shops

- [Restrict Content Pro](#) - for membership
- [OptimizePress](#) and [Premise](#) - for Landing Pages
- [WordPress-Property](#) - for listings, and property websites
- [Flexslider](#) (customised as our own plugin) for slider functionality

I have a step by step process for finding good quality plugins and will share that with you in the future.

BACKUP AND SECURITY

Its important that all your, and your customers's websites are always backed up.

I use BackupBuddy and whenever I land a new project, the first thing I do is install BackupBuddy and move the site to my development server and setup a scheduled backup to my business Dropbox

Do this, and make sure you team know how to properly use BackupBuddy and have access to your FTP/Hosting so they can fix anything if needed

If anything happens to a site, it takes just a few minutes to have it online again.

I have done this from the parking lot of the supermarket on my iPad when a site went down, because one of my customers installed a crap

plugin from WordPress.org

SECTION 4 - SERVICES AND TOOLS I USE

I have a large part of my business budget set aside for systems and software to make my life easier and my professionalism show through.

ON MY MAC I USE

- [Mamp Pro](#) - its my local web server so I can run all my websites on my mac
- [Tower](#) - For Version Control
- [Sublime Text 2](#) - it's my coding program (I recommend Coda 2 for non nerds.
- [Clarify](#) - for making step- by- step tutorials and process's
- [Jing](#) - for screencapture
- [Transmit](#) - for FTP
- [Screenflow](#) for Recording and editing screencast videos and tutorials

SAAS (Software as a service)

- [Activecollab](#) - for project management

- [HarvestAPP](#) - for time-tracking
- [Quoteroller](#) - for making professional proposals
- [Contactually](#) - for CRM
- [Google Apps](#) - for my company email
- [Hootsuite](#) - Social Media all in one place

WordPress services

- [ManageWP](#) - for managing many WordPress sites and to keep them all up-to-date
- [WP Engine](#) - Professional WordPress hosting
- [TordenBox](#) - Super fast and affordable danish web hosting
- [Beanstalk](#) - Deploying code to our websites (from Version Control)

Some random links from my bookmarks folder (which is HUGE!).

- [Wordpress plugin - projects](#)
- [Easel](#)
- [Activecollab](#)

- [Slideshare - Stop hacking WordPress](#)
- [Slideshare](#)
- [Manage WP](#)
- [Brad Frost](#)
- [Gravitywiz](#)
- [Style Tiles](#)
- [Phase 2 Techonolgy](#)
- [WP Remote](#)
- [Slideshare](#)

There are some other really useful tools and services available, such as unlimited WordPress fixes for \$100 a month and others. I will be sharing these in the future.



SECTION 5 - PROCESSES

PROFESSIONAL PROPOSALS

If you do this for a living, you need to make sure you stand out and show the customer your professionalism. You also need to make sure that you are productive and efficient.

My proposals are made in about 20mins using a program called QuoteRoller.

They are about 7 pages long and detail the potential customers's Business Needs, their Customers Needs and details What we will do, when, and why.

Many people in our industry spend a few hours and make a long detailed email.

Then they send it off, hoping they get that email back from the lead.

Using a system like QuoteRoller, allows me to get an email notification when the lead views the proposal, and also allows me to see how long they view each section.

In the future I will share with you an example of my own proposal.

CONTRACTS BETWEEN US AND THE CUSTOMERS

In our industry, there can be many misunderstandings and communication problems. It's very clear to have a detailed contract explaining all the fine details.

My contracts have saved my family's economy a few times and also show that bullies can't just bully us around.

I had a customer that I spent about 80hrs on, and worked all night and for over 2 days straight.

I also had my team working overtime but I was only paid around \$500 for the whole lot, but because of my contracts and processes, I have managed to get the money returned.

STAGES OF A NEW WEBSITE BUILD (OR REDESIGN JOB)

I have 6 stages in a web project, and they are as follows;

1. Discovery - This is where we gather all the info we need, and make wireframes, sitemap, and a scope of work document
2. Design - This is where PSD's or Style-tiles and Design Brief is made
3. Development - Here we add all the functionality and integrate the design
4. Testing - We test things as we go, but here is where we try and break it! (by getting spouses and friends to play with it)
5. Migration and the handover period - Our customers get 3 weeks of free unlimited changes (within reason) here is where they ensure they get the product they need and that it works as expected



6. Maintenance - We do plugin, theme, and WordPress updates, and improve conversion rates and all those things like SEO, functionality and such.

It's important to have a process and stick to it. It helps keep structure in a project and keeps you, your team, and your customer focused and moving forward.

Everyone knows what to expect and what's expected.

NEW CUSTOMER PROCESS

This is very basic but should inspire you.

1. Customer contacts us via this [link](#)
2. We give a quote, they accept and pay deposit of 50% upfront
3. We collect all login info and details and make a new project in [Activecollab](#).
4. I assign 2 team members to the tasks
5. We make a backup of the site and move to our own hosting (usually at our cost)
6. We make the changes on our own development version of the site and document all changes (they pay next 30%)

7. When customer is ready, we move the changes live to their website
8. Job complete, we collect remainder of payment

The most important for my business model is the 50% upfront and backing up to our own site, but it's also very important to document the changes.

SECTION 6 - MOVING FORWARD

Thankyou!

You have made it to the end!

I plan to make a follow up webinar where we take the outline of this e-book and go in-depth and show some of the process's and ways I do things.

I am working on my WordPress Apprenticeship program and will be soon looking for a select few (3-5 people) to be my beta testers of the new program.

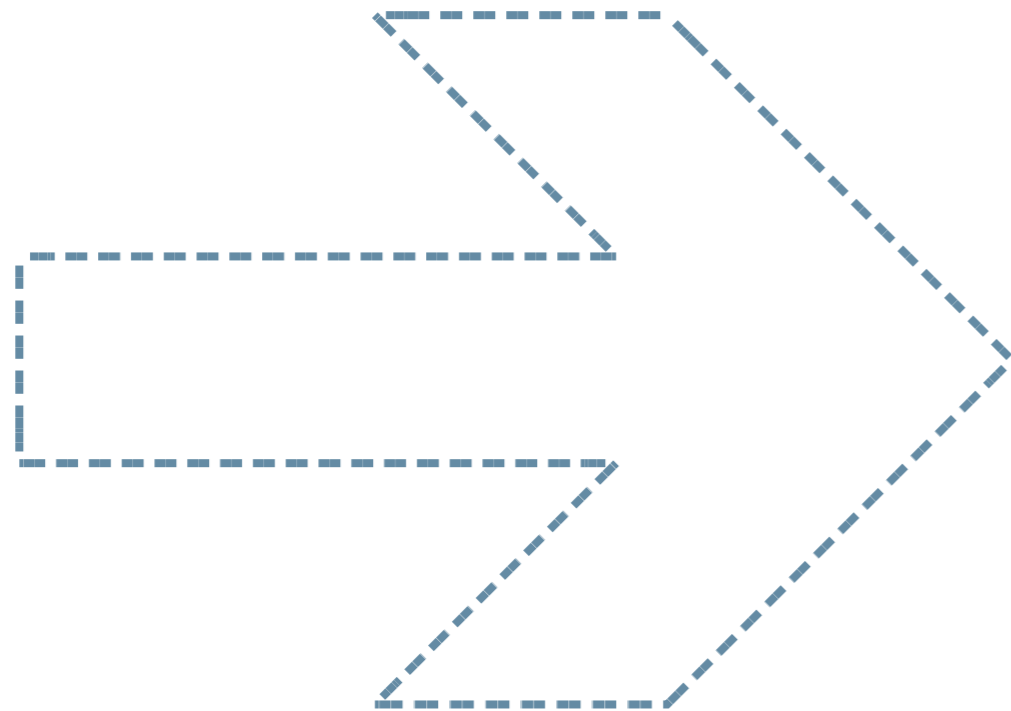
It will include:

- Step by step process's
- Templates
- Project Management system with pre made systems ready to hand over to your team

- Field Guides and modules on topics such as (outsourcing, Word Press development, project management and more)

Please share this link with people who you think could benefit from this ebook.

Hi Friends,
I have just read this FREE ebook “The Ultimate WordPress field guide for Designers” It’s packed with all kinds of tips and steps that will help me with my WordPress development. [Get it here.](#)



TO FINISH OFF WITH HERE’S SOME MORE INFO ABOUT ME

Phillip Dyhr Hobbs Australian Online Business Specialist, living in the Danish country side.

I have worked with WordPress since 2010, and have been living off it since August 2011.

When not playing with plugins, and theme files. I like to spend my time out in the forest chainsawing wood and dragging it out of the forest with my 4wd Land Rover.

Read more about me on my [WEBSITE](#)

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