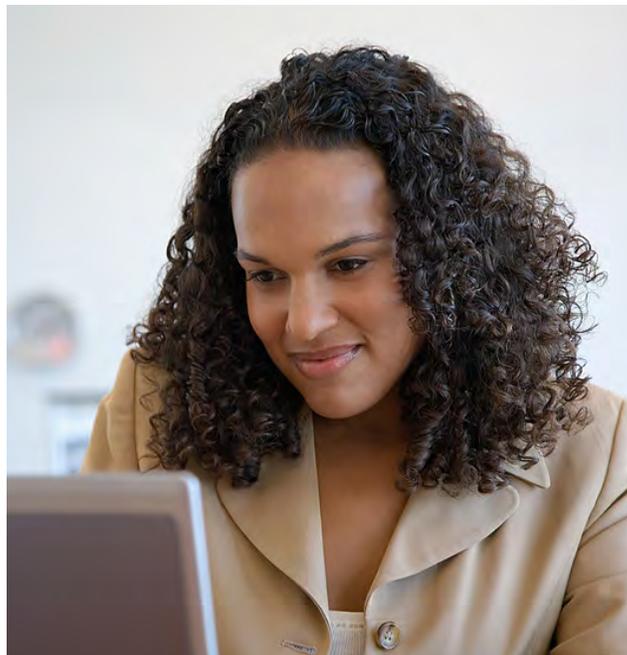


Client Considerations for Wordpress

Determining What Your Clients Need and Giving it to Them

for
Web Designers and Developers
(who are not coders)

by
Glen Draeger
Sweet Thursday Web Development



You, Your Clients and WordPress

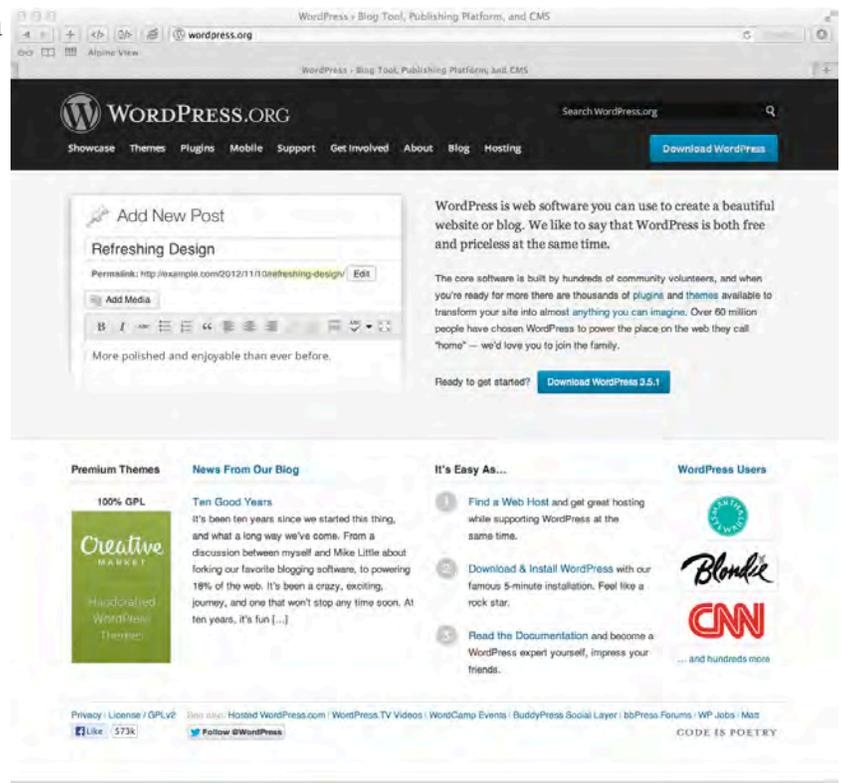
Your clients come to WordPress, the popular Content Management System (CMS), with a variety of skills, needs and budgets. As web designers, developers and programmers we must make sure that they have what they need once we release their websites (and them) into the wild world web.

It's not enough to simply give the client a great looking website. Google and other search engines do not care what the website looks like. They want to see code that makes sense, that ultimately presents content with mark up (HTML) that is meaningful and structurally sound, that helps them determine what kind of content is on the page and if it's arranged in a way that benefits the user.

The ideal website will both look great and use HTML correctly, that is, please the user and please the search engines. That's the goal for a business website.

Yes, Your Majesty

On the web content is king. It always has been. Modern search engines are constantly changing their algorithms to reward websites that reward their users with great and unique content. A great website experience will leave users wanting more so that they'll keep coming back to see what else is going on.



But for web developers there are other royal members in the castle: clients. Once the WordPress website is completed do clients have what they need? Did they get what they expected to get? Are they going to call you one night (don't answer the phone at night, by the way!) and say any of the following:

- “I changed something on the home page and now nothing works.”
- “I can't figure out how to change the phone number in the header.”
- “I think I messed up something.”
- “I can't remember where to login.”

It's not their fault. It's yours.

Say what?

Yes, it is. You blew it. Okay, I'm half kidding, but only half. It could actually be their fault. The customer is not always right....but it's a good bet to consider that neither are we web developers always right. I hope you were sitting down for that one.

How did this happen? If your client is frustrated with their new WordPress website then something went wrong somewhere. The goal for

Client Considerations for WordPress is to make sure that does not happen by helping designers and developers understand how designs are implemented into WordPress.



What Does Your Client Need?

That is the question. It's not about you. It's hard to remember sometimes. It's easy to talk shop and complain about clients (rest assured, they also complain about you), but without clients.... well, you know....I won't insult you by stating the obvious....or maybe I just did. I'm so confused! But don't confuse your clients. Make sure they know exactly what they are getting (a WordPress website) and how to use it.

First Things....ahhh....First

The very first thing, of course, is to determine if a WordPress website is the correct fit for your client. I'm assuming you've already determined that. So with that in mind...

Before you design. Before you code. Before you give the bid. Before you eat....you must determine what your client needs from their WordPress website. Your first question is the most important one, because it will determine final cost, how you design the website and how your programmer codes it. The first question to ask your potential client is (you're on the edge of your seat, I know):

Who will be updating the website?

You're kidding?

No, I'm not.

Ask your client, “Who will be updating the website?”

If they look at you like you’re crazy or like you’ve just asked them to explain quantum mechanics or if they have the incredulous demeanor of someone who has just been asked if they do their own electrical work...there’s a good chance they expect you to update the website. If that’s the case. No worries. You can do what you want...you’re a programmer or have a good one on staff, so you’re good to go. Cheers!

Of course, they could look at you the exact same way and mean exactly the opposite. George Bernard Shaw said:

The single biggest problem in communication is the illusion that it has taken place.

If they plan to update the website themselves this is where things get a bit tricky, because there are a number of things to consider that will affect the outcome of the direction you take.

Show Me the Money

What’s their budget? A bigger budget can mean a more complicated design, lots of different page designs and a more sophisticated WordPress site. A smaller budget may mean a less complicated design. But the tricky part here is that simple designs can still be complicated to implement into WordPress and possibly difficult for clients to update themselves (more on this later).

Let’s Define Our Terms

When I write about simple or complex designs, I’m really writing about how simple or complex it is to implement these designs into WordPress and in turn, how simple or difficult it will be for your client to update or add content on the web pages you’ve created and this in turn will be determined by the skill level of the client updating the web pages which may or not matter as much depending on how the WordPress administrative backend was set up by the coder/programmer.

Good grief! Does this guy know how to use periods?

Let me catch my breath...

Simple Designs / Simple Updates

Here are some characteristics of a simple design most likely simple to update in WordPress:

- Same header and footer throughout the site.
- All pages have the same look and feel
- Headings, lists, links, paragraphs and other HTML elements have a very consistent look throughout the website: size, format, color, margins, same padding...you get the idea

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About Robert Berkstresser

Robert Berkstresser's expertise in the field of charter, transit and school bus operations is backed by over 37 years of broad experience. Robert began his career in the charter bus industry in 1975 in San Diego and is currently the Transportation Director of a southern California high school district.



Mr. Berkstresser has a wide array of experience in Driver safety and training, hiring, disciplinary action and driver regulatory requirements and qualifications. He has conducted behind the wheel driver instruction and supervised training programs ensuring that commercial bus operators attain the proper driving skills for professional, smooth and safe bus operation.

Mr. Berkstresser has also been charged with managing carrier operations. He has insured

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A rate of \$ 175.00 per hour will be charged for all case work including travel and stand by time. Depositions will be billed at a rate of \$ 250.00 per hour. Any required airfare and lodging will be added to the invoice. Charges for trial testimony are limited to travel and stand-by time only. There is no charge for actual testimony in court.

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These are things that can take time for the programmer to implement and possibly make it difficult for the client to update:

- Headings that change size, color or spacing on a page by page basis.
- Pages with inconsistent navigation
- Same elements with different formatting throughout the site. For example, lists that use different bullets, paragraphs with different font-sizes, headings with different colors, etc.

Complex Designs / Simple or Complex Updates

Here are some characteristics of complexly designed websites:

- Many unique headers throughout the site. Could be different banner images on each page, different navigation.
- Many unique layouts
 - sidebar left
 - sidebar right
 - sidebars left and right
 - full width pages
 - multiple columns
- Many uniquely designed pages throughout the site. There may be a home or landing page very different from anything else on the site. There could be many pages that don't look like other pages on the site or that have very different elements than any other pages:
 - Page listing staff members
 - Portfolio pages
 - Frequently Asked Questions page
 - Etc. It doesn't matter what the page is, only if the elements on it are very different from anything else on the site.
- Dynamic Elements
 - Sliders / Faders
 - Tabs
 - Hide and Reveal elements
 - Things that move
 - Rotating Images
 - Alternate Realities (these are really complex!)



Let Me Make this Crystal Clear

A principal I had in Junior High used to say that all the time.

What's that got to do with this topic?

Nothing, I admit. But here's the crystal clear part:

Just because a design is complex, doesn't mean it has to be difficult for a client to update. This is where you have to make some things very clear to your client.

If you have a complex design AND you want the WordPress install to be easy to update for anyone, this will take more time on the part of your programmer to make sure that's the case and in turn, obviously, cost your client more money.

Developers and programmers who are familiar with WordPress will know how to make most anything fairly easy for your client to update. They have many things at their disposal to make this happen. There are vast amounts of plugins that can be installed in minutes that can handle numerous website features and make them easy to update. Where these do not work competent WordPress developers can use the power of WordPress to custom code the administrative area to make the entire WordPress website easy for your client to update regardless of how complicated the design might be. Not only can it be easy to update, but the design can be bullet proof.

Bullet Proof WordPress

By bullet proof, I mean the updating process can make it very difficult to mess up (this is the polite way to say it) the design. When a WordPress website is coded this way even if the client isn't careful they'll have a hard time destroying your design. This will make your clients happy. Just keep in mind, it takes more time for a WordPress programmer to bullet proof the website.

Your client needs to know this option (the bullet proof one) is available. And your client needs to know it will cost more. And they'll need to decide if they need it.



Is Bullet Proofing the Entire Website a Necessity?

Do you have to make the entire site easy for the client to update? Not necessarily. Maybe the client only wants to update certain areas of the website. Maybe most of the areas will remain the same or if they change they'll just want you to update it.

But some clients want full control, they want to be able to update everything and this is when you must determine how bullet proof you want the updating process to be. That is, do you want to make the site nearly impossible for a client to have a reason to call you at 10:43 on a Saturday night?

Some clients may have a very savvy html/css coder on staff and are really only hiring you to build a website that that person will be updating. On the other hand, some clients may have a revolving door of web site updaters who have never seen HTML code and don't want to see it. If they're going to be making updates, it will be important to make sure it is easy for them while maintaining the integrity of the website design.



What's Your Point?

The point is it's important to know this even before you design because the answers to these questions can have big effect on your design process. If you understand what the client wants AND what they're willing to pay for you'll be way ahead of the game.

That's a bit of cliché, wouldn't you say?

Well, yeah, but it does kind of get his point across.

But with a little more thought he could have come up something original.

Maybe it's late and he needs some caffeine?

It is and I do.

For Designers Who Are Not Coders

If you are designer who does not code (I'm coder who does not design) it's a good idea to un-

understand the concepts behind the HTML that is responsible for a webpage. This will help you understand, to some degree, how easy or difficult it is to implement your designs into WordPress.

The Basics: HTML and CSS

HTML

HTML tells the search engines what they are seeing...structurally. For example most pages have or should have a h1 tag:

```
<h1>My Webpage Heading</h1>
```

The h1 tag DOES NOT determine what the heading will look like. Nor do the search engines care what the heading looks like. They only care that these tags are used correctly. For example, if you have a h1 tag on the page, then you should NOT have a h3 tag on the page unless you have a h2 tag on the page.

Why is this important?

Many times WordPress admins/editors use tags for styling without consideration of web page structure. THIS IS NOT THE CORRECT THING TO DO.

Why is he using all capitals? I find that very annoying.

Sorry. Let's try that again.

This is not the correct thing to do. Tags should be used to tell the search engines / end-users what the content means, to build the structure of the page in a meaningful way. This is very important for Search Engine Optimization (SEO) and it is something your clients should be thinking about.

Then what makes a web page look cool?

Enter CSS

CSS (Cascading Style Sheets) is what tells the HTML tag what to look like. It's perfectly feasible to make every HTML tag look exactly the same with CSS. That is, with CSS every heading, every paragraph, every list could be Arial, 12px, black. The user would see no visual difference...the search engines would see exactly what they've always seen...the HTML tags.

Or you can make every HTML element look wildly different. You can make them look wildly different on different pages without ever changing the tag itself.

It's a very cool feature about web pages. It's possible to have 10,000 web pages and change the look of the h1 tag on every page with one line of code.

But let's say you design a page that for some reason has a heading tag that you want to look different on two different pages....the same tag.

Let's call the pages: About and Contact. Here's some CSS for an HTML h1 tag:

```
h1 {font-size:18px;font-weight:bold;}
```

About Us
Contact Us

This is telling the HTML to format the h1 tag as bold and at 16 pixels on every page in the website. If I put a h1 tag on each page they will all be 16 pixels. But what if I want them to be different sizes? I might do this:

```
h1 {font-size:18px;}  
.about h1 {font-size: 24px;} // for the about page
```

About Us
Contact Us

But let's say I want the *about* and *contact* page to have different sizes and the rest of the website to have the same size. Then I might do this:

```
h1 {font-size:18px;}  
.about h1 {font-size: 24px;} // for the about page  
.contact h1 {font-size: 30px;} // for the contact page
```

Other Page Headings

About Us
Contact Us

These are simple examples, but the lesson is this: it takes more code to stylize individual pages and if you have a lot of different styles on different pages.....the coder (me) has to take more time to code and you will have to charge your client more because....(greedy coder that I am) I'm going to want more money for the extra coding from you.

He does sound kind of greedy doesn't he?

I don't think so.

Come on. How long could it take?

It's a good idea to speak with your WordPress developer/programmer after you talk with your client and before and during the design process. Something that may seem like it should be quick and easy to code may take a lot longer. I can't tell you how many times I've had a client or potential client say to me, "This shouldn't take you very long."

...and you would know this because...?

I don't actually say that...but it is what I'm thinking.

But Wait....There's More!

Even a simple WordPress install will come with some unique pages that will probably need some extra styling. It's up to you how much, but they are pages that need to be remembered:

- **Static Page**
This is a typical page for example, an "About Us" page.
- **List of Blog Entries**
Every WordPress website comes with blog capabilities. This page will list the last 10 blog entries or whatever you set it up to list.
- **Single Post or Blog Page**
This can be very similar to the static page, except there is usually a place for comments.
- **Archive Pages**
Can be very similar to the list of blog entries
- **Search Results Page**
All WordPress sites have a search feature if you want it. The search results page can be styled anyway you want it.
- **404 or Page Not Found Page**
Most people forget about this page, but it can be a very fun page to get creative with instead of simply using the default, particularly if you can tie it in with the website in some

way. There are actually contests for the best 404 pages on the web.

There Could Even be More That!

Depending on the functionality of your site there could even be more pages to style. For example an ecommerce website will often need styling for:

- Products Page (listing all products or categories)
- Single Product Page
- Login Page
- Account Page
- Checkout Page or Pages
- Shopping Cart Page

In WordPress a site functionality like ecommerce will most likely be handled by a plugin, but just because you use a plugin doesn't mean that pages won't need styling. Themes sometimes do not play well with plugins and require a lot of extra work by the WordPress programmer.

There could be other plugins that add more pages that need attention:

- Forums
- Member plugins
- Portfolios
- Calendars
- And on and on.....

Be aware of the possibilities and make sure you and your programmer talk these over before you make a bid and before you start designing.

In short, the keys are this:

- Ask your client if they plan to update the site themselves.
- If they answer yes, find out how much of the site they want to be able to update.
- Explain to them that if they want every area of the website to be easy to update the cost will be more.
- Determine if it is necessary for them to be able to update every area of the website. Maybe they only need to be able to update the blog.
- Talk to your WordPress coder/programmer.
- Design.
- Talk to your WordPress coder/programmer.

Common HTML Tags Used in WordPress

The most important thing for you to remember as a designer is that each and every HTML tag can have a unique look and feel. The beauty of this for a client updating their site is that if they simply use these tags their site will look the way you designed it. They don't have to play with color, or font sizes or padding or letter-spacing or anything. They just use the correct tag and it's done.

But they need to use the "correct" tag in a structural sense, not a design sense. For SEO they must be thinking about structure, not design. So your mission as a designer is to design for these tags when they are used in this way (see heading tags below).

It's a little like being a poet writing sonnets. The sonnet requires a very specific structure and the poet must accomplish his or her creativity within the confines of that structure. Shakespeare was great at it.

Yeah, well, I'm no Shakespeare.

No problem. Who is?

At the beginning of the design process consider all the tags you have to work with and design for them while keeping in mind the necessary structure for good Search Engine Optimization (SEO). What will the page look like if the the client uses the code they should?

The second thing to remember is this: if you design pages that are going to look wildly different, then these differences are going to have to be addressed in relation to the client updating the site. As a programmer, I can target specific pages with CSS to make the same tags look very different. If I do this, the client can easily update any page, only using the basic tags, and your design will remain intact. Obviously, this takes longer on my end...but it makes updating a site with many different designed pages very easy.

Keep in mind I am not pushing for simple designs that look the same across all pages. As always, the clients' needs and wants are the most important. And as always, this almost always involves budgetary considerations. The goal here is to help designers and developers who do not code, understand what kinds of designs would take less time to code and what kinds would take more time. As a general rule with complicated designs, the easier it is for the client to update, the more time it will take the WordPress developer to set up.

As a programmer I prefer more complicated designs, but I realize not all clients have budgets for higher end designs.

Here Come the Tags!

Heading Tags

h1, h2, h3, h4, h5, h6

Remember, ultimately styling is not the most important function of these tags. Think of them as a way to structure content, like you might structure a research paper. For example the code for a web page about books might look like this:

```
<h1>Books</h1>
<p>Intro</p>
<h2>American</h2>
<p>Intro</p>
<h3>Moby Dick</h3>
<p>Content</p>
<h3>Scarlet Letter</h3>
<p>Content</p>
<h2>English</h2>
<h3>Tale of Two Cities</h3>
<p>Content</p>
<h3>Jane Eyre</h3>
<p>Content</p>
```

When designing the site, keep these tags in mind. If all these tags have the same styling on most pages (a home page most likely would be different) it's a far simpler site for a coder/programmer to set up and most likely easy for your client to update.

Font Style Tags

strong, em

These tags tell search engines that you are emphasizing the word or phrase or content in some way. Traditionally `` is a bold tag and `` is an italic tag...but with CSS we can make them look like anything we want. Neither would have to be bold or italicized. You might want to design them differently. But again, to make things easier for a client consistency would be the key.

Paragraph

p

The `<p>` tag is the basic paragraph for content.

address

The `<address>` tag should be used for, you guessed it, an address.

Links

a

The `<a>` tag is used for links, often traditionally underlined with a different state for a hover.

Quotations

blockquote

The `<blockquote>` tag should be used for quotations. A good use of this tag is for testimonials or quotations from books.

Lists

Let me emphasize once again. HTML tags are about structure. If you are going to list the top ten movies on a web page then you should use one of the tags below. If you are going to list them in no particular order, the `` or unordered list tag would be the best choice. But if you were going to list them in a particular order the `` or ordered list would be the best choice.

But lists should use these tags. Traditionally, the `` tag uses bullets and the `` tag uses numbers. But again, we can make them use whatever we want: images, letters, etc. As a designer you can be very creative here if you prefer not to follow tradition. The search engines will still see them for what they are.

```
<ul>
  <li>an item</li>
  <li>and item</li>
</ul>
```

```
<ol>
  <li>first item</li>
```

```
<li>second item</li>
</ol>
```

Tables

In the old days the `<table>` tag was used to layout the design of a website, something for which it was never intended. But before CSS became what it is today, coders realized they could use tables to make very complicated designs...and they did.

Today, this is very bad practice. Bad coder! Bad coder!

The `<table>` tag should be used for tabular data. Think of it as a spreadsheet of information. If you have a website with a lot of this kind of data, you can get very creative with the tags that are all used within the `<table>` tag. These tags are:

```
<tr>: This a row of data, i.e. "table row"
<th>: This is a heading, i.e. "table heading"
<td>: This is the data, i.e. "table data"
```

Borders, colors, fonts, background colors, alternating row colors, all this can be added via CSS so that when your client adds a table of data to his or her website it is all automatically styled.

In the HTML it would look like this:

```
<table>
<tr><th>Heading One</th><th>Heading Two</th></tr>
<tr><td>Data for heading one</td><td>Data for heading two</td></tr>
</table>
```

Forms

It's not often that you have to worry about a client adding a form to their site. However, with WordPress there are many plugins that allow the client to easily add form capabilities.

Just like the HTML tags above, form tags can be styled in all kinds of ways. Like the tags above with CSS we can make sure that all the form elements are consistent across the site, and like the elements above it is important they are used correctly.

Form Tags

`<fieldset>`: The `<fieldset>` tag surrounds a group of input elements. It's a way to organize them. For example you might have `<fieldset>` tags enclosing personal information, and others enclosing contact information and a third set enclosing company information. By default these usually have a border, but they don't have to and very commonly do not. Quite often a `fieldset` tag is never even noticed by the end-user.

`<legend>`: Think of the `legend` tag as a heading for a `fieldset`.

`<label>`: The `label` tag let's the user know what the input element is. I.e. name, phone number, etc.

`<input>`: The `input` tag is where the user enters information and submits information. There are a number of different input tags and here are the most common ones:

```
<input type="text" />
<input type="password" />
<input type="email" />
<input type="radio" />
<input type="checkbox" />
<input type="submit" />
<input type="hidden" />
```

With CSS we can style all input tags at once or specific ones if we want.

`<textarea>`: This is larger input area for text. Very often used for comments or for large areas of content in CMS systems.

[have image with all the above form elements labeled]

Final Thoughts

One last thing on tags. Tags can be styled with something called a "class". For example you could have an `h2` tag like this:

```
<h2 class="green">My Green Tag</h2>
```

Why would you want to do this? Well, let's say you want to give your client more control over

the tags they use, but you want to keep them styled and colored consistently. A client could add a class to the h2 tag and it would automatically be styled the way you want. Of course, the client would have to know what classes to use.

Wrapping it Up

Those are the common tags. There are others, but if you understand how these work in conjunction with CSS then you'll understand how the others work when you come across them.

In the Real World

Let's explore a few simple scenarios. Your potential client says:

“Cheap as possible and extremely easy to update.”

Design for the basic tags and keep everything very consistent on a page-by-page basis.

“We have a big budget, but we'd really like you to update the site.”

Design elaborately if you like. Many unique pages. The cost can be lower since the programmer does not have to code for non-programmers.

“We're a big a firm. We have people in house to update the site.”

Find out the skill level of those “in house” people. Let's say it's minimal. With a big firm it will probably be a complex design. It's important to let the client know the site can be made bullet proof, but the up front cost will be more.

“We don't have much money, but we want a site like this [picture any very complex, high-end site].”

Let them know they must have the wrong number. Break for lunch.

It's Down to You and It's Down to Me

As a programmer my job is to make sure clients can add content easily without fear of destroying the consistency and integrity of their website's design.

As a designer your job is to design in such a way that a user using HTML tags correctly in a WordPress install will end up with a great design, the design you intended they have, without ever having to think about it.

Together, we've done the thinking and planning for them.

