JAMESSCHRAMKO

From Concept to Launch: Navigating the Steps of Website Project Management

Explore the website design and development process with James Schramko and Charl Coetzee, highlighting key management steps for project success.

Charl Coetzee

James: James Schramko here. Welcome back to my podcast. This is episode 1007. And today, we have Charl Coetzee back. Welcome back, Charl.

Charl: Hey James, always great hanging with you and super stoked for our conversation today.

James: For those listening, the visual is amazing. You've got this long, gray beard and a little black beanie, reminds me of a rock musician. I know you play the guitar; you've definitely got the look. And I'm appreciating it. It's always good to see how my guest shows up. But it was stunning. Thank you.

Charl: Awesome. Awesome. Thanks, James.

James: Now, we've been talking about web-related stuff in the last few episodes, of course, you're in my community, you've been helping a lot of my members with their projects, especially using the Kleq platform, that's spelled K-L-E-Q. I've been very interested in the feedback we've been getting. I'm getting feedback, like, Hey, this guy knows what he's talking about, hey, this guy's got good values, hey, this guy actually understands marketing and the computer stuff, which makes him a valuable supplier.

So I appreciate that you've been sharing this, and the feedback that we've been getting means it's a joy for me to invite you back to talk about this stuff. Today, I want to talk about website project management, because if you're a small operator online, or you're starting out, like I was, you know, I was learning how to build my own website, which I think probably delayed my success to some extent. But it also just coincidentally helped me trip over website software as an affiliate. So I wouldn't want to change that.

But for most people, they shouldn't be messing around with their own website, I think we can all agree on that. But they're going to need help. But a lot of people don't really know what to expect when it comes to managing that project. We've got all the great ideas, we might have something that we want to try selling or that we are already selling. We probably know our website looks crap, it might have been built by Jimmy down the end of the street and offered to do it for $500. We want to go professional.

Let's see if we can break down a few steps with project management. Let's go into your world a bit, Charl. Let's see, when something floats across your computer screen, or you have a Zoom, or you get an inquiry from a client, I'd love to track a project all the way through so that we can build an understanding of what we could actually expect in terms of who does what, how long things take, what's included in the scope, what sort of budgets we might be working with, what size project do we bring to certain suppliers?

What does the project cover?

So let's just start out with defining the project's scope. I think that might be a good step, because you're going to get various size projects across your desk, what sort of stuff do you tend to work with?

Charl: Yeah, no, you're 100% right there, James, the scope of a project is basically the starting point, because it might be something as simple as, there's a button on my site that's not working, we need to update that and integrate it with my CRM. So it can be something that you can explain in an email, you know, so that in and of itself is a task that you can just explain clearly, but then it can be something totally new, like, you know, sometimes we transition people over from, say, a WordPress WooCommerce environment over into something like Kleq.

And then it's like multiple touchpoints, multiple skill levels, multiple things involved, and then the scope of that project becomes so much bigger. So you can't explain that in a simple email. And I think this is so critical, because you know, one of my favorite sayings is that teamwork makes the dream work. But you can have the greatest team available. But if you can't articulate your vision, and communicate the process with your team, you're not going to extract the value that they have to offer.

And that's why we read about Coach John Wooden, he's got a great team, but the coach knows how to get that team to perform, and to win a game, and to win a series, all those kinds of things. So that is important too, for us, as entrepreneurs, to understand whether you're going to do it or delegate it, it's just important to understand that process.

And like you just said, you want to start with the scope of the project. And typically, when I want to outline a project with somebody, it's important to me, number one, before we get into the nitty gritty stuff, just understand the goal of this project, what are we trying to achieve here? Right? We've spoken about on our previous episodes about the awareness phase, where you're getting people to find out about you; consideration, you're starting to build your list; conversion, you're making sales, and then obviously retention, keeping those members or selling them more stuff.

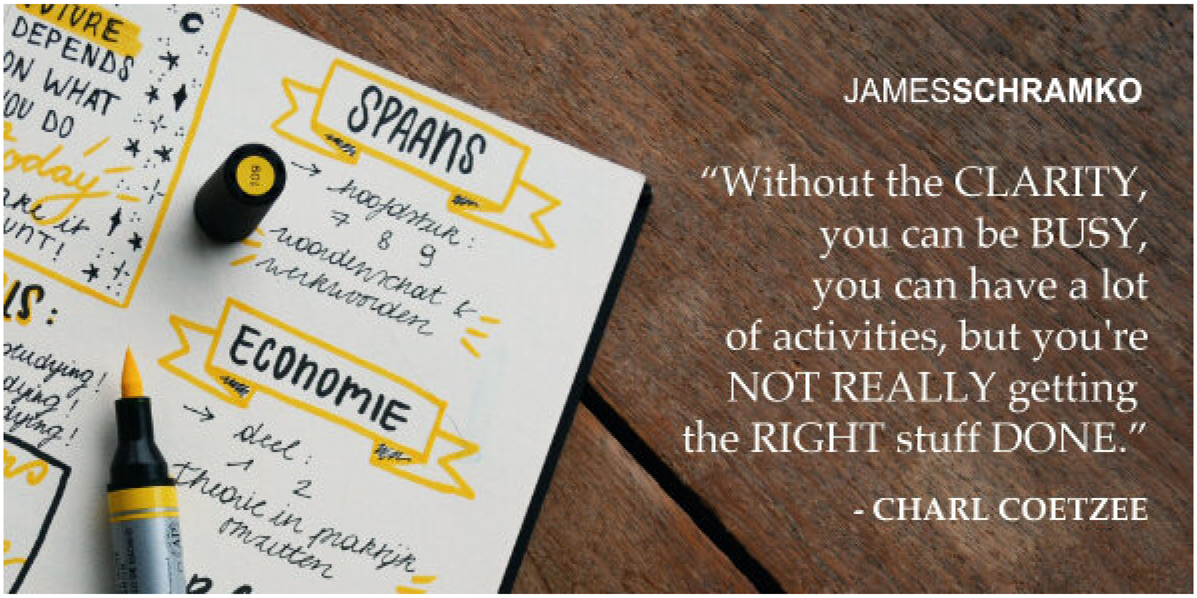
So those are the four different phases. So I'm trying to see, does the goal fit into any of these four phases? And then based on that, once I understand the goal that someone has, then it's important for me to look at the deliverables, you know, what's it going to take to actually get all of this work done? And then also deadlines, because if you don't introduce the concept of time into this project, the project’s going to die somewhere.

And we as entrepreneurs need to be aware of the fact that our greatest skill, which is ideation, seeing opportunity, taking risks, doing all these crazy things, you know, that we do as entrepreneurs, it's great, and it's to be celebrated. But it can also become your Achilles heel. It can become a weakness if it's not managed well.

And that's why I find that if you can define a scope, what is my goal, what are the deliverables needed in order to reach that goal and get this project done, and then what deadlines are we working with?, that helps you to narrow your focus and kind of, you know, don't jump around from thing to thing, because like they say in the book, I think it's Essentialism, you can do anything, but you can't do everything.

So just getting everything on one piece of paper, the finding that scope, that is the starting point for anything that you're going to do, whether it's small or big. And that really helps you as a starting point to see, okay, great, how can we identify potential risks or potential constraints, even looking at past patterns, when you try to do stuff in the past, what went wrong? Take those data points into consideration.

And then once you have all of that stuff handy, now, as a business owner, as the visionary of your business, you can go in and articulate this to your stakeholders, whether that's clients, team members, suppliers, whatever the case may be, you now have a one piece of paper with your goals, your deliverables, your deadlines, that you can communicate that plan with the team.



So I find, once you have that clarity, then it really helps you to actually start getting momentum. Because without the clarity, you can be busy, you can have a lot of activities, but you're not really gettung the right stuff done.

James: I love how you use your hands when you communicate, Charl, that's exceptional. I have to get my hands up and out. Thank you. I'm always learning from you. So with the scope, I imagine that doesn't take much of a project where it should just move on from the person actually trying to complete it themselves.

Charl: You know, that's a tricky thing, is like when you start to try and do work, you know, that is not in your mind skill set, people say you are paying a premium for a subpar result.

James: That's a great way to look at it. The other thing that comes up a lot, the novice person who's visionaries come up with these great ideas, they usually brainstorm this amazing outcome they want. So in terms of defining the project, they're going to say, Oh, okay, this is the goal of my website, these are the features and functionalities that I want, and they're going to give you a big checklist of all the things it has to do.

And invariably, you're going to say, There's nothing off the shelf that does these things, you would have to custom build this thing at a great expense. And often, I'm having the conversation with people saying, You know what, just cross some of those things off that you think you need. I think you don't need all those things. I think what you need is a web page that collects emails that you can communicate with people. And then you need a page where you can deliver the thing that you've sold. And all the extra little bells and whistles, maybe you want to put that down the track.

Do you find yourself educating someone when they're trying to define the scope? Do you sometimes say, Hang on, maybe you think that's the goal. But if you need all of these features or functionalities, you're in for a headache.

Charl: Yeah, that's such a great point, because the second thing, once we have that project scope, is we want to define that project plan. And part of that is allocating the resources. And one of the most important resources is your tools that you use. So before you get to the tools, I also want to look at what's the function here. Because like, you wouldn't want to drive a car with only three wheels or have a three-legged table, you know?

So I always take it back down to where we’re at with that goal. Because sometimes people have a lot of goals, but it's like, people, you know, that thing they say about the gym, these big buff guys, but they always skip leg day? You don't want to skip leg day in your strategy and have too much focus on one area.

So I very often tell people, Okay, great. These are awesome ideas. But taking a word from the software, agile space, they've got this thing they call a backlog. So it's a great idea. And even with John, that's what I love about John, the way he runs Kleq is...

James: John, the founder of Kleq.

Charl: Yeah, totally. So whenever there's people with feature requests, or whatever the case may be, with a team, they've got a backlog where they manage it, like which of these requests is going to give our members the biggest bang for their buck and the biggest impact? Because if they try and be everything to all people, you know, that's a recipe for failure.

And that's kind of what WordPress has turned into, you know, with all the plugins and all the different things. You can do so much with it, but it becomes like this mammoth thing that you have to deal with, and plugin updates, and theme updates, and WordPress updates. And it's just, you know, it's security issues.

And then you find yourself, and I've been there, you're on chat with a hosting company and try and sort this out, or you got a hack, or you got a malicious infection somewhere, and it's just taking you out of that zone where you need to be operating and doing what you need to be doing. So for those reasons, we do two things.

We look at the scope, do we need to do all these things right now? And so it's always great if you can pare down the scope of the project, because that means it's going to get done quicker, and you can start getting results for it faster.

The tools and the timeline

And then the second thing is looking at your tools. Because at the end of the day, you know, if you use like 10 different tools to do a simple campaign, the breakage of that just goes up exponentially, because all these things have to keep communicating with each other.

So I love something like Kleq, that is not trying to be all things to all people, it's got a very specific goal in mind. And it makes it easy for you to build your list, to make offers, to collect payments, to deliver products, to do all these essential things, and then it's got the nuances on a feature. So whenever you're doing your project plan, pare down the scope where possible, put other stuff on the backlog that you can come back to later.

And then secondly, make sure that the tools are there to support you. Because the right tool for the right job just makes everything so much easier than trying to have kind of a duct tape solution, which is that complexity as an entrepreneur is not your friend, and it's going to cost you time, money, effort, joy, and all those kinds of things. So simplicity is your friend for sure.

James: Yeah, it's like the pioneers are the ones who get the arrows in the back, right? I've created that Frankenstein website, because that's all I had available to me back in the day. Last year, I switched across. So there was a little bit of pain in that. But my goal was very clear, I want to simplify. I want someone else to be doing the patches, and the updates, and managing the hosting.

My team have now, you know, they're spending more time making videos and doing marketing instead of dicking around with web stuff. And also, I'm not paying a service provider to fix broken things. In terms of timeline, I imagine it's much easier to build out a project timeline when you know that, let's say you're using that platform, or people have already been there before, they've already done this, they've already pushed through the development requests years ago, like me.

And now, inside Kleq, there's a campaign builder for a membership site, there's a campaign builder for a book funnel, because I asked for that, and they got put there because that would be a big impact for my audience. And now the project timeline shrinks, because instead of having to invent stuff, or create stuff from scratch, someone doesn't have to pay you to go and build that. They might pay you to click the button, and then to help them populate the data, right, which is more the sort of project you've been doing lately for some of my clients, right?

Charl: Yeah, that's such a great distinction, because, you know, if you're working with something where you always have to rely on somebody else to make a tweak for you, that limits your maneuverability. And your speed to market, like speed of implementation is so important. So it's great when something is good enough there for you that you can go and make a tweak where needed.

And so either you're going to be time rich or actual money rich. You're either going to have more time than money or more money than time. So depending on where you're at, that's going to depend on the kind of decisions you make. But you know, the thing is, you shouldn't have to, you know, pay top dollar, if you just want to change a word or two on your website.

If you have that ability, you want to log in, you want to change that, I always believe in telling my clients this, and once we're done, you're going to end up with a document, we're telling you everything, how it works, we give you the source files, or whatever the case would be, you can go and do it.

And the thing is that ten to one, or most likely, they come back and they say, Can you just help me with this and that? So the fact that we don't try and hold things back makes a big difference. And I've found that sometimes when you work with designers or with people that come from the older school, they want to own everything.

An argument for no-code

James: Oh, the black box. They want the proprietary IP platform that no one else in the world uses so that you're completely dependent on them. The other problem is, you know, we used to have a website development business. And we developed at the time it was on WordPress. And we'd hand over a project. It wouldn't take them long to blow the website up. They'd go and change a line or something, or they'd publish something in the code mode or whatever. I really like the no-code environment, because it's much harder for the consumer to destroy what you've built.

Charl: Yeah, that's so true. I remember back in the day, when we first did our first website, and it was Joomla, not WordPress, believe it or not. So I remember it, figuring it out, how to do stuff on Joomla. And then we moved to WordPress. And then Facebook released the like button, but there wasn't a plugin yet to actually go and install a piece of code in your core theme files.

And I remember messing around with that. And if you just mess up one character, then everything goes offline. And here I am trying to add a line of code just to get a like button on my website. So no code is definitely your friend. And you want to leave that to the professionals. Because the other thing also, that people don't realize, is the speed that it takes for your site to load.

If you have this very bloated software, and too many plugins, too many things on your website, it's going to take a long time to load. And even in today's day and age, four to six seconds is kind of an eternity, right? So you want to leave the hosting and the way the code and all that stuff features with, you know, the networks and the hosts and all that kind of stuff, you want to leave that to the professionals.

And then when you go and change a word on a site, you know you're not going to mess up any code or any proprietary stuff or whatever, it's literally there for you to go and work with. So that gives you maneuverability. If you want to change something, you can go and do it. And you don't have to wait, you know, for supply.

And one thing that we do, is us being in South Africa, we're kind of here in the middle of the world. So Australians wake up before us. And then New Zealand is even before Australians I found out the other day, so then by the time they've been awake already for the whole day, then we only wake up. And then we get to Europe, and then it's America, and then it's Hawaii and so forth.

So there's this time zone issue that you don't always want to be limited when you need to do something in the moment. Oh shucks, my order form had the wrong link in, so I need to go and change something, but I can't reach Charl because him and his team are asleep. You don't want to have that kind of problem. But if you need to go and update a link on your sales page, log in, change the link, hit save, and you're off to the races.

And something like Kleq, they even have a knowledge base, right, or a live chat. If you want to learn how to do something, you just ask them. So I like the fact that clients have that freedom and flexibility to be able to do stuff. And normally, having that ability means you probably don't need it. You don't want to have something where someone's running a launch, or they're doing something, and something goes wrong, and then they can't reach you, right?

So these are the kinds of things that you want to test beforehand. And when you have your project plan, you literally have all the line items for your deliverables, your milestones. You can get it done, you can test it, and you have all that stuff ready to hand over. So that just makes all of that stuff so much easier in your second phase of your project management.

James: So you're listing all the tasks, and you're listing it in a schedule. This is the task, this is when it should be completed by, you used the word milestones, I like that. And then I imagine as a part of that, the next step is probably, who's doing what? I know from having a website development business, and I'm really glad I don't have one now, like, hats off to you, mate, because it's a tough business at times, but I think it's probably getting easier, maybe, I'm not sure.

Defining who does what

But sometimes, the person who's commissioned the job has to supply stuff. They might have to supply words, or they might have to engage a copywriter, or they might be working with a designer who's done their logo or business cards or something else, and they're waiting on a design style guide, etc. Or if they're sensible, they'll just ask you to do everything if they possibly can. But there may be bits and pieces required. That should also be spelled out, correct?

Charl: Yeah, totally. So whenever I talk with a client, we love transparency, and we love to finish a job on paper. So like, what does it look like finishing on a paper? In the same way that you wouldn't start building your dream house without the blueprint where everything is already mapped out.

Now, part of that is, I'm going to do some stuff, my team's going to do some stuff. But some of that stuff, the entrepreneur might have to do. So for example, what's your offer? Do you have your course videos ready? Are you working with a different copywriter? Do you have a different designer? Or sometimes, we do those things in house. But like for example, the simplest solution is the business owner will have to open an onboarding call, so we can learn more, we can ask all the right questions, document it in order to get into that project plan.

And also, they might ask you for sales videos. So we might give them the scripts for the videos, but they still have to go and film the videos, either send it to us to edit, if we're adding that to the service, or send us the embed codes. I want to be able to clearly map out what responsibility is on the business owner so that they know, Okay, great. At this date and time, Charl's going to give me scripts, I've got to go and film the videos, and get that stuff back to him.

Because once that is clear, and people can understand what the deliverables are, it's easy for them to plan for that. But when the whole thing is ready, and now you say, Where are the videos or whatever, and if they're not aware of the fact that they have to do this or that, or they don't get to it, it's going to hurt the momentum of the project.

And I always use this silly example, is if you're going to go make a cup of coffee, right? You don't want to get to your kitchen and then go, Oh, shucks, I don't have any Nespresso pods. Now you go to the store, you buy Nespresso pods, you come back home and make your coffee, and then you say, Oh shucks, I don't have any milk to put in the frother to make a cappuccino. You go back to the store, you get milk, you come back home again.

And by this time, you've wasted a pod, and then your friend wants sugar, and then you know, you don't have sugar. And it's like, it's laughable when we think about it. But unfortunately, that's the way people do projects, right? They don't understand, I need my machine, my pods, my milk frother, proper milk that's going to make a nice froth, sugar if people are going to have sugar, clean cups. And I mean, these are things silly to talk about that. But that's why I like to map it out. Project scope, project plan.

Tackled so far…

James: That's why we're doing this episode. So just to recap, the milk, the sugar, everything, it's defining the project scope, right? Finding out what the goal of this whole thing is, and seeing what's reasonable or not to actually be the goal, with some guidance. Second step is building out that project timeline, so that you can know exactly what the tasks are and when they're going to be achieved by.

The next part, the third step is assigning all the roles and responsibilities. You gave a huge nugget there. And that was that you might give someone a video script. Like, that assumes two things. One is that you actually know marketing, because you actually know they need a video. And the second thing is that you can actually provide them a script. Right? That's amazing, because if you go off to some jobs board and hire some coder, they're not going to integrate your marketing message or have an eye for the design.

The fact is, you actually have your own music membership site. So you know this marketing stuff. I met you at a marketing conference where you are doing a high-level mastermind with power hitters in the room. And so I know that you've got that deeply embedded context. You're not going to let the customer do something that's crazy, based on what you know. So I love that depth that you can bring to the table, because that's really what I think separates you from your sort of run-of-the-mill agency/web shop, etc.

The inevitable question of pricing

Of course, there's another step that needs to come after that. We've got to talk about the price at some point, creating the budget for this project. And, you know, is it reasonable for someone to know what it's going to cost them before they get too far down the track so they don't have to keep going off and doing this and doing that? Can they have an estimate that's reasonably accurate in terms of what their costs are as you go and then when they're finished?

Charl: Yeah, I think that's critical, because that's one of the resources that you need to manage, is your budget. So for example, like we just discussed on the previous episode, you've got copywriting, you've got all the technology and the wiring, and then you've got the design. Typically, those three things, copy, tech, and design, that's all the things that you're going to need to do any of these web campaigns, whether it's a membership campaign, or whatever the case may be.

So when we price out the things, I think it's important to scope it out, when we, it's the total done for you where we're going to do the copy, the tech, and the design, scope that out and then people know, they go, great, Charl's going to handle all of those things for me, I've just got to film my videos and do the rest.

Now, sometimes, people might have a copywriter on staff, or they might have a designer on staff or whatever, then I will say to them, Okay, cool. Our second option is the done with you, where we'll go and do these things. But you've got to do that. So everything that we're doing, that's obviously scoped and budgeted properly, and then everything that they are doing, it's articulated in terms of line items, what you've got to do to make it happen.

And they then will either create a copy of the designs in house, or they might have a preferred supplier that they work with that. And in that regard, they can factor in that costing. But I think it's important to really understand what costs are involved when you put this together. And I've seen this before where people might go in and they'll sign up for a piece of software, but they're not ready to use it for months on end. And then they're paying for that every month. So it's kind of money that's down the drain.

So I'd say to people, Get ready, get all your things in place before you sign up. Then you sign up for those software. Because then you're going to feel good about it. You see that bowl coming off every month. I've got a couple of Kleq subscriptions, whenever the payment comes off, it's no worries for me because I know the money it saves me, the time it saves me, and ultimately the money, it makes me.

But it's when you have these things that go off every month that you're not using, that is not good. So you need to factor your budget in accordingly for that as well. So that, you know, you just have all these things. And even something as simple as traffic, I found that it was important to understand that some people say, Okay, great. Are you also going to run the traffic for me?

Then the answer there is no, we don't do traffic, that's your responsibility, you've got to send the traffic, but we're going to give you a fully functional funnel. And we are also going to give you a handover document that you can hand to your traffic team that they can understand. What is this offer about? What are the landing pages? Where should we put our pixels on our tracking?

So we equip and empower the team that might take the traffic portion of that, but that might be an additional cost. So we just always want to be clear of what these things are. And I'll always use this as a silly example, but you might afford be able to buy, you know, a 911 Turbo, but just because you can buy it, doesn't mean you can afford it, because can you pay for the services, if something goes wrong? Or can you afford the insurance? Or do you know what the tires cost and those things versus, you know, just a normal car?

So you need to factor in your operational costs as well, in addition to your funnel, but it all comes down to this. When this is done right, it's not a cost, it's an investment, and it should make you money. So that's why you need to understand, who is my market? What is my offer? Who am I talking to? And it all goes back to the goal, because you don't just want to have a fancy site for the sake of having a fancy site. It must be functional, it must solve problems, and package and provide your solution in a way that's easy to get it out there to the people that need it.

So I like to factor all those things in. And like you say, the budgeting is key just to know like, what money do I need to spend so that there's no surprise balls? Because nobody likes a surprise ball down the line.

James: No, you don't want to say, Listen, this thing hasn't gone the way we expected. And you're going to need to pay an extra 5000 or whatever. You need to have a clear scope and cost. But also, I mean, you're going to have to communicate to the client, when they're starting to say like, that cheeky question, you're going to send traffic, I'm surprised that anyone would even ask that.

But that's a significant expense that's going to be borne by the customer. But you know, they might want to invest a little more on the sales copy or something to make sure that that traffic actually gets a return. It's one of the most expensive things I've ever bought, actually, was paying a copywriter, quite a lot of money. However, it had a return on investment.

The lines of communication

So let's talk about this next topic. Step number five, communication. I imagine you've got to set either meetings or some kind of project management tool where you're back and forth with the customer to let them know where it's going in terms of the milestone, what deliverables you need from them, etc.

Charl: Yeah, totally. And you know what I've found working with people is, we all have our different perspectives around things. So you might have a meeting, you might feel that there's been an agreement around the topic. But when you leave, and you come back to it, you see that people have different understanding, you know, of the meeting or the outcomes or whatever.

So that's when we always just go black and white, we just want to be able to externally without filtering through our own perspective, black and white, what are those deliverables? Who's going to do it? When is it going to be due? And how's it going to get done? So I just want to get all those questions on set on paper, get the job finished on paper, because then it's there.

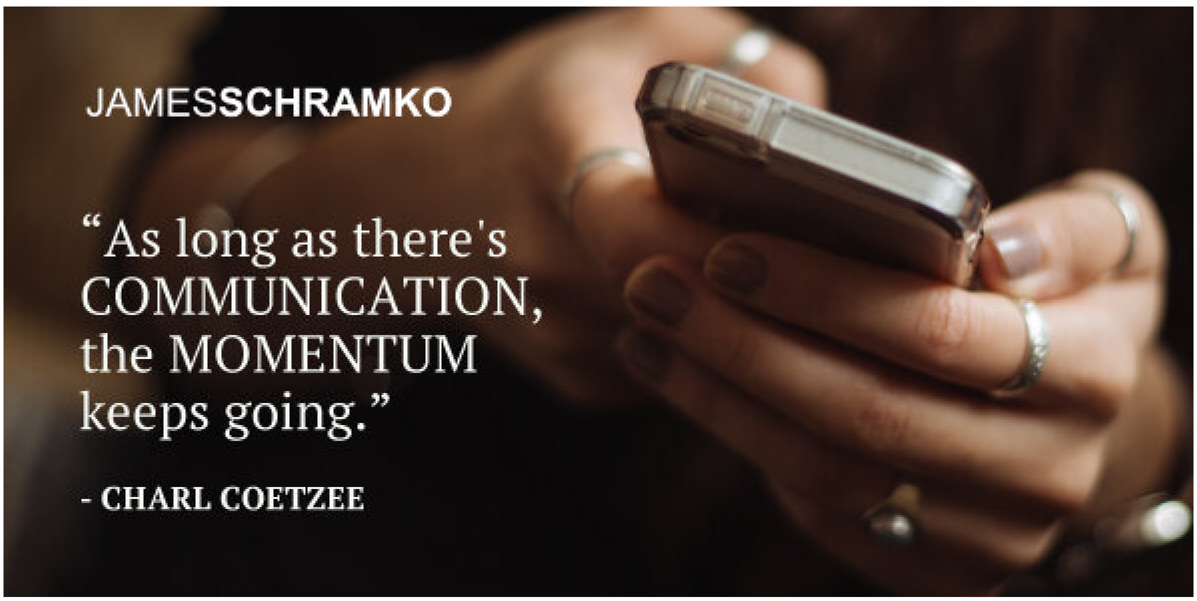
So for example, the other day, we converted awesome designs from Greg over into Kleq, and there were so many pages and so many things involved. It was imperative for us to map all that stuff out beforehand, and actually looking at like, how long are these pages, how many folds are within the page, working out the timeline, because that way, we could have an external document to share.

And Nils was the client there, that you could actually go and see the progress, you could go and tick the boxes, yes, I'm happy with this, that page doesn't need links, that page need links, there's still a lot of ipsum copy on that page. So it’s just externally. And then he was able to do that in the US. I believe he's in Phoenix. And then when we wake up, the doc is ready, we can carry on and my team can communicate with Nils at all times.

So that transparency throughout the project is so key. So either the communications can happen with you and your team as the people that do the deliverables and the fulfillment, but at the same time, you want to involve the client as well. And if you are a client working with external teams, it's key for the industry.

Why updates are important

I always think it's wrong for a client to ask for an update. Because if a client is asking you, how are we doing with this, it means that I didn't do my job properly just to give you at least the weekly updates, or this is where we add, that what's happening next. Because as long as you have that transparency, even if the project takes longer, clients are fine with that, but it's when service providers take the money and then they go kind of radio silent, that is not a nice feeling.



I've had that on my side as well. So the transparency and the communication is so key with your team and with your client, because that way, like they say, you know, a lot of stuff happens, you're able to adapt and tweak the project as you go. But as long as there's communication, the momentum keeps going.

James: I have a story around that communication, because when I was running the car dealership, back then, there was a shortage of supply of some of the hot models of Mercedes-Benz when they came out, like the SLK, the CLK, the M-Class. And, I mean, we're back in that scenario now with the pandemic. But back then, if the customer called up to say, Where's my car, I'd say to the salesperson, you've blown it, like they've given you a deposit, they've got this dream of their car coming. They don't know where it is so they have to call you.

And they're like, But I told them it's going to be six months. I said, You can't leave that with them, you've got to give them updates. And so I would actually tell the customer, like, This is what's going to happen once you place your deposit, it's going to go into a queue, it'll be chronologically placed with the factory, the factory will allocate the specs, your car will be manufactured, it will be then taken to the local dock, and we put on a truck and put on a boat, it will go across the ocean to Australia, it'll be unloaded from the boat, put into the customs, they'll clear it, and then they'll send it out to a pre-delivery center. And then they'll do all their paperwork, put it into our system and then send us the car on a truck, and then it will arrive. And then we'll be able to call you and say, It's at the dealership. And then you'll have a few days while we register the car and get it prepared for you for final delivery. But I'm going to give you updates the whole way, as it moves through.

Now, here we are. That was like 1997, '98, '99. Here we are now, I ordered a car earlier this year, which is on an 18 to 24-month wait. And when I ordered it, they said, Your car is now in the queue, and it's ready. I got a call. And the guy said, Hey, listen, you must be the luckiest person in Australia because I found I've got an extra allocation. I'm going to allocate it to you if you want it. And I said, absolutely.

So then the next thing I got, Hey, the wheels have been put on your car. This now comes from the factory. And then there's one, Hey, your car's just been put on a boat, and it's sailing across the ocean. So they're actually doing this automation of exactly what I used to do decades ago. It's really a funny situation.

But the takeaway here is if you're doing any kind of project management, it's essentially, if you're the supplier, of course you have to communicate to the customer. But if you're the customer, I think it's a reasonable expectation that you should never be curious where things are up to, you have to ask.

There's actually a joke in the surfboard industry that shapers, as soon as someone puts in an order, the customer keeps pestering the shaper, is my board ready yet, is my board ready yet? I never follow up my shaper. I put my order in, and I just wait. And then they tell me when it's ready. I want to be that one customer who doesn't nag them. But in general, the shapers are not that good at keeping their customers informed. I think they could really learn a lot from this episode, Charl, maybe a couple of them are listening to it.

Keep your customer more updated than you think you need. Because if they ever ask you where it's up to, that means your communication is not up to scratch.

How to mitigate the risks

Instead of a related topic, I think number six would be managing risks. You know, things that can happen along the way. I imagine, with things like a pandemic or things like financial crisis, or whatever, when you have a longer term project, maybe the customer situation changes sometimes, or maybe the supplier costs change, or maybe a tool that you were planning to build goes broke or whatever. Have you had these sort of situations pop up? And how do you mitigate them?

Charl: Yeah, definitely, a couple of those things have happened. Thankfully, on the tool side, you know, we've been working with Kleq for, you know, it must have been 10 years plus at this point, so we have that certainty that that's going to work, and that's going to be fine. But obviously, lives change, or either somebody, you know, we've had a client, unfortunately, had a health crisis. So then because we had communication, we could just pause the project and then come back to it once they're up and running again. So that kind of stuff has happened.

But that's when there's always milestones, and then wherever we add, we do a snapshot, I call it, so that if I have to pick this project up two months from today, I can just read my snapshot. And then as a result of that clear communication, we can just continue the project again. So that has happened. It has happened where people had one offer and then they've had problems with fulfillment or the offer changed or that kind of stuff.

So then that is something that can change a project, because that's your ultimate goal is to sell a certain offer. So then either the client needs to make the tweak and offer, but in those kinds of things, you want to just articulate that ahead and in advance so that they can say, Okay, great. That's what we got to do.

But the main thing is just in terms of risk, thankfully, for the web stuff, because it's well spec'd out, the risk elements are not as critical. Like, for example, talking about the car dealership, my father-in-law is the COO of Kyalami, the racetrack in South Africa, and also at Porsche in South Africa. And I hear stories about the exchange rate, right, and with all the inflation, the fluctuation. So they are big risks, right, when you have to pay for a lot, a shipment of cars beforehand, and you have to sell them at prices. So they have those more economic risks at play.

So thankfully, in our industry, that doesn't happen as much, except on the traffic side. If the traffic all of a sudden becomes more expensive, or they remove targeting options, or your conversions aren't what they used to be, or whatever the case may be. So those are problems that can be solved. Number one, the traffic team, what are their deliverables? Right? We are making the funnel, everything is working fine. And then you need to say, Okay, great. That's my traffic team.

And then for what we call conversion rate optimization. Once you get your data back from how this funnel is performing, what insights can you glean from that, and then based on that, what tweaks do you need to make? But that is again, it's like someone has sold you an awesome car, but you are responsible for putting fuel in the car, for keeping it serviced, for getting your tires updated.

So it's just important to understand those distinctions between, I'm sending traffic to a funnel, that thing performs a certain way, which will make me do things or updates or tweaks in order to meet my benchmark. So when people understand this, they are equipped and empowered to make the decisions to see, how do I mitigate the risks and so forth?

But thankfully, for getting the work done, once it's spec'd out, you know what the offer is, everybody knows what they got to do. The risk there is really minimal unless something happens, like we said, someone might have a health issue or anything like that. Yeah.

James: And to a large degree, it's about responsibility, you know? I smile when you talk about just because you're going to have an expensive car, right? Because we used to do these AMG drive days. And some of the very wealthy clients who could afford the cars were just really bad drivers. Like one guy, one guy put an SL 65 into a ditch on the side of the road. He was trying to do burnouts in the middle of the highway, and trashed the car. Right?

And I remember delivering this sports car to a young lady. And she was a particularly bad driver. It's the only time I've terminated a test drive. Like I just said, Please pull over. I'm going to drive us back to the dealership, I don't feel safe. Right, one time ever, in my whole career. I've warned people, Please, you know, behave better. But in this case, I didn't have confidence this lady could actually drive.

Assuring the quality of the thing

So let's say you've scoped out the website, you've set the milestones, you've talked about the budget, you've got a communication pattern happening, you've covered off all the risks, everyone's being responsible for their thing. At some point, you know, this thing's going to have to be tested and checked out before it gets handed over. How rigorous is this testing and functionality checking process?

Charl: Yeah, I think that QA process, Quality Assurance, is so important. So what we do there is once the funnel is built, obviously, you've got your site, those are your pages. And the pages have sets of functions, do they capture an email, do they collect the payment, do they do this or that, are the pixels firing, all that kind of stuff, on the pages?

But then you also have your CRM. Are the emails being delivered, are the tags being applied, are people removed from a sales sequence when they've just made the purchase? All those kinds of things. So we've got that spec’d out. And then one of my team members will physically opt in to the funnel, and to make sure, do those emails get delivered.

Obviously, at this point, the emails have been proofread and spell-checked and all that kind of stuff, but are the tags being applied, are the automations firing the way they should? And literally, just going through it as a user. So that is when you're literally putting it through its paces as a user and just making sure, does all the automations happen, are the pages loading, does it look good on mobile, on iPad, a laptop, a bigger iMac?

So it's all these kind of testing processes just to make sure we've built this thing now, and does it work? And from that point of view, most of the time it works. Because obviously we've got the clear processes in place to make it happen. But sometimes you might see, Oh, shucks, it's applied the wrong tag, and therefore the automation didn't fire.

So then you can see something didn't happen as it was expected to happen. So it wasn't user error. Was there something else wrong? Is there a conflict some way? It makes the troubleshooting easier. Now, at that point, once you've confirmed that everything works as it should, then we can say to the client. Okay, great. Here it is ready, here's the handover documents. These are the tags that are being applied. That's a flowchart of the funnel, all these kinds of things so that should they need to have a look at it, then they can see what all those parts are.

So that's our quality assurance. And you literally want to have a checklist for that, just to literally just go through it as a user, check all the boxes and making sure it's doing what it's supposed to do. And at that point, once you've got that everything checked, then it's like handover time, right? And I'm sure with cars it's the same thing.

Handover and setting expectations

James: I was just thinking, this is all exactly the same as dealership. That's the pre-delivery, workshop, check everything, you know, oil indicators on, all the rest of it, and the handover. That's where, you know, the handover, like that's probably step eight, the launching, and the ongoing thing.

Is that where you discuss - because I mean, when you pick up a car, they tell you, Hey, this is where you service it, this is the service manager, it needs a service at these intervals. Is that where you talk about who's going to manage this thing ongoing? Do they need help updating things? Or they're going to do it themselves? What happens if the software platform changes? Obviously, that's not really an issue for us with Kleq, because that's all handled by someone else. Thank goodness.

And you know, is that where you set the relationship for - are they - I think you'd probably do other things in your agency, right? You do other things like quiz funnel surveys, and perhaps we can talk about that on a different podcast episode. Is that where you say, Okay, now here's what's next?

Charl: Yeah, exactly, right. It's all about expectations, managing expectations. So for example, if somebody came to me and they worked with another designer, and they just need those pages exactly converted to Kleq, then that's an easy job. So then we just do the job...

James: Do you do small jobs like that?

Charl: Yeah, totally. Because some people just need that. So the scope is smaller, which obviously makes the budget smaller and the timeline shorter. So in that regard, it's a check box, and then we hand it over to you, and then everything's working fine. And from that point of view, it's very simple.

But other times, people might have worked with a copywriter for an offer and all those kinds of things in. Then at that point, if the copy doesn't quite do the way it's supposed to work, then they will work that through with a copywriter to see, okay, cool, because our focus was really on, are the pages loading, are the automations firing? All that kind of stuff.

And then we do have a third level where, like you mentioned quiz funnels, when we actually come alongside somebody, we help them come up with a hook, the big idea, the questions, the video scripts, and all those kind of things. They may have benchmarks, because I want to be able to say to somebody, If something isn't working, is it the quiz funnel? Or is it what, some part within the funnel? Or is it the offer? Or is it the traffic?

So we want to be able to see where the problem is. And sometimes, it can be a combination of things. But if we were supplying, say, the conversion mechanism within a funnel, we will tell them, Okay, great, go send traffic. And we're checking in a week or two weeks or whatever, until we've had some significant traffic gone through that. So we can test and evaluate, does this thing perform as it should?

So those are like the different levels. Either it's so simple, you can see it's done, you approve it, you sign off, I like the logo, I like the brand style guide, I like the site, then it's done. Or there's some moving parts, but you had an external provider, and you'll work with them. Or if we did the conversion mechanism within the funnel itself, then obviously we make sure that it's doing the job like it's supposed to do.

And part of that process really is so critical to pull the information from the client, like who's your market, is this a new offer, an existing offer? What are the pain points? Have you sold here before? All these kinds of things that the pains are and it sets the expectations going forward. Because if it's a brand new offer, then obviously it's got a different criteria to judge it versus something that you know has worked before, but it's just a slight variation on that.

James: Like they might want to change their upsell flow, they might want to change some of the copy on a page. They might want to change the price points or some of the things might need adjusting, I suppose, so you've got that follow-up process in place.

Charl: Totally. Yeah. And then either someone will need additional help on their strategy going forward to make those decisions. And or, they have the strategy tweaks and they just need the technical implementation. So at that point, we basically look at, okay, great. What future help do you need going forward? Like with, obviously, some of the cars you buy, you get a drive plan. And you know for the next period of time, you don't pay for the services, or you just take it back for the incremental checks, or whatever the case may be.

So we just look at where they're at and what they want to do going forward. Because at this point, you're in motion, and now you need to drive your car, and you need to make some decisions based on the inputs that you're getting. So all of that is customized based on what somebody needs. But at the end of the day, you need to be able to go from idea to execution, following these project management principles.

Once you've launched it…

Once it's launched, it's not the end of it. That's actually now, you're in motion. And like we joke, you say, you can't steer a parked car, your car's along the path, you're in motion, and then okay, great. What tweaks and changes do we need to make so that I can hit my OKRs, and my KPIs and all those important things as a business? But that tool needs to perform the function and the ultimate goal that you started with right in the beginning.

James: I think that's the last step, isn't it? It's the reflection, it's what did we learn during this project? If we were to do it again, what would we change? Are we happy with it? By the way, Nils, I think, might be the happiest customer on the planet. This guy sent me an email, he said, I've got the most beautiful Kleq website on the internet. And it looks amazing, and it works fantastically well. I think we're going to hear from him in a future episode to see how that's progressing.

So I appreciate all the hard work that you've done there. I imagine in your case, and in his case, you've reflected on that project and thought, Well, that was great. And now comes the learning and discovery and the adjustment phase to see what happens. And I imagine some people, you know, you form a long-term relationship with them, or you work with them on other projects, or get referrals from them if you've done a great job.

Charl: Yeah, I always tell my team, our job is not to finish a project, our job is to get a happy customer at the end of the project, because sometimes you work with a supplier and yes, you might get to the end goal. But it's been such a laborious process, you wouldn't want to do that again. So for me, the goal is, and that's a retention model that we spoke about in a previous episode, you wanted happy customers, so making sure that the process worked well for them.

And then obviously, internally, we have our own notes, I could do different document, what should we do again? What should we do different? What lessons did we learn? So that when we do that project, again, or a similar project, you know, because we've evaluated the project throughout, we can keep that improvement going. And that's really important. What lessons did you learn? And how can you keep improving around this.

And then ultimately, it's important to just celebrate the team's accomplishments, you know, if you're working with a team, and just recognizing that an individual's contribution that they've made to that, because if you're running a team, it helps with that culture. Just let people know that all the late nights and the hard work, or whatever the case can be, we achieved our goal, which is to make an impact in another business owner's life.

So the celebration part of that, and the lessons learned, those are the two things at this final step, when you're just looking at, what lessons did we learn? Let's celebrate. And then, Okay, great. What's next, and we keep iterating and improving as we go.

James: Oh, you almost made me tear up, Charl. You're a good guy, you've got a big heart, and you actually care about the customer, you know, like I do. I think that's why we relate well. I mean, this is a technical episode. There's some pretty big steps here, in terms of project management. But I would say, clearly, you know, as we reflect on this episode, a lot of this stuff I brought from the car industry and just was natural for me to bring to this industry.

You've obviously developed these skills somewhere as well. And you apply it to the website development. People can apply these steps to any kind of project they're trying to run, of course, and I appreciate you sharing your process with us and how that works. But I do think it's important for visionary creative type entrepreneurs to get serious about understanding these steps, being realistic about things.

If you're not getting good supply from people, and you're not experiencing this as you go through things, then ask for this. It's within your right. And by the way, if you do have a website project or whatever, whether it's big or small, and particularly if it involves Kleq, because that's a platform we really like to work with, Charl, how do we get in touch with you? You could drop an email address, or you could give us a website address.

Charl: Yeah, the best place is to go to jbaystudios.com. That stands for Jeffrey's Bay, so jbaystudios.com, and you can email me at anytime, charl@jbaystudios.com. And then like James said, whether you have a big or small project, we'd be happy to assist you with whatever you need there.

James: Mate, legend, I appreciate it. I'm going to ask you to come back and talk about quiz funnels and segmentation, because that's how you and I met. You were at that conference of Ryan Levesque, who's like, popularized that in our market with the Ask method, etc. I've done stuff with it. You've done a lot of stuff with it. I think that would be useful to recap and talk about how we're using that.

I got asked a question today, actually. This is my third podcast today, I was a guest on someone else's show earlier in the day. And thankfully, a good surf breaks it up. But he was asking me about my book. And he said, What are the four levers that I use for business? But I explained to him that I pulled those levers out of surveying my audience and finding out what the main set of problems they were having was or challenges, and then I was able to sort of clump them into little brackets.

And so we'll get you back to talk about that in a future episode. For now though, this is episode 1007. We'll put a link to Charl's website, jbaystudios.com. And of course, I appreciate you helping my clients and our community and you're in my community as well. So a lot of gratitude. Keep doing that good work. And to your success, Charl.

Charl: Awesome. Thanks, James. And great chatting, as always, have a great rest of your day.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