

Codeable presents:

WORDPRESS FOR AGENCY OWNERS

How to outsource client work
and grow your business
revenue steadily

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Foreword

Hello!

I'm thrilled to have the chance to share with you how we've seen agencies of all types embracing WordPress for their client's needs. Agencies make up a large piece of the pie, here at [Codeable](https://codeable.io), in terms of those we are working and growing together with.

As an agency, we understand you are presented with difficult challenges when scaling your business and taking on new clients and new projects. Whether it's being at capacity already when that *perfect* new client walks in the door or lacking the specific expertise for part of a project, we've got you covered here!

We've rounded up the best of the best content we have created based on our experience working with agencies of all types and put it here as a **valuable ebook for you**. Coming in at around 100 pages, we're sure you'll find some golden nuggets of information that will help open your eyes to see how other agencies are handling things and inspire you to take similar action.

It's no secret — well, actually sometimes it is a secret — that many of the top agencies working with WordPress are working together with Codeable to meet the demands of their growing businesses. Regardless, we're going to expose it all here in the pages to follow and show you how we've watched agencies go from 1 person operations to globally recognized operations, that deliver for their clients and allow a better quality of life for all who they work together with.

Thank you for downloading it, make sure you take the next step of digging in!

Enjoy your reading,



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Chapter 1: Taking Advantage Of Outsourcing

How To Integrate Outsourcing Into Your Agency Workflow

Back in the days, when I had just started to work, I was sharing a condo in Rome, Italy with some friends. We all worked at that time, but we also enjoyed cooking and inviting neighbors over.

Problem was, it was hard for the four of us to go to the grocery store, or supermarket, and prepare a nice dinner for everybody with short notice.



(Photo by [Dave Ware](#))

We needed more time, but adding hours to a given day doesn't fall into our "mortal" domain as human beings. We needed to find a solution, a quick fix to that recurring scenario. And that's why we agreed to rely on one another to buy desired ingredients or specific food. If I was stuck at the office, for example, I'd ask one of the other three to "merge" my list into theirs, so I could still help them cooking.

Without even noticing, we started to see and learn the huge benefits of delegating tasks to someone you trust.

Since dinners became more popular and frequent (who doesn't like a homemade Italian dinner?!), we had to come up with a solution and take "delegating stuff" to the next level: we delegated the grocery shopping, just for our party dinners, to one of our neighbors.

Yes, [we scaled thanks to outsourcing](#).

To be honest, it took a while before we all felt comfortable and "safe" doing that. Yes, outsourcing might look scary to first timers as we were. But after acknowledging this was just a temporary issue, all went through smoothly!

So why, in the first place, were we scared of delegating something we all cared about?

Meet the exotic sister of delegating: Outsourcing

At its core, outsourcing is an advanced form of delegating, i.e. assigning to someone else what you used to be in charge/responsible for. The act of delegating something usually entails somebody that is close to you, whether personally (friend, spouse, etc.), professionally (employee, assistant, etc.), or geographically (in our office, part of your team, etc.).

And when you delegate for the first time something business-related, widening up your reach to go beyond your "in-house" resources (aka you outsource it), that unpleasant feeling of mistrust starts to boil in.

When you ask other people to take care of something you usually are responsible for, it's hard because you feel you're losing control over it.

But that's not the only thing you might be afraid of related to outsourcing.

What business owners fear the most when they think about outsourcing

Experienced business owners have all gone through at least one of the following feelings and thoughts [when they started to outsource some of their client work to a third-party company](#). Specifically, they've all experienced variations of:

TOP 4 CONCERNS

WHEN IT COMES TO OUTSOURCING

FEAR OF...

CAN BE TRANSLATED INTO...

... losing control of the overall project development

— How will I be able to keep track of the ongoing status regularly?

... issues related to language barriers different time-zones

— Will they understand the project requirements clearly? Will they be able to provide info I need when I'll be working?

... late delivery

— How long will it take me to find the perfect match for this project? Will they be able to keep up with the agreed schedule?

... lacking trust in an outsourced professional/team

— How can I be sure they stick to what we'll agree on and deliver it on time since we live apart?



Sounds familiar? Well, I have now a good news and bad news for you: the good news is that all these fears can be grouped into one major set caused by one widespread psychological burden we all share.

So it's "just" one thing you'll need to focus on, rather than 5. Good stuff!

Bad news is that psychological burden is hard to overcome because it's what Carson Tate, founder of Working Simply, Inc. and author of "Work Simply: Embracing the Power of Your Personal Productivity Style" calls "the urge to do it all". Specifically, Carson [says](#):

The most common obstacle to delegating is psychological—the insistence, either conscious or subconscious—on doing everything yourself. [...] The insistence is really resistance.

I see what you're thinking now. It's your own business, the one you founded years ago, the one you stayed up at nights to get it started. It's your "baby" ultimately, and that's why more than often than not you find it hard to delegate matters that have to do with it.

So why the hell are there business owners outsourcing part of, or even completely, their client work? The answer is one: outsourcing is one of the most effective business strategies out there.

Let's dig deeper into what this means.

Top ways outsourcing will benefit your business

An interesting [IBM research found out](#) that companies and organizations that implement smarter sourcing gain significant and measurable benefits in key areas: cost, quality, cycle time, predictability, and innovation.

Figure 2. The implementation of best practices can produce productivity improvement in many areas.

Criteria	Results
Business Partner Satisfaction	30% to 90% improvement
Severity 1 Defect Rates	58% to 82 % reduction
On - Budget	27% to 41% improvement
On - Schedule	20% to 41% improvement
ROI	3.6 to 9 times

Source: IBM Research

Even if it's not the most recent data, they still tell you something. Implementing a leaner approach to sourcing can bring huge benefits to your business. Let's see some specific ones, then.

Quickly address client work requests

In a world that changes so fast (singularity is coming), having a good picture of your incoming workflow is a must, otherwise, you'd be completely burned down by the hills and valleys related to incoming client work.

And, as a business owner who has been running his/her company for a while, I do believe you're good at planning your in-house resources for ongoing client work. The problem here lies on how accurately you could plan your in-house workload based on future, not yet definite, incoming requests. As I'm pretty sure you can't read the future, you won't be able to plan your workload in advance. But you're not lost!

That's where [outsourcing shows its compelling nature](#).

What if after you finish reading this article, you check an email from a client who kept you on hold for a bit? They finally said yes! Congrats, but what if you already have all your in-house resources stuffed with work? Could you afford to lose this client? Well, the answer is "of course not!".

And that's where outsourcing part of, or even the whole, client work comes in handy.

Work with highly-skilled specialists you don't have in-house

Let's keep the imagined scenario going on.

How about this client is willing to start working with your agency and needs something you, as a business, aren't able to provide completely. For example, the client needs [an eCommerce based on WooCommerce](#), but you already have your in-house Woo experts working on something else.

In that moment, you don't have time to go through the whole hiring process to find a new developer specialized in WooCommerce. You don't have that time, nor the willingness to go through that process for just a project.

What could you do, then? How could you find an experienced developer willing to kick off as soon as you're both on the same page?

You outsource part of/the whole development to an experienced professional, one who has proven records with those types of projects you need now.

Cut costs

Hiring a Senior developer is key, but given his vast experience, is also expensive from a business perspective. Don't get me wrong: it's a fact that a Senior developer, or designer, marketer, etc. gets a higher wage than others in the same department. That's fair.

But as a business owner, I bet you kinda always have to keep an eye on the monthly and yearly expenses on one side, while improving the quality of your services on the other. In an ideal scenario, you'd love to be able to hire more Seniors but it's not always possible for budgeting reasons.

Same thing applies to other less experienced employees of all departments. Actually, the idea exceeds the limits of working roles and applies to department themselves like HR, accounting, etc.

By outsourcing part of your client work, you'd have way more chances to work with Senior developers, that you could ever hire in your entire life. Again, it's not that it's all about working with Senior devs. All is true to working with any professionals.

Outsourcing amplifies your reach for experienced professionals without directly increasing your expenditure

Scale your client work intake

[Leveraging outsourcing correctly](#) could enhance your business' capacity to handle more incoming client work. Having a bunch of trusted outsourced developers at your disposal would allow you to say "yes" to more requests and projects, all without the need to have them on your payments book, not even in slow months.

With more projects your business can take care of, you'll gain a higher number of those you're delivering on a monthly basis. Therefore, an increased firepower related to your business.

But that's just one way you could scale through outsourcing. If you succeed in [finding trusted professionals to work with](#), you could start to think about providing a completely new service to your current clients or even reach new segments, thanks to that.

Think about offering speed optimization, [maintenance](#), [updates to custom themes](#), etc. as specific services your clients can now request from your agency, [even on a recurring basis](#). You'll be completely covered!

Or, as with the example above, you could even start offering eCommerce development customizations thanks to those outsourced developers you had already found.

Improve specific areas faster

One thing that many hardly see being generated by outsourcing part of their client work, or even whole departments, inevitably results in an increased focus on each project. As Michael F. Corbett in his "The Outsourcing Revolution" [explains](#):

Businesses increasingly create teams to attack specific tasks and achieve specific results. A team comes together to find a solution and then disbands. Project leadership requires a different set of skills and a knack for blending team members' competing interests. Everyone must stay focused on the task at hand.

Needless to say, with a greater focus potential, comes a different approach to project leading/management. So, how could you start taking advantage of outsourcing as part of your business strategy?

How to merge outsourcing development or design work when you are an agency owner



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The first thing you might be thinking now would be to go out and [look for a WordPress developer or designer](#). Wrong.

That's a common mistake that could cost you time and money. Remember the famous "Give me six hours to chop down a tree and I will spend the first four sharpening the axe." quote? Well, it's time to take seriously that suggestion and [start scoping the project](#).

1. Scope the project with the client to create a great project brief for your outsourced work

When you wish and need to outsource some client work, the very first step is to [have everything properly prepared](#). And that comes from scoping the project you might need to outsource.

Is it a custom theme development request? Do they need a custom plugin? Is it just a matter of updating regularly their website? You name it.

The more info you're able to collect here, the easier and clearer [your project brief](#) will be. Because that's your goal: being able to craft a detailed and informative project brief to attract a great professional to work on your client's project.

Scope, deadlines, deliverables, requests, tools, preferences, and all information you already have: bundle it all up into a great project brief and [be prepared to answer quickly to experts asking for more details](#).

2. Pick a project management tool and set everything up (we'll see this into detail later in this book)

If outsourcing is the exotic sister of delegating, planning can be easily seen as their father (probably with German heritage). There can't be any outsourcing activity without planning. Not even if the outsourced project is "easy" or "quick". No, no, no.

There are plenty of tools to keep track of projects and, if you ask me, it all comes down to how you think and are comfortable using such tools. From a spreadsheet to [Asana](#), to [Trello](#), [Jira](#) to others more advanced.

There's no one better than the other here. You pick the one that suits your workflow best and stick to it.

3. Discuss payment with the outsourced expert (so you know when you'll be charged)

When outsourcing client work, you're the client in a way. You're the one asking a professional to take care of several things, based on your project brief. One of them being the price. Experienced business owners, who outsource lots of their client work, learned that [it's always best to have a clear communication](#) on this topic with developers or designers they're going to work with.

Would it be better for you a one off payment? Would it be more efficient for your cash flow to set up milestones within the project and get billed after each one?

Given the great universe of types of projects you can outsource, I strongly suggest to build up a straightforward communication on price, deliverables, and deadlines between you and the professionals you'll be working with.

4. Set up your preferred policy about code repos, hosting, status reporting and documenting

When working with remote outsourced developers or designers, nothing is taken for granted. Especially when it comes to where the code is hosted, where the staging vs production websites will be running, how frequently the outsourced developer should report to you, and finally where to document their work.

Whether you're a tech-savvy business owner or not, you'd need to share your preferred policy for each of these matters, otherwise, you'll be thrown into a world of chaos where you aren't able to check the ongoing advancements of the project and won't be able to report back to your client.

From medium to bigger projects, consider to set up a recurring flow of communication with a set of requirements that have to be addressed by the developer. How frequently you'd need to be informed about a given project? What types of info you'd need to be updated about? What's the required frequency to update documentations? And so on.

This way you won't lose touch with the project and can quickly inform your client about its status.

When you outsource, never take for granted anything. State all that you need in the clearest way you can, leaving out loose requirements and descriptions.

Ask yourself: "Will I be able to understand all of this 5 years from now?". That's how straightforward you'd need to aim for.

Wrapping things up



Slack, Github, AppSumo are just a few of today's most well-known and successful companies who integrated outsourcing as part of their growth (more on this topic in a new blog post).

And look at where they are now.

So why is outsourcing so effective? In one sentence, because:

Outsourcing enhance the capacity, speed of adaptation and firepower of your business, without a linear increase in your expenses.

I'm not saying here you should fire half your in-house staff first thing tomorrow, and outsource all your business. No, actually is quite the opposite. What's important here to understand is that taking advantage of outsourcing is becoming an essential part in growing a business.

The faster the economy evolves, the more it'll be required to have a smarter and hybrid approach to managing and delivering client work.

The Agency Owner's Conundrum: Should I Tell My Clients I'm Using Outsourced Developers On Their Project?

You can't always be a master of all trades on every project and there are times when [an outsourced developer becomes a necessity](#). Maybe you're short on in-house resources, maybe you don't have specialists for that part of the project, or maybe again you could use a helping hand to stick to your deadlines.

As common as this might sound to you running your agency business, however, it can turn out to be a cause of concern for many of your clients on many fronts. Clients are usually people with minimum technical knowledge (it's not required for their role) and an [agency outsourcing work](#) sets off a number of red flags for them.

*Is the company not qualified enough to handle the work on their own?
How are things going to turn out at the end?
Will I waste my money with this agency?*

These are just some of the most common concerns that might be going on in your client's mind. And here exactly is where you're faced with a crossroad:

Will you tell the client about outsourced developers or would you just avoid it completely and simply outsource the work without the client know?

For an agency that believes in the core principles of business and transparency, this is not something that is to be recommended. In fact, obscurity never wins over transparency in business relationships.

Still, that's a huge issue many agency owners experience and can't decide which path they should take.

Let's delve into this matter and see how you could turn it around in your favor.

Where does your client's fear come from?

If you make it clear that [you'll be involving outsourced, "external" developers](#) working on your client's project, it might be the case that some of them will raise their eyebrow and won't feel 100% confident to hand their project to your agency.

Why is that happening? Why is a client concerned if outsourced developers will be - or won't be - involved in their project?

Setting aside all sales technique someone might have up their sleeves, there's a profound reason for a client to be somewhat hesitant: lack of trust. Specifically, lack of trust in those new subjects they're hearing about now and whom they've never talked to.

Your clients are afraid they will not get the best outcome possible. Sometimes, clients feel they're getting tricked or even scammed. As WordPress developer and Codeable expert [Paul Cohen](#) highlights:

When it comes to outsourcing, clients are concerned because they simply don't trust these new developers. And, to an extent, I don't blame them and understand their point well because I've heard this from other developers too. What I think, though, is that there are already enough issues when you're doing the development directly without lying about what you're doing. I see no real good reason to do that with your clients.

[Building trust](#) should be the first priority on your list when talking to a client. Thanks to it you'll be able to mitigate their concerns, if not address them completely. Communication gives rise to trust. Once a client sees the effort that you're putting into keeping their concerns at a minimum, they start to confide in you and believe that you're the right pick for the job.

If you don't do it and keep it a secret, you're settling for project failure.

Failure to be transparent about outsourced developers causes projects to fail

A substantial chunk of web development projects fails due to a [lack of effective communication](#), which has a direct impact on trust of course. Hiding a vital piece of information like the outsourcing part of it also falls under this banner. As Paul shared with me his valuable insights on this aspect:

Communication is the biggest point of failure in any project, we know that from project management studies and product management. Business owners not properly talking to their users, clients not talking to the developers, product managers not talking customers. That happens across the whole spectrum of businesses, where getting clarity on communication is key.

If, for whatever reason, the flow of communications stops or breaks down, the level of trust in your agency and its ability to provide the right solutions will start to decrease in your client's mind, shaking the whole environment in which all parties engage. And that could open the door to misunderstandings, unexpected issues, and even a working relationship going awry.

So how could you craft the perfect communications and overall message flow to inform your clients that you might be working with outsourced developers, all without undermining your work (and price)?

It might sound naive, but the answer is telling them in detail all about your value. Here's how to do that.

Tell the client openly what's the real value they're getting from you

I get it: you're worried that if you tell your clients you're working with outsourced developers, they'll expect a lower end price from you or simply go away because they don't trust your business.

If we set aside the trusting issue, you're left with a client possibly demanding a lower price because some of the developers involved aren't your employees and, in your client's mind, they all work from remote countries for insanely low hourly rates.

But if you look at it a bit closer, you'll start noticing that being afraid of telling about outsourced developers is closer to having to deal with clients demanding discounted price rather than a higher-level business matter.

As you've been dealing and handling client requests about price since day 1 in your business, you should be less concerned because you've been doing this your whole business life. You just didn't realize it before.

So, what's the best way to explain - justify, if you want - your price to a client? Yep, showing your value. Overwhelm them with details and examples of how your business, and even you directly, can take care of their requests. As Paul elaborates:

A real professional will be able to communicate to a client what their skill set is, how they can help their client, how they will take care of their project management or product management aspects. For example, I'd say: 'My skills set is determining what your pain points are and coming up with the next steps to follow, so running and doing what's [known as the discovery process](#). Then, once we know what I need, I know where to go and find the best developers and I know how to communicate with them and I know [how to create a good brief](#).

Your focus should be on highlighting the things that you as the agency owner and professional are able to put in place and deliver.

Is that an in-depth experience in developing WooCommerce extensions? Maybe it's your eye and background as a former UX designer? Maybe it is that you're a great Project Manager and can coordinate all subjects involved minimizing frictions, not matter if in-house, outsourced or both.

The idea here is to share this type of information pertaining to your business up front so that you make it understandable to your clients. It is of utmost importance that you take the client on board and clearly mention what your competencies but also limitations are. This avoids any hassles and disagreements over the course of the project collaboration.

Not every client is going to be your client (and that's good for you)

Of course, there will always be clients that are never satisfied whatever you might do. And these clients are not advisable to work with, and you should try to anticipate them and lower the chances for your business to engage with them, whether through a list of defining questions, a discovery call, some automated funnel. Anything. As Paul points out:

There is always a percentage of clients, no matter how well you do, who won't understand and appreciate your value. You can't simply please everybody. And there is a small portion as well that goes bad no matter how good you are. Cut that off ahead of the curve and pick up those risk signals and act on them immediately.

Wrapping up

*To tell, or not to tell, that is the question:
Whether 'tis nobler in the mind of an agency owner...*

Transparency always trumps obscurity. And in a business world that gravitates around Open Source software, that's the perfect - even though not mandatory - approach an agency owner should be embracing.

It's even more than that, no matter if outsourced developers are even involved or mentioned. It's a business law: when engaging with a client, you should focus on building trust and a cooperative flow of clear communication among parties, all the times.

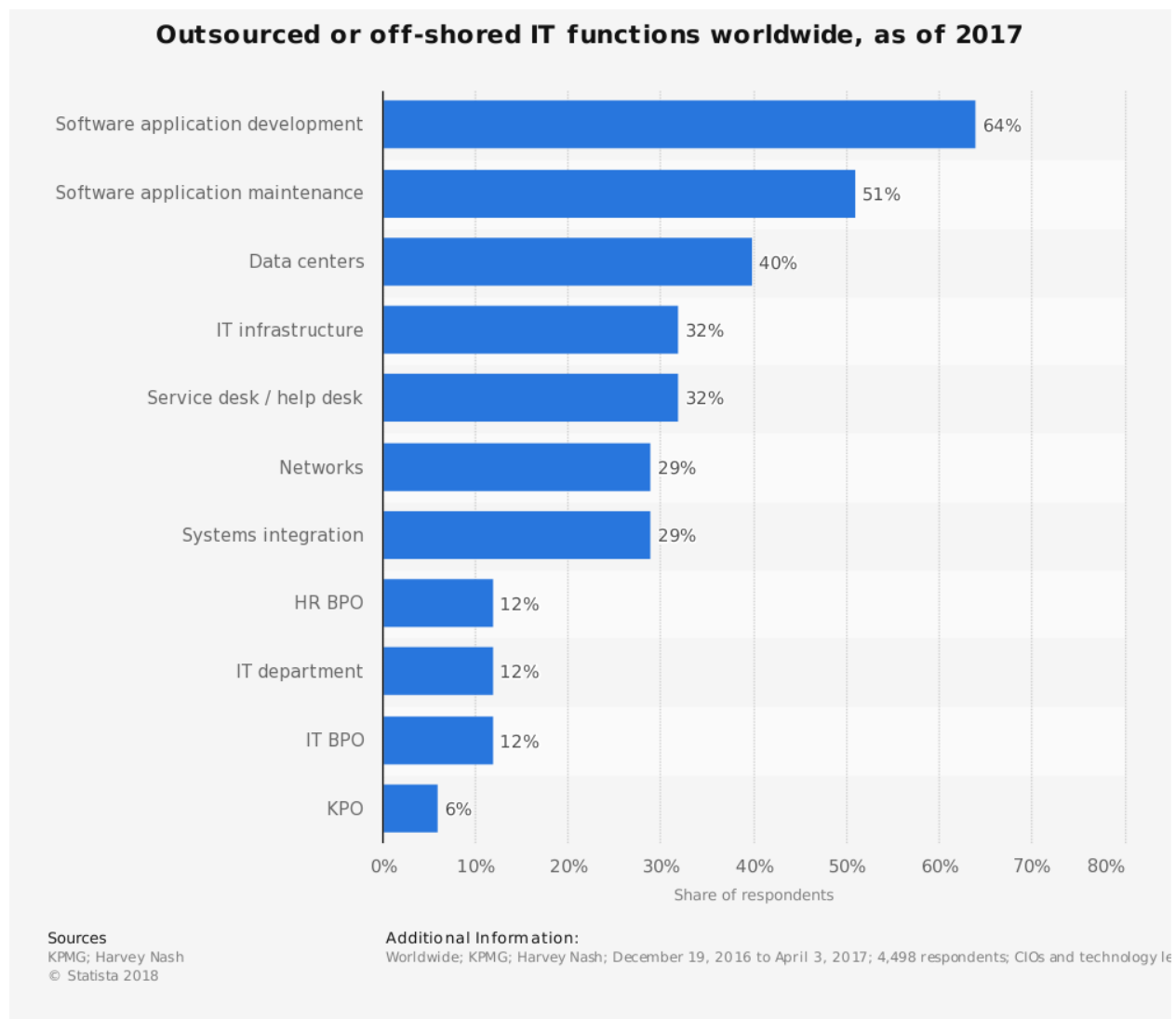
By focusing and explaining your true value, the way the outsourced developers will play an important role in the client's project, you'll be shifting your focus on getting better at managing client expectations, rather than finding ways (and excuses) to keep them in the dark.

Besides that, it's a matter of how good you are at [finding the right outsourced developer](#) for a given type of project and how good they are at delivering quality work for your agency. But that's something you need to get better at, not your clients.

3 Successful Outsourcing Examples That Changed The Way These Businesses Operate

It's the numbers that tell it: outsourcing is regarded as one of the most effective operational practices in the business world today.

This bar chart shows what companies are outsourcing worldwide:



The WordPress market is no different. Although with some caveats: outsourcing WordPress development - or any other type of work - has a substantial catch to it because, with the ever-increasing number of options, it's hard for a business owner [to pick the right partner](#). I always like to say:

Outsourcing sits on a 3-legged stool of trust, quality, and deliverability.

To take advantage of it, you'd need to feel confident and reassured you'll be working with world-class professionals, not simply someone who says they're professionals. Someone who can be trusted and provides you with personal support if things go south. Someone who will deliver all you've agreed on, at the right time.

But [there's more to that](#).

Top 5 business benefits from outsourcing WordPress development work

Merging outsourced developers with your current in-house team opens up your business to several big wins such as:

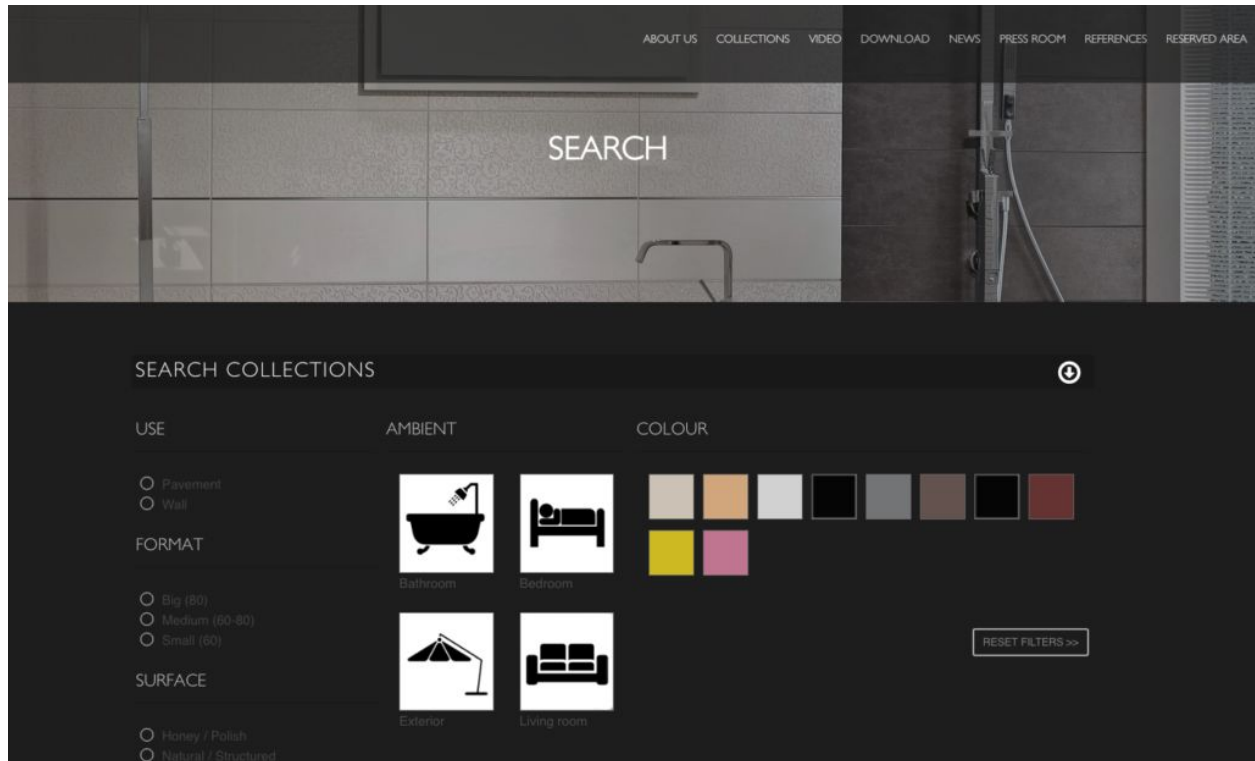
1. Quickly address client work requests
2. Work with highly-skilled specialists you don't have in-house
3. Cut down costs
4. Scale your client work intake
5. Improve specific areas of your own business faster

Now that we have the theory in the know, I'd like to support it with 3 real-life examples of different businesses that successfully outsourced different projects (or part of them) so that you get to see how it all works.

Are you ready?

Let's dive in!

Example #1: Custom search feature for a leading Italian tile retailer



The first example is of a large Italian tile retailer, Versace Ceramics, that wanted to have a custom product search feature built into their website.

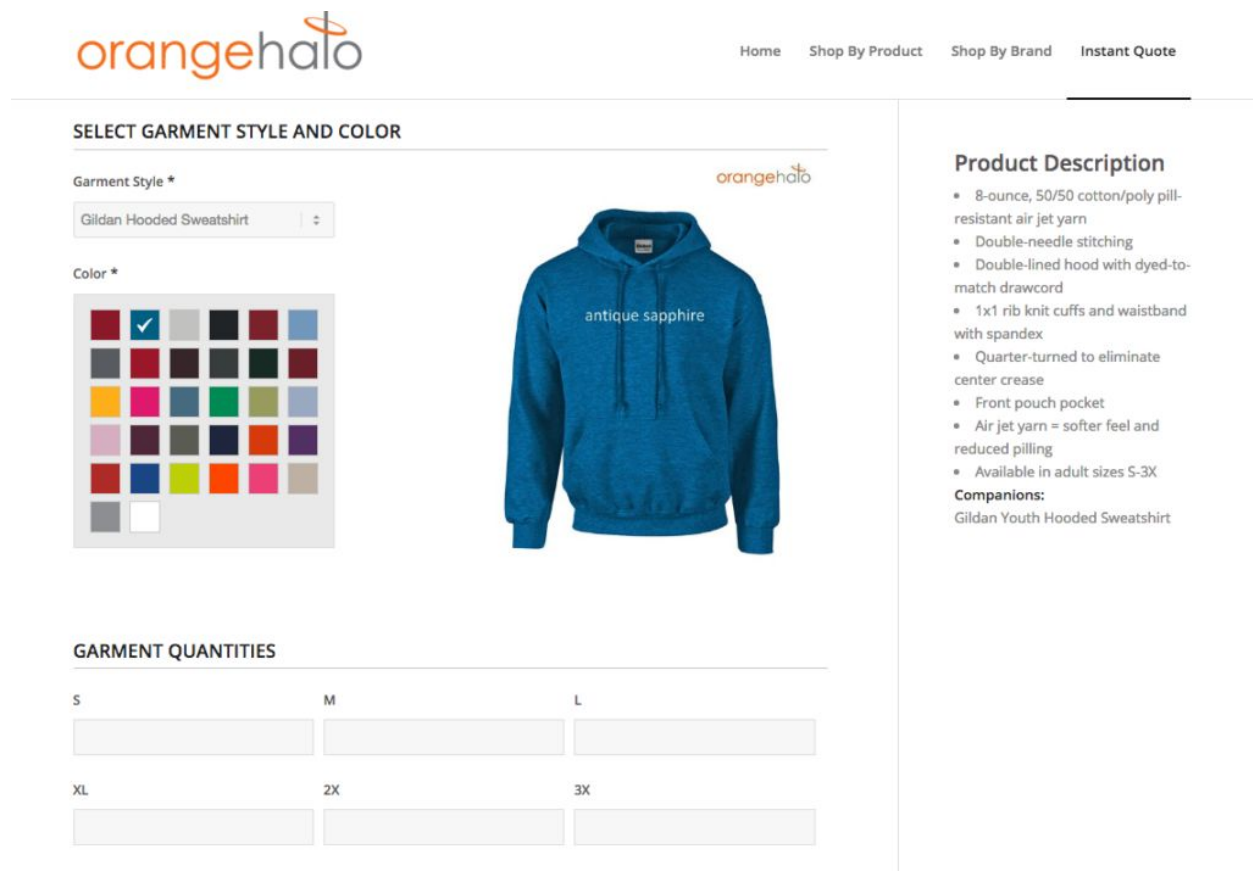
The agency working with them in all marketing and development matters was lacking the technical knowledge to handle the task because they didn't understand how to integrate their very complex range of products in the appropriate manner following the client's request. WordPress developer and Codeable expert [Marius Vetrici](#) explains:

At first, we had to work with them side by side. We were like thinking partners where we helped them structure all of their products in the right way. Then, based on the new structure, we built a custom plugin for them which added the type of search they needed. This custom functionality allowed Versace Ceramics to provide their users with similar suggested products, different types of categories and featured products based on a given category.

Major benefits in example #1

The client got access to experienced developers who supported them from the start by digging deeper into the problem. They took care of the business analysis, as well as the development process, and delivered a custom WordPress solution able to address their business needs.

Example #2: Real-time quote calculator based on Gravity Form for an American t-shirt business



The screenshot shows the Orange Halo website's product selection interface. At the top, the logo "orangehalo" is on the left, and navigation links "Home", "Shop By Product", "Shop By Brand", and "Instant Quote" are on the right. The main section is titled "SELECT GARMENT STYLE AND COLOR". Under "Garment Style *", a dropdown menu shows "Gildan Hooded Sweatshirt". Under "Color *", a color palette is displayed with a blue swatch selected and labeled "antique sapphire". To the right of the color palette is a product image of a blue hoodie with the text "antique sapphire" overlaid. Below the color selection is a "GARMENT QUANTITIES" section with input fields for sizes S, M, L, XL, 2X, and 3X. On the right side of the page, a "Product Description" section lists features: 8-ounce, 50/50 cotton/poly pill-resistant air jet yarn; double-needle stitching; double-lined hood with dyed-to-match drawcord; 1x1 rib knit cuffs and waistband with spandex; quarter-turned to eliminate center crease; front pouch pocket; air jet yarn = softer feel and reduced pilling; and available in adult sizes S-3X. It also lists "Companions: Gildan Youth Hooded Sweatshirt".

The second example is about [Orange Halo](#), an American business that specializes in selling printed t-shirts.

Before deciding to have an automated solution for users' inquiries, they used to receive price requests via email and then run the numbers based on an extensive Excel spreadsheet.

They had a freelancer working alongside them for quite some time but then they decided to build a quote calculator that ensured clients could be provided with estimates instantly. Recalls Marius:

We started from their Excel file. We had to clean it up and straightened the math as well. Once we had all the formulas in place correctly, we went up and turned them all into a real-time quote calculator which would ask the relevant questions, provide options, and give answers on the spot.

Major benefits in example #2

By having a 0-latency quote calculator on their store, the number of conversions and UX improved greatly. Additionally, the client no longer needs to invest time or in-house resources among email requests, Excel files, and client requests.

Example #3: Question-powered checkout process for an American subscription-based business



The third example is about [Gleam for Life](#). They deal in dental supplies for families. Ok, nothing fancy here, I know. The twist is in how they sell their service: they offer

subscriptions so that customers can choose when and how many supplies they want and place recurring orders that are then delivered to them at specified intervals.

By offering different types of products, delivery preferences, and subscription tiers, the company was looking for an easier and more efficient way to hand-hold their customers during their buying process. And that's where a guided checkout process proved to be the right solution: it improved the overall buying experience without leaving out all the needed information to sell subscriptions. As Marius highlights:

We've been contacted by the digital agency working with them. The final result is a wizard-like type of checkout where there are multiple steps involved to gather different information from customers in a nice and smooth manner. This custom solution had to relate different types of products, different types of subscription options, different types of deliverability preferences and payment as well.

Major benefits in example #3

Even though the company was relying on an agency to get help, they were still walking in the dark in relation to an advanced and complex scenario. By involving Marius and his team, the company had the chance to take advantage of specialists' experience and bundle it with in-house resources.

Wrapping up

The world of WordPress development is vast and complicated. And it might even look frightening to some business owners for, deep down, when we delegate something we care about to someone else, we all feel like we're losing control of it. Specifically, [working with outsourced developers](#), who can easily be located in remote places from your headquarters, amplifies this idea and make you see a blank wall.

How do you usually overcome being stuck, then? You'll find solid reasons not to be. And when it comes to outsourcing development, your research ends when [you'll find developers who you can trust](#).

Chapter 2: Working With Outsourced Freelance Developers

The Productivity-Driven Guide To Working With WordPress Developers In Different Time Zones

Working with remote freelance developers is becoming a common thing for many businesses. The fast-paced and more efficient workflow provided by outsourcing entire development projects, or parts of them, usually outgrow the learning curve required with this new approach to working.

On a purely business perspective, geographical borders are often a limit to growth and efficacy. Because of this peculiar feature of working with freelance developers, often projects happen between subjects living in different countries or even continents.

The biggest issue that arises in this regard is that you and the developer you have outsourced to are most probably located in different time zones. This can be an incredible inconvenience to both sides and cause hassles that result in a loss of productivity and effectiveness.

So what do you need to know about time zones to make the best out of them for your WordPress projects?

Pros of working with a developer in a different time zone than yours

Let's start with a real-world scenario: you have a new your project that needs to be addressed now, and you're in need of the best candidate to take care of it.

It might be the case that in your local area there are no [WooCommerce experts](#), or [performance specialists](#), or [security professionals](#) available you could reach out to. What do you do, then? You look for a freelance developer.

Since your goal is to move things forward, your research for the perfect candidate shouldn't be limited to your local area or personal network. Therefore, where [your outsourced developer](#) will be based shouldn't matter that much either.

That's just one of the pros of working with remote professionals. On top of that, if you work with freelance developers in different time zones, you'll also benefit from having an ongoing flow of work that you could hardly recreate with someone in your own time zone.

Think of companies with 24/7 support or those with a continuous development cycle where you send requests by the end of your day and the developer picks it up in their morning (when you're about to call it a day). We'll see more of this in a second.

The third and great benefit of working with someone located in a different country, and likely a different time zone, is the cultural freshness they bring in. A different culture often means a different perspective on life and, more often than not, on job-related aspects.



To sum up, here's the list of pros of working with a developer in a different time zone than yours:

1. No geographical limits to hiring the best candidates and specialists
2. Uninterrupted project development
3. New ideas and fresh perspectives from a different culture

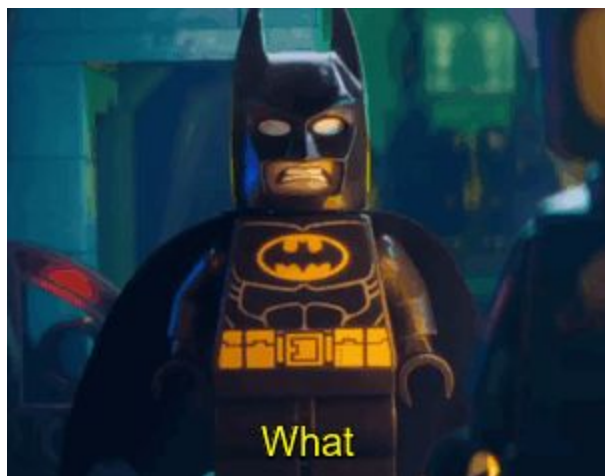
Unfortunately, when working with freelance developers, there are some cons as well you'll need to be aware of. Fear not – you can overcome all of them with good communication skills (which is something you can start improving today)!

Cons of working with a developer in a different time zone than yours

Working with a professional not only outside your office but also in a different time zone than the one you're currently in, [can be challenging](#) for some business owners.

Why that? The main reason is, even though you always knew communication is important in your work, you had never had the chance to actually test how that assumption happens to be true.

In fact, working with developers and any other professionals in a different time zone brings up all implications of remote work plus asynchronous communications and flows of work.



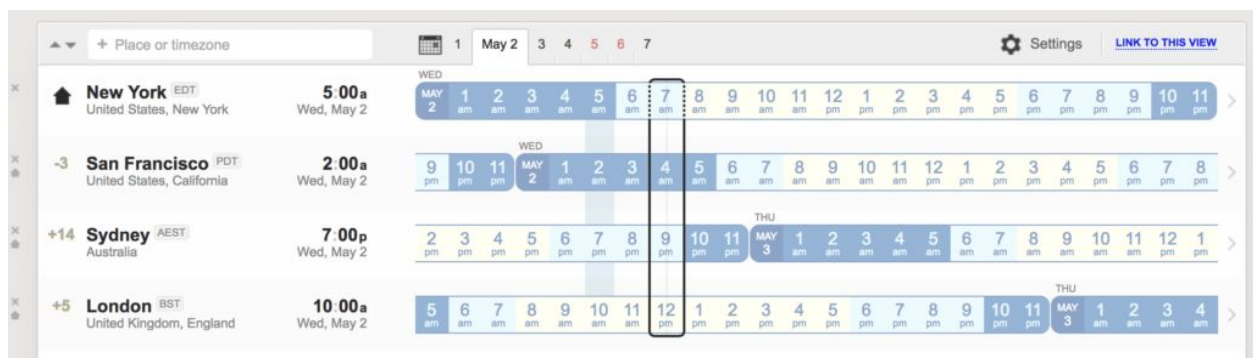
Working with developers in a different time zone than yours requires communication and organizational skills from your part. If you lack them, your project could get delayed, your developer might deliver something different from what you have in mind, and so on.

To sum up, here's the list of cons of working with a developer in a different time zone than yours:

1. if you suck at communication, you're delaying your project (+ meetings will be hard)
2. if there's no good planning, working will be hard and poor
3. there's going to be little to none constant collaboration

How to find out your developer's time zone

Let's start by clearing the air around where your developer's currently based. You can simply do that by picking a developer's location and put it on one of the many free tools. The one I use is called [World Time Buddy \(WTB\)](#):



Just add your city and your developer's in the top-left search box, and you'll get to see how your time zones overlap. That's the very first step when considering to hire a remote (WordPress) developer.

Now, here's where the game gets funnier...

How to decide on a developer's time zone: behind vs ahead vs your local time

It is important to give ample considerations to [choosing developers](#) from the best suited time zones.

The first choice you might think about should be someone within your own GMT. But that's your best choice only at certain times; it is possible that you find a more interesting opportunity elsewhere. In such cases, it is imperative to give time zones, and their difference, a considerable thought.

As WordPress developer and Codeable expert [Jonathan Bossenger](#) highlights here:

When you are working across different time zones, it's really important that you understand what time zone you're in so that you understand the difference in the time delay.

Let's have a look at the three options you have:

- Option a): the developer is ahead of your time zone
- Option b): the developer is behind of your time zone
- Option c): the developer is in your time zone

Option a) - Working with a developer ahead of your time zone

The favorable outcome that comes out of working across time zones is when you're working with a developer who is six to eight hours ahead of you.

For example, if you're based in New York, US a developer based in Europe might be an ideal choice.

This is because as they end their work day, you're only halfway through yours meaning that they can effectively send you updates on your projects and you can have an overlapping, working time zone to interact and work things out seamlessly.

Explains Jonathan:

I'm Cape Town, South Africa and all of my US-based clients are between six to eight hours behind me. That means at the end of my day I can send them an update, and I can send them some finished piece of functionality, and they can spend the other half of their day testing that functionality and sending me feedback. Then I can log on the next day and I can start working on that feedback, fixing bugs, making changes, and so on.

The great benefit here is the constant flow of work which almost never stops between the involved parties. Specifically, by working with a developer ahead of your time zone could help you set up a routine where your day starts with an update about the project already in your inbox to look at so that you have your day to review it and send feedback back to your developer right before they start their day.

Option b) - Working with a developer behind of your time zone

What if your best candidate developer lives hours behind your current time zone? Well, theoretically nothing major changes: if you need to have daily status updates on your project, your developer could send them when they end their end their workday so that you'll find them the next day in your inbox.

I should warn you, though, that working with someone behind of your current time zone requires additional planning to be done up front as you'll need to take into account all of the project details you can think of to prevent any delays.

It takes some training, but the benefits of working with developers in different time zones than yours have a greater impact than the annoyance of doing some more planning you're requested to do.

Wait so... does that mean hiring developers in your own time zone has little value? No, it does not!

Option c) - Working with a developer in your time zone: better suited for urgent work (but not exclusively)

Even though the quality and professionalism of a developer should be the first aspects you hire them for, there's also another one that has to do with the time you have planned around your project deliverables.

In other words: urgency. As Jonathan comments:

The basis of the choice sometimes is the amount of time you have. That's why, if time is a concern, find someone in a similar time zone, especially if your work is urgent because it's easier to quickly send a message and, if there's any clarification needed, the response can happen within a few hours.

Urgency can be mitigated with a detailed project brief and a solid preparation in advance of all other additional information your developer will ask you to provide. Time-sensitive projects can also be managed with developers located in different time zones, it's a matter of how comfortable you are with an asynchronous workflow.

4 aspects to embrace to get the most out of a developer working in a different time zone than yours

The hardest part isn't working with someone in your same time zone, although some further communications and planning are required than in a common per-person working relationship.

When working with developers in different time zones, as most of the work happens in a non-linear way, you should always have the impression of over-communicating to convey your requests properly. This allows the process to be streamlined and executed in the most efficient manner.

There are some important factors you should keep top of mind in this regard. Let's see them!

1. Deeply understand that you're in different time zones



It is important that you understand the difference in time zones quite clearly. Be sure that you have your developer's respective working hours figured and have communicated yours to them as well.

This allows you to keep appropriate expectations of when you'll be receiving updates and when you'll have to respond to them. Jonathan highlights:

When working across time zones, it is important to be as detailed as possible with your communication because there is going to be a large chunk of time between communications, you can't simply waste time clarifying things.

If you miss doing so, there's going to be an enormous communication gap in certain situations along with expectations not being properly set up and managed.

It is better to be as descriptive in the problems that you're having or [the feature you want to build](#) as possible, rather than wasting time with unclear requests or feedback that might be misunderstood.

2. Be considerate when planning meetings



This is another vital aspect to consider when working with someone outside your time zone. Each individual is different in terms of their brain working capacities. There are certain individuals who are up and active at 7 am, while there are people who might wake up at 9 am but only feel fit to work only after noon.

Although this might not be the most common behavior, it is important for you to be aware of and consider it [in your communication flow](#). Jonathan summarizes:

When you're booking meetings or calls with your developer, plan a meeting at a time that doesn't just fit your schedule, but also fits both your productivity level.

Either a developer who is tired after a long day at work or yourself won't be much help and, as a result, your project will suffer.

3. Have the term "End of the day" clearly defined



"End of the day" is a term that needs a proper definition for both sides because it will determine and clear a lot of expectations that exist among you and [an outsourced developer](#). The term "end of the day" might be different for each individual, for instance, a developer might refer to end of the day when they go to sleep because they like to take work home and sort major problems that might occur from there.

This doesn't necessarily mean that they'll always be available and here an effective communication becomes a necessity from both sides. Jonathan points out:

In an outsourced environment, specifically for a freelance developer, "End of the day" is a variable thing. It doesn't always mean a specific time. That's why you need to define and agree on it up front.

4. Discuss project updates, feedback, responses up front with the developer



No matter what aspects and considerations are discussed, it all gravitates around defining and agreeing on a common communication and updates flow with your developer. Some examples are:

- How frequently do you need project updates? Daily, hourly, weekly...
- How can you reach out to the developer if an emergency occurs? Here you'll also need to define what an emergency is
- How long should you wait before sending another request to the developer?
- When will your developer be online? How does that relate to your workday?
- (more...)

It is important that you ask the developer and clearly define what type of conversation you're having with them and how quickly you expect them to respond. Similarly, you need to ask them what work they're performing and what their availability is and how conveniently they might be able to send messages back to you.

Defining the parameters of communication and clearly sharing what your expectations are across time zones is crucial.

Wrapping up

[Working effectively with outsourced developers](#) who are situated in different time zones can be somewhat of a hassle depending on the respective time zone that they're in and your work schedule.

For urgent projects, your first choice should be better to hire someone in your same time zone to take advantage of a greater time span in which you and the developer are both working.

Nevertheless, working with freelance developers isn't a matter of where they're located, rather how a good fit they are for your project. By getting used to these fundamentals concepts, you'll start taking advantage of this efficient working paradigm, the only one empowered with an around-the-clock focus on what you care most about: your project outcomes.

3 Action-Driven Tips To Make Your Outsourced Developer Stick To Your Project's Deadlines (And What To Do If They Quit)

[Relationships with developers](#) tend to be quite delicate at times due to a variety of reasons. There are certain situations where issues reach a level after which the result is a breakdown of the work relationship. This is especially true when pressure builds up in deadline-sensitive projects and a communication gap exists on both sides.

A developer quitting the job in the middle of a project can be quite a devastating challenge to overcome for you, as a business that is handling the task in the first place. Therefore, it is important to manage and streamline things from the beginning.

So what are the measures you'd need to put in place to get a developer stick to your project's deadlines and prevent them from quitting?

Let's dig in!

1. Communicate your expectations effectively

Some developer-client relationships don't go all the way to the end because of differing expectations or because one person or the other hasn't communicated things properly. As WordPress developer and Codeable expert [Ashley Shaw](#) explains:

Project deadlines are a contentious topic because the client's perspective of how long something should take and the reality, which is invariably what the developer would predict, sometimes do not correlate. When you hire a developer, ensure that you map out every detail of your requirement to understand the scope of your project and identify a realistic turnaround time. Clear communication between you and the developer on your expectations is essential..

Establishing a clear language between you and the developer you hired means, for example, agreeing on when the project will start. In fact, don't take for granted that a developer will jump directly into your project right after you hired them.

Another aspect that you should establish, if you're hiring someone [on an hourly basis or a retainer](#) is to make sure that your idea of working day reflects that from the developer. Do you need them to work on weekends? Are they clear on that? Will the developer even be working on weekends?

These expectations are vital to a successful development project.

2. Be aware of how time zones will affect your workflow

[Time zones can sometimes cause great inconveniences](#) in professional relationships. It is important to sort these out from the beginning. Ashley elaborates this further:

Differing time zones can quite often lead to delays in a project because if anything unexpected happens - and it will at a certain point - you might only get a response from the developer the next day, which is during the night where you live. However, this does not have to become an issue if you, as the client, are always aware of it and establish an understanding with the developer you're working with from the start about their availability during emergencies.

Prior communication can phase out this problem easily because once you make the developer aware of your working hours/your availability, you'll be able to respond to requests and questions at the earliest and the developer can schedule their workflow accordingly, minimizing any inconveniences.

If time differences allow is, you could even set an overlapping time slot in which you both are working on the project or in which you could have calls about it.

3. Ask to be informed about delays and barriers in the process

Even if you and your developer have planned everything out, things could go awry because of something completely unexpected. That's a hard truth you have to embrace about development. That's why having clear expectations shared up front, a [detailed project brief](#), and a [proactive approach](#) is your way to lower the chances of project delays.

But when something unexpected pops up, the developer not only should try to address it at their best, they will need to inform you and make sure you're understanding how that is affecting the current project. In fact, Ashley highlights that it is a developer's job to do this and there is nothing wrong if you expect it from them:

When the developer identifies a problem, they need to make sure their client becomes aware of it and understands the complication. And by that, I mean how it could then affect certain aspects of their project and that there may be a delay in meeting their project deadline.

This is very important because, when each party is clear on the current state of things, they tend to be more patient and co-operating in all matters, mostly when these "hiccups" were likely unpredictable and hard to anticipate.

What to do if a developer quits?

Although it is very rare, a developer might become unresponsive or even quit on your project. Why that? Even though there's a wide spectrum of different reasons that could leave you without a developer during a project, there are still few things you could do to get things unstuck.

Let me just better define the possible scenario we're talking about: you hired a developer for your project, all was running smoothly when, all of a sudden, the developer tells you they can't complete your project as requested.

What should you do next?

Well, Codeable experts not only have been pre-screened for their development skill set and experience, they also go through a communications and client management testing phase where we assess whether they can manage clients professionally (read more [about this process in our whitepaper](#)). That means, if the developer can't follow through with your project, you should always expect to be informed in a timely manner and receive reasons on why they can't proceed.

If that's the case, Customer Support will jump in and after reviewing the current status of your project, they will match you with another developer who's perfectly capable of getting things back on track. If anything just outlined isn't happening, immediately reach out to Codeable's 24/7 support and inform us about that.

The other thing you should do, which I can't stress enough how important is, is that you need to determine why they did quit in order to move further and learn from that. Ashley points out that it might have been a shortcoming on your part and, as a result, you need to check what is what:

If a developer quits, you should look at how the project went down. Where were the problems with that developer? If they quit, maybe it was that you didn't provide enough information, maybe you weren't responsive enough to their request and unrealistic in expectations of the timeline.

In that instance, try to be truthful with yourself and look at all of the things that led to the situation and aim to avoid them with the next developer.

Do you know what are the top common reasons for developers to quit on a project, after they got hired? In no specific order, as they all are show stoppers:

- [Unresponsiveness from the client](#)
- [Lack of additional information](#)
- [Scope creeping](#)
- [Disrespect/Rudeness](#)

Wrapping up

A developer might quit due to a variety of reasons that aren't under your control. That's something that might scare you, I get it. But If you want to take advantage of remote and outsourced developers, that's a feeling you'll have to cope with. That's not a curse, though, that's a habit you should be building little by little.

To facilitate that, there are several things you have control of you can do and it all starts with the [outsourcing platform you're choosing](#). Then, it's about learning what [working with a remote developer will require](#) and always be open to improving your communication skills.

Don't forget: getting the best out of your client-developer relationship sits on both parties' laps. Take ownership and be responsible for yours.

How To Pay Outsourced Developers: Fixed-Price vs Time and Materials Pricing Models – Which One Should You Choose?

Working with outsourced developers means that there are a few fundamentals that need to be hammered out from the beginning. This is because each project is different in its own regard and throws up a unique set of challenges.

As a result, the solutions and the way in which these are tackled change too. When it comes to hiring an outsourced developer to work for you, there are two popular ways to do it: the fixed-price approach and the time & materials approach, each with its own merits and drawbacks.

Which one is the best for you?

Let's start by understanding more how each one is defined.

What's a fixed-price type of project?

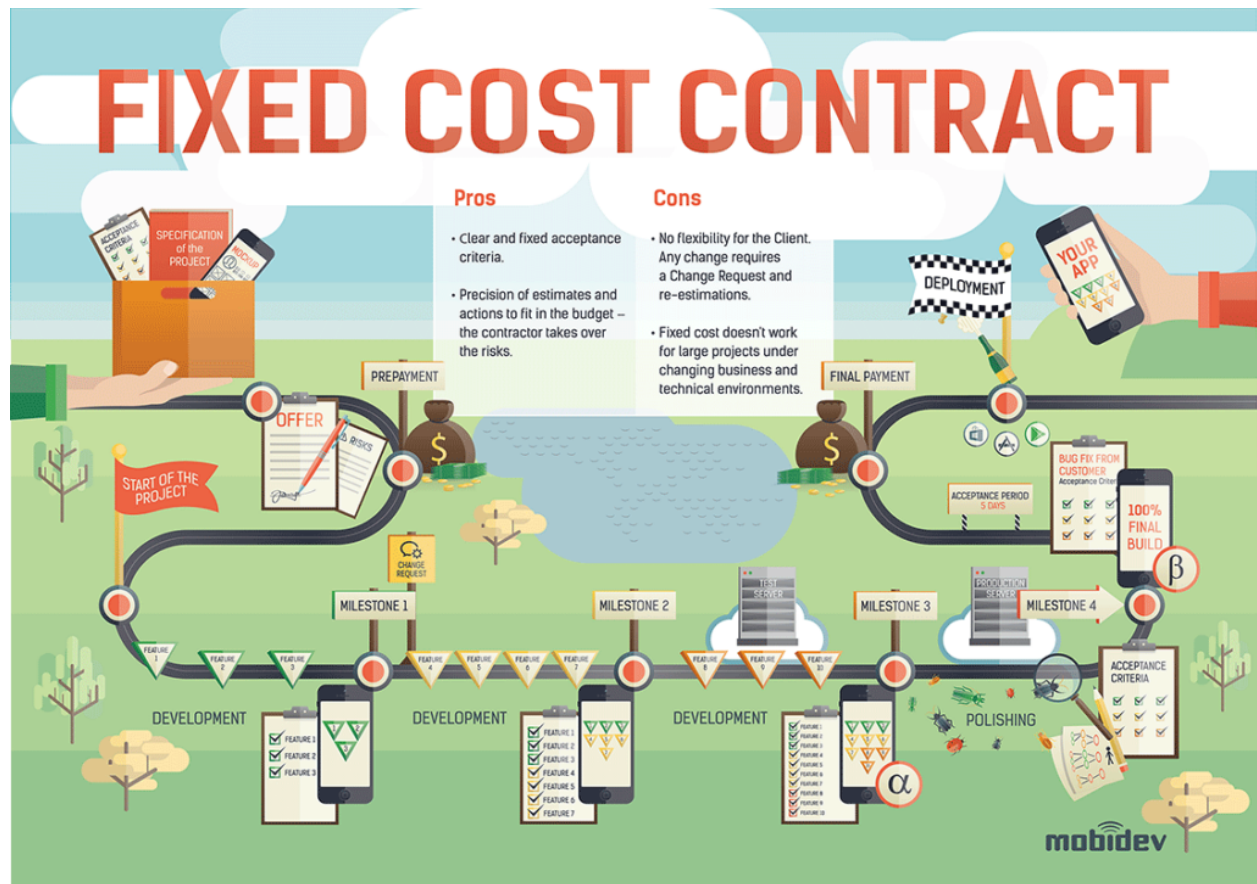


Image [via](#)

As the name hints, a fixed-price type of project occurs when you know in advance how much a single project will cost you. With a fixed-price, there is a fixed budget allocated for a specific list of deliverables that should be provided in a given timeline.

All parties involved agree on the [scope of work](#), budget, timeline, and deliverables up front. Usually, there's little to none room for any changes after the project kicks in. Both sides agree to all terms of the project before starting it and do not expect any change or adjustment after the project's kicked off.

A fixed-price pricing model is paying for all that's covered in the documentation shared with [the developer you hired](#), without the possibility to make changes during project implementation.

A fixed-price project in short:

- Fixed budget and price agreed upfront between parties before project kick off
- Scope, features, and timeframe are fixed too
- Payment usually follows different stages of the project: upfront payment, after the first milestone or project completion, the last set of payment is generally released after the testing phase (if it goes successfully)

What you need to know about fixed-price projects

Since this pricing model isn't flexible, the end price your developer will provide you with will surely account for the risk they're taking. Specifically, given how difficult it is to anticipate and know exactly how your project will be, more often than not developers add a buffer cost to the final price to cover any future delays or issues after the project has started.

Now that you've got a better idea of a fixed-price project, let's have a look at a different one: time and materials.

What's a time and materials type of project?

A time and materials type of project, as opposed to a fixed-price, is one where scope, budget, timeline, and deliverables aren't strictly defined and set in stone right from the start.

[Hiring a developer](#) following a time and materials approach results in paying them the number of hours they actually work on your project - based on their hourly rate - and any additional costs related to third-party tools, apps, services they might need for your project.

A time and materials pricing model is similar to a pay-as-you-go pricing model, often starting with a set of shared goals, [clear requirements](#), and a [ballpark estimate](#). All these elements can be changed during the project if needed.

A time and materials project in short:

- Budget is not fixed. It's estimated and might change during project implementation
- Scope of the project and deliverables are flexible, meaning that they could be changed on-the-fly if things require

- Payments are linked to a commonly agreed calendar, not to a specific deliverable. This might occur every week, every two weeks, monthly, quarterly. The frequency of payments and deliverables has been agreed upon before project initiation

What you need to know about time and materials projects

Since you're paying for your developer's actual work hours and tools, apps, etc., you aren't able to [know in advance how much a project will cost you](#). That's why it's usually common practice to start with a discovery phase to a more precise estimate for your project.

By looking closer to your request, whether it's a [new feature for your WooCommerce store](#), a [custom WordPress plugin](#), or [a fix](#), the developer is able to gather key information and actually see things to better formulate their project proposal to you. Given the flexibility of this pricing model, you can make any changes - even to the project scope - more quickly and while the project is running.

 | **Fixed-price vs Time and material**

Fixed-price		Time and materials	
✓	✗	✓	✗
Precise final cost of the project.	Long and meticulous planning phase.	High flexibility on project scope, requirements, timeline.	Budget can't be predicted precisely.
Clearly defined and agreed upon deadlines before project kick-off.	No changes can be made during project implementation.	Precise payment model as it's a pay-as-you-go pricing model.	Deadlines might drastically change.
High predictability of the development process.	No room for adding missing key information after project kick-off.	Process transparency.	Proactive involvement requested to the client for all project phases.
Little involvement required from the client.	Higher and costs.	Ability to modify the course of actions to reflect current scenario at best.	-

When you should use the fixed-price approach

A fixed-price approach works best for you - the client - when two criteria are met.

#1 criteria (on your end): ideally, you need to be absolutely spot-on about your requirements meaning that everything down to the minute details of the project [has to be documented](#). You don't have room for loose project terms. Being able to do so also entails you to knowing the exact end product you'll need, hence having a clear idea on when to call it "done".

#2 criteria (on the developer's end): it could be often the case that you aren't sure about the details of your project, how to write them in a clear manner, or literally what to [add in your project brief to make it a useful one](#) for the developer.

It's in situations like these that good developers show their value: a professional developer will bring up a good amount of questions so that they can ease out the required details for ascertaining what key information is missing and, ultimately, a properly fixed price project cost. WordPress developer and Codeable expert [Marius Vetrici](#) points out:

If project requirements aren't correctly defined, and you want to go with the fixed-price approach, you should expect the developer you're engaging with to be getting back to you with plenty of questions to clarify all details in a pretty granular manner. Only after that, you can commit to a fixed-price project.

Another example suitable for a fixed-price project is when [your project has a smaller, specific scope](#), with fewer visual elements involved. Think of an advanced custom form, a calculator, and almost anything which you can list out all the formulas or combinations of and share them with your developer.

Even though a fixed-price project might sound the perfect pricing model to go with, it can be trickier than you think. In fact, it is only recommended if you've put in a lot of work to gather the abundance of information required to start your project and make sure it's correct. Of course, you can hire a developer willing to [help you out with them](#), but still, the effort required from your end is considerable.

On top of that, if you fail at accounting for all project requirements in the first place (it can happen, but it shouldn't with this pricing model), and keep asking little revisions,

your developer might start to lose interest in the project since they were only paid for a certain set of man-hour. As a result, the quality of the project might drop. As Marius summarizes:

You're good to go with a fixed-price project either when the project is small or, for larger projects, if you can break it into smaller, manageable, and clear milestones.

It's likely that to define the scope, you might be required to pay the developer to do a discovery project.

When the time and materials approach works better

The time and materials approach is called that way because it takes into account the actual hours and resources involved in your project.

With this pricing model, you won't get a defined estimate because of its open-ended flow and somehow loose terms. This doesn't mean you won't be able to [budget accordingly](#) and narrow down to some decent range your project specs and [get a ballpark estimate](#) eventually.

Does this scenario sound like a poor way to manage an outsourced project? If you think so, it's just because your attention focused on the wrong aspects which might have given you the wrong idea. In fact, a time and materials approach is probably one of the most flexible and adaptable models to project development. As Marius explains:

A time and materials approach will allow you to learn what you need as the project evolves. The more your project proceeds and more features you develop, the more you learn about its details.

Thanks to its yielding nature, a time and materials pricing model allows you to easily split your project into smaller chunks, known as milestones, that make it more goal and budget-driven. In other others, it's agile.

Using Agile Project Management and sprints



Image [via](#)

The time and materials approach is the [ideal avenue for the Agile Project Management methodology](#), one that has proven to be one of the most effective and efficient when it comes to development work.

Combining two productive tools, the time and materials pricing model with an Agile methodology, allows better management of your project overall. Specifically, the developer will break the entire project into "sprints", which are smaller, more manageable phases built around milestones of the project, each followed by a physical deliverable. These sprints allow you to focus on the costs for each sprint and then move onto the next.

All along the way, you have the ability to analyze whether or not a solution is working with respect to your problem and figure out the necessary tweaks to set it on the right course.

Thanks to the flexibility, one other interesting advantages that the time and materials approach has over the fixed-price one, is a shorter deliverables timeline. Instead of receiving them all at once at project completion, you'll be receiving deliverables after each sprint.

This gives you a closer look at whether the project is heading in the right direction. In addition to that, it'll give you the ability to test you developer's skills in terms of their understanding of the project and your requirements in a shorter time span.

Marius defines a few parameters that you can judge them on:

First of all, do you like working with that freelancer or agency? Does he understand your business needs? Is he connected to your needs? Do you like the questions that he asks? Are those questions insightful? Do they stimulate your thinking? Generally speaking, do you like working with that person? Running a first 'trial' sprint without any further commitments should clarify whether you are a good match for each other.

Fixed-price vs time and material: How to choose

I can't give you the answer as that's a per-project answer. What I can do, though, is providing you with a list of questions that should guide into looking at things from the right perspective.

Ready?

Fixed-price vs time and materials - Questions to guide your choice

1. Do you have a pretty good idea of what you want? If so, then a fixed-price project might work for you.
2. Can you write a thorough project brief? If you think you can cover every little detail in your documentation, then a fixed-price project might work for you.
3. Are you open to a discovery project to help you define the scope of your project? If so, then a fixed-price project can be a viable option.
4. Are you willing to pay a buffer cost? If you don't mind, then a fixed-price project might work for you.
5. To what extent are you willing to be involved in the project? If it's medium or high, then you're perfect for a time and materials project.
6. How important is flexibility to you? If it's important, then a time and materials project is what you should look for.
7. How important is having a defined budget and timeline for you? If you can make decisions based on a ballpark estimate only, then a time and materials project might be a good option here.

Wrapping up

Fixed-price and time and materials have both use cases, advantages, disadvantages, and challenging aspects. The former's rigidity sure is a constraint that makes it hard to

be used with many types of projects. Still, that same aspect is the one that gives you a clear picture of how things will evolve and will cost you, with little room for uncertainty.

On the other hand, the flexibility a time and materials project can count on is a real advantage as you don't need to invest lots of time into the planning phase and the trajectory of your project can be changed in a faster manner. What it lacks, though, is a precise end price and timeline which might not help when trying to budget for a given project before starting it.

Which one fits your needs best? No matter your answer, never forget that a transparent and clear communication with your developer, along with being open to suggestions from them, will always be the perfect ground from which your project will thrive.

Chapter 3: How To Get Project Estimates From Outsourced Developers

How To Get An Estimate For Client Work When Outsourcing (Part Of) It

It's happening again: one of your current clients knocks at your door (or inbox) with a new project for your agency. Yeah, time to celebrate! But then, right before breaking the news to your team members, you realize you don't have resources.

The client is asking for a very specific task and you don't have that specialty among your in-house resources.

What do you do now?

You don't want to miss this job opportunity, of course. But this means you'd need to [find a trusted WordPress specialist](#), ask them how much they'll charge you, add your markup eventually, and then get back to your client with a proposal.

Since these things take time, you start panicking (even just a little), and be like:



Your entrepreneurial mind realizes what's the major obstacle you're called to overcome here:

How come I can get an estimate for my client's request without hiring the developer? Is it even possible?

While many might assume this to be difficult or even impossible for some reason, the truth is quite the opposite!

Let's see how you can get an estimate for client work without hiring a developer on Codeable.

Discuss the budget with your client

Ok, so you already have a [good project brief](#) (did you check for [red flags](#)?) in your hand and need help understanding how much that would cost so that you can let your client know.

Given that the project requests are mainly defined, you should start gathering information related to your client's budget. Talking about a budget is never the easiest part of a project, but it's an important aspect that should be somewhat defined right from the beginning.

If you could inquire your client by asking them something along the line of: "What's your budget for this project? Is it above or below \$X?", that would make it a good conversation starter and it'll keep the conversation focused on what's important for you to know at this stage.

Your client's current budget is an important element that allows you to get a better-informed quote from developers. If you don't have a budget yet, [do this](#).

Match your client's budget to KPIs and a timeline

An effective way to talk with your clients about budgeting for their projects is linking these to KPIs and/or features that would need to be deployed.

For example, a project that costs \$1,000 and is expected to bring in \$5,000/\$10,000 in the next 6 months sounds more appealing than one that might cost \$500 but brings in only \$300/\$400 in the same amount of time.

The return on investment and the budget that a client might want to allocate to their project are influenced by the respective costs with regards to the time taken for it to generate returns.

By pairing KPIs to their budget and a timeline, you enable your client to see their project in perspective. WordPress developer and Codeable expert [Marius Vetrici](#) highlights:

When talking with clients, I like to bind the value their project brings in to a timeline, for example within the next 12 months. This approach helps clients with their thinking. A simple question like 'How much money will this feature bring you during the next 12 months?' should clarify the situation.

It is important to have this discussion with your client because it allows them to tell you what kind of money they're willing to spend depending on [the returns that the particular feature will generate](#).

Bigger project? Discuss the budget related to each milestone

When the project is big, i.e. it costs \$5,000 and up, you might want considering breaking it into smaller milestones and ask the client about the budget for each.

As noted before, trying to pair the budget with the ROI and feature gives the right context in which this discussion should occur. It is important to have this discussion with your client because it allows them to share with how much money they'd be willing to spend in relation to what such particular feature will generate.

Splitting a bigger project into milestones and discussing them with your client allows you to manage expectations properly on one hand, while providing a more efficient flow to the development work on the other.

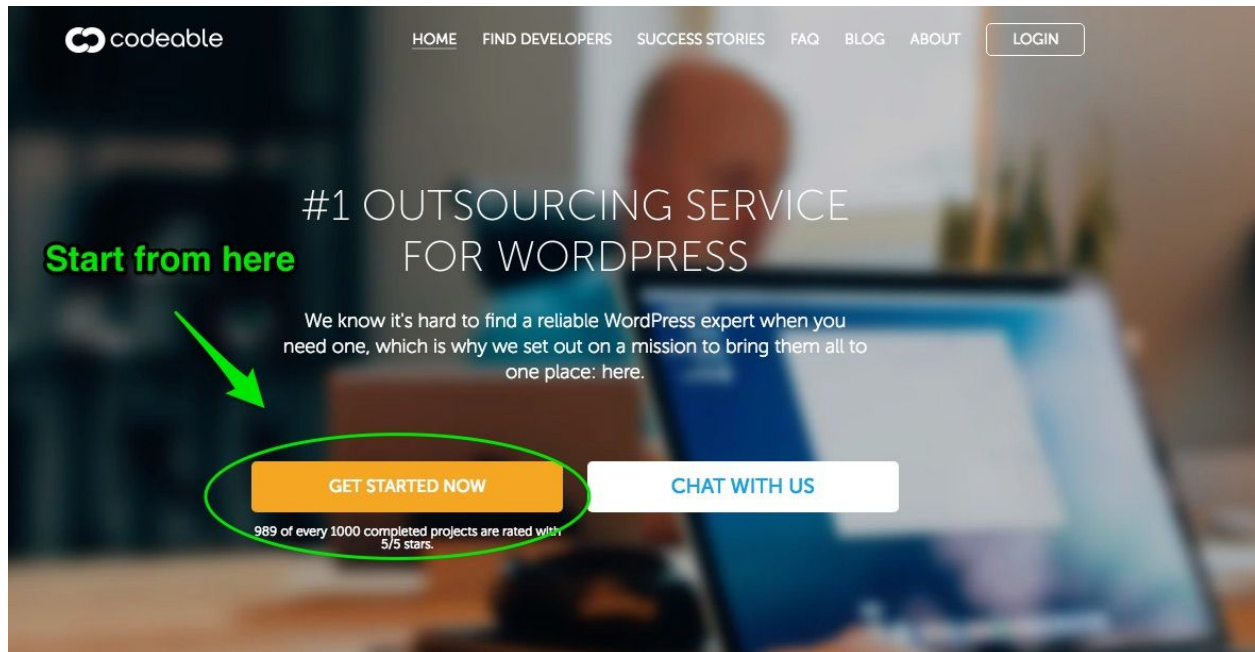
How to get a project estimate without hiring a developer

To recap a bit: [you're in need of a trusted WordPress developer or specialist](#) of any sort because you have client work you can't take care of, either completely or just part of it. You need to get back to your client with an offer but don't know how much it'll cost you to hire a freelancer for that job.

That's where everything you should have already done and prepared (what we covered earlier) comes into play.

Ready? Ok, great.

So here's the cool thing: if you need to get an estimate from developers at Codeable, the best way is to [post a project](#).



Posting a project is free (note: posting is free, the project delivery is not) and when you do, you can count on a no-obligation to hire policy.

This is the key factor here you should pay attention to.

Posting a project that outlines your client's request is free for you to do. But, you need to be upfront and open on the purpose of your request: [you're looking for a ballpark estimate](#) that will then need to be approved by your client.

Would developers start engaging to such project with no immediate hiring involved? The answer is yes.

There are plenty of developers who understand your request is for client work. Usually, developers who are more inclined to serve [agency clients](#) are those who will start engaging with you.

Developers will not shy away from giving you an estimate even if your project states that you're only looking for price and time figures to have them approved by your client. This

is because they know that once you've been greenlighted by your client, you will likely come back and hire them to do the job. As Marius tells:

We understand you need to get an approval for your quote. As long as your brief is good enough and what you need to be done is clear, there will be plenty of people willing to give you a ballpark estimate. We know we'll get hired if the estimate is approved.

How to get a precise estimate for your client work

Don't try to exploit the platform, though: you have to be straightforward about your inquiry for [ballpark figures and not actively hiring anyone](#) at that moment.

This trait will decree what would come next: developers engaging with you to deliver you an estimate vs an unanswered request.

So how can you get a precise estimate, then?

Add client specs to your project brief


One of the important things to consider is to make sure you have a [comprehensive brief prepared for the project](#), one that describes everything as elaborately as you're capable of so that the developers know what they'll have to do and provide estimates accordingly. Marius points out:

Write a few sentences about the end results that your client is trying to achieve at the beginning of the project brief and briefly share what the business is all about. This way you'll provide your prospect developers with an informed context. Then, add the project requirements as you'd normally do.


Getting an estimate all comes down to enriching your request with as much information as you can. The more details you share, the more precise the estimate will be.

When in doubt, jump on call with the developer

In case you're unclear about any of the technical details related to your client's project, you aren't doomed because you have the chance to jump on a 1-to-1 a consultation call that will likely clear doubts for you.

 **HONESTLY - I DON'T KNOW.**
(OUR MOST POPULAR OPTION)

For only \$59, you may hire one of our experts for up to 1 hour to speak about your project or work you're considering.
See if a Consultation is right for you...

Jump on a 1-to-1 call with a developer 

START

There are [many benefits from a consultation task](#) – how it's called at Codeable. One of which is that you get a much simpler and clearer picture on the project details so that, at the end of the day, you can handle it much more effectively.

Wrapping up

When it comes to obtaining estimates for client work, the most effective way to get them is to engage directly with the [freelance developers and/or specialists who have the right expertise](#) for what you need to deliver.

This makes it easy for you to manage the project because you have an estimated price from the [outsourced developer/specialist](#) which, if approved, will allow you to get started on the project in a shorter time with a budget already been established. On top of that, it'll free you from regularly explaining how the project is evolving as your client is aware already of "the big" picture.

As a business, your revenue stream is not only linked to how much work you deliver. It has also directly impacted by whether your client perceives the same value in your work that justifies how much you charge them for. If there's a misalignment here, your client won't be happy and they'd feel ripped off.

Leveraging the approach here outlined sets you and your business on a solid path towards properly managing your client's expectations. And, as you've already realized, their money.

5 Basic Ingredients To Get An Accurate Estimate For A Fix Or A New Feature For Your WooCommerce Store

Estimating the actual costs for a fix or for [adding a new feature](#) to a WooCommerce store can be tricky and depend on a number of factors. As a client, you should be able to obtain clear figures on the amount of money that you'll need to budget for.

The clarity and accuracy of the estimate that you receive will be directly proportional to the attention to detail with which you describe the issue or feature that needs to be added.

So how can you get the perfect estimate for a fix or new feature for your WooCommerce store?

Enrich your brief with a test case

A test case helps the developer identify the ideal circumstances and what has gone wrong with the problem. It allows them to understand how much work will go into fixing the problem and, as a result, how much it will cost. WordPress developer and Codeable expert [Ashley Shaw](#) highlights this point:

If you want a solution to a specific feature or fix on your WooCommerce store, first of all, provide a test case. The test case should be very specific. The more information about the user journey to where the issue occurs, the better. If you're requesting a feature, on the other hand, you'd need to explain in just normal user terms what your desired feature should do and if some of the base functionality already exists on the site.

The more details the better

Details are everything. They are extremely crucial for developers to be able to tackle your request and give you an accurate estimate. And when you're engaging with a developer to help you fix an issue on your WooCommerce store, the more details you'll be able to provide them, the better your task will be understood.

So, for example, some additional information you should be adding can include the process that the user who encountered the issue followed, where exactly the problem did occur, a screenshot of the issue and what browser the person was using etc. Ashley further explains:

It doesn't have to be all in technical terms, you can simply describe what happened in plain English: 'They go to this page, they add this product to cart, but when they click this option - or whatever the case is - there's an issue with the checkout page when they're using a certain browser.'

Add screenshots with annotations to your brief

As you should already know, [screenshots are incredibly helpful](#) when communicating with developers. Ashley also stresses this:

Including screenshots for the fix or the required features can really help the developer's work, especially if they have annotations. You take a screenshot, and then you circle the problem area or the thing you like, and then you put in little comments on the screenshot. That always does give a visual indication. And I can't stress enough the importance of explaining what browser is being used when you're doing things.

There's never "enough" information when communicating with developers

When in need to find the perfect developer through outsourcing platforms, it's common for the clients - you - to [publish their project requirements and brief](#) and then wait for the developers to start engaging with you.

Codeable only allows up to 5 developers estimating on the same project so you don't get overwhelmed by offers. It's a controlled environment in which you and the developers applying for your project can discuss your requests more in-depth.

As important as within your project brief, even during this pre-work chat and communication you should share the most information you can and answer questions coming your way.

To get a good estimate, keep in mind that the developers you're chatting with are keen to understand everything related to your WooCommerce project at their best. Ashley comments:

When you post the project on Codeable and you start getting questions from the various developers, hopefully, they will re-explain how they understand your user journey and then ask questions. Try to answer those questions proactively. More often than not, being explicit in your communication about what you need can help extending the brief that you've written because your understanding might not be technical. And we - the developers - might then mention technical aspects that we need to consider for achieving an accurate estimate. So, in my opinion, it's always important to be as verbose and explicit as possible.

Provide links to the actual sites or staging environment

There are a couple of things people miss out on when they're looking for estimates for a fix or a new feature for their WooCommerce store.

You probably won't believe it but this is true and one of the crucial elements clients miss probably because they're too busy focusing on the issue or the feature they want to have. As Ashley reminds:

There are many clients who don't provide the exact URLs to their actual site or their staging environment. So, very often I have to ask: 'Which site are you referring to?' I realize sometimes you're working on a development site or staging environment, but it doesn't prevent you from sharing a link: I can't work on something that I don't know about.

I can (partially) understand the client's little distraction because maybe they were caught up in the number of problems the issue had already caused to their WooCommerce store. But not providing the URLs you're referring to either when asking for an estimate for a fix or a new feature makes both lose time with back and forth communications.

Wrapping up

[Running a WooCommerce store](#) and business is already a major and tough task on its own. That's why you should make the process for getting a precise estimate for a fix or a new feature as smooth as possible.

At the end of the day, whatever the issue or feature your WooCommerce store might need, little room for misunderstanding and effective communication with the developer are always what is going to win the battle for you.

The Little Big Secret Behind Getting A Costs Estimate For WordPress Without Hiring A Developer For The Job

A development project is an extensive activity, one that requires considerable planning and research before it can actually be executed. That clashes majorly with one of the most common requests around any new WordPress project:

How much will it cost me? How long will it require to be delivered?

It might be hard to hear this out loud but, usually, clients are seldom well-versed in the estimation process that goes on behind a website development. It's understandable, though. There are important reasons driving their requests for costs and development timeline.

You - as the client - do so because you need to understand key elements of a new WordPress project before making the choice of hiring a developer for that. You need to know what costs and timeline will be involved in a given project to being able to evaluate it as a feasible solution.

Or, in other cases, you might need such information because a client of yours is asking for a project you want to (partially or entirely) outsource. You have to gather insights on costs and timeline because you're not at the right stage to commit and make the choice of investing in a developer.

So how can you get a clear picture of how much a new WordPress project will cost you, if you aren't ready to hire a developer yet?

Knowing the costs involved up front can be quite tricky because of the nature of development work

It all starts with you wanting to know how much a new WordPress website, a new custom theme, a fix to that awful issue [will cost](#). And you want to know that before you commit to hiring some developer.

These are real pain points you're trying to address so there's no trouble in that at all. The only thing here you need to be aware of is how development work occurs. WordPress developer and Codeable expert [Milan Latinović](#) highlights:

On one hand, clients need help to figure out how much their project will cost them before moving forward. On the other hand, the developer has to share knowledge to help clients make informed decisions. The problem here occurs when, at some point, a developer might be concerned when they start thinking they're sharing 'too much' without being compensated or ensured that client is willing to proceed with a project and not only seeking for 'free advice'.

In fact, if a developer can provide you with a specific estimate right off the bat (with no research, no additional information, etc.) either one of two scenarios is happening:

- a) You're a recurring client and you already have [a solid project brief](#) in your hands
- b) The developer you're engaging with isn't a professional developer and just want to give you some numbers to win you as a client. When this happens, usually poor work gets delivered or the estimated budget will need to be re-touched.

If scenario a) applies to you, you already have a channel of communication with that developer and you know how to approach and request estimates to them. Just be sure your [project brief doesn't have any red flag](#) that might scare away your trusted developer!

If scenario b) is the one better describing your current situation, run away and just [pick another developer](#). A good one, this time.



A project estimate is a serious thing (via [Dilbert](#))

Obtaining detailed estimates without hiring a developer can be problematic sometimes. This is because every client request, such as yours, is different.

Some clients are inquiring about something that has to do with their WordPress website, others are gathering information related to their client's. Some might have a lot of technical knowledge, others might not have any at all. On top of that, you also need to add all that a developer has to go through and analyze to understand what you're asking them to deliver.

As a result, getting an estimate before hiring a developer requires you to engage with the developer from the ground up for as long as they have all the needed information lined out.

There's no other way for you to get that coveted realistic estimate.

There has to be a middle ground

In your quest to getting a costs and time estimate for your new WordPress project without hiring any developer, you need to be aware that the more you put in, the most you get out.

One of the ways forward is that you try to find common ground between you and the developer. And you do this by engaging directly with them. Based on how big/advanced your WordPress project is, you can do this two ways:

Option #1: Engage with them via chat (not always a viable option)

If what you'd like to build isn't too much advanced, and you have already a basic project brief where all important information is available, then chatting with the developer might be good enough for you. Not all platform to find outsourced developers are powered with this features, though.

On Codeable, after you've posted your project, you have the chance to fire up a chat with prospect developers who will help you refine your budget (or other aspects of your project) by making you aware of [missing yet important information](#) or wrong assumptions you might have.

Posting a project is free, chatting with some developers is free as well, but don't try to exploit this opportunity. Developers have a sixth sense for users who aren't a good fit and who just look for free work. Be transparent and open about your request so you'll have higher chances to get more answers back.

Option #2: Jump on a call (always the best option)

Another way to get a costs estimate for a project without hiring a developer is to talk with one directly. On Codeable, [you can pick a 1-to-1 private call](#) with one of the 300+ WordPress developers for a fixed price, and a fixed 1-hour time slot.

By jumping on a private session with a Codeable expert, you can have detailed and in-depth discussions about every aspect of your soon-to-be website, plugin extension, or anything you're in need of. You'll receive appropriate replies and course of action that can help you make better decisions onwards. As Milan further explains:

A client might choose not to post a project on Codeable because they simply need to know more before making any further decision. So they opt to jump on a consultation task. These 1-hour private sessions sometimes evolve into 2, 3-hour consultancies or whatever is needed to clearly define the project. Once the project has been clearly defined through these private calls, the client will have everything set up in terms of research, infrastructure, project needs, and most importantly, budget and timeline.

What are the benefits of this process? You get a costs estimate but not only that

Finding a middle ground between you and [the developer you're engaging with](#) can really be the secret recipe to knowing project costs without having to hire a developer. But all doesn't stop there, as Milan points out:

As a developer, I generate PDF reports and proper documentation for clients I've consulted with. Specifically, they'll be delivered to-do lists, a solid project scope, a precise budget scope, and a roadmap, all tailored to their project. With all this documentation, clients can then decide whether to hire me (or not) and maybe look for another developer. Even on a different platform.

Costs are just one piece of the pie. Having a solid scope defined, a roadmap for your project, and all that documentation and planning is surely something useful to have.

Wrapping up

The costs involved in a WordPress project can vary tremendously. That's why you keep hearing that (serious) developers need to know more details about what you have in mind, about your new website, [about your issue](#).

They don't have the power to provide you with an estimate without such information, much like any other professional you've engaged with in your life. A painter will never tell you how much repainting your house will cost without having seen it first. A tailor will need your height, chest, waist, and neck measurements at least to give you an estimate. They need information before providing you with an estimate.

Same happens within the (WordPress) development world. Delivering an idea of WordPress development costs is ordinary life for a professional. So, if you're looking to get an estimate before committing to hiring a developer, you're doing something they're prepared for.

There needs to be a common ground established between you and the developer, though. One through which both subjects benefit from the situation: you'll be getting your costs estimate, along with a solid documentation around your project, and the developers will be able to showcase their experience and be compensated for their work.

As with other professionals, the more information you'll be willing to share with a developer, either by chatting or talking with them, the better the estimate you'll receive from them will be. As Milan summarizes:

Clients and developers should both try very hard to find a middle ground to handshake. If this middle ground doesn't happen, the project won't likely happen either. Or, even worse, it will happen in a very poor way.

And this, essentially, is a result you don't only want to ever occur but also one you should stay away from with your business.

Chapter 4: Increase Your Business Margins

How To Sell Your Agency Services At A Higher Price

There's always a time when you look at your business and think you're not happy with the current state of things and want to take your business to the next level. Most of the times, "doing more" can be easily translated with cashing more money in and increasing your income.

The problem is, as soon as you think about that, you're scared that if you raise your prices, you'll lose half of your current customers, make the other half angry, and end up broke eventually. You greedy business owner.

Fortunately, this is the less likely situation you'd experience, both as a web agency or freelancer/consultant, if you do it the right way.

Before jumping in at how you can sell your services at a higher price stack, you should consider some key areas that are intimately connected to your desired business goal. I'll come clean: there's no secret formula here, it's just numbers but if you wish to earn more from your services, you'll have to focus your efforts on 2 important aspects:

- you need to lower your business expenses
- you need to increase the amount paid by each client

On lowering business expenses

Taking expenses continuously under control and check them regularly is a great way to understand where your business is bleeding money (if any) and get to know where most of your cash is spent. So, start today by looking through all your expenses, even those you almost forgot about.

The more you get close to these numbers, the more you'll find flows that aren't perfectly optimized, or aspects that aren't required for each of your clients but you've been paying ever since.

Also, think about improving the effectiveness of your workflows: is there any activity that you're currently taking care of but brings no money into your business? Teach someone else to do it or [outsource it](#). Think this is a waste of your time? [You couldn't be more wrong](#).

Bottom line: if lowering expenses is what you need, try to streamline all your processes as much as you can. Find out how to automate all aspects that have to do, for example, with invoicing, scheduling, estimates, confirmation, and let others take care of what makes you lose time instead, and get back to work onto something that would bring more money into your business.

On increasing the price of your services

If your goal is to make more money, starting today you'll need to increase the price of your products and services. I know it sounds counter-intuitive (you think clients will be scared away) but is something great agencies and experienced professionals have been doing for years.

Let's see how you can do the same with your business and start pricing your services at a higher stack.

1. Perform an in-depth analysis of your business

To better understand how your business is doing, you should start with a [SWOT analysis](#) which is a great way to evaluate the strengths, weaknesses, opportunities and threats involved in a project or in a business venture.

Specifically, you should be able to:

- Enlight your core propositions
- Find your weaknesses
- List what can be improved in-house and what you should outsource

With these crucial information around your business, you're empowered with everything you need to analyze how your business can differentiate towards competitors.

2. Compare your business to competitors and look for opportunities

With a SWOT analysis, you should now have clear in mind all business insights relevant to your business. Now let's start by comparing your business to that of your main competitors to gather a deeper knowledge of it and look for opportunities. With this in mind, start by looking at:

- Their offer
- Their pricing structure
- Their clients and testimonials

Try to think both as an entrepreneur and a prospect client when you're doing this analysis.

Would you buy what they're selling? Is it a clear and compelling offer? Are there some cool features they talk about that you never mentioned on your website or selling materials? How is their tone of voice: serious, friendly, technical? Do they offer premium services or products?

By answering these questions, you'll understand the *what*, *why* and *how* of their offering and, most importantly, you'll be able to find where your propositions overtake theirs or where your business falls behind.

3. Ditch the hourly-based pricing strategy and use the value-based strategy

With a better picture of your business and how it stacks against the competition, it's now time to take a step further and talk about pricing. If you charge clients on hourly-based fees, you're doing it wrong because competing only on prices is always a bloodbath for your business.

At first, because offering services at low costs will let clients and prospects perceive them as low quality. Secondly, if no further value is added to your services, you'll always be in the run against smaller agencies or freelancers that cost way less than you. The turning point here is to switch from an hourly-based pricing model to a value-based pricing strategy. In "[Brake the time barrier](#)", an amazing ebook from Mike McDerment

and Donald Cowper from FreshBook, the constraints of a per hour pricing strategy are explained like this:

Selling hours actually creates a conflict of interest. It puts you and the client on opposite sides of the table. If you're selling hours, it's in your best interest to take longer, to bill more hours. But your client is interested in getting solutions that work as promptly as possible.

And more interesting:

Our clients don't care about our costs. They care about the value we create for them, so that's what we should be asking them to pay for.

Of course moving to a value-based pricing strategy isn't something that happens immediately, and you have to earn and develop your way into it but this will enhance your business with better-paying clients.

4. Position your services as business investments

With a new pricing approach, based on the value your services are providing, you need to position your services differently. Let me explain.

Since everyone hates to spend money, when people buy a product or service they usually try to capitalize on that and see how this expense is worth in their future, how much would this give in return to their life. Yes, an ROI.

When Mike McDerment changed his pricing approach and started to position his agency services as something able to provide an ROI to clients, he [tells](#):

I was no longer competing with other service providers on price. My clients stopped seeing me as a commodity, someone with an hourly rate that they could compare to somebody else's. [...] Instead, I was competing based on distinction; on the unique, customized ways I could help my clients reach their goals.

As a business owner, you should leverage this way of thinking among clients when talking about your services and present them as valuable tools to achieve their goals, like business investments.

5. Communicate and show your value

With a new approach to pricing based on both perceived and provided value, you have now to consider investing some efforts in showing your prospects and your current clients what they should expect from your business services.

This means you have to be sure the following 5 elements will communicate your value at best:

- Portfolio: create breathtaking pictures and compelling copy of selected projects that align with your new pricing strategy
- Case studies: it takes time, but case studies are great tools to share meticulously how your business addressed interesting requests and business issues from your clients
- Blog: [creating useful content](#) like writing blog posts, guides and also tutorials about your market, or tools you're using to provide some of your services, benefits your business in several way: strengthen your market position, add an authoritative layer to your business, it improves your SEO
- Social proof: it's no secret that social proof is an [effective technique](#) experienced businesses use. That's why you should do the same by showing testimonials, sharing comments from happy customers and anything that could help communicate how great your business is
- Newsletter: email addresses are powerful tools that let you talk directly to prospects and clients. This is where you could promote your services, share exclusive discounts to increase conversions, upsell your services and many other things. If you don't have any idea about how to grow your email list, create an ebook, a short guide or a cool infographic and give it for free to those who share their email address with you

6. Use leveraged growth tactics (like outsourcing)

In modern business, companies don't need to own all the assets to create and deliver services. Specifically, smart entrepreneurs can tap into one growth strategy known as leveraged growth, where you would look for resources (assets) outside of your company to improve your business earnings.

In a way, outsourcing is a leveraged growth strategy you can implement within your business because independent freelancers and experts add value to your services in a

cost-effective way. And when you opt for this growth strategy, your role will be to orchestrate all the involved parts and subjects.

7. Turn services into productized services

As you learned at the beginning, streamlining your processes can have a huge impact on your way to increasing the profits of your business.

That's way productized services are worth mentioning here. Entrepreneur Pat Flynn from Smart Passive Income quickly [explains productized services](#) as:

A productized service takes a skill you already provide and allows it to run systematically, growing with or without your direct involvement. [...] Productizing your service can free you from the classic freelance model, where you bill by the hour. When you productize, you're no longer limited by the number of hours you can feasibly work.

Given this, you should now evaluate which of your services can provide an added value to clients if bundled together, but still be something easy to manage or even completely automated to your end.

Wrapping up

Increasing your business profits and margins ain't easy and it could take some time because it's a business shift that affects several aspects: pricing, market positioning, branding, value, just to name a few.

With these proven tips and tactics, you'll be able to change radically the type of clients you're used to working with. Specifically, low-paying clients will likely leave their place in favor of those who need what you're selling because it aligns with their business needs.

Even if all of this might sound a crazy move, don't be afraid and take your chance: start re-thinking all of your services by the value your clients can earn from them, and not by the mere price they're asked to pay.

3 Core Areas To Increase Your Agency Margins Without Touching Your Pricing Strategy

One of the biggest challenges agency owners face is [scaling their business](#). Increasing client work intake should mean higher profits, but that's not always the case. More clients require more resources, either time-based or in-house employees, and that doesn't even account for the hills and valleys your business experience on a monthly/quarterly basis.

That's where leveraging outsourced developers comes into play. Many agency owners integrate freelance developers into their workflows on a variety of occasions and they do that with an interesting goal in mind: improve their outcomes and their business margins.

Scaling an agency business is a hard topic to discuss for it's strictly connected to your current scenario, your market position, your available resources, and your approach to business. Yet, there are core principles that apply to the vast majority of agencies and that can be really helpful for you, no matter how big or young your business is today.

So, how can you increase your agency margins without changing your prices?

Scaling a business means being productive and efficient on three fronts

You should pursue better productivity and improved efficiency.

These might seem quite basic recommendations about nothing special. However, most of the time it is the basics that are neglected by agency owners caused extensive damage in the long term. WordPress developer and Codeable expert [Paul Cohen](#) elaborates:

It's common sense but you'd be surprised how often we're not following these core principles and get distracted. Nowadays it is happening more than ever with distracting activities like social media acting as a time waster.

To do that you need to take action on three main areas of your business: Project and Product Management processes, communication tools, and automation.

1. Project and Product Management

It all starts with better procedures and processes.

Project Management encompasses every single detail of the project from the client's knowledge to their objectives and techniques, while Product Management is focused on designing the right product for the customer. As Paul explains:

Roughly speaking, Project Management is the process of development. Product Management, on the other hand, is the process of developing the right product, the right website. They're interrelated but separate processes, like two cogs in a gear assembly.

Being productive and efficient with respect to these two areas requires an agency owner to deal with different and connected matters in a [sensitive and timely manner](#).

Opting for the most efficient and effective development workflows, asking the right questions, and determining appropriate deliverables and milestones enable you to keep hold of the process and the costs involved. Paul comments:

In terms of project management methodologies, if your clients are very clear and they have an existing business, then you can almost do a waterfall project management methodology, which is still valid in certain contexts, because you're able to do all the requirements up front with a little bit of iteration. That will allow you to estimate much more efficiently. If your client's request is more open-ended or they don't really know what they want that's the value of using a more agile or rapid prototyping iterative method of development.

There are many Project Management methodologies to choose from and your choice should be driven by the type of clients and projects you usually work with. Some of the questions that might help you here are:

- What's the type of product/website your client is asking? Is your client's website a marketing website or is it an eCommerce website? Maybe a rental site?
- What's your client's awareness level? Do they know what they want/need? What's their background?
- To what degree do your clients have experience in that business area? Is it [a new idea that they're trying?](#)
- What's their in-house resources availability?
- What's the budget?
- What's the timeline?

An important part of improved workflows is played by [highly-skilled outsourced developers](#) who know what they're doing. They might cost more but they can deliver a better product faster with higher quality so that there should be fewer downstream issues.

2. Communication tools and processes

Efficiency in communications comes from streamlining processes and tools adoption. Having clear lines of command and communication channels and then utilizing them in the most productive ways possible should be the precise way forward. As Paul also brings to our attention:

You increase agency margins by being productive and efficient. And that has also to do with tools you have and how you use them. I'm talking about everything: from the right GitHub client instead of a command line, what development processes you're running, how far you've standardized tools among all your developers, etc. If you focus on making these flows of communications more efficient, theoretically it means you have a better process.

The lesson to draw here is that, at a higher level, you should be looking at minimizing friction among all parties involved.

3. Automation

Another area that might be worth investing is [automating repetitive tasks](#). Think of how much time you could gain back if you were able to automate these tasks:

- Backups for your client's websites

- Plugin and theme updates
- Performance monitoring
- Application performance monitoring
- Server monitoring
- Analytics reporting
- SEO reporting

The list could be endless.

If you really want to take it to the next level, automating your repetitive tasks goes hand in hand with leveraging what's usually called "retainers", which are fixed-scope tasks you outsource to freelance developers and pay for a fixed price. This way, you free time on your end and still are in control of the process and the final outcome.

Wrapping up

You won't believe how such basic truths aren't embraced by many agency owners who say they'd like to grow their business.

The fundamentals are important more than anything else. If you want to increase your margins, without touching your pricing strategy, you need to be "brilliant at the basics", as one of the longest winning NFL coach Vince Lombardi used to say.

Being brilliant at the basics means trying to do everything you can to improve these three fronts of your business so that you'll be able to juice out higher margins. At the end of the day, it's all about focusing on and increasing efficiency in all your processes.

An important aspect that stands out is that increasing margins doesn't necessarily mean cutting costs at every possible step. Sometimes, spending more means investing in greater returns because this allows long-term gains and minimizes your chance of having issues in the near future.

Chapter 5: Project Management

Project Management For Digital Businesses: How To Choose A Project Management Methodology That Suits Your Company

In a digital world, it's a daily thing to fight with things moving and change at a different pace than the one dictated by those procedures we've implemented and are trying to follow.

This fast-paced environment has not only to do with the way you manage your own organization and project workflows but also it impacts how your client will perceive your work.

For example, there's a high chance a client of yours would need to retouch their budget for a project when they're told something along the line of:

We strongly advise to do a discovery phase.

It's up to you, though, to convince them your work is still worth that updated amount of money. To make things even more complicated, in that scenario, new estimated delivery dates, different resource allocations, more meetings, and calls are likely to occur.

Here's the point:

Having a set of rules and methodologies that help you set expectations more correctly, help you manage your work in a more effective way, and help you deliver on time is a critical business asset.

As part of our broad business mission here at Codeable is to [help online business thrive](#), it's our duty to shed some light on such a tough (and vast) topic such as project management.

And that's where the journey begins.



If you haven't embraced a Project Management Methodology (PMM) in your business yet, or have some rules in place but not in a properly structured format, you might be wondering:

- Where should I start from?
- What do I need to understand before picking one for my organization?
- What features should a PMM have to be a good fit?

Let's start with one of the shortest ways that perfectly explains what you should look for, in this PMM quest you're into right now. I like how Ben Aston, digital project manager and VP of Client Services at FCV, [sums it up](#):

The best methodology is one that's continually and organically improving, adapting and through strong collaboration increases the value of the output so the sum is much greater than the parts.

No matter which methodology you'll end up with, your PMM should continually improve, adapt and bring to you more value when it comes to the desired outcome.

But wait, you might wonder:

How embracing a PMM could help run my business better?

Top 4 benefits of a proper Project Management Methodology

There are several aspects that will improve through a PMM properly set in place, but these following are the most immediate and deep improvements you could gain.

Specifically, I'm talking about:

1. Improved efficiency

With a more structured approach to managing work and requests from clients, you'll be better at planning and reduce variances in project results/delivery because you'll be able to streamline and optimize processes along with a decreased room for guess and uncertainty.

This will give you an edge over client management expectations as well.

2. Better risk assessment

Risk assessment is another important aspect that you'll be able to improve on. With an improved planning and a more controlled project environment, you'll gain a clearer understanding of the type of risks you might be facing, along with being able to foresee their possible consequences and prepare up front.

3. Better resources management (in-house and outsourced)

An increased efficiency in delivering work and a better resources management level are two sides of the same coin. Leveraging a PMM in your business would make your life easier when it comes to assessing what types of resources you'll be needing for a given project by providing you with insights on how many you can count on (or are short of) and how to better allocate them.

4. More control over project phases

By implementing a more organized action plan, along with all these other benefits, you'll get more control over the entire process. This will allow you to anticipate questions coming from your clients for example. But that's not just it.

Let's think about this other one: with an adopted set of structured rules to follow for each project you need to deliver, you could easily spot where bottlenecks or hiccups occur and act immediately to get everything back on track.

These four major benefits of implementing a proper PMM should already be enough to convince you of the important role that Project Management can play into a digital business. But things get tougher now:

It's time to choose a Project Management Methodology (PMM) out of the many that currently are available.

But where should you start from? How many PMM are there to choose from? Well, let's put on hold which one is the best fit for your company (for now) and let's look at a list of well-known PMM you could choose from.

Project Management Methodology list:

- Waterfall Method
- Critical chain project management
- Scrum
- Kanban
- Scrumban
- Extreme Programming
- Adaptive Project Framework
- Event Chain Methodology
- Extreme Project Management
- PRISM
- Lean
- 6 Sigma
- Prince2

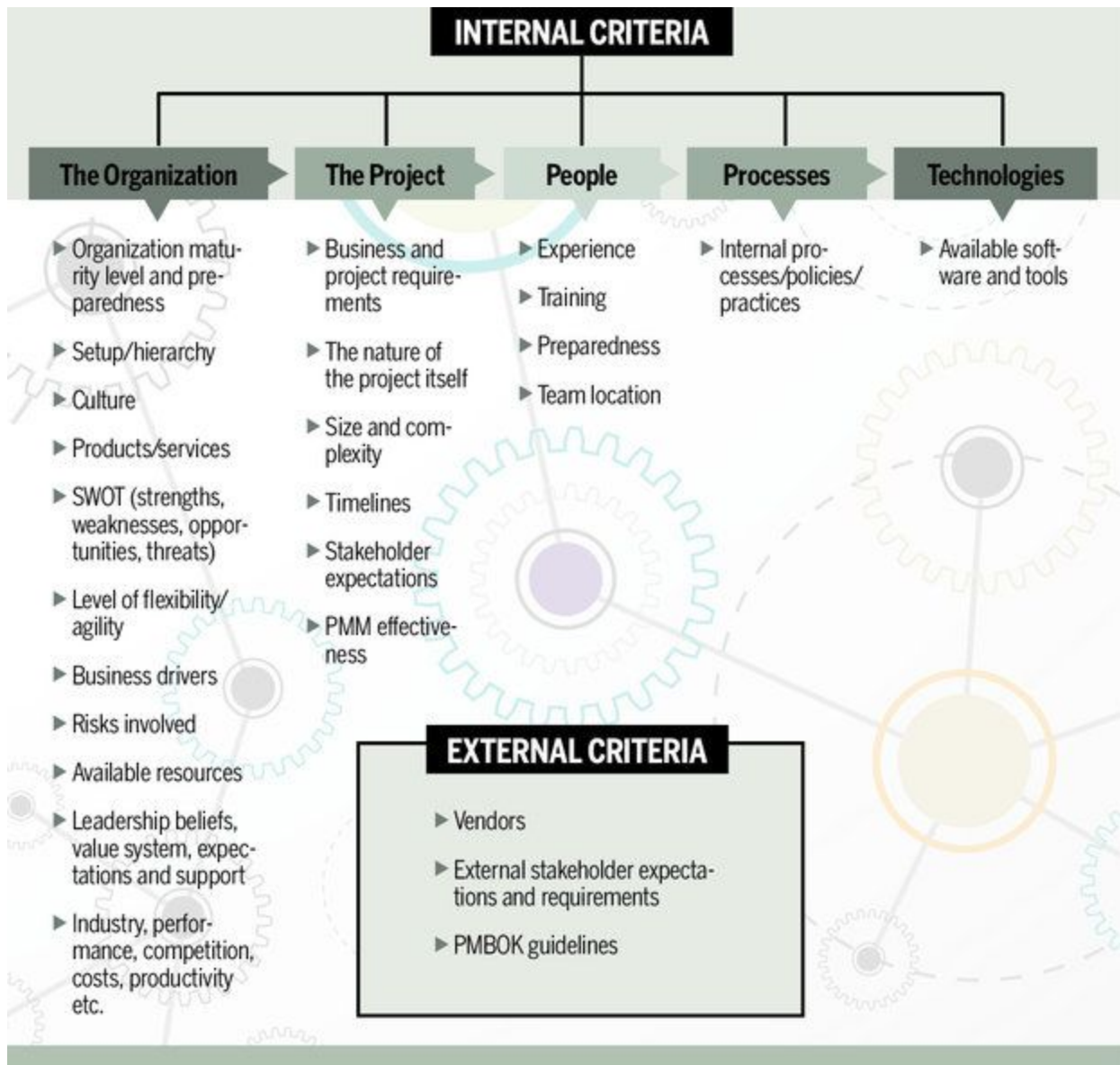
Overwhelming, uh? I agree with you. And this list doesn't account for all PMM that are currently available.

So out of all these, which ones should grab your attention? Which ones should you invest more time to master and implement eventually?

What to look for in a Project Management Methodology

As Moira Alexander, author of "LEAD or LAG: Linking Strategic Project Management & Thought Leadership", [points out](#) in this useful graphic, there are several criteria along with their sub-criteria you should take into account.

When trying to assess whether a PMM is good for your business or not, you should examine different subjects and aspects that are involved with your organization both internally and externally:



How to find out if a PMM is a good fit for your organization

To find out whether a PMM is going to be a good fit (or not), you ultimately should question some behaviors, procedures, or communication flows that usually are taken for granted and have probably never be challenged on a management level.

Well, now it's the perfect time to revise them. There are further questions that will help you find an answer in your research for a PMM to use. Specifically:

- Do your stakeholders prefer a particular methodology?

By questioning aspects that usually aren't, you'll start gaining a clearer idea of how different subjects are connected within your company. And one of them could be whether or not there are already preferences for a specific "system" to adopt over another.

If that's the case, what are the reasons behind it? What put its implementation on hold? What are the main concerns that stopped it from being adopted? You should be aware and gather all these types of information because when/if you'll be suggesting to start using a new PMM, you'd have to bring in solid arguments on the table.

Moving forward...

- How involved do your clients want/need to be in the work?

By asking this question you're trying to define what type of approach and how deep their level of involvement will be when it come to your clients.

The answer varies extremely to such a question because it's inevitably dependent on the type of relationship and client management process you've been following since today and the one you'd want to have in place in the future.

- Is it flexible enough?

In your PMM discovery and assessment process, you should try to find a PMM that is flexible enough in its deployment to be able to cover a project type but, with some adaptations and refinements, could work for others as well.

Even if there's no "one size, fits all" solution, the PMM you'll end up with should be able to address the majority of your needs with minor and quick changes.

- How steep is going to be the learning curve?

As with any new thing inside your business, there's always some learning required. And the more complex your organization is, the longer it will get for the whole company to make it their own.

New processes, new requirements to be followed, new roles in some cases, but also a whole new terminology that might sound obscure to some, are elements you have to take into account at this stage of the research.

Wrapping up

Each Project Management Methodology features its own strengths but also its weaknesses. Picking one it's really a hard task from a business perspective because its impact will be affecting your organization as a whole.

By revolutionizing your business internally, with new workflows and practices, you'll modify how you manage your clients, your outcomes, your costs, your resources management eventually. And that's a huge business leap.



Knowing this might put you into a *freeze* mode, where you're a bit worried whether adopting a better project management system is even worth it, based on all the things is related to that could go wrong. That's completely understandable.

But there's something you're missing here: through this research and assessment process for a useful PMM, you're aiming to improve your overall efficiency, and your entire business outcome we could even say.

And this is something that's always worth pursuing.

How To Use An Agile Development Approach When Working With An Outsourced WordPress Developer

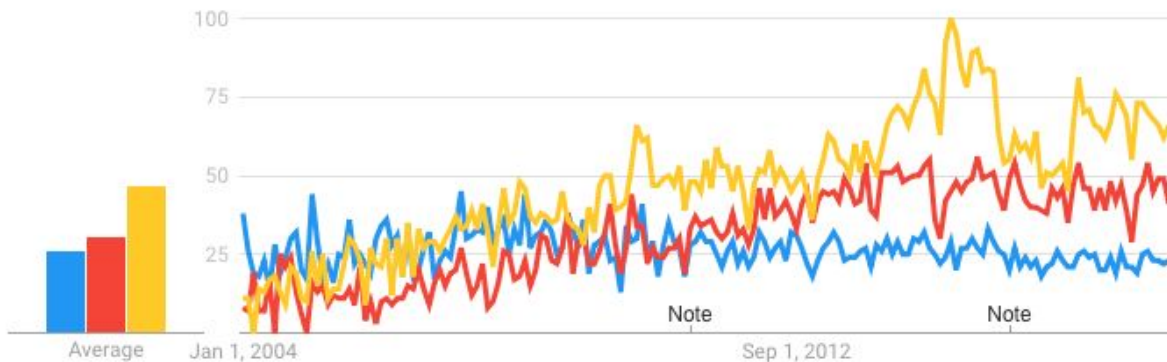
If you don't want to squander your money and time when [working with a WordPress developer](#), you need to keep track of everything. Budget required, timelines, milestones, release dates, testing phase, who's doing what, etc.

Literally, you have to have a clear picture of the project status and advancements.

That's why project management is such a critical aspect business owners should get better at.

In recent years, when people or industry outlets talk about project management applied to software development, they often pair it with the concept of Agile and, more specifically, they talk about Agile Project Management, Agile Software Development, and Agile methodology.

● Agile software development ● Agile Project Management ● Agile methodology



United States. 1/1/04 - 7/2/18. Web Search.

It seems like "Agile" is all the rage when it comes to [software development work](#). In fact, it's such a powerful methodology that any business owner can get used to and even master in a reasonable time frame.

So what does it look like working with an outsourced WordPress developer following an Agile approach?

Understanding what an Agile methodology is

To take advantage of Agile in your next project, it is important to first understand what the term "agile" means. Agile means flexible. When it comes to project management and software development, the term refers to fluidity in the process.

It allows the entire project to be classified and executed in a way that is more efficient by dividing it into recursive cycles, with a keen focus on continuous improvement, called "sprints".



Image [via](#)

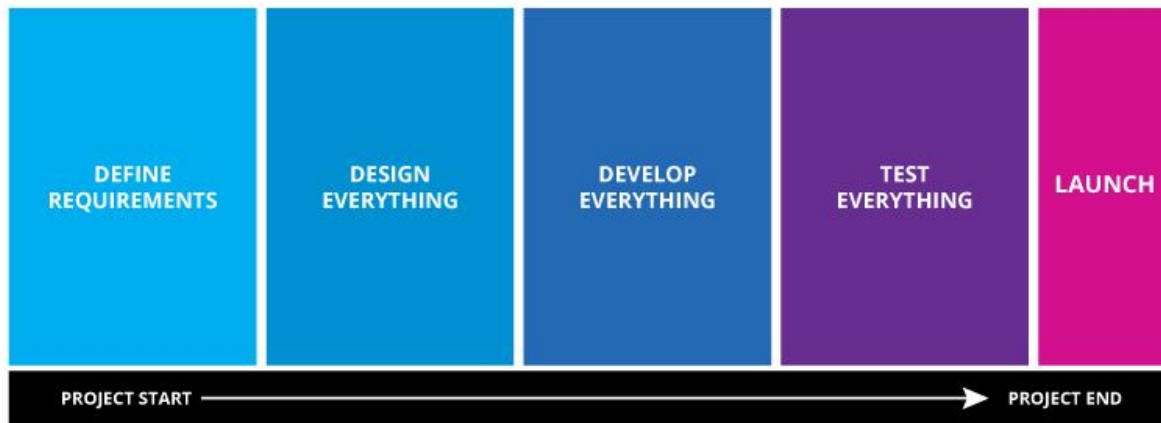
Sprints are usually two- to four-week-long and allow an extremely productive development flow because, for example, instead of discovering problems and suggesting edits at the end of the whole project, you and your developer can become aware of them earlier and adapt right away.

That's where the more traditional approach, often referred to as "Waterfall approach", show its limits.

Take a look at this:

What's the difference between Agile vs Waterfall methodology

EXAMPLE: LINEAR WATERFALL APPROACH



EXAMPLE: ITERATIVE AGILE APPROACH

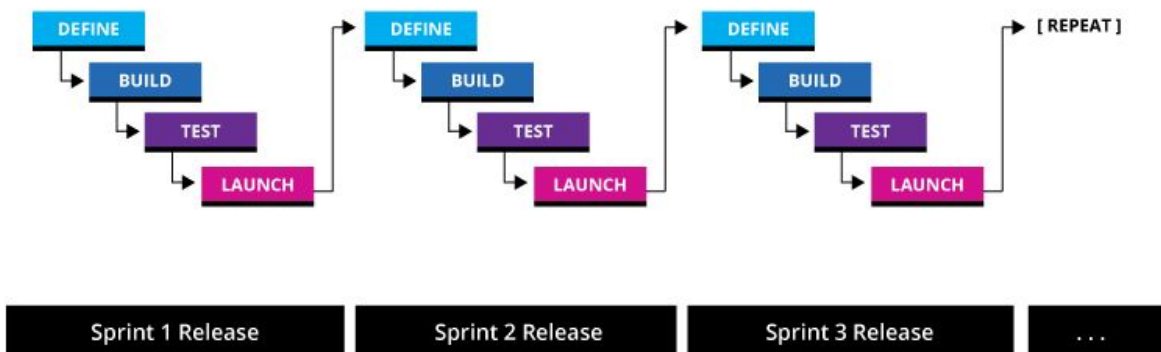


Image [via](#)

There are many differences between an Agile approach and a Waterfall one but, as you can see from the image here, the main one relies on the fact that the Agile approach favors a smaller and incremental delivery of work, while a Waterfall-based approach focuses on delivering the project all at once.

On top of that, Agile and more traditional methodologies differ on other key aspects, such as:

- Agile stands for customer collaboration over contract negotiation

- Agile stands for individuals and interaction over process and tools
- Agile stands for responding to change over following a structured plan
- Agile stands for prototyping/working solutions over comprehensive documentation

Having established that an Agile approach is an effective way to handle software development projects, we now dive deeper into understanding the most efficient way in which it can be made to work.



The five pillars of an Agile approach to working with outsourced WordPress developers

There are many ways and methodologies to implement an Agile approach. Still, there are five essential pillars that support such approach to project and software development and, at the same time, that cater to different aspects of the entire process.

Pillar #1 of an Agile approach: Problem and requirements need to be investigated and documented before anything else

Every proper problem-solving process begins by investigating either the cause of the problem or the requirements of the feature and document them.

This is important because as long as you don't know [what you have to fix](#), what [new functionality you're trying to build for your WooCommerce store](#), how are you going to successfully finish the project?

So, the first important step of Agile is understanding and documenting the implication of your request based on the current state of things. The developer starts investigating every minor detail including the issue, your requirements, your expectations, etc. WordPress developer and Codeable expert [Jonathan Bossenger](#) explains:

As the client, you'll come to the developer with a problem. Depending on the size of the problem, the developer you've hired may need to spend some time investigating it, whether is an issue to fix, the requirements of a new requested feature, the root cause of a problem. Once completed, it's the developer's responsibility to group findings, requirements, causes, etc. in a human-readable document.

More often than not, such investigative first step is delivered through what is called a "discovery phase" or a [scoping project](#).

Pillar #2 of an Agile approach: Evaluation of potential solutions

Once the problem has been identified, and the main project requirements have all been documented and shared with you, a starting point has been established. The next phase of the process will see your outsourced developer analyzing possible solutions that will be able to provide you with optimum results. Jonathan explains:

No one problem has one solution. There's always the perfect solution, and given unlimited budget and time, the perfect solution might be your option. But budget might be a concern. Time might be a concern. Technology might be a concern. So, after the discovery has been done, I will then propose to the client two or three solutions based on my findings. Once the chosen solution has been picked, we need to take that solution and break it down into smaller pieces.

Pillar #3 of an Agile approach: Project has to be split into shorter life cycle stages

Planning and its related time and costs estimate is where the Agile approach really shows its difference and its value.

In fact, the third pillar entails breaking your project (aka the solution you've picked thanks to the developer's suggestions) into smaller chunks, at the end of each, deliverable goals are bundled with.

Remember the concept of sprints I talked about earlier? Well, this is just them.

Specifically, once a solution has been preferred over the others, your [outsourced WordPress developer](#) will split it into smaller yet meaningful sub-projects and link them to the fixed-timed development cycles. On top of that, at the end of each sprint, you're supposed to receive a physical deliverable to test.

It could be something you could see in your browser, something you can click and test on a separate [staging environment](#) on your own. Almost anything. The important thing here is, you play a proactive part in the development process by having the change to test early and providing your developer with feedback on every piece of code they're working on.

Wow, uh? See the effectiveness of such approach?

Pillar #4 of an Agile approach: Costs and time estimates don't cover the project as a whole

Given all the core difference Agile brings in, you should also be aware that also costs and time estimates change drastically. Fear not, though. That's a good news for your wallet!

Let me explain.

With other standard approaches, you're used to [preparing a project brief](#) with some requirements, criteria, and then ask for an estimate or, if the requirements are too loosely defined or it's a big project, you might request a ballpark estimate.

What happens next, usually? You get a project estimate covering the whole project development costs and also a timeline in which it might be developed. Something like:

This project is going to cost you this much and will take three months.

Sounds familiar? I bet it does!

If you're following an Agile approach instead, you'll be able to get time and costs estimates for the initial part of a project only. Sometimes, a couple more sprints can be estimated too but it's not always the case because it's only after a developer has started to look deeper into a matter that they're able to estimate properly. Jonathan highlights:

Once we agree on a solution, I usually define several milestones to achieve that goal and then share it with the client as 'To have our solution in place, we have to go through these X milestones. First I'm going to do this, then I'm going to do that,' and so on. As for estimates, I'm only delivering estimates of costs and time for the first milestone, sometimes the second as well.

A key aspect of an Agile methodology is to request a continuous flow of project updates from the developer. This doesn't have to be misinterpreted as [checking in too many times on the developers](#).

Yet it is the other way around: you should expect your WordPress outsourced developer to share updates with you on a recurring and ongoing basis, based on your preferences and project size.

Examples are:

- Monday, Wednesday, and Friday
- Longer weekly updates
- Short daily updates
- Weekly updates and a monthly call

Communications and updates preferences have to be defined at the earliest possible to keep the workflow as efficient as possible.

Pillar #5 of an Agile approach: Adaptability driven by continuous feedback

Testing is the phase that determines whether or not the project is on track. This is why collecting feedback through testing at end of every sprint from you is vital. It also has to be extensive so that any issues that might be present arise while they can still be fixed.

It is possible that things don't work out the way you expected. Or, it could be the case that you realize a certain solution isn't solving the issue as you hoped in the first place.

Thanks to proper testing, things can easily be altered midway and then steered into a direction that makes productive results possible. Jonathan tells that this is important because:

Another great thing about the Agile approach, is the client gets to test the project early on. And they get to see how it's going, and how it's working. Does it solve the problem that they set out for it to solve? And has anything changed in the course of this development that we need to deal with? With Agile, we can answer all these answers and act accordingly when things change.

Wrapping up

When [working with an outsourced WordPress developer](#), efficiency has to be your Northern star.

Embracing an Agile methodology and approach helps you streamline otherwise haphazard operations. You have the ability to provide feedback during project phases and improve aspects that are not working out as they should.

In addition, you get to be directly involved in each stage of the project, right from the earliest ones and get to test solutions regularly, rather than waiting for the whole project to complete.

[Project management is an important business skill set](#) on its own. It's crucial. But it's combining it with an Agile methodology that will allow an even higher level of seamless planning, execution, and delivery of project goals.



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