

Unlocking WordPress

8 Keys to Managing Your Website with Confidence

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Key #1

Build a Strong Foundation

Take your business assets seriously. Whenever a business owner trusts me with registering their company domain name – with my own credit card – then a big red flag goes up signaling this person does not recognize the value of her online assets.

What happens when your website manager is no longer a good fit? Or he gets hit by a truck? Seriously, sometimes relationships fall apart. I know this because many of my WordPress training clients come to me in desperation asking, “How do I get my website back?” It’s not easy and sometimes it’s just not possible!

Take the time right now to inventory your passwords and your access to each of your digital assets. Anything missing?

WordTip

Watch my video, [“Protect yourself from unethical web design agencies”](#). Know exactly what you need to be in control of your website assets.



Choose the Right Hosting

There are two things that differentiate great hosting companies from the not so great:

1. High quality tech support
2. WordPress friendliness

A good hosting company is going to have tech support available 24 hours/day and be able to communicate clearly with you. They will also advertise themselves as WordPress friendly. Although, there is no reason to pay extra for a special type of hosting plan that is specific to WordPress.

As a website developer, I have plenty of experience attempting to work with various hosting companies. Launching a new website or transferring a website requires a strong website hosting interface. Let me tell you, there are some real nightmares out there!

I use and recommend [Blue Host](#) and [HostGator](#) for hosting services.

Select the Best Theme

When I was getting started with WordPress, I wish I would have had someone to tell me, "Use this theme!"

Instead, it took me a long time to stumble upon some high quality theme providers. I didn't know how to tell the difference between the good stuff and the bad stuff. Here are some rules to follow when selecting your WordPress theme:

Responsive. It has to be responsive. A responsive website looks good on phone, tablets and desktops. Do not even look twice at a theme that does not have the label, "responsive".

Avoid "Free" Themes. When you purchase a premium theme, you are paying for the support behind it. Without a doubt, you will have questions about how to use your website theme. A quality theme comes

with excellent documentation and a support forum where you can get answers quickly. If you think you will not need to utilize a support forum while you are working with your theme, then you are a more skilled developer than I am!

Flexibility. Because I work with a variety of companies, I need flexibility in a WordPress theme. Flexibility means I can use it to design a website exactly the way my client wants. My favorite theme is currently offered by [Theme Fusion](#) and it is called [Avada](#). Take a look and you'll see why I love it.

Additional theme providers: [Themify.me](#), [Elegant Themes](#), and [Studio Press](#).

WordTip

"What if I'm using a customized theme?" See Chapter 8 to learn more about common WordPress mistakes.

Does your theme come with a child theme? Upload both the primary theme and the child theme to your WordPress theme library. [Activate the Child Theme.](#)





Key #2

Memorize These 7 Basic WordPress Definitions

Use correct wording when you communicate with web developers and support forums. Enter the correct terms when you do a Google or Bing search. Don't waste your time by talking about "web pages" when you really mean "website". Don't talk about "blogs" when you really mean "posts". Don't say "tabs at the top" when you mean "main navigation". You will save yourself a lot of time and confusion by using the correct terminology. Take a look at these 7 definitions. Feeling fuzzy about any of these terms? Read [7 Basic WordPress Components](#) to get clear.

1. Header
2. Main Navigation
3. Slider
4. Footer
5. Widget Areas
6. Posts
7. Pages



Key #3

Use Your Support Tools

Read the Theme Documentation

It's not unusual to install a WordPress theme for the first time and be hit with the realization that it doesn't look anything like the demo. Surprise! As a WordPress trainer, I get lots of questions that are specific to themes. Of course, it's impossible for me to know how every theme works! So, my response usually starts something like this: "Let's see what your theme documentation says . . ."

Having a good grasp of WordPress fundamentals will take you a long way in understanding your theme documentation. But, sometimes the documentation just doesn't get you there. That's where the next two steps come in handy.

Use the Theme Support Forum

Not finding answers in your theme documentation? If you've purchased a quality theme, then you should be able to find answers in your theme support forum. The key to using a support forum efficiently is this: use the forum search tool. It's likely your question has already been asked and answered. It's much quicker to use the search bar to find answers than to post a question and wait a day for a response.

As an experienced website developer, I still use support forums regularly to get answers to my questions. Think of the effective use of support forums as an important skill—like study skills and research skills—to help you achieve your goals. It's not optional.

Google Knows

Just about every question that has ever been asked has been entered into a search engine. If you are getting frustrated with Google search, chances are that your searches are not specific enough.

WordPress Training

There's nothing like 1-on-1 to speed up your learning process. I know this from my own experience. It took me almost two years to learn and feel confident about WordPress. I finally learned the value of training when I hired a consultant to teach me about Search Engine Optimization.

I learned so much in a short period of time. He knew the answers to questions I didn't even know to ask! That was the beginning of my journey toward becoming a [WordPress Trainer](#).

WordTip

WordPress.org support forum may have inaccurate information. Their information is frequently out of date or just plain wrong.





Key #4

Work Efficiently - Before Diving In

Decide on Your Primary Call to Action

What do you want your prospect to do once they've landed on your website? Call? Buy? Opt-in to your email list? Make sure your website design helps you achieve this ultimate goal.

Decide What Your Main Navigation Will Include

Does it make sense for a first-time visitor? Do you really need to jam your entire website into your main navigation?

Remember... The average visitor makes less than 2 page visits before abandoning your website. Consider offering fewer choices in your main navigation.

Decide on Your Color Palette & Fonts

Go grab some great ideas from Adobe for color inspiration and head on over to Google Fonts while you're at it.

Work in Various Browser Tabs

Pull up the WordPress dashboard in one browser tab. This is also known as the "backend".

In a second browser tab, pull up the "frontend" of your website— the part of your website that is visible to the public. After you make changes on the backend, simply refresh the frontend in your second browser tab. Switching between the backend and frontend of your website is easiest when it is open in separate browser tabs.

Work on a Copy of Your Website

Wouldn't it be nice if you could test design ideas and changes on a separate copy of your website? You can! The steps include making a copy of your website and launching the copy on a subdomain. Sound complicated? It's usually not. But it can get a little hairy if you're hosting company isn't WordPress friendly. To see how it's done, refer to "[How to create a copy of your website for practice purposes](#)" for step-by-step instructions. Not sure about taking on this task by yourself? My team can take care of this part for you - contact us for pricing.





Key #5

Selecting Plugins

Plugins can be awesome. Simple or robust, they add powerful functions and features to your website. Keep in mind a few rules about plugins.

Filter for Quality

Use Google to search for recent reviews of plugins. Once you find a plugin you like, then read more reviews! There's a lot of junk out there in plugin land. If you feel completely lost, then only go with plugins suggested by experienced developers you trust.

WordTip

Check out [my list](#) of favorite WordPress plugins.

Less is More

Just because there's a plugin that can do backflips, doesn't mean you should use it. Why? Plugins can be in conflict with each other, with your theme, or with your current version of WordPress. They require monitoring and some-time eliminating.

Whenever your website seems to be acting sort of wonky or just plain bad, then the first thing you should suspect is a plugin conflict.

Beware of Caching Plugins

Caching plugins can be excellent tools for speeding up your website and improving your website performance. But, they need to be used wisely.

I've experienced issues with caching plugins in two different situations. First, caching plugins frequently cause weird behavior in online shopping carts and checkout pages. Do not cache those pages.

Second, during the WordPress training classes I offer, participants will frequently install WordPress for the first time. I've noticed a caching plugin activated among the list of plugins on fresh WordPress installations. An activated caching plugin is never a good idea while you are working on your website. Why? You can't see your changes! Your pages will appear to be unchanged even after you refresh them. Frustrating! Simply deactivate the caching plugin before starting work on your website. Then, reactivate it when you're finished working.



Key #6

Use Design Help

I'll let you in on a secret. I'm not a graphic designer. That's it. I used to struggle for hours in my attempts to produce attractive graphics. As it turns out, I have very little skill with graphic design. That's why I rely on a list of valuable resources.

Online Freebies

Sometimes I just need a button! Let's face it. It's not always necessary to hire a professional graphic designer to design a simple button or help you figure out an html color code. Over time, I have found a handful of free online resources to help me with the small stuff.

Fonts:

dafont.com
[Google fonts](http://Google.com/fonts)

Button Makers:

dabuttonfactory.com
buttonoptimizer.com
grsites.com

eBook Covers:

Canva.com

Background Makers:

bg.siteorigin.com
[Zen BG](http://ZenBG.com)
grsites.com/archive/textures/
imagecolorpicker.com

What font is that?

Chrome extension: [What font?](#)

Image Editor:

GIMP.org (similar to Photoshop)
Find free GIMP tutorials on YouTube.com

Budget Conscious Resources

Use these resources when you don't have the time--or money.

Through trial and error, I've learned to use these two websites to find freelancers for short term small projects:

- Fiverr.com
- Upwork.com

For example, if my dedicated server needs a tune-up then I can browse Server Administration experts who take on small projects. My experience has been mostly positive with an occasional **not worth it** experience.

WordTip

Research prospective freelancers thoroughly. Read reviews of their work, take note of their response time, and do not go with the lowest price.

Professional Design Resources

These people make me look great! There are a handful of companies I trust with the long term growth of my business.

I know I will return to them for large and small projects. They know and understand my style and my business goals. When I hand something over to them, I don't worry about getting it done right. They are experts. When it really matters, rely on professionals you trust. Here are two companies I trust with my business:

- StacyUy.com
- FlightMedia.co





Key #7

Backup Your Website

Mistake #1: Not backing up your website.

Mistake #2: Not having a copy of your website backup stored separately from your server.

When do I make a website backup? This is something I do every 4 to 6 weeks. First, I backup my website. Then, I update plugins, themes, and my version of WordPress if there's a new one available.

It's an unusual situation when you need to restore your website from a backup. If you are in a situation where your website has been corrupted beyond repair, then you may need to restore your website from a backup copy.

For example, if your server has been attacked by a virus, it may be appropriate to delete your website files entirely. Then replace them with your latest backup copy. I prefer to have this copy stored on my desktop or on a disc completely separate from my website server.

I feel more confident when the product of my hard work is not stored in someone else's "cloud".

WordTip

I recommend the plugin **Duplicator Pro**. Not only do I use Duplicator Pro for regular backups. I use it for transferring websites and launching new websites.

If you've never transferred a website from one hosting account to another, then the process can seem overwhelming even with the help of a great tool like Duplicator Pro. You don't have to figure it out by yourself.

Contact us for more information about 1-to-1 training to help with the backup and transfer process.





Key #8

Avoid These Common Pitfalls

Here is a list of common pitfalls that might seem to work out in the short term but they often create challenges down the road.

Copying and pasting content into your WordPress dashboard from another source.

You definitely do not want a bunch of different fonts showing up on your website. Besides that, when you copy/ paste you risk using HTML links which may end up broken at some point. Instead, open your text editor and copy and paste it here to get rid of any additional styling.

Incorrect WordPress settings.

Still have your permalinks set to default? Empty blanks for your Site Title and Tagline? Check out your basic WordPress settings and be sure they're correct.

Are you working with a theme that was customized just for your company?

That can be a problem. Sure, you get exactly what you want from the start and the good feelings last for about a year. But, past that, you're probably running into problems whenever you attempt to make changes or

updates. Here's the deal-- Custom coded websites create problems. I see this over and over again with my training clients. You need to start developing your new website now. Sometimes you need to take two steps backward before you can move forward on the right foot.

Becoming too reliant on drag-and-drop website builders.

Drag and drop website builders are convenient tools specific to one theme provider. They are not transferable to other WordPress websites or theme providers. It's easy to become dependent upon a single theme provider's website builder and get rusty with your WordPress skills. Avoid this pitfall by making sure you have a good handle on the Classic WordPress editor.

Neglecting to update your theme, plugins, and WordPress version.

You should stay on top of this. Most updates are for security purposes. If you have a virus on your website, it is likely due to a failure to update. I advise updating within 1 month of notification.

Lazy image management.

Okay, this is one that can sneak in with the best of website managers. One of the most time consuming activities when it comes to managing your website is image management. It is so much easier to simply upload an image as it is. All done, right? Wrong. The problem is this: over-sized images can cause your website to eventually become sluggish. Truth is, there is no need to have a 4000px image on any of your website pages. As a rule, very few images should be allowed over 1000px. Also, with the exception of your logo, most images should be in jpg file format instead of png file format.



You've Got This

In Summary

I know this a lot of information to absorb, but I promise this is the first step in taking your business assets seriously. Go grab a dictionary and familiarize yourself with the correct terminology for your website. It will ease the process for you and the people you work with. This way you will be on the same page. Use all of the support tools that are out there. After all, it's not the questions that are hard, it's just the answers! Be efficient with your time and energy. Set goals and make smart design decisions. Don't settle for anything less than a perfect website, but remember that less is more when it comes to plugins. Outline a budget and take advantage of free resources. However, investing in a professional design team is never a bad idea. Do yourself a favor and back up your website. It's always better to be safe than sorry. Lastly, avoid common pitfalls. If you are going to do something, do it right.

Ready for more? We do this all the time!

We bring in-person and customized WordPress training to individuals and teams. You don't have to do this alone. Get the training you need to manage your company website with confidence at www.emilyjourney.com.



Traveller. Dog Lover. WordPress Artisan. I am a WordPress Trainer for marketing teams, IT departments, business owners and administrative staff. This includes virtual and in-person WordPress training throughout the United States. I've spent years delivering and refining my comprehensive WordPress training. I love helping business owners leverage technology to increase sales and social impact. I write, speak, and coach full-time.

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