

PROJECT MANAGEMENT
FOR PROFIT



PROJECT MANAGEMENT FOR PROFIT

FUNDAMENTALS

Learn the basics to
maximizing your website
development ROI.

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Project Management for Profit Fundamentals

Table of Contents

Introduction	1
How Project Management Saves You Money	1
Other Benefits of Effective Project Management	3
Project Management as your UVP.....	5
What is a Project?	5
The Basic Definition of a Project.....	5
Three Four Elements of a Project	6
What Clients Care About Most	6
What is Project Success?	6
The 7 Most Common Reasons Projects Fail	6
What is Project Management?	9
Other Project Management Terms.....	10
The Project Lifecycle	11
The Project Plan	11
Project Plan Phases	11
You Are Already a Project Manager	13
The Effective Project Manager	14
Additional Tasks for Projects with Teams	17
Other Project Management Roles and Responsibilities	18
Essential Principles and Processes.....	20
The 6 Principles	20
The 8 Processes.....	20
In Summary	21

Introduction

When I first started attending WordCamps, I was shocked at how many website providers, solopreneurs, and agencies had no idea how to effectively manage their own projects. Even though I started out hating project management (in the corporate environment) and eventually came to love it when I really understood how to implement it, I forgot that early part. I just assumed everybody who knew way more than I about building websites surely knew these basic project management concepts and techniques.

Not true. Everyone everywhere was complaining about clients not adhering to the schedule and projects that ran over time and over budget resulting in unhappy clients. Here's what you need to know.

It's not your fault that no one taught you how to manage projects properly.

In the website development space, there is a ton of training on how to use the tools to build and you can get the "how to start a business" training at your local community college and there is a boatload of training on how to SCALE your business. But sadly, there is very little project management training out there specifically for website providers and the ones who are teaching it are teaching fallible, anecdotal, unproven concepts and processes.

The result? Talented professionals are working harder than they need to, making less money than they should, and dealing with way more stress than necessary.

That's why I created **The WP Project Manager's Academy** and have trained hundreds of website providers, just like you, regardless of platform, how to consistently get website projects completed on time, within budget, with features that meet the client's business requirements, without sacrificing profit.

And while the project management skills and techniques I teach have not changed (and will not change as the technology changes), recent massive technology changes HAVE impacted and improved the methods we use to implement the planning and management processes. And that's how **Project Management for Profit** was born - a modernization of the former The WP Project Manager's Academy, improved and expanded to apply to any website development project, regardless of platform.

This e-book, **Project Management for Profit Fundamentals** is the foundational component for our larger **Project Management for Profit Framework**. Both are essential in order to get the most value from our upcoming flagship course, **Project Planning with AI** where we teach you how to scope and plan a project in less than half the time.

And don't worry. This isn't about adding bureaucratic overhead to your creative process. It's about implementing practical, proven systems that will help you deliver better results while actually enjoying the work you do. You'll discover how proper project management isn't just about organization—it's about protecting your time, maximizing your profits, and building a business that works for you instead of the other way around.

Whether you're a solo freelancer juggling multiple clients or an agency owner trying to scale without losing your sanity, the principles and practices in this guide and our Framework will help you transform chaotic projects into smooth, profitable operations.

The best part? You already have more project management experience than you realize. We'll show you how the skills you use to plan a family vacation or organize a home renovation project are the same foundational concepts that successful project managers use every day. Building on that foundation, we'll introduce you to the specific processes and mindset shifts that will revolutionize how you work.

By the time you finish this e-book, you'll understand not just what project management is, but everything involved in **CONSISTENTLY** delivering projects on time, within budget, and with results that meet or even exceed expectations. It can help set you apart from your competition, as not just another service provider, but a trusted partner to whom clients willingly pay premium rates.

Ready to stop leaving money on the table and start running projects that actually work?

Keep reading...

How Project Management Saves You Money

While it might seem like extra overhead or tedious busy-work at first, solid project management practices actually put more money in your pocket by preventing the costly mistakes, delays, and chaos that plague poorly managed projects. Instead of hemorrhaging cash on emergency fixes, scope creep, multiple revision cycles, and missed deadlines, you'll be running a lean, profitable operation that delivers consistent results.

Solopreneurs and agencies that have implemented the proven project management techniques included in the ***PM for Profit Framework*** know first-hand that, it is truly an investment that pays for itself many times over.

Here's exactly how good project management translates into better financial outcomes:

Prevents Budget Overruns and Scope Creep

Using proven processes for planning, monitoring, and formally managing (controlling) change will keep your projects within the agreed-upon budget because it ensures you

catch and address time and cost deviations early. Using formal and well-thought-out change control and approval processes prevents uncontrolled feature additions (scope creep).

Eliminates Waste and Rework

Breaking the job down, structured and clear requirements documentation, and regular client reviews prevent costly mistakes and miscommunications that would otherwise require expensive corrections and timeline extensions.

Optimizes Resource Allocation

Standardizing physical resources, where possible, with reusable assets, prevents “reinventing the wheel” for every project. Systematic resource planning also ensures the right people work on the right tasks at the right times, thereby maximizing productivity from team members (including the client).

Reduces Risk-Related Costs

Every project has risks to a successful completion. Proactive risk identification and mitigation prevent expensive surprises, delays, and crisis management situations that typically cost 3-5 times more to resolve than preventing them up front. It also establishes you as a professional in the eyes of your client because you already know what “might” go wrong and have plans to address it if it does.

Speeds up Time-to-Market

Efficient scheduling and bottleneck elimination (especially with client delays) shorten project timelines which reduces costs and enables faster revenue generation and competitive advantage.

Other Benefits of Effective Project Management

While saving money is probably the most compelling reason to embrace project management, the financial benefits are just the beginning. Good project management creates a ripple effect that improves virtually every aspect of how you work with clients and deliver projects.

You'll build stronger relationships, reduce stress, and create a more professional operation that clients actually **want** to refer to their colleagues. These additional benefits might not show up directly on your bottom line, but they're what transform a chaotic freelance hustle into a sustainable, enjoyable business:

- **Set client expectations more effectively**

When you have solid project management in place, you can paint a clear picture for your clients about what's going to happen, when it's going to happen, and what

they need to do to help make it successful. No more awkward conversations about missed deadlines or surprise costs—your clients will know exactly what to expect from day one.

PM for Profit Tip: Include your most essential processes in your proposal and/or services agreement to which the client must agree before the project is awarded.

- **Projects become more predictable**

Instead of crossing your fingers and hoping everything works out, good project management gives you a roadmap that actually makes sense and ensures you get paid for ALL that you do. You'll start to see patterns in how long things take, what usually goes wrong, and how to plan for the unexpected. It's like having a crystal ball, but better because it's based on real data and experience.

- **Retain planned ROI**

You know that profit you calculated when you priced the project? With effective project management, **you actually get to keep it!** When projects run smoothly and stay on track, you're not eating into your margins with overtime, rush fees, or having to redo work that went sideways due to poor requirements definition.

- **Stay within budget**

Money has a funny way of disappearing on projects, but project management helps you keep tabs on where every dollar is going. With a solid project plan and change control process, you'll catch budget overruns before they become budget disasters, and you'll have the tools to adjust the budget (and ensure you are compensated) for changes that happen along the way.

- **Get done on time**

Deadlines don't have to be suggestions anymore. With proper planning and tracking, as well as a solid change control process, you'll actually hit your target dates, which means happier clients, better cash flow, and the ability to move on to the next profitable project instead of being stuck in deadline limbo.

- **Avoid scope creep**

You know how clients love to add "just one more, small thing" that turns into a massive undertaking? Project management gives you the framework to handle both small and large change requests professionally while protecting your time, sanity, and profit margins.

- **Resolve roadblocks and issues more quickly and easily**

Problems are going to happen—that's just reality. But with good project management, you'll spot them early and have systems in place to deal with them efficiently. Instead of panicking when something goes wrong, you'll have a plan to get things back on track fast.

Project Management as your UVP

Industry experts all agree, if you can establish a unique value proposition (UVP) for your agency – ***that one thing you do better than all the rest*** – you can attract higher paying clients who actually respect the work you do.

PM for Profit Tip: The single best strategy for setting yourself apart from the competition is showing the client how YOUR project will not succumb to common project obstacles, delays, and cost overruns.

Now that you understand the compelling financial case for project management, you might be wondering how this applies to your specific situation. The key is recognizing that project management isn't just for massive corporate initiatives—it's equally valuable for the everyday work you're already doing. Let's start by getting clear on what actually constitutes a "project" in your business.

What is a Project?

You might think you already know what a **project** is, but having a clear definition helps you recognize when you need to shift into project management mode versus just handling routine tasks.

Understanding what makes something a "project" also helps you communicate more effectively with clients and set appropriate expectations from the very beginning. Here's how to think about projects in a way that sets you up for success:

The Basic Definition of a Project

1. ANY job that has a beginning and an end.
2. At a stated level of Performance.
3. At a budget and with a specific outcome.

For example, performing a website redesign is definitely a project. Your continuous care plan or website maintenance activities, on the other hand, is an ongoing effort so while you may have a set of Activities and Tasks to complete, it does not fit the classic definition of a project, per se.

Three Four Elements of a Project

For many years, the 3 elements of a project have been presented as “the triple constraint,” meaning to manage a project effectively, a Project Manager must control: the project:

- Scope,
- Timeline, and
- Cost

However, managing resources is also a very big part of any project and, while it could be considered part of managing scope, it’s important to understand how big a part it plays. In real-life project management, the job entails managing scope, timeline, cost, **AND RESOURCES** effectively.

What Clients Care About Most

Studies have shown, when tracking where clients spend time when reviewing proposals, they are most concerned with the contents of the proposal in descending order as shown below.

1. Cost/Investment
 - a. Timeline
 - i. Solution

Based on this information, it makes sense to focus a large part of the proposal on HOW you plan to keep the project within budget and delivered on time.

What is Project Success?

Clients all tend to agree that the definition of project success, on any type of project, is completing it:

- On time
- Within budget
- With results that meet the client’s business requirements

The 7 Most Common Reasons Projects Fail

Now that we know what project success looks like, let's talk about why so many projects miss the mark. Understanding these common failure points isn't about being pessimistic—it's about being prepared. When you can spot these warning signs early and have strategies to address them, you're already ahead of most people running projects.

Here are the seven biggest culprits that can derail even the most well-intentioned projects:

1. Unrealistic/incorrect client expectations

This is the big one. When clients think their website redesign will take two weeks or that adding "just a simple e-commerce feature" is no big deal, you're setting yourself up for frustration and failure. If you don't take the time, up front, to educate your clients about what's realistic, you'll spend the entire project trying to manage disappointment and defend your timeline.

But setting expectations involves more than that. It's off-the-scale important to educate your clients on your project management processes, why they exist, and what problems they are designed to prevent or minimize.

The **PM for Profit Framework** encourages folks to include these in the project defining documents such as the proposal, master services agreement (if applicable), and having the client intentionally agree to them.

2. Inadequate estimating

We've all been there—you throw out a number that sounds reasonable, only to realize halfway through that you've drastically underestimated the work involved. Poor estimating doesn't just hurt your bank account; it creates a domino effect of missed deadlines, quality compromises, and stressed-out team members trying to make impossible timelines work.

Using a repeatable, methodical, and mathematical method (sometimes aided by AI) for creating your estimates ensures you:

- account for all the work involved
- create realistic expectations that you can actually deliver on consistently
- have a reference point for continuous improvement

3. Poorly defined business requirements

When you start a project without really understanding what the client needs (not just what they say they want), you're building on quicksand. Vague requirements like "make it user-friendly" or "we need it to be modern" lead to endless revisions, scope disputes, and a final product that nobody's really happy with.

That's why the **PM for Profit Framework** includes a "Deep Dive Discovery" as Phase 1 that ensures 1) you've identified all requirements that may have been missed in the proposal, 2) you get paid for all discovery tasks, and 3) is completed BEFORE ANY development work is begun.

4. Not getting paid for all you do

This one's a silent killer. You do extra work here, a quick fix there, answer "just a few questions" that turn into consultation sessions, and before you know it, you've donated hours of unpaid labor to the project.

If you don't **consistently** implement a solid change control process, regardless of how small the change, even successful projects can lose money.

5. Scope creep

It starts innocently enough—"Can we just add one more page?" or "This should be quick to change." But without proper boundaries and change management processes, these small additions snowball into major project expansions that blow your timeline and budget to smithereens.

6. Content bottlenecks

You can have the most beautiful design and flawless code, but if you're sitting around waiting for the client to provide content, photos, or approvals, your project grinds to a halt. Content delays are one of the biggest productivity killers, and they're often completely outside your control if you don't plan for them.

7. No risk mitigation plan

When you don't think through what could go wrong and how you'll handle it, you're gambling with your project's success. Whether it's a key team member getting sick, a third-party service going down, or a client changing their mind about core functionality, having no backup plan turns manageable hiccups into project disasters.

Note: The free eBook you are reading is one of the foundational assets of the overall Project Management for Profit framework [and our flagship course series on *Project Planning with AI*](#) (currently in development as of September 2025).

If you want to stay informed, get some of the training in advance, and be notified as modules are released, [please sign up for our newsletter here](#). Each week we cover a little WordPress news, a LOT of AI news, some PM for Profit tips and techniques, as well as an invitation to our Friday Zoom chat.

With a clear understanding of what makes something a project and why so many fail, you're ready to explore the solution.

It's important to remember that Project Management isn't some mysterious corporate discipline—it's a **practical** set of tools and proven processes designed to address exactly the problems we've just discussed.

So, let's dive into what project management actually means and how it can transform your work.

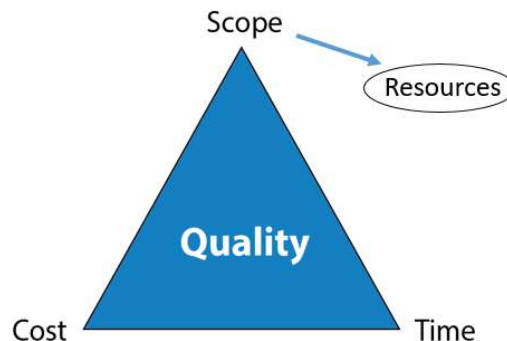
What is Project Management?

Project Management that results in a quality product has always been defined as the act of controlling the “triple constraint” as shown below. The premise is, if you successfully control the scope, cost/budget, and timeline, you will create a quality product and when one element changes, the other 2 will likely also change.



For example, if the client decides they need 2 additional pages on the website (a change to scope) this will likely affect both the cost and timeline.

However, as mentioned in the previous section of this e-book, titled **Four Elements of a Project**, the real-life method of project management is the act of controlling the “triple constraint + 1” as shown here.



For example, if a resource (like a free plugin) is no longer available, while it doesn't directly impact the project scope, it may affect the cost if a premium plugin ends up being the best option. It might also affect the timeline if a learning curve is involved.

Now, if you are new to project management or as you start implementing better project management practices, you'll come across some industry terminology that's worth understanding. Don't worry—this isn't about memorizing jargon to impress clients.

These terms represent concepts that will actually make your projects run more smoothly and help you communicate more clearly (and more like a professional) with both clients and team members.

Important Project Management Terms

Here are the key terms that show up regularly in project management conversations:

Acceptance – The ***Project Management for Profit Framework***, per some previous advice by an IT consulting firm, uses the word “acceptance” instead of “approval.” This is because the criteria for “approval” is defined up front and **IF** that criteria is met, the client **MUST accept** that what was agreed upon is what is being delivered. Getting clear acceptance criteria up front saves you from endless “almost done” revisions later.

Deliverable - Think of this as anything tangible you hand over to the client—a wireframe, a completed web page, a style guide, a training manual, or the final website. Deliverables are the concrete proof that work is getting done and help everyone stay on the same page about what's expected and when.

The ***Project Management for Profit Framework*** approach uses a deliverable based project plan where each one builds upon the previously accepted deliverable.

Methodology - This is your approach to managing projects—the specific steps, processes, and tools you use consistently. Using a proven framework and methodology means you're not reinventing the wheel every time you start a new project.

The ***Project Management for Profit Framework*** uses a customized Waterfall methodology because each deliverable tends to build on the previous one.

Milestone - These are the major checkpoints in your project—like completing the design phase, getting client approval, or launching the site. Milestones help break big projects into manageable chunks and give you and your client regular opportunities to celebrate progress and catch any issues early.

Mitigation - This is your plan for reducing or dealing with risks before they become problems. For example, if you know that client content is always late, this might mean establishing incentives or penalties for not adhering to the agreed-upon schedule or requiring that all content is received before you start design work.

Stakeholder - Anyone who has a vested interest in your project's success—the client, end users, or your team members. Understanding who your stakeholders are and what they care about helps you communicate more effectively and avoid surprises.

Work Breakdown Structure - This is where you take a big project and break it down into smaller, manageable tasks. Instead of "build website," you'd have specific tasks like "create homepage wireframe," "code contact form," and "optimize images." It makes planning, estimating, and tracking progress much more accurate.

The **Project Management for Profit Framework** uses a traditional project plan broken down into Phases, Activities, and Tasks.

Now that you understand what project management is and have the key terminology under your belt, it's time to see how all these concepts come together in practice. Every project, regardless of its size or complexity, follows a natural progression from initial idea to final delivery.

Understanding this predictable flow—what we call the project lifecycle—will help you structure your approach and ensure you don't miss any critical steps along the way.

The Project Lifecycle

Understanding the project lifecycle helps you plan better, communicate more clearly with clients, and avoid the chaos that comes from jumping into work without a roadmap.

The beauty of having a structured approach is that it gives you a framework to adapt for any type of project while ensuring you don't skip critical steps that could come back to bite you later. Here's how projects naturally flow from idea to completion:

The Project Plan

All project plans can be distilled into four Stages:

- Initiation
- Planning
- Execution
- Closing

These four stages will translate into four or more Phases for the project plan.

Project Plan Phases

The phases you use for your project may look similar to the following or you may have more or fewer phases depending on the project details. The **Project Management for Profit** approach uses the following project phases.

Phase 0 – Proposal Creation

We number this phase as zero because until the proposal is accepted, it is not “really” a project. In this phase, we conduct the pre-proposal meeting with the

client, create a baseline project plan, craft an estimate and proposal and present it to the client.

Phase 1 – Project Definition

This is where you nail down all the details that were probably a bit fuzzy during the proposal process. You're diving deep into exactly what the client needs, defining specific requirements, setting up communication protocols, and creating your detailed project plan.

The **PM for Profit** approach refers to this as the Deep Dive Discovery and positions it as Phase 1 (with a strong change control process) to ensure you get paid for anything discovered during this activity that wasn't considered in the proposal. And, you're making sure everyone's on the same page about what success looks like before you start building anything.

Phase 2 – Design and Preparation

Now you're creating the blueprint for everything that's going to happen next. This might include setting up hosting, creating a staging environment, creating wireframes, mockups, content architecture, technical specifications, or whatever planning documents your type of project requires.

You're also gathering assets, and getting all your ducks in a row so that when you move to the next phase, you can hit the ground running.

Phase 3 – Development and Testing

This is where the actual work happens—you're building, coding, writing, or creating whatever the project deliverables are. But it's not just about cranking out work; you're also testing as you go, getting feedback from the client at key checkpoints, and making sure everything meets the requirements you defined in Phase 1.

PM for Profit Tip: You may be surprised how much more quickly this phase is completed when you've taken adequate time and depth in the planning phases.

Phase 4 – Deployment and Training

You're crossing the finish line here. This phase covers launching the final product, training the client on how to use it, transferring files and access, and making sure everything works correctly in the live environment. You're also handling any final tweaks, documenting what you've built, and officially handing over the completed project to the client.

Now that you understand how projects are generally structured, here's something that might surprise you: you're probably already doing project management without even realizing it.

Before we jump into all the project roles and responsibilities, let's take a step back and recognize the project management skills you've already developed in your everyday life.

You Are Already a Project Manager

Earlier in this e-book, you learned that a project is defined as ANY job that has a beginning and an end, with a stated level of performance, at a budget and with a specific outcome. That means you ARE already a Project Manager whether you know it or not.

For example, if you grocery shop, plan a family vacation, or take on a home renovation project, among many other day-to-day activities outside of your job, you ARE already ACTING as a Project Manager.

The responsibilities of the Project Manager detailed in the next section can look a little scary so, let's first take a look grocery shopping as an example, so the next list doesn't appear so daunting.

- When you make your grocery list and have an idea of how much you can/will spend, you are **defining the scope** of your project, **creating an estimate**, and **managing the budget**.
- When you explain to your children (team members) that you will no longer be buying sugary cereals, you are **setting proper expectations**.
- When you involve your spouse and/or children in planning your meals and grocery list, you are **establishing the “client” as part of the team**.
- When you organize your list by grocery aisle or different stores, you have **created a project plan**.
- If you take your children with you and have them gather certain items to save time, you are **assigning project tasks**.
- When you plan to spend no more than 2 hours shopping because you have an appointment later in the day, you are **establishing and managing the timeline**.
- When you decide whether to go to a 2nd store OR buy a different brand, because your primary shopping place is out of stock of your favorite mayonnaise, you are **managing change**.

- When you return home and put away the groceries, you have **handed over the project**.
- Taking note of items you purchased that weren't on the list or substitutions you made for items out of stock, and what you will do in the future when those things happen, you are **documenting the project**.

The Effective Project Manager

It doesn't matter whether you are a solopreneur or an agency with a team, these are the activities an effective Project Manager typically completes on any project.

- **Define the Scope**

First and foremost, you need to be crystal clear about what you're delivering and what you're not. This means getting VERY specific about features, functionality, and boundaries up front, before you start building ANYTHING. Vague scope almost always equals disaster—you'll end up doing way more work than you planned for and if you are a solopreneur, you can't delegate the overflow to anyone else.

PM for Profit Tip: It can aid in client understanding if you not only list what is in scope and out of scope but also detail which in-scope activities are the client's responsibility (if any).

Our **Project Planning with AI** series, specifically the module or "mini-course" *Website Project Deep Discovery with AI* will help you become a Rock Star at Website Discovery, ensuring you never miss a detail your client needs.

This is currently in development as of September 2025, so if you want to stay informed about Project Planning with AI, get access some of the training in advance, and be notified as modules are released, [please sign up for our newsletter here](#). Each week we cover a little WordPress news, a LOT of AI news, some PM for Profit tips and techniques, as well as an invitation to our Friday Zoom chat.

- **Set Proper Expectations**

You're not just the project manager; you're also the client's main point of contact, so managing expectations falls squarely on your shoulders. Be honest about timelines, realistic about what's possible, and very candid about what you'll need from them. It's better to under-promise and over-deliver than to create unrealistic expectations you can't meet.

PM for Profit Tip: Be sure to include your most important client-facing processes, like Change Management and Acceptance Management, in your project definition documents to which the client must agree up front.

- **Establish and Manage the Budget**

Every dollar spent comes directly out of your pocket, so budget management is crucial. You need to track expenses, monitor how much time you're spending on different tasks, and catch any budget overruns before they eat into your profit margins.

- **Establish and Manage the Timeline**

When establishing the timeline, it's important to include ALL team members in the process, including the client. This collaborative approach ensures you're getting realistic time estimates from the people who actually do the work, identifies potential scheduling conflicts early, and creates buy-in from your team because they helped create the schedule.

Once the timeline is established, your job shifts to monitoring progress, identifying delays before they become disasters, and using your established processes to make necessary adjustments and keep everyone informed.

PM for Profit Tip: If you're not sure how long a task will take, AI can help if you ask the right questions.

- **Position the Client as Part of the Team**

Your client isn't just paying the bills—they're your de facto team member. You need their input, feedback, content, and approvals to keep things moving. Make it clear from the start that their participation directly impacts the project's success and timeline and make sure you have written agreements where necessary.

PM for Profit Tip: This is often where the old adage “the customer is always right” doesn't really serve you because you position yourself as a “worker-bee” instead of the skilled colleague you are, helping the client to achieve their goals.

Showing your client you have processes in place to circumvent common project problems goes a long way towards establishing respect and being considered a professional by your client.

- **Build the Plan**

This is where you map out exactly how you're going to get from start to finish. Your plan needs to be detailed enough that you can follow it even when you're juggling multiple projects or coming back to work after a break.

PM for Profit Tip: Having a “starter” project plan that you modify over time (and for each project) can save a lot of effort in this process. Never build your plan without input and agreement from all team members, including the client.

- **Assign Tasks**

Even if you're doing most of the work yourself, you still need to organize tasks logically and prioritize what needs to happen when. This might mean assigning content creation to your client, scheduling specific work blocks for yourself, or coordinating with any subcontractors or vendors you're using.

- **Manage Change**

Changes are going to happen—it's not a matter of if, but when. Your job is to have a clear process for handling them so they don't derail your project. This means evaluating how each requested change affects the timeline, budget, and scope, then getting client approval before moving forward.

Without proper change management, "quick little tweaks" can snowball into major project expansions that blow your budget and timeline to pieces. Document every change (no matter how tiny), communicate the impact clearly, and make sure everyone agrees on the new plan before you implement anything.

- **Hand Over the Project**

The project isn't done until your client can successfully use what you've built. This means organizing files, providing documentation, training them on how to use or maintain what you've created, and making sure they have everything they need to move forward independently.

- **Document the Project**

So many folks skip this step but when you do this properly, you're not only building a knowledge base for your future self, but you can also position this as a “value add” for the client.

For the client version, include all the relevant information they will need to access and use the website now and as a reference if you are not available for future enhancements or redesigns.

In your internal documentation, include the client version along with details about what worked, what didn't, how long things actually took, and any lessons learned. This information becomes invaluable for estimating and planning future projects more precisely.

The activities we've just covered form the foundation of project management, whether you're working solo or with a team. However, when you do have a team to manage, there are a couple of additional responsibilities that become crucial for project success. These extra tasks can make the difference between a group of individuals working separately and a cohesive team working toward a common goal.

Additional Tasks for Projects with Teams

- **Assemble the Team**

When you're managing a team project, you need to identify what skills and expertise are required, then either recruit team members or assign the right people from your existing staff. This isn't just about finding warm bodies—you need to match specific talents to specific tasks, consider workload and availability, and make sure your team members can actually work well together.

Getting the right people in the right roles from the start can make or break your project.

PM for Profit Tip: For very large teams or when occasionally using contractors it is helpful to maintain a database or spreadsheet for future reference that details each person's relevant skills

- **Lead the Team**

Once you've got your team assembled, you need to actually guide them through the project. This means:

- involving them in the planning process
- facilitating communication
- resolving conflicts
- keeping everyone motivated and on track
- making sure the work gets done to the right standard

You're not just assigning tasks and walking away—you're actively coaching, supporting, and directing your team members to ensure they're working effectively together toward the project goals.

Pro Tip: Team members are much more likely to stick to the project plan if they had input during its creation.

Whether you're managing a project solo or with a team, understanding all the different roles that contribute to project success helps you plan more effectively and communicate more clearly with everyone involved. Even if you're wearing multiple hats yourself, knowing these distinct responsibilities ensures nothing falls through the cracks and helps you decide when it might be time to bring in additional expertise.

Other Project Management Roles and Responsibilities

The following are the roles you and your team will typically need to fill on any project. It's important to remember these are the roles to be filled, not necessarily different people. In other words, except for the Project Sponsor:

- one individual may fill more than one role
- one role may be filled by multiple people

For the solopreneur, it is not uncommon for you to be filling ALL these roles except Project Sponsor.

- **Project Sponsor**

This is the single client representative who is ultimately responsible for the project's success and has the authority to make final decisions and approve budgets. It's important to identify this individual during the proposal process. The sponsor may or may not get involved in day-to-day tasks, but they're the one you go to when you need major decisions made or roadblocks cleared.

In the case of some non-profits, a committee has been charged with managing the website project which makes every decision more time consuming and complicated. Even in these cases, it is wise to attempt to get the organization to name a single person to fill this role for circumstances when the committee cannot come to a consensus.

- **Business Analyst**

This role digs deep into understanding what the business actually needs (not just what they think they want). The person(s) filling this role are the ones asking tough questions about processes, requirements, and goals to make sure the project delivers real value and meets the agreed-upon business requirements.

- **Website Environment Manager**

This role handles all the technical infrastructure—setting up hosting, managing databases, configuring servers, handling backups, and making sure the technical environment runs smoothly. The activities carried out in this role are crucial for keeping everything stable and secure, especially when you're dealing with staging sites, live sites, and development environments.

- **Content Developer/Manager**

This role creates, organizes, and manages all the written content, images, videos, and other materials that go into the project. It may be filled by your internal team, a 3rd party, or the client. The appointed person(s) are also responsible for making sure the content follows brand guidelines, is optimized for the web, and gets delivered to the project team on schedule. Without good content management, even the best-designed site can fall flat.

- **Website Designer**

The designer role creates the visual experience—how the site looks, feels, and flows. They're thinking about user experience, brand consistency, and making sure the design works well on different devices and browsers. A good website designer understands both design principles and the technical constraints of the platform.

- **Website Developer**

This role is often filled by the same person filling the Website Designer role. They take the designs and make them actually work on the chosen platform. They're coding custom features, integrating plugins, troubleshooting technical issues, and making sure everything functions properly. They bridge the gap between what the designer envisions and what's technically possible on the website.

- **SEO Analyst**

This role's primary responsibility is making sure the site can actually be found by search engines and potential visitors. Individuals filling this role handle keyword research, on-page optimization, technical SEO issues, and analytics tracking. They're thinking about how to make the site visible and discoverable in search results.

- **Testers**

This role is almost always filled by multiple people, even if it is just you and the client. Using test plans you create, they systematically check that everything works as intended before the site goes live. They will click every button or link,

test forms, and check different browsers and devices. Basically, they are trying to “break things” so you can fix them before your client's users find the problems after launch. Good testing can save you from embarrassing post-launch issues.

Pro Tip: If you are a solopreneur, including a description of team roles and responsibilities and showing that YOU are filling ALL those roles, goes a long way toward setting proper expectations about what is involved in a website project and establishing you as an expert/professional.

Essential Principles and Processes

The **Project Management for Profit** approach to project management uses 6 Guiding Principles, 8 Essential Processes, and one simple Project Plan to help you CONSISTENTLY get your projects completed on time, within budget, with a result that meets your client's business requirements.

The 6 Principles

1. Define the Job in Detail with a Content-First Approach
2. Get the Right Resources Involved
3. Break the Job Down
4. Estimate the Time and Costs Often
5. Establish and STICK TO a Change Procedure
6. Agree on Acceptance Criteria.

The 8 Processes

1. The Proposal Process
2. The Communication/Client Management Process
3. The Requirements Process
4. Issues and Risk Management Process
5. The Change Management Process
6. The Acceptance Management Process
7. The Project Closure Process
8. The Continuous Improvement Process

All of these principles and processes are explained in detail in another soon-to-be-released e-book available from PM for Profit titled: **The PM for Profit Framework**.

[Check here to see if it is already available.](#)

In Summary

Congratulations! You've just taken the first crucial step toward transforming your web development business from a chaotic hustle into a profitable, predictable operation. The concepts you've learned in this e-book aren't just theory—they're practical tools that successful agencies and solopreneurs use every day to protect their time, maximize their profits, and deliver exceptional results.

Key Takeaways

- **Project Management is Your Secret Weapon**

Effective project management isn't overhead—it's an investment that pays for itself many times over. By preventing budget overruns, eliminating rework, and reducing crisis management situations, good project management directly impacts your bottom line while positioning you as a professional who has their act together.

- **You're Already Closer Than You Think**

If you've ever planned a family vacation, organized a home renovation, or even created a grocery shopping list, you're already using project management principles. The skills you need aren't foreign concepts—you just need to apply them systematically to your client work.

- **Clients Care About What You Can Control**

When reviewing proposals, clients focus on cost and timeline above all else. This gives you a massive opportunity to differentiate yourself by demonstrating exactly how your project management approach will keep their project on budget and on schedule.

- **The Four Elements Rule Everything**

Successfully managing scope, timeline, cost, and resources isn't just good practice—it's what separates profitable projects from money-losing disasters. When you can effectively control these four elements, you control the success of your entire business.

- **Clear Processes Prevent Common Failures**

The seven most common reasons projects fail—from unrealistic expectations to scope creep—can all be prevented with the right processes in place. Having a systematic approach to change management, acceptance criteria, and client communication eliminates most project disasters before they start.

- **Your Role is Bigger Than You Thought**

Whether you're a solopreneur or managing a team, your responsibilities as a Project Manager extend far beyond just "getting the work done." From defining scope and setting expectations to managing budgets and documenting lessons learned, effective project management touches every aspect of your business.

What's Next?

The fundamentals you've learned here are just the beginning. To truly transform your business, you need to implement these concepts consistently, refine your processes over time, and develop the specific frameworks that will make project management feel natural rather than burdensome.

This is where the ***PM for Profit Framework*** comes in. While this e-book gave you the foundation, the complete framework provides the detailed processes, and step-by-step guidance you need to implement what you've learned. [Check here to see if it is already available.](#)

The Choice is Yours

You now understand that project management isn't something that happens to your business—it IS your business. Every client interaction, every project decision, and every deliverable is an opportunity to demonstrate the professionalism and reliability that commands premium pricing.

The choice is yours: continue running projects by the seat of your pants, hoping everything works out, or implement the systematic approach that successful agencies use to build predictable, profitable businesses.

Your clients are waiting for someone who can deliver on their promises. Your bank account is waiting for projects that actually make money. And you're waiting for a business that doesn't consume every waking hour of your life.

It's time to stop waiting and start implementing. Your future self—and your bottom line—will thank you.