Step 1 - Before Going Live

Step	Order	Area	Task	Completed
1	1	Settings	Verify all site pages and elements display properly on Chrome, Firefox, IE (multiple versions), Safari, Opera, Mobile Safari, Android, etc. Most importantly, test while logged out. Secondly, test all scenarios while logged in, both the front-end and the back-end. (do this again as the very last step)	
1	1	Settings	Verify favicon displays on IE (might need .ico version) and non-IE browsers	
1	2	Communications	Receive Client approval of site design concept, moving forward toward finalizing/publishing. As appropriate, initiate change orders (i.e. charge more for feature-creep)	
1	2	Settings	Take backup before proceeding to finalize	
1	3	SEO	Create needed categories and tags, including Description text for each	
1	3	Settings	Change default category from "Uncategorized" to something else (e.g. "News")	
1	3	SEO	Confirm SEO plugin's settings per tag and category	
1	4	SEO	Create archive-, tag-, and category-specific layouts/pages	
1	5	Settings	Change the author of all posts, pages, and CPTs to be authored by the Client's User(s), not your own Administrator User	
1	6	Themes	Review items in the WordPress Theme Development Checklist	

Step 2 - Going Live

Step	Order	Area	Task	Completed
2	1	Settings	Run the WordPress Search and Replace script if needed (if moving from a test site with a different URL), and **delete** the script	
2	1	Themes	Theme / Child Theme named appropriately in wp-admin and FTP	
2	1	Themes	Delete unused themes, except a fallback like Twenty ____	
2	1	Plugins	Deactivate development plugins, like Action Map / CSS Map; testing code, scripts, and dummy content; and SSL testing plugins	
2	2	Plugins	Delete unnecessary plugins	
2	2	Settings	Delete unnecessary / inactive users, as appropriate	
2	2	Settings	Make sure all users have their profile information as desired -- Name, Contact Info, Bio, etc.	
2	3	Settings	Test site Search functionality: obviously-relevant results (i.e. search not broken), not returning hidden posts/pages/content (if any), returning CPTs, etc. Consider implementing a better-than-WordPress solution	
2	3	Settings	Make sure all WordPress default posts, pages, and comments are trashed or permanently deleted	
2	4	Settings	Verify all Widgets are in the right place (and display logic, if applicable) and delete unnecessary Widgets from the Inactive Widgets area	
2	4	Settings	Verify General Settings are as desired (e.g. www or non-www, new user registration, Timezone, etc.)	
2	4	Settings	Verify Discussion, Media, and Permalink settings are as desired (e.g. closing comments after 14 days, setting image sizes, and having pretty permalinks). Re-save Permalinks if you didn't make changes, just to make sure.	
2	5	Settings	Delete WordPress default links and link categories	
2	5	Settings	Enable Remote Publishing XML-RPC if Client wants to use the WordPress mobile app, IFTTT, or verify site on Gravatar profile	
2	5	Settings	Setup WPMU DEV Dashboard to hide branding and only be enabled for your Administrator User account, as desired	
2	6	Settings	Delete all unused logo, background, and other files from Media Manager via Dashboard and	

			from Theme / Child Theme folder via FTP	
2	6	Themes	Verify the theme's (not the server's) 404 page works and is designed as desired	
2	6	Settings	Turn on WP_DEBUG and Deprecation Testing before publishing site for one final test. After resolving all errors, if any, turn off WP_DEBUG and Deprecation Testing plugin(s)	
2	7	Themes	Validate website (HTML/XHTML, CSS, broken links, feeds, etc.).	
2	7	Themes	Run site through page load testing, like Pingdom, GTmetrix, YSlow, Google PageSpeed Tools, and Google Webmaster Tools' and Google Analytics' Site Speed reports. Make improvements as necessary/desired	
2	8	Themes	Verify all enabled Post Formats have specific styling. If styling won't be created, disable non-styled Post Formats.	
2	8	Themes	Verify Featured Images are properly configured for archive pages, single post views, and any sliders / widgets that include Featured Images (i.e. Post Thumbnails).	
2	8	Themes	Add code that reminds Client of the ideal Featured Image size(s).	
2	9	Themes	Make sure all images have captions and that they look good	
2	9	Themes	Make sure video embeds work as desired	
2	9	Themes	Verify print preview (i.e. print stylesheet) is as desired	
2	10	Themes	While logged out, use View Source on the front-end of the site for several pages, looking for theme and plugin scripts that are loaded unnecessarily. Rectify as appropriate.	
2	10	Settings	If site has an SSL certificate, force SSL login/admin and resolve insecurely-loaded assets. If no SSL, consider adding a secure login alternative like Facebook.	
2	11	Communications	Create/Update the Client's Gravatar and make sure it's set to the same email address as used in the Client's User Profile. Complete Gravatar image, verified services, and other profile info. Create/Login to the Client's WordPress.com account (to be connected to JetPack)	

Step 3 - Finish Going Live

Step	Order	Area	Task	Completed
3	1	Settings	Setup RSS feeds as desired. Verify all feeds that should be on are on and those that should be off are off. (e.g. all posts, all comments, comments per post, author, category, tag, CPT ones)	
3	2	Communications	Verify site Terms and Conditions and Privacy Policy are displayed on-site and are approved by Client	
3	3	SEO	Create a robots.txt file	
3	3	SEO	Turn on WordPress' "visible to search engines" setting	
3	3	Settings	Implement Analytics	
3	3	SEO	Verify site ownership with Google Webmaster Tools and Bing Webmaster Tools.	
3	3	SEO	Verify sitemap is valid with Google and Bing Webmaster Tools	
3	3	SEO	Integrate with Facebook and Open Graph (OG) if not already part of your SEO plugin settings	
3	4	Plugins	Activate needed plugins that aren't active yet, like Jetpack, activity monitor plugins, spam-blocking plugins, and Email Post Changes	
3	4	Settings	Add social sharing icons via Jetpack, Digg Digg, Floating Social, or other method	
3	4	Settings	Setup Comments Plus, Google Plus, and any other social integrations	
3	4	Settings	Setup Newsletter / MailChimp / Feedburner / Jetpack / other subscription manager settings and put sign up form on front-end	
3	5	Settings	Consider minifying your code. Enable caching, and CDN	

Step 4 - Promoting the Site

Step	Order	Area	Task	Completed
4	1	Settings	Setup Admin Help Content and Custom Dashboard Widget to include beneficial links: to your own blog(s), tutorial / how-to videos, wiki or knowledgebase or support chat, the WPMU DEV Manual, the WordPress Codex (or a select few pages), podcast, contact information, Terms and Conditions, "tell others about us" affiliate reward (setup their PayPal email address in their User Profile). Include information about possible upgrades and reminding Client of your other services	
4	1	Settings	Set Dashboard Feeds settings with your own blog's feed	
4	2	Settings	Setup syndication / auto-posting of new posts and CPTs to Client's social media channels, as desired	
4	3	Communications	Write a blog post about the new site design, providing yourself a backlink, and tell Client they have their first blog post. Invite them to edit as desired	
4	3	Communications	Promote Client's site on their social media channels	
4	3	Communications	Add Client's site to your own site's Portfolio page	
4	4	Communications	Promote Client's site on your own social media channels	
4	5	Communications	Create a screencast video (or collection of screenshots) to walk Client through all the features of their new site (maybe 2 videos if also wanting to demo the back-end). Publish to YouTube as a Private video (or Public if you have Client's permission) and email to Client, requesting feedback	
4	6	SEO	Submit site to dmoz open directory and industry-specific site directories	
4	7	Communications	Provide an email signature for Client, including link to their site	
4	8	Settings	Finalize Pop-Overs, Social Marketing and Pay with a Like giveaways, Floating Social, lead captures, squeeze pages, etc. as needed	
4	9	SEO	Make sure your Update Services are as desired (for notifying sites of new posts)	
4	10	Communications	Subscribe to the site's feed(s) in your own RSS reader, if you don't have any other way to keep track of the site's posting activity	

| 4 | 11 | SEO | Update Facebook, Twitter, Google+, and Google Maps pages with current domain name and other contact information. | |

Step 5 - Finishing Up

Step	Order	Area	Task	Completed
5	1	Settings	Implement a tag-picker metabox (to avoid Client creating multiple variations of the same effective tags)	
5	1	Settings	Finalize Ultimate Branding settings	
5	1	Settings	Finalize Easy Blogging settings	
5	1	SEO	Finalize Infinite SEO or other SEO plugin's settings	
5	2	Themes	Consider disabling some of the Write Panel features, as appropriate	
5	2	Settings	Login as each user to verify they have proper viewing/editing permissions and all Dashboard meta boxes, Post Editor meta boxes, and Admin Bar links are displayed as desired, including in the proper order. Ideally, there should be no dead links ("You do not have sufficient permissions to access this page.")	
5	2	Settings	Make sure WordPress default email address is as desired (yours or Client's email address?)	
5	2	Settings	Verify all form submission notifications are sent to Client's email, not yours	
5	2	Settings	Add code to customize WordPress' send-from email address	
5	2	Settings	Verify robots.txt and/or SEO plugin's settings are working as desired by checking webmaster tools indexation	
5	2	Settings	Verify all site pages and elements display properly on Chrome, Firefox, IE (multiple versions), Safari, Opera, Mobile Safari, Android, etc. Most importantly, test while logged out. Secondly, test all scenarios while logged in, both the front-end and the back-end. (same task as in the beginning)	
5	3	Settings	Add site to ManageWP, WP Remote, or an alternative, if desired and not already done	
5	3	Settings	Run a database cleanup to remove old revisions (proceed with caution, consider backing up database first)	
5	4	Settings	Save a .zip backup of the entire site (files and database) to your local computer as proof of what you delivered to the Client on the day of going live.	
5	5	Setup	Implement auto-backup schedule	
			Get your Client started on the right writing path	

5	6	Communications	by teaching them how to follow their own [Blog Post Writing Checklist](#)	
5	6	Communications	Consider suggesting Client setup [Google Alerts](#) and/or [Yahoo Alerts](#)	
5	6	Communications	Finalize your contract and get Client signature that the work has been completed satisfactorily. Get final payment (maybe before providing login credentials). Get web hosting payment if applicable.	
5	7	Communications	Provide Client with login, FTP, database, and third-party management utility credentials, as appropriate	
5	7	Communications	Setup WordPress mobile app and/or other remote publishing tool for Client	