How To Efficiently Plan A WordPress Site

The most exciting moment of your new WordPress project is right at the beginning. You have an idea that one day, you hope will soon be shared with the world. But it can also be overwhelming.

WordPress has countless plugins that do pretty much everything under the sun. In fact, the WordPress ecosystem has doubled in terms of plugin submissions in 2025.

So, which ones should you use?

In this post, I will talk through how I plan to build a WordPress website.

Why You Should Plan A WordPress Site

To plan a WordPress site really is a must-do process that reduces the risk of the project spiralling in time and cost.

Spending an hour or two following a simple checklist, like the one I've detailed below, puts you and the client on the same page when building the website.

Time and again, I've seen projects that've undefined elements that need to be factored in, which eliminates potential scope creep.

It will also give you a list of tasks, so as well as avoiding scope creep, you can easily transfer the elements of your plan into your project management tool as tasks and milestones.

That will speed up development time.

Define Your WordPress Website Goals

The first thing you should do is define the goals of the website. The easiest way to begin this process is to ask yourself the following two questions:

1. Where are your visitors most likely to come from?
2. What do you wish them to do when you're on the website?

Assuming that the site is a brochure site, then more than likely, you'd want your visitors to come from search engines, and you want them to contact you.

That way, you'll need a plugin like Yoast SEO or Gravity Forms.

You may have other goals, like growing a newsletter or an ecommerce store. Or you may get traffic from a social media platform that your blog needs to integrate with.

Each of these needs to be defined, as this will help define your tech stack.

Goals Defined? Great. Now, Plan The Layout

Once you've defined your goals, you need to think about the layout and what custom work you will need to do.

When building your site, I prefer to think of templates, rather than pages.

You don't need a template for every blog post, for example. If you are building a website for a solicitor, for example, all services it offers (e.g., Conveyancing/Wills & Probate) could run off a similar template, cutting build time.

This is not necessarily true if you're using a page builder, as sometimes page builders treat each individual page separately.

You could also look at custom post types and taxonomies for certain pages.

For example, if you have a "Meet the Team" page, then every person could be their own post. This makes maintenance a lot easier, as it allows a new team member to be easily integrated without too much trouble.

Testimonials work well as a custom post type as you can create a "bank" of them to use throughout the site.

Once you've got the structure of the site and what you are using to build it, that should be the templates.

Generally, for a brochure site with a blog and a "Meet the Team" section, you would have the following templates:

1. Home Page Template.
2. About Page Template.
3. Contact Us Page Template.
4. News Post Template (Single).
5. News Post Template (Archive).
6. Team Member Template (Single).
7. Team Member Template (Archive).
8. Catch All Template.

The "Catch All" template I find useful as it's used for pages that are present but don't need much design, something like a Terms & Conditions or your Privacy Policy pages.

I tend to start with these first, as you can build a header/footer easily enough here.

Finally, you may want to consider whether you have multiple languages or if you have different regional offices. A large site may be better suited for a multisite, rather than an

individual WordPress installation.

Once done, you should have a WordPress theme and a WordPress plugin ready to build.

My general thought is that any WordPress functionality you wish to retain when redesigning should be in a plugin, rather than a theme.

Things like definitions of custom post types or SEO changes you make programmatically are ideal for a custom plugin.

Depending on the complexity of the project, it could mean that you split functionality into a number of plugins.

For example, I have an ecommerce site where their custom invoicing is in one plugin, and the voucher management is in another plugin. There is also the "helper" plugin that has minor performance improvements and a custom post type.

Don't Forget The Ancillaries!

Of course, a well-built WordPress theme, with a range of custom and supporting plugins, is just the beginning. Your website needs content.

If you are a marketing agency, you may be responsible for the creation of the content, but what about imagery? It's a good idea to define in the WordPress site planning things like who is responsible for the content.

If you are using the content of the old site, it's a good idea to define who handles the migration, or at the very least be aware if it's transferable – not all content systems are!

Other things to define in your WordPress site plan are training, who will have access to the site, and what level. Ideally, you want as few administrators as possible.

If you are pushing a new design to an existing site, there's

an approach of making everybody but yourself authors or editors, and see who complains about lacking access. That works remarkably well!

The First Step Comes With Experience

In reality, the more you create plans and pitches for WordPress websites, the more refined your toolset and your planning process become.

I already know the tools I'll be using for the next 10, maybe 20 sites, with often very little variance among them. What works for a solicitor's website will probably work for a cleaning firm.

I have a core group of about five to 10 plugins and two to three themes that I use, and then I add extra plugins as needed.

Those plugins are personal to me, but over time, you'll build your own list of plugins. Doing so will make WordPress site planning far more efficient.

More Resources:

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