



EXPAND 2021

Create a Project Stack

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This guide will help you templatize your projects, so you can jump ahead to customizing clients' sites.

Decide where to save your project stacks:

- **Local drive:** Easy to access, but not easy to update
- **Local dev tool:** Easy to access and update but requires cost and/or technical expertise
- **Staging site:** Easiest to work with, requires hosting account

Plan and organize your project stacks by use case:

- Do you need to create one stack or several for various use cases?
- What CMS do you prefer for each use case?
- Which plugins, extensions, and themes do you want readily available?
- Is there anything else you want to include in your project stacks? (e.g., readme.html, HTML verification files, etc.)

Make a list of default software, themes, and plugins for each project stack. This list should include software you use on every site. Create additional lists for specific types of websites.

NOTE: For your list, include names and links to the extensions software you wish to use. We've provided some categories below.

Maintain your project stack

- Make sure to keep all software up to date to avoid vulnerabilities.
- Periodically review your project stack lists and add or remove anything.

Use your project stack

- Clone/migrate the project stack to new staging site
- Update plugins and themes to the latest version
- Test the site
- Get to customizing!

EXAMPLES

Default site stack	Ecommerce site stack	Membership project stack	An example image heavy site stack
Design and layout tools (page builder or framework)	Cart & checkout	Platform	Gallery
Theme	Payments	Role management	Caching
Child theme	Merchandising	Content restriction	Image optimization
SEO	Products	Email subscriptions	Sliders
Security	Services	Ecommerce integration	Thumbnail editors
Analytics	Shipping	Learning Management System (LMS)	Watermarks
Privacy / GDPR	Store management		
Social media sharing	Marketing		
Marketing tools			
Classic Editor (if not using Gutenberg)			

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