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Michelle Lee - Getting the Most Out of WordPress - Conditional Content Edition

[00:01:19.770]

Hello, my name is Michelle and this is getting the Most out of WordPress Conditional Content Edition.

[00:01:25.750]

And all we're really chatting about today is how to make our WordPress site smarter and how to help our clients to see that their WordPress website can be smarter and work harder and also be the centre of all of their business processes. I think most don't really understand how much WordPress can do and you know especially since we're using page builders to build them, there's just so much more heavy lifting that their website can do and hopefully consolidate some of the platforms that they're using and really see that their website is the centre of everything and it really can be.

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And hopefully that helps also in their head to see that and feel that their website is really worth investing in.

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And that's maybe a little geeky of me, but I really want that to happen and I'm hoping that you'll be able to help your clients see that as well.

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The more that you ask them questions and dig into why they are building it, understanding their brand, understanding who they are, that you'll be able to craft solutions that will help them be not only happy and happy with their website, but also to see that there's so much growth that can come from it and so much potential.

[00:02:57.290]

So again, my name is Michelle, I'm a web and user experience designer. I'm also a developer, that's where I started, it's what I started with. And then I did the corporate thing, then I did the quitting thing and then I decided, you know what, I think I'm pretty much done with that life. And I did the wandering thing and just tried different things but eventually I still, still ended up coming back to web design.

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I just, and development. I missed the coding, I missed the experience part and sort of crafting user experiences and working through the processes and at the end of the day I ended up specialising in WordPress just because it can allow me to do all of those things.

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And from there WP WonderLab was created because not everybody can afford a super expensive website or to spend a lot to set everything up. They might Be working in phases.

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They're building their business and they're building their website.

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And I was really seeing a gap in how people were viewing their websites.

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Because mostly it was static and then they would go to different platforms to build things and spend money there instead of investing in the actual website itself.

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And so, you know, I started teaching.

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People how to DIY doing tutorial videos, really, first for my clients, and then they became, you know, quite reusable.

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And it was teaching them how to not be afraid of their WordPress site, how to build and certainly how to maintain it. Because a lot of clients did come to me with sites that had been built by somebody else and then they had no understanding of how it was built, how it was used or how they can use it and really how to maintain it.

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Because, you know, plugins, that's pretty much how Wonder Lab was born out of. Out of necessity.

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And also I really enjoy that part is, you know, seeing people being able to DIY their own site, to have their business on and be successful, it's just.

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It's really cool experience and really cool thing to see.

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So when I first moved from, know, hand coding things to building with WordPress and page builders, of course, the thing I missed the most was control. Being able to, you know, build a script or build something, to do something dynamic and fun and or different, or add something, you know, to the site to not be so static and be interactive. I mean, that's really kind of the part that's missing. Right? Um.

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And with WordPress, you know, I'm really not actually looking for very much and realising I just want to do some conditional stuff, you know, to be able to show and hide things when it's needed instead of building multiple pages or duplicating pages, which I have clients too, and have five, six different versions of it because of, you know, a small piece here

and there. And it just was hurtful because it's a lot of extra pages that over time they actually didn't remember if they needed anymore.

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And you just now have hundreds of pages.

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And so that's kind of the piece that I was.

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Felt like it was missing to just, you know, take it a step further. And so being able to find, excuse me, being able to use conditional content on WordPress is just, you know, that just extra bit that just makes this so much better. And this is my own little definition of conditional content. Really, we're, really. We're asking for the ability to choose how to show and hide content based on, you know, a simple set of rules, which is really some really simple if statements.

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So if a user is logged in, what do they see?

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If they're logged out, what do they see? If they have a certain user role, can we schedule content? You know, if it's on this particular date and time, can we launch something? What about query strings, which I miss a lot.

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Can we do parameters?

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Can we do by geolocation? Can we do by tags?

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And there's just so many things we can do just by being able to do these simple if statements and having this built in.

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And so before page builders were able to do this, there were and are plugins that help us to do conditional content and conditional logic. I've used these plugins in varying degrees and different forms for different clients.

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The first two really are, If it's you're using more of a block based theme or builder, this could help build conditional content into it if it's not available for you. Content control is outside of a page builder, but really great way to still have control over, you know, what pages are locked down or only for logged in users and based on user role, et cetera. So a good one to use and try too. If so, I find I feel like it's a little bit more for location based stuff, geolocation, time zones and all of that stuff. It goes beyond that as well. But I feel that's where really I've been using it was more for geolocation and things and you get to define what your default message or default content is and then also have A versions and B versions if it fulfils that if statement.

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So all of these four are quite useful, but we are talking about page builders and luckily our page builders have conditional content and display conditions built into them.

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Now before they weren't really very good at it, and that's why we needed those plugins.

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But now that they're built into our page builders, we can just get so much more granular because now instead of just can we show or see this page or this menu, we can actually get into can we see this piece of content on this page and who can see it and when? And so we can get even further into our design. So one of the ways that it's already sort of been using this for a while is through our theme builder.

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So we of course we can use our page builder just for the page building part, but the strength of it is the theme builder for each of these page

builders. So here we have Elementor and if you're building certain templates then there's display conditions to them.

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Right. So we build a template and then it asks us, well, where do you and how do you want to show your template? Where should it be used?

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And so we can use templates or sorry, we can build templates specifically for products for different posts and for Divi. We can do it for even a specific post itself, or maybe it's an archive page or maybe for a certain category of a post or a page. And so it keeps going. And it's amazing that we can do that because we can make our designs even better and more targeted and strategic and in some cases actually be able to touch some of these pages because before we couldn't really do them without maybe another plugin or maybe never like our 404 pages.

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Right. Or some of our search pages. So.

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And so this is really where some of those conditions are. Just very simple.

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Where and how would you like to use your template? But again, the strength of it really is getting into the actual individual pieces and elements of our designs and our sales pages. This is just a simple Elementor scenario.

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There's an element and we're deciding whether or not it can be shown based on a role in this particular element. We're going to go the advanced tab under display conditions. There's that little tree hierarchy, probably seeing the cellar on that little icon there. If you click on it, it's going to show you those conditions that we can set.

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Right. So this looks very similar to the previous screen when we were building our templates. And so if you drop that down.

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You can choose from many different things.

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One of them being role, but also Day of the week, time of the day, current date, and then whatever that role is, the other side, to satisfy our statement.

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So this way we can show a certain element based on a user role.

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And this is really how WP wonderlab is built. So instead of having multiple dashboards, because we do have tutorials and we do have courses and we do have a membership side, I didn't want to build multiple different dashboards for different things.

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I want it to be more dynamic and it's in one space, right?

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So based on what they've purchased and based on their role, they see different links and they will see the content that they've purchased or opted into.

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And I use Thrive themes for WP Wonder Lab. That's my main page page builder of choice.

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And so conditionals are also built into that.

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And so the only really extra thing I really needed to build this and make this work is since it's being with roles and I am using WooCommerce

instead of just having everybody with customer, I wanted to assign different roles based on whether they're a student or they're a member.

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And so I use Uncanny Automator to help trigger that. So when a, when a new user is signed up, if they've just purchased a course or a tutorial, then they're going to get a certain role and then I use members by MemberPress so that plugin to help create those specific roles. And so now I can use Uncanny Automator to assign them based on what they've purchased and then based on what they've purchased they see different things on their dashboard. And this also runs the navigation as well.

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So I have a navigation at the top that stays fairly stagnant steady because I want it to be consistent experience.

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But I also have a smaller one. So this is also a mobile menu where everything is listed as well.

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So I'm hoping nobody gets lost.

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You know, there's multiple ways to get into their dashboard, multiple ways to get to the courses that they need or to even further serve if they need more tutorials.

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And so but changes based on whether they're logged in or they're logged out.

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In this particular scenario.

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So the logo changes to their profile photo if there is one and if there isn't one, then there is just a user profile image. But then the text shows up and says that they're logged in. Their links get added to their dashboard.

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Of their dashboard and their account and then of course the login link changes to a logout link. So what once they log out it goes back to the non logged in status or view. So that's basically how it's run.

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Very simply it's just with thrive themes.

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And then with user roles.

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So this is just another scenario using Elementor and this is also using logged in and logged out status.

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This is a demo site that we built for behind the scenes for Elementor and it's a fully functioning WooCommerce site with courses using MasterREO.

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I don't like saying that plugin name. It's weird to me. It's hard for me to say but of course, you know, in building this.

[00:14:31.790]

We had to sort of solve well whether or not what logged in users are going to see. They should have easy access to their courses, to their account area. But we still want them to be able to have links to working with, working with them or maybe going to the blog or maybe it's leading to resources but also having a support link. So it'd be different, a different form on that page than get in touch.

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They could submit a question, they could have suggestions, but it would go to maybe a different email or maybe it's a different form, an airtable, whatever it is, but it would be more specific for students only.

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So here's where we can actually do that with our navigation. And we're having a single navigation at the top. It's a very simple site and so we didn't really need to do anything super complicated. And we changed links based on the navigation, based on their logged in and logged out status.

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Then the nice to have sort of thing is just having their name there.

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So it says hello friend, if they're not logged in and they're on the account page.

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But then once they're logged in, it says their name. So when they purchase and they opt in, you probably have their first name. And if they don't have their first name, it does do a fallback to anything that you want to choose.

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But I usually use friend.

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And the other way we could be using conditional content is to serve up specific content and posts based on their potential user role. Or again, if they're logged in or logged out or maybe time of day. So a different logic.

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Maybe in the evening you're showing them something different.

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Who knows, right?

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The sky's the limits at this point. It just really depends on your customer.

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And your client and the kind of service that they provide, but just so many different ways of really doing that.

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And all within this one page.

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Instead of, again, you know, having potentially different pages or different dashboard pages or landing pages just because it's a different course that they purchased, you can serve it up in different ways all on one page.

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So the other question I kind of started having too was really, how can I help people to understand WordPress and its strengths? I mean, WordPress has a bad rep for lots of reasons, not always uncalled for, sometimes for fairly good reasons. And, and of course, when people are dying their sites, a lot of this stuff does come up, right? And that's why they're afraid of it. And you know, for you and your clients, I feel like it's part of our job to help them understand how WordPress is so amazing and how it can help them and how we can help them build a better experience both for them and for their customers or their clients.

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And when I was working with clients I just found that a lot of times they were thinking they had to choose between a web developer and a web designer because you know, I want functionality so I'm probably going to need a developer and then I want it to be beautiful, so I probably need a web designer.

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And you know, I think we really don't need to have that these days. We're extending the WordPress functionality a lot more and being able to, you know, give them some of that functionality in our solutions while having

an amazing design just sits you in a very, in an amazing spot to be able to craft a solution for them. And then a lot of the times they weren't understanding their own process, you know, how or why they needed the platforms. I found a lot of my clients were just like, I don't remember why I did this. Oh yes, I remember, but I remember how this connected and so was quite scattered, right? So just just putting out a course or maybe even a sales page or an opt in. It took them a long time because they were either duplicating work or not remembering where this connects to, what and where and why. And part of that really is the gap is not understanding that WordPress can do a lot of those things. And then on top of that they're scared of maintaining their website, so they don't really want to touch it. So they might as well opt into a platform that feels like it's more all in one and gives them an easier way to drag and drop and build things.

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And it helped them understand that platform more than they understood their own website, which makes me really sad.

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So the thing about it is, now that we've talked about conditional content and you know, from our page builders is we really are just building simple memberships and that's all a lot of people need, that's all they really need.

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And they don't really need all of the bells and whistles.

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And usually with memberships, you know, courses can come with that too.

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So if you're finding someone wants a membership, there's likely some sort of a course element built into that as well as a very high likelihood, but the fundamentals are still the same.

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So going back to our example with Elementor, this was a very simple demo site and what we used was WooCommerce.

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And then a course plugin and then.

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This really was just a simple one.

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So it was logged in or logged out like we said.

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However, you can get even more granular.

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And you're going to need this because it's not part of Elementor, but you can show WordPress menus based on their roles. And so the two plugins that I have there, nav menu Roles by Helga the Viking. That's awesome. And Menu by User Roles Nav Menu Roles.

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The first one there is actually the one that I like the most and I've seen around the longest. I've been using that the longest for clients, unfortunately checking as of this recording it was nine months kind of old since its last update, which is a little concerning because it's just a very simple and useful plugin.

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I've not used the second one, but it does seem to do the same Thing and it's fairly new I think, but but has the same functionality.

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So those are two options to give a try, but having that built in.

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So when you're in appearance and then menus you can choose build one menu and then choose the links to show based on user role and

logged in or logged out status. And that's how you can build that there instead of just logged in or logged out. So that's already.

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This is already a simple membership and course area.

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However, if we want to take this a step further, we can actually integrate and loop in our email service provider.

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So this was the setup for WonderLab last year and again I'm using Thrive themes and so my course was Thrive Apprentice selling through WooCommerce.

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My email service provider was ActiveCampaign. And so I used Active Member 360 to be connected to ActiveCampaign. It only works with ActiveCampaign and I can run conditional content based on the tags of my contacts in activecampaign. This was so seamless and it just, you know, instead of using a membership plugin, this allows you with your page builder to build really dynamic pages and really targeted pages and serve targeted content and relevant content to your contacts. However, I decided that I really wanted to go even a step further with Wonderlab and I brought everything into WordPress.

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So I do have two sites. One runs all of Wonderlab and the other runs the community and my email service provider, which is Fluent CRM.

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So I have switched to that as my email service provider.

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And that is a plugin, that is an email marketing plugin on WordPress.

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And so in order to do the same thing as my last setup, I now have WP Fusion and that syncs my tags with fluentcrm to WP Wonder Lab.

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And so any purchases, any opt ins I'm running the membership and courses and everything through a specifically WordPress. So everything is on WordPress now.

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But also just having a very seamless experience for myself and also for my students, my members and my clients. Because you know, it's just easy to troubleshoot so whatever it is they purchased or whatever they opted into, whatever content I wanted to serve, it's all through and run through tags. And so this just really helps me to streamline all of my processes. I'm really just in WordPress all the time. Wonderlab is the centre of everything, funnels, courses. And I've reduced the need of something like Pably or, or Zapier or Make which sometimes fails, right?

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And we have to like also opt into it if we want more or better zaps to create better zaps. And so this is how wonderlab is set up right now.

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And of course, just as a side note, Fluent Community is our community now. So instead of being on Facebook or having a Facebook group, it's all brought into wonderlab.

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And I use WP Remote Sync and that's what syncs the users from one site to the other.

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That way you know, if they've opted in or if someone purchases something, they have access to the correct groups and spaces that are in Fluent Community and.

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Where they can always ask questions, submit tutorial ideas, anything like that.

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So that's where our, all our discussion hubs happen.

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And so this is really how WP Wonder Lab is built right now, of course. I mean, we really don't have to go that far, right? And we really don't need all of that if that's not what your client needs. And you can have a simpler setup and it's still totally fine to be able to use WP Fusion.

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WP Fusion actually works with almost.

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It's quite a long list, and it's.

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Not an exhaustive list, but quite a long list of email service providers.

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The free version allows you like One Direction, so it'll sync new contacts into your site, but the paid version allows you to sync in both ways. And so if someone purchases here and you add a new tag, then it goes into your email service provider.

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So, you know, there's some. There is a. There's obviously advantages to that, but of course, again, it depends on what you're using, how you're using it and what your client really needs.

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But this could be a typical stack, right?

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So you have your site, which is built on maybe an LMS like Master Study, and you're using Elementor Pro, which you really need to be able to do

conditionals and display conditions, and then WP Fusion to hook into your service provider to run any sort of conditional content, not just memberships, right?

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Just any sort of conditional content for clients and customers who have purchased something and to show them some content based on logic. So this could be a very simple, very simple setup.

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And again, you don't need to have all of this.

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You can do conditional content in a very simplistic way.

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This is just an example really based on if you have memberships. So you could use something like WooCommerce to sell, I think Master study. You can still sell through there and connect with Stripe, but you can do. SureCart, Cartflow, SureTriggers, there's, you know, a plethora of different ways of building a stack for your client depending on their budget and depending on their needs.

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So really what I really want to drive home in this way is that you are building a process and ecosystem for them. You are showing them what is possible when they use and invest more into their WordPress site.

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You're building a better user experience both for your clients experience and their processes, but also your client's customers experience.

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And when they see that you are thinking about all of these things and there are ways that they could use their WordPress website more, they will be able to see the growth and have more goals in investing in their site. You're showing them how they can invest into their site, they're going to come back to you for more work.

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That's just kind of how it works, right? Because you understand them, you understand their business, you understand their brand and you can help them to grow on this. And versus, you know, having again, just a WordPress site that's informational and then having all of these other things, a separate platform for funnels or a separate platform for a membership and courses. And so they can have all of this and still build in pieces, build in phases so that they don't have to invest in everything all at once. Right.

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But you are the person who's going to help show them that and to help them understand what their investment looks like when they're building with you and really investing in a WordPress website. So it's up to you to really build that stack for them.

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Again, you don't have to go super far into it.

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Right. It's more likely that their email service provider is specifically someone else, likely with Kit, maybe Mailerlite. And you don't have to do WP Fusion.

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That does cost a little bit more to invest in and they're not ready yet.

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But you can use query strings to help you run some of these pages. You can use just and invest in just one LMS.

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And a lot of the LMSs actually have free tiers that may actually be enough for them to be able to run one course and then for you to use your page builder with the conditional logic, the sky's the limit. You can show them so much of what their site can do without having to spend an arm and a leg elsewhere.

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And they're really investing in their site.

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And investing with you as well. So to go back to our original slide, we're really talking about conditional logic and our really simple if statements. And again, you can show, you know, the power in it is logged in and logged out status and user roles because you know someone purchases something, but you still don't need to do that, right?

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You could use query strings, location, page post types, scheduling content. So maybe something needs to be appearing every night for a certain time or maybe for one day they have one sale and it's going to turn off. You don't have to take that page down, it automatically turns off after, you know, 9pm that night when the sale is over. And so there's just different ways you can use this creatively and to show that your client show your client that there's so much they can do. So the homework for you is to go back to your favourite page builder.

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Or maybe your client site and find ways that you could use conditional logic and content creatively. Maybe it's going to save you some time so you don't have to update certain things all the time. Or maybe it's going to help out with some, some of the sales pages or content for your client and maybe it's not client facing that you really need to be doing, or sorry, customer facing. Maybe it's between you and your client. What are some ways you can use conditional content that can help the process between you and your client?

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Just so many different ways that you can apply this and I'd be really excited to see what you actually and how you actually apply this. And keep it simple.

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It doesn't have to be super complicated, it doesn't have to only apply to certain scenarios. There are different ways to be using this and it'd be really cool to see how you help your clients solve some of their process issues or help them to think ahead and propose solutions that are going to knock them off their feet. So I can talk about conditionals all day, but all good things must come to an end.

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If you want a little bit more, then you can go to wpwonderlab.com/PBS and there's a bonus tutorial in there just on how I use query strings to save myself a little bit of time on duplicating pages, also how I use it with my email marketing links. And also, you know, if you're new into the web design world, there's something in there on how I maintain client relationships and have consistent and constant referrals.

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And referrals are so awesome because, you know, you've worked with an awesome client.

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And then they know awesome people and then you work with more awesome people. And so, you know, those are the clients that we want and we want them to, you know, be more consistent.

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So we have stability in our business. So if you're interested in all of that, again, that's wpwonderlab.com/PBS and if you have any questions, you can head over to wpwonderlab.com again and there's a little chat in the bottom corner and.

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You can message me through there. You can also find me on IG.

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And the handle is WPWonderLab and I'm happy to connect.

[00:32:22.840]

I hope you're enjoying the summit and all of the awesome presentations and I'll see you around.