

Better Website Checklist

A customizable checklist
of necessities and "nice-to-haves"
to keep you from missing anything critical,
and help you plan and manage your
website project more efficiently.



FROM YOUR PALS AT



Better Website Checklist

Our new website must include:

1. Design/Creative/UX:

- ☐ Mobile-first, touch-friendly, responsive design that works well on all devices
- ☐ Accurately reflects CU brand; pushes our brand forward
- ☐ Clear, simplified interface
- ☐ ADA conformance/accessible at WCAG 2.0/2.1 AA standards
- ☐ Effective, easy internal search
- ☐ Thorough testing in a wide variety of devices/browsers

2. An established, well-supported CMS that is:

- ☐ Extensible and expandable (plug-ins, custom development, etc.)
- ☐ Not locked into or dependent on a specific vendor
- ☐ Easy and fast to use for all regular tasks, including:
 - ☐ Creating a new page
 - ☐ Updating navigation
 - ☐ Duplicating pages and content
 - ☐ Updating page content (images and text)
 - ☐ Updating rate sheets
 - ☐ Managing promotional content
 - ☐ Adding landing pages
 - ☐ SEO management/optimization
 - ☐ Creating blog posts
 - ☐ Creating video and image galleries
 - ☐ Managing integrations (social media, landing pages, tracking, forms, etc.)
 - ☐ Advanced content such as accordions, graphs/charts, embedded HTML

3. Easy integration with a variety of third-party services, such as:

- ☐ Online Banking
- ☐ Calculators
- ☐ Maps (Google Maps, locator service)
- ☐ Analytics with event tracking
- ☐ Loan and Membership Apps
- ☐ Surveys, feedback
- ☐ Social media/digital marketing
- ☐ Custom code

4. Security and Hosting that includes:

- ☐ Written, understandable security policies and processes
- ☐ Monitored for nefarious activity, uptime, speed, and software updates
- ☐ Hosted in a major, secured, fully staffed data center in the US
- ☐ Daily backups with fast recovery process
- ☐ Member data secured and separated from website data

(continued)

5. Support when we need it:

- ☐ Initial staff training at launch with additional training when needed
- ☐ Ability to handle additional changes as needed at our direction
- ☐ Urgent/emergency/after hours support
- ☐ Coverage and continuity when CU staff are out of the office
- ☐ Maintaining Accessibility

Additional capabilities desired:

6. SEO and Optimization Services:

- ☐ SEO strategy/planning services
- ☐ Content creation (research, writing) services
- ☐ Existing content editing and optimization
- ☐ Tools in CMS for assessing and improving content

7. CRM/Marketing Automation:

- ☐ Able to integrate with current CRM solution or recommend better solution
- ☐ Personalization based on user behavior/characteristics
- ☐ A/B testing and tracking
- ☐ Custom landing pages and microsites

8. Additional Site Capabilities:

- ☐ Blog
- ☐ Chat/chatbots
- ☐ Comments and ratings
- ☐ Intranet
- ☐ Private section for Board Resources
- ☐ Multiple languages

☐ _____

Important factors for evaluating vendors:

9. What kind of company do we want to work with?

- ☐ Experience designing website for financial institutions, particularly credit unions
- ☐ Understanding of website as cornerstone of marketing and branding
- ☐ Compatible culture and mutual trust (someone we can work with)
- ☐ Additional areas of expertise that we might be able to draw upon