# **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
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## 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

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