

# 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

The logo for iDIZ, featuring the lowercase letters 'iDIZ' in a white, sans-serif font. The 'i' has a dot, and the 'Z' has a horizontal bar. The logo is centered within a black circle, which is surrounded by a light blue circular glow.

iDIZ

# 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