

Website project checklist





Congratulations, you have decided to embark on creating a new website for your firm!

Before you start tendering your project to different agencies it is important to ask yourself: are you confident that you have created the best possible foundation for your new project and covered all the relevant bases?

Website design projects are not cheap and you will likely have your new website for at least a few years once it is finished. Therefore, knowing in advance why you are doing it, who it is for, the content and digital assets required and the purpose and goals of the project will give you greater clarity beforehand. It will also give you greater peace of mind afterwards.

In light of the above, here is our checklist for commencing a new website project based on over 30 years' experience providing creative solutions to financial firms.

By the end of the checklist you will have:

- Worked through all the key areas of a successful website.
- Have clarity internally about why you are creating the website, and who it is for.
- Created a strong, clear brief to present to the agency you eventually choose.

1. Website purpose and goals

What is your overall vision for the new website and what do you specifically hope for it to achieve?

Tick the following items which you believe are important to your project.

To raise the profile of the firm

To engage our existing clients

To attract new clients and generate leads

To create a balance. We want to engage our existing clients through the website whilst attracting new leads and clients.

To help increase client referrals.

To improve the user experience so the website is easier to navigate and more enjoyable to use.

To bring the website design into line with the new company brand.

To move away from a website template & improve the quality of the website through a bespoke design.

To bring the website's functionality, style and/or mobile responsiveness up to date.

To bring the website's structure and navigation into line with our new business model and/or structure (e.g. due to a business restructure, acquisition etc.).

To rank higher in Google search and draw in more qualified, engaged website traffic.

Other (please specify):

2. **Who** is it for?

Who are you specifically looking to attract and engage with your new website?

Tick the following items which you believe are important to your project.

Business stakeholders.

Existing private clients (B2C)

Existing corporate clients (B2B)

New private clients (B2C)

New corporate clients (B2B)

New and potential business partnerships (e.g. lawyers, accountants etc.).

Startups

Small to medium sized businesses

Large blue chip companies

New clients who are business owners or entrepreneurs.

New, private clients in a specific field or industry (e.g. GPs, dentists etc.).

Press / media.

Other (please specify):

2. **Who** is it for?

Buyer Personas

Buyer personas are a simple way of ensuring that you are targeting and designing the website for the right audience.

A “buyer persona” is simply a description of an idealized customer or client for your business. This description might include your target audience’s typical age, income, family background, goals and common pain points.

If you want to create your own set of buyer personas, check out our free [buyer persona checklist here.](#)

Client Pain Points

Client pain points are the needs or issues your clients are experiencing and will probably be the trigger behind them visiting your website. For instance, perhaps many of your website visitors are feeling overwhelmed by the complexities of sorting out their inheritance tax situation, and need a specialist to help them.

What pain points will the new website aim to address/solve?

Financial pain points (e.g. your clients are spending too much money on investment management fees):

Productivity pain points (e.g. your clients spend too much time dealing with their current provider):

Support pain points (e.g. your clients do not get the help they need from their current provider):

Other:

3. **Logo and branding**

It might seem strange that we have included your logo and brand on a website checklist, the truth is that every website is built on top of a brand.

Is your logo very corporate? Is it bright and quirky? Has it got a rounded font? These are all factors that will shape the design, look and feel of the website.

In our experience, it's almost impossible to design and build a great website when starting with a poor logo and brand.

Therefore, it is crucial that you start with a unique, high-quality logo and brand which will connect with your target audience.

Tick the following items which apply to your situation:

We have a strong logo and brand in place already which connect with our target audience.

We have a logo but we are not sure if it connects with our target audience or needs updating / replacing.

We do not want to change our logo or brand at this stage.

We do not have a logo or brand and need help creating one.

Other (please specify):

4. Copywriting

Having great copy which engages your target audience, identifies their pain points and moves them into action is key to any successful and engaging website.

Does your website copy achieve the above? If so that's great! This will give the agency a great foundation upon which to design the website.

If not, we would highly recommend you ask about copywriting when considering our service.

We have high quality copy that is targeted to our audience and their pain points.

We have existing copy but this needs to be improved.

We don't have any copy and need to get some professionally created.

We are going to write the copy in-house.

Other (please specify):

5. Digital assets

A great website will take your unique business assets and bring them to the forefront for your users to see and engage with.

Therefore, it's really important to list all the key digital assets and make sure these have been provided to the designer to include on the design of the website.

What digital assets do you have currently?

Brand guidelines
Brand imagery
Team / office photography
Educational or promotional videos
Guides, whitepapers and/or E-books
Interactive tools / calculators
Client photos
Client testimonies
Industry awards
Accreditations
Podcasts or webinars
Articles, news or blogs
Other (please specify):

... and which assets are you looking to create as part of the new website?

Brand guidelines
Brand imagery
Team / office photography
Educational or promotional videos
Guides, whitepapers and/or E-books
Interactive tools / calculators
Client photos
Client testimonies
Industry awards
Accreditations
Podcasts or webinars
Articles, news or blogs
Other (please specify):

6. Website functionality

Are there any particular tasks you wish the new website to perform for your audience? Also, are there any business assets you want it to integrate with?

Tick the following items which you believe are important to your project.

The website needs to clearly explain our services.

The website needs to clearly explain our process / methodology.

The website needs to show portfolio / fund information or data.

The website needs to link to a client login area (e.g. their online portfolio).

The website needs a bespoke login area created or integrated.

The website needs to show our team with individual profiles.

We would like the website to include engaging, downloadable material (e.g. eBooks).

The website needs an interactive calculator or similar to engage clients.

An existing/new video or video series needs to be integrated with the website.

Other (please specify):

7. Tracking, analytics and re-targeting

Tick the following items which you believe are important to your project.

Tracking how clients and potential clients use your website is vital to giving your team and the agency insight into how to improve the website going forwards.

Adding re-targeting technology such as Google and Facebook retargeting will also help serve ads to people who have visited your website at a low cost.

Tick the following items which apply.

The website will need Google analytics (or similar) and re-targeting technology.

We will be using Google analytics only and have an account already.

We don't have this setup and will need help with this.

Other (please specify):

8. **Lead and data management**

Getting new leads through your new website is always a great moment! But where is all of that lead data going? Moreover, who does it need to go to?

Tick the following items which apply.

We will need lead data to go into our CRM system (Salesforce / Hubspot etc) or similar.

We don't have a CRM in place and need help setting this up.

We will just need lead data to be emailed through (no CRM).

We have a newsletter system place (MailChimp etc.) and will need email signups on the new website to plug into this.

We don't have a newsletter system in place and need help with this.

Other (please specify):

9. **GDPR**

With increasingly-strict laws being introduced about data protection, it is important that your website is compliant with these rules and respects users' personal information and privacy.

For this reason, your new website will need a fully up-to-date privacy policy and cookies policy.

We have a GDPR compliant privacy / cookie policy that can go on the website

We don't have a GDPR compliant privacy / cookie policy and need help to get one created.

10. Post-launch

Thinking about the next steps and what needs to be achieved after a successful website launch will help you choose the right agency going forwards. It will also help to ensure your new website is designed and built with your future goals in mind.

What ongoing work do you envisage being needed for the website, following successful completion of the project?

Tick all of the following which apply to you:

Website hosting, security and maintenance.

Ongoing content creation (e.g. blog posts, articles, guides, infographics etc.).

Client newsletter design, management and optimisation (linking to your web content).

Search engine optimisation (SEO – to improve website rankings, traffic and conversions).

Social media management and/or advertising (e.g. Facebook Ads).

PPC/Google Ads set up, management and optimisation.

Other (please specify):

11. **Final thoughts:**

The cost of an expensive website vs a cheap website

Everyone loves to save money and we also love a good bargain when we see it!

However, one of the most common mistakes is thinking your firm will “save money” by having a cheap website. The truth is that a cheap website will cost you with regards to:

- **Audience impact.** A cheap website will not connect as effectively with your target audience, due to the lower perception of quality.
- **Client loyalty.** Yes, the design quality of your brand (including your website) can have a big impact on your ability to retain clients. If your online presence looks out of date, bland or out of sync with your brand experience, then it can create enough unsettled feeling for people to look at other options elsewhere.
- **New business.** If a potential new client looked at your website first and then a competitor's, which of the two would they reach out to? A big factor will be the prestige and quality of your website versus your rival firm.
- **Brand exposure.** Beautiful, high-quality financial brands and websites have far greater potential to get in front of more pairs of eyes. Why? Because people want to see them. A cheap website will not travel as far, therefore limiting your potential to attract new business.
- **Replacements.** Just as it is with cars, computer hardware and other things we buy, a cheap website is more likely to run into problems faster and need replacing sooner. This often means you often end up spending as much as you might have done on a bespoke website – possibly even more.
- **Lost opportunities.** If a potential client visits your website and is unimpressed or frustrated with the user experience, then you risk losing their business. Moreover, you lose whatever business they might have passed your way (e.g. friends and family) had they become a client.

Our firm belief is that financial firms are better-off investing in a high-quality, bespoke website design rather than cutting corners. Your balance sheet, clients and staff will thank you for it!

If you have any questions or would like to discuss your project or get a **free** project proposal then please call us on **01923 232840** or visit: <https://www.creativeadviser.co.uk/start-your-project/> and enter your details to get started.

Alternatively, would you like to get a professional opinion on the different aspects of your website including your logo, design, copy and digital assets?

Order our health check report for £299+vat and one of our team will:

- Provide a thorough analysis and report of your website's compliance with current SEO industry standards (search engine optimization).
- Review the quality and characteristics of your current visual identity (e.g. logo design, corporate styles etc.) in light of your target audience.
- Give you an assessment of the quality of your users' current experience on your website, and some practical suggestions to address this.
- Offer an analysis of your closest business competitors, comparing your SEO, brand quality and user experience to show you areas where you can gain the upper hand.
- Provide a summary of your current digital assets (e.g. blogs, eBooks, videos and podcasts) as well as a recommendation of assets you could develop in light of your target audience and marketing goals.

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