**UX**WEST

CHECKLIST FOR CREATING OR REVAMPING A WEBSITE

The perfect website lies at the intersection of the users' needs, the site owner's goals, effective design and good use of technology. This checklist is organized under those headings to help you think through how your site will address each of those areas. Refer to this post for more explanation of many of the points below.

Without a deeper understanding of a site's purpose, its size and complexity, and its specific users' needs, it's impossible to make a generic checklist that will cover every question that should be answered. Therefore, the questions below are only directional and should be expanded upon as appropriate. Consider these points to be like the outermost layer of an onion and keep peeling back more layers by adding your own questions in each of the four areas as needed.
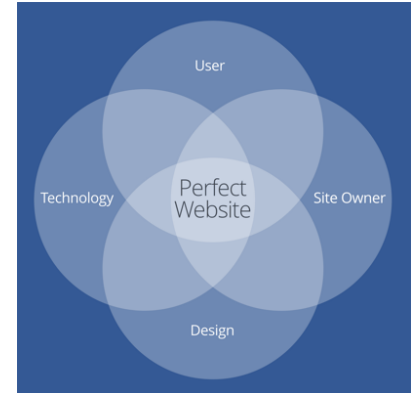
1. THE USER'S NEEDS

How can the site best deliver on the users' needs or wants, simply and intuitively?

☐ Who are the primary users of your website? Define each user group as a persona. What are they looking for from your site? What pain points or other needs can you help them with?

☐ What have you learned by talking to users? How do they react to your current site (if applicable) or sites similar to yours? What do they find good/helpful about competitors' websites and what do they think can be improved?

☐ How will they arrive at your site (e.g., via a Google search or by clicking from a social media site or an email)? How will you ensure a consistent experience for users across all channels?

☐ Primarily, where will they be when they use the site (office, home, traveling, shopping, at multiple locations)?

☐ If you're revamping an existing site, test it with users to understand how well it meets their needs and accomplishes your goals.

#2: THE SITE OWNER'S GOALS OR BUSINESS OBJECTIVES

What are the desired organizational or business outcomes and how can the site contribute to those?

☐ What does success look like? What are the desired outcomes? Where do those goals overlap users' needs?

☐ Narrow your objectives to a few key performance indicators (KPIs).

- ☐ Document the KPIs and decide how you will measure each one.

- ☐ Put measurement methodologies in place (for example, Google Analytics Conversion Goals or CRM database lead acquisition reports).

- ☐ How will you define conversion KPIs (e.g., total visitors, visitors from a certain source or demographic group, average pageviews per session, video views, video completion rates, document downloads, signups, calls to your office, etc.)

- ☐ What CTAs (calls to action) will be used to promote conversion?

- ☐ Set up a regular reporting cadence (e.g. weekly or monthly).

- ☐ Optimize the site based on performance.

#3: EFFECTIVE DESIGN

How can UI design and content provide something useful, beautiful or entertaining?

If you're working with a website designer it will be helpful to provide a sampling of sites that you like and some that you don't— and the reasons why. The aesthetics of design can be subjective and any guidance you can provide your designer will help ensure your satisfaction with the end product.

- ☐ UX Design – If you do a good job covering the priorities listed in area #1, you'll be well on your way to outstanding UX design. Put the user first and filter every design decision through their eyes. When your site is in the design stage, test it with users.

- ☐ Information Architecture – What's the best way to organize the content? A rule of thumb is to have no more than 5-7 main sections, with no more than 5-7 subsections (if needed) under each main section. But there's not absolute rule other than be intuitive and test the IA with users to ensure that it's simple and all the content is discoverable.

- ☐ Taxonomy – what should you name your sections, subsections and navigation links? Avoid being overly clever – the best taxonomy is simple and its meaning is obvious.

- ☐ UI Design – Novelty is sometimes dangerous and it can be particularly challenging for users when applied to the design of the UI (user interface). Put things where people expect to find them (e.g. place the login button in the upper right corner). Make sure the text is easy to ready (e.g. avoid small text or poor contrast).

- ☐ Content Design – The content is the meat you're delivering to users. As such it should be nutritious and delicious. It should be useful and/or beautiful and/or entertaining to the greatest degree possible in ways that will meet users' wants and need.

☐ SEO Content – The content on your pages should contain the optimum number of targeted keywords to ensure the best page rank possible. Use research tools (such as Moz) to identify the desired keyword phrases and incorporate them into your content. Page titles, meta descriptions, H1 headings and image alt tags are all very important for SEO.

☐ Text – According to UX expert Steve Krug, the rule of thumb for website copy should be, "cut it in half, then cut it in half again." That's because users generally scan web pages rather then read them. Break up text with subheadings, bullets and images. (Minimizing text can work against you in terms of SEO benefits, so try to strike a balance and choose your words wisely).

☐ Video and Images – In most cases you can assume users will prefer video content over text. If you want to optimize a page put a video on it for the human visitors and include text for the Google search bot. If you can't use video, images make your content much more inviting to users. Be sure images and video are high-resolution to look good on modern HD displays.

☐ Accessibility – Don't forget people with disabilities who require accommodate for their special needs. At very least avoid the most common accessibility issues: low contrast on text, missing alt text on images, ambiguous link text, etc. For more information refer to W3C® Web Content Accessibility Guidelines (WCAG).

☐ Include a privacy policy – Regulations like Europe's GDPR and the California Consumer Privacy Act (CCPA) place very specific requirements on website owners. If you're not familiar with what's expected, be sure to find out and implement the required measures.

#4: APPROPRIATE TECHNOLOGY

What technologies, platforms or techniques will best deliver the desired experience and results?

☐ CMS Platform – Compare content management platforms like WordPress, Squarespace, Wix or Weebly to decide which one's features and costs are best for your needs. For larger-scale sites requiring more robust functionality you might consider Magento, Drupal, Sitecore or DNN.

☐ Consider Shopify or WordPress/WooCommerce for an e-commerce site.

☐ Mobile optimization – Be sure to select a platform that will let you create a responsive site that will adapt elegantly to any device.

☐ Hosting – Where will the site be hosted? Platforms like Squarespace, Wix, Weebly and Shopify come complete with hosting as part of their monthly fees. WordPress, Drupal, Magento and others require the hosting decision to be made separately.

☐ Domain Name – Do you need to secure a new domain? Be sure to make is as short and simple as possible. Don't use made-up or purposely misspelled words. Think about domain names across the web including social media sites and be as consistent as possible so you can be found wherever people are looking.

☐ Security Certificate (SSL) – Your hosting service or hosted platform can provide this – sometimes at an additional cost.

PRELAUNCH CHECKLIST

How can you ensure a flawless site when it goes live?

☐ Proofreading – Run spell check using tools in your CMS and then also have your site proofed by a human proofreader.

☐ User Assurance Testing (UAT) – Recruit people from your audience and ask them to navigate to particular pages and to perform key tasks in order to identify any issues.

☐ QA Testing – Look at every page on multiple devices (desktop, tablet, phone) in all the popular Windows and Mac browsers and operating systems.

☐ Fill out all forms – make sure they provide error messages when not filled correctly and check that they are received when submitted.

☐ Accessibility Testing – Run your site through appropriate accessibility checks (see https://www.w3.org/WAI/test-evaluate/tools/).

☐ After the site goes live – Repeat the main QA tests to ensure that everything is still working.

☐ Submit site to Google – Be sure to included Google Analytics code on your site' and set up Google webmaster tools, where you can submit your site's URL to help speed up Google's indexing process.

POST LAUNCH

A site launch is a bit like the commencement ceremony when you graduate from school – it may feel like the end but it's really just the beginning. Be sure to:

☐ Keep the site content up to date.

☐ Check analytics against KPIs (from #2) on a regular schedule and optimize as needed.

☐ Do periodic user testing to look for ways to continuously improve the site for users.