YOUR PE,SUB-DEBT OR M&A WEBSITE REDESIGN

A CHECKLIST TO HELP YOU PREPARE

We believe that redesigning your website should be purposeful.

Everything from updated security to a simplified user experience can help your private equity or investment banking firm site function as it should.

However, the initial meeting with an agency can be overwhelming. They often have lots of questions and suggestions to help you make the best decisions.

This list will help you prepare for that first meeting with tasks to complete beforehand as well as some important things to discuss with your agency throughout the process.

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Preparation

A new website is a major undertaking. Give it the attention it needs by doing a little preparation before you meet with your agency. Consider the items on the list below before you head to your first meeting.

DISCUSS WITH AGENCY   RESOLVED

1. Define your personas. Every company markets to specific stakeholders. Most PE firms target a mix of investors, business owners, and intermediaries. Your marketing agency or website design firm should be able to help you define these target groups, if you need assistance.

2. Review and revaluate your branding. Is your current branding working for your company? Consider speaking with the creative agency about refreshing your logo, tagline, messaging, visual identity, and imagery, including photography, to maintain a relevant and impactful presence.

3. Take stock of your current SEO efforts and make a plan for the future. Optimizing your website for search engines is important for every company--even PE firms who often believe that their clients already know them. A few simple changes can make you much easier to find. Your agency can help you get started if you don't have a program in place, or they can help you understand and interpret any data you have.

4. Reevaluate your blogging or news strategy. Are you blogging or posting news? This is a major way to increase site traffic, boost SEO rankings, demonstrate industry-relevance, and show that you are current and active in your field. How can you be using this section of your site to gain clients?

5. Collect your current assets. In order for your agency to better help you, it is important that you gather all of your current assets.
- *Bring vector format logos. The easiest way for an agency to help you put your best face forward is with great assets. You can help by providing a vector format (.ai or .eps) file for each logo you want to feature on your site.*
- *Bring visual and tone of voice guidelines for your brand. Knowing where you are coming from stylistically allows the agency to help you make decisions moving forward. If you don't have these guidelines, your agency can work with you to define the basics.*

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With the agency

There are few things as important to private equity firms and investment banks as security and the language that attracts investors, intermediaries, and business owners. Give both the time they deserve with a little help from your agency.

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1. Be open to reformatting your content. Frequently firms have either too much content or unclear directions for users. There are several ways to improve content.

- *Cut it down. We recommend small amounts of copy and simple designs, especially on the homepage.*
- *Create clear calls to action. Work closely with your agency to determine what areas of the site would benefit most from calls-to-action.*
- *Speak directly to your audience. Include pages for each audience group: investors, intermediaries, business owners.*
- *Be clear about your content. Consider a bumper warning, a pop-up dialogue box, that alerts people that they are leaving your site.*

2. CMS and third-party integrations. Many agencies build websites on content management systems that make it easy for private equity firms to edit or add pages, team members, portfolio companies, etc. as their company grows. In the past, CMS-based websites built on platforms like WordPress have had security issues. However, this is a function of how the site is coded, not a problem with the platform.

Some marketing agencies create websites using an extensive list of both free and paid-for plugins, extensions, and components. These plug-ins can cause lots of security issues as well as slow loading times, poor UI, and console errors.

Ask your agency how they intend to handle these potential problems. At MVP Marketing + Design, our solution is to build websites for our clients "from scratch" as much as possible. We make sure everything works together to keep your site safe and secure.

3. Consider adding SSL certificates. An SSL certificate is an effective way to add trust certification to your website. This certification shows that your site is encrypting data between the user and the server your website is hosted on. Without this certification, information could be intercepted and used maliciously. While this is not a mandatory provision, it is definitely a good-to-have. Speak with your agency about the SSL certificate that best suits your needs.

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With the agency (continued)

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4. Use firewalls. Firewalls are filters that can prevent Distributed Denial of Service (DDOS) attacks and forced entry attacks on your site from all over the world. This is a defensive measure that should definitely be taken to protect your site.

5. Back up everything. Backing up work can save your company from a potential disaster. There are several different ways you can do this. Talk to your agency about what type of backup would work best for you.

6. Stay in contact with your Securities and Exchange Commission (SEC) knowledgeable attorney. There are many rules that govern SEC regulated firms. Make sure you regularly consult your attorney for questions and approval of your intentions before adding case studies, testimonials, etc. to your site. Your agency can help you identify what areas may be problematic.

7. Decide who will host your site. Some firms choose to self-host their sites while some go with a hosting plan through a third party. Generally, an agency should be able to recommend a hosting company that is well-equipped with the latest technologies to keep your site secure. However, if self-hosting is something you are considering, check with your IT services person or support firm to make sure the host is compatible with the latest security requirements and will run as efficiently as possible.

8. Identify who will host your client portal. To prevent security breaches consider a client portal rather than an onsite solution. Client portals have different hosting requirements than your website. In general, these need to be very secure, so we strongly suggest externally hosted client portals. It is possible to self-host your client portal, but it is not cost-effective or as secure to do so. A few external hosting options are:

- *Intralinks*
- *Merrill Datasite*
- *Sharefile*
- *eFront*

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With the agency (continued)

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9. Decide on a maintenance plan. Most often if the agency creates the site on a user-friendly content management system, typically WordPress, you will be able to maintain the part of your site that people can see. However, there is a backend to your site that will likely need to be kept up-to-date by your agency. Talk with them about their recommended maintenance plans and what they include.

10. Think about print functionality. Many PE companies need to incorporate print functionality on their site. Discuss which pages would benefit most from printing style sheets. Pages to consider are the firm overview, contact info, case studies, news, or bios. Ask the agency for their recommendations.

11. Mobile responsiveness is a given. Many companies come with the specific requirement that their site be responsive to mobile devices. This is a request with which we whole-heartedly agree! Today, mobile responsiveness is not optional. Any good agency will automatically make your website responsive.

12. Template or custom? Initially many clients are drawn to the idea of using a template to create their new website as it can reduce cost. However, we discourage the use of a template because often they look generic and use a variety of slow-loading plug-ins that can negatively impact SEO. Moreover, once you break a template to accommodate a design improvement its security becomes problematic. At MVP, we're proud to deliver custom, user-centered websites that make your company look great.

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Revitalizing your private equity website can be painless.

As a PE firm, investment bank or family office, you need an agency that can help you tackle the important issues on this list as well as any other problems that come up throughout the process.

We're here to help.

At MVP, we specialize in providing effective, full-service digital marketing solutions for private equity firms, investment banks, family offices, and their portfolio companies. If you have any questions about the items on this list or are seeking a new marketing partner, give us a call! We look forward to becoming your most valuable partner for branding and website design success.

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