APEX

Strategic marketing partners

10 steps to an effective asset management website

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Build a website that delivers with our step-by-step guide

Websites are a critical component of a winning commercial strategy. Fund selectors and management teams will often make your website their first port of call. Follow our step-by-step guide to create a well-structured website that shows you in the best possible light.

Your website is a high-profile project. Even if senior stakeholders are not fully engaged at the start, that will not be the case towards the end. And the moment LPs or potential portfolio companies comment on your new site, senior stakeholders will be highly engaged...

Our step-by-step guide will help you navigate the entire process.

What support do you need?

Before you get going, think about what type of support you will need. This will be highly dependent on the skills, experience and resources you have within your marketing team.

Highly resourced team

In the uncommon event you have a full marketing team staffed with skilled strategists, writers, designers and project managers, much of the work can be done in-house. In this case, you will likely only need external help building the website – and even that isn't necessarily the case if you have simple requirements and team members with experience building in Squarespace or similar platforms.

Moderately resourced team

Larger firms may have a team that is capable of some writing and project management but lacks design or coding skills. These teams benefit from an agency that can create wireframes, design prototypes, and manage the development of a website. Your team leads on content and compliance while the agency executes your vision.

Limited team

Most firms still don't have specialist marketing personnel (separate to IR or sales personnel). If they do, they likely lack the capacity or experience to take on most parts of the process. In this case, a full-service partner can handle the content, design, development and maintenance, with direction from the firm's marketing or IR team.

Select the right partner

Once you have understood this, you'll want to select a partner. There are essentially two choices here. A generalist web design agency, or a specialist in your sector. Although generalist agencies will sometimes appear to be cheaper, this will not necessarily end up being the case - particularly for moderately or low-resourced teams, where the time required to educate on industry-standard requirements will be significant.

Before you sign contracts, make sure you have checked testimonials, references, or case studies and viewed some of the team's previous work. Picking the wrong partner can result in delays, unexpected expenses, and a poor result.

Failing to plan is planning to fail

Before you get going, it's important to collaborate with your chosen provider to create a realistic project plan. This should outline:

- Timelines and deadlines
- What input will be required from your team
- When reviews/sign-offs are needed
- Which stakeholders should be involved at each stage – when senior stakeholder input is required, make sure they are given plenty of notice as sign-off delays can derail even the most conservative project plans

Step-by-step guide

Once you have decided on your approach and put together your project plan, follow these ten steps:

01
Identify your audience, their goals, and the journey to achieve them

02
Pick your domain name and registrar

03
Choose a platform and website host

04
Plan the website content, structure, and navigation

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Create the wireframe

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Write the content

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01

Identify your audience, their goals and the journey to achieve them

For your website to be effective, you must first understand its intended purpose.

As a fund manager, that almost certainly includes communicating with potential investors about your offering and providing them with some basic information.

Think about who will be visiting your website.

- Who are your investors?
- What information will they be looking for? And what information will they be most interested in seeing (whether they were looking for it or not.)
- What other groups might visit the website, and how important are they to you? Potential portfolio companies? Prospective employees? Journalists?
- What information do you need to provide for these groups?

Once you understand your audience's needs, you can map out their ideal user journeys.

Responsibilities:

Highly resourced team: You lead this in-house, defining audiences and their requirements.

Moderately resourced or limited team: The agency runs workshops to help you define audiences, key messages, and user journeys.

02

Pick your domain name and registrar

The domain (the website address or URL) you choose should be short, memorable, and consistent with your brand. Keep it simple: if your company name is Microwave Partners, microwave.com, or microwavepartners.com would be best.

Next, pick a domain registrar (where you purchase your domain). We recommend GoDaddy, BlueHost or Network Solutions. They provide 24/7 customer support and will help with a lot of things like renewals, security features and domain transfers.

Responsibilities:

Highly resourced team: You register and manage the domain directly.

Moderately resourced or limited team: Your marketing or operations team purchases and manages the domain and registrar. The agency can advise on availability and technical setup.

03

Choose a platform and website host

Pick a platform to host the website. Your choice should consider whether your website is bespoke or built from a template. The CMS (content management system) is where you will make edits to the website after launch, so it's essential to choose one that your team can use confidently. Popular choices include WordPress or Squarespace (for simpler sites).

Equally important is your hosting provider. This determines how quickly your site loads and how reliably it performs. Slow speeds can increase bounce rates (users leaving your website without visiting other pages), so it's important to select a provider that can handle your website's technical requirements. Strong uptime guarantees, security, and scalability are also aspects to consider.

Responsibilities:

Highly resourced team: You choose your CMS and hosting provider directly.

Moderately resourced or limited team: The agency typically recommends suitable CMS and hosting options. Your team should weigh in on ease of use for the CMS and ensure the hosting provider meets requirements for speed, security, and compliance.

04

Plan the website content, structure, and navigation

This is the stage where you decide what information belongs where.

When considering the content, structure, and navigation, keep the user journey in mind. What questions does your audience have? How do they move through the site to find information they are seeking?

Create a navigation structure that includes your main sections. This is often Home, About, Strategy, Portfolio (where relevant), News, and Contact. Note what content belongs on each page and identify where calls-to-action will appear.

Responsibilities:

Highly resourced team: You create the content, structure, and navigation plan and sign off with internal team before design.

Moderately resourced team: You work with an agency, or independently, and create a plan that meets your requirements. Your approval is required to move forward.

Limited experience: The agency leads planning. Your team confirms the structure and ensures that it aligns with the user journey and your business priorities.

05

Create the wireframe

The wireframe is a visual outline of your website (typically without branding elements) showing page layouts and where content will be displayed.

It should include your top-line navigation, any calls to action, and links you will include on each web page to help people navigate your site easily. It should also highlight any specific functionality you require e.g. videos or interactive graphs

Review the wireframe carefully. Does it reflect the user journey? Have the most important pages been included in the top-line navigation?

Responsibilities:

Highly resourced team: Your developer or agency drafts the wireframe. You review with stakeholders.

Moderately resourced or limited team: The agency presents and explains the wireframe. You review and sign off.

06

Write the content

We recommend outsourcing this to your third-party agency. If you will be doing this yourself, pay close attention to the following:

- Whether you are writing or reviewing the text, ensure it is clear and focused on two or three key messages that you want people to remember. These should be the things that differentiate you from your competitors. This is what you want investors to remember.
- Ensure the text aligns with your user journey. Are you providing the information visitors to your website will be looking for?
- Include the information you need to provide but avoid including too much information. The more you say on your website, the less of it will be remembered.
- Remember: The average person spends between 52 and 54 seconds reading a web page. Use their time wisely. Do not confuse people with complicated language.
- Use typography to help pull out important pieces of information.
- Incorporate key SEO (search engine optimization) terms if they are particularly relevant for your offering. But don't let SEO dictate your content: it is more important for your website to be differentiated than for it to include lots of generic industry terms. Few investors find new managers through general Google searches.
- You may also consider AI SEO tools that can:
    - Generate keyword ideas that match how your audience search
    - Improve headings, subheadings and meta descriptions
    - Suggest text improvements to enhance readability
    - Identify gaps where your competitors are outperforming you
    - Track and provide analytics on SEO performance over time
- Don't forget required legal disclosures. This includes disclaimers, cookie policies, privacy policies, and terms and conditions.

Responsibilities:

Highly resourced team: You draft all content.

Moderately resourced team: You write core content, agency polishes for clarity and SEO. You then sign off on the final text.

Limited experience: Your agency drafts the text, and you provide factual input. You review and provide sign-off.

In all cases, lawyers must supply disclosures and policies, and then compliance must sign off on your content.

07

Create and design prototypes for each page

The "first draft" of the website you see will be a series of static design prototypes. They may be presented as PDFs, or via collaboration tools such as Figma. These give you an idea of how your website will look before development begins. They are not coded, meaning they will not include any of the functionalities the final pages will have, such as links or text animations.

When working with a third party, you may initially see a small selection of pages, such as the homepage and another page, to confirm you are happy with the overall design.

When reviewing the prototype, remember to check:

- Is there too much text?
- Are calls to action in the right places?
- Does the overall design reflect your visual identity?

It is important to ensure you are happy with the design and layout of the website at this stage. It is much harder to make significant changes to the site once it has been coded. If you have second thoughts about how the content is arranged or how things look, now is the time to raise them.

If your compliance team has not already checked the website text, they must do so now if delays are to be avoided. Material changes to length or content of sections are much easier to make now than once development has begun.

Responsibilities:

All groups: Your developer or agency produces the prototypes. You confirm it reflects your brand and sign off before coding begins. It's important that senior stakeholders are looped in at this stage. If they have any major changes past this step, you could incur additional costs with your agency, as pages may need to be re-coded.

08

Build the website

Once the static pages have been signed off, the website developers will build the website in a staging area. It is on the internet but not visible to the public.

This will typically take a few weeks to complete but will depend on the complexity of your website.

If you have a legacy website, you may want to import existing news stories, blog posts etc. Your agency will often be able to do this automatically.

Responsibilities:

All groups: Your developer or agency develops the website.

09

Quality assurance

Your website will be delivered as a link with password credentials, and will behave in the same manner as the final site (working links, animations etc.). It is still not visible to the public at this stage.

When reviewing the website in the staging area you should check:

- Does everything look the same as the static pages you signed off?
- Are all the elements of the page – pictures, blocks of text etc. – aligned as they should be?
- Are the font sizes correct? Are they consistent? For example, all headings of the same hierarchy should use the same size font.
- Is the space between sections on the page appropriate?
- Are all forms and other interactive elements working?
- Do all the links take you to the correct places?
- Are there any spelling mistakes or other issues with the text?
- Are the animations working properly?
- Does the site display correctly on different screen sizes? Check with as many phones and tablets as possible.
- Are charts that are pulling data from external links working properly?

Responsibilities:

Highly resourced team: You review all aspects of the website. Your developer or agency fixes any issues. Compliance must sign off.

Moderately resourced or limited team: The third-party agency runs quality assurance, testing all aspects of the website. Your team should validate compliance and functionality.

10

Launch your website

The agency you are working with should manage the launch process and ensure it is visible to everyone on the World Wide Web. Please bear in mind, it can take a week or more for your website to become visible to every user. This is perfectly normal and is due to browser caching.

Keep testing the site after it is launched – and test Google Analytics again to ensure it is working.

Responsibilities:

All groups: Your developer or agency manages the technical launch, making your website visible to the public.

Final thoughts & considerations

Don't forget about your site after launch. It's important to have a plan to keep the site updated and to resolve any technical issues that might arise over time.

If you have a News or Insights page, you need a content plan to keep it populated with new articles. This will keep people coming back.

If you worry you won't have time to do these things, talk to the third parties who helped you build your site. They can probably manage this for you or suggest others who can.

If you want a new website and have any other questions or would like more detailed information about any of the above steps, reach out to the Apex Strategic Marketing Partners team. We will be happy to help.

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