



QRC – Websites Best Practices

MARKETING SUITE KNOWLEDGE GUIDES ON WEBSITES:

- [How to set up form-triggered emails](#)
- [Embedding a custom form on your website](#)
- [Supporting multi-language websites](#)
- [Enabling SSL on your website](#) | [Troubleshooting for SSL](#)
- [Long-tail keywords and their importance to SEO](#)
- [Tips for choosing a domain](#)
- DNS troubleshooting: [General](#) | [GoDaddy](#) | [Network Solutions](#)

Website Best Practices

Digital Best Practices:

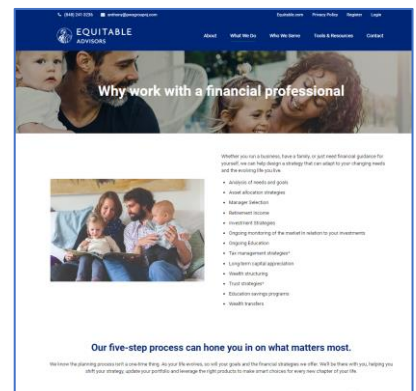
WRITING COMPELLING WEBSITE CONTENT

Once your customers navigate to your website, you want to ensure they will actually stay on your site and learn more about your business and services offered. Well written website copy will:

- Clearly communicate your business' mission and goals.
- Make a good first impression.
- Provides SEO benefits

WHAT TACTICS CAN I USE TO IMPROVE MY WEBSITE COPY?

- **Your page layout should be easy to read**
Long blocks of text on a page is hard for a customer to consume. Play with spacing and include bullet points to break up the text. Keep paragraphs short to break up dense blocks of copy.
- **Include headings and subheadings**
Headings and subheadings help your customer understand the important topics on the page. They also help search engines, like Google, to identify what topics your web page is focused on – which in turn can help improve your search engine optimization.
- **Add visuals**
Break up text heavy pages with relevant images or graphics interspersed throughout.
- **Call attention to key terms and phrases**
Utilize bolding or highlighting within text to help your customers easily find key terms/phrases within a paragraph of copy.





Website Best Practices

Digital Best Practices:

WEB DESIGN BEST PRACTICES

- **Branding Consistency**
Using consistent branding throughout your website (and other digital marketing channels) will help ensure customers recognize your business and establishes trust.
- **Calls to Action (CTA's)**
Your site's ultimate goal is to persuade users to take an action. Strategically placed calls to action (CTAs) help convert users into paying customers.
 - Make CTAs clearly visible – don't hide your CTA withing a dense body of text.
 - Route leads in the right direction by including a relevant CTA on each page. Don't make users navigate back to your home page to convert.
 - Include CTAs on internal pages to keep customers moving through your website
- **Accessibility**
Everyone, regardless of device, special needs, or location, should be able to use your site. A great resource for web accessibility is [W3C - Web Accessibility Initiative](#).

Search Engine Optimization:

WHAT IS SEARCH ENGINE OPTIMIZATION (SEO)?

SEO is the process of improving your website to help increase its visibility in search engine results whenever people search for:

- Products you sell
- Services you provide.
- Information on topics in which you have deep expertise and/or experience.

The better visibility your website has in organic search results, the more likely you are to be found and clicked on. Ultimately, the goal of search engine optimization is to help attract website visitors who will become customers and keep returning to your site in the future.

WHY SEO IS IMPORTANT

While paid advertising, social media, and other online platforms can generate traffic to websites, **the majority of online traffic is driven by search engines**. Organic search results cover more digital real estate, appear more credible to savvy searchers, and receive more clicks than paid advertisements. SEO can take some time to establish, but leveraging basic SEO principles can make the process easier:



Website Best Practices (Cont.)

Search Engine Optimization:

WHY SEO IS IMPORTANT (CONT.)

BASIC SEO PRINCIPLES

- Provide clear, engaging, and easy-to-find content on your site.
- Update your website regularly to ensure content is not stale or out of date
- Ensure page titles are descriptive and relevant.
- Links leading back to your website (called 'backlinks') from other websites can boost your search rankings. Relevant backlinks from authoritative sites signal to Google and other search engines that your page is worthy of attention.
- Social influence and social shares are positive signals to search engines, and can help boost your site's relevancy
- Page speed is important, along with a positive, useful user experience.
- Use ALT attributes (website metadata) to describe images, so that search engines can better understand their content.

THINGS TO AVOID

- Thin content, pages showing mostly images or hyperlinks, or that content that otherwise redirect visitors away to other websites will not rank well.
- Lengthy URLs, that are not descriptive or unclear
- Duplicate content

PAID SEARCH

Paid search (sometimes referred to as PPC) is a form of online advertising where advertisers pay a fee each time someone clicks their ad. Search ads on places like Google and Bing are the most common format, but social media ads fall into this category too.

Pros	Cons
PPC can be established faster than traditional SEO	PPC for FinServ industry can get prohibitively expensive
PPC allows you to target specific user segments	Requires up-front cost /dedicated spend budget
PPC allows for quick experimentation	PPC can lose effectiveness overtime



Website Best Practices (Cont.)

We understand moving to a new website platform comes with many challenges, including learning how to edit and add to your website. To assist you in the editing process and to ensure your website looks professional, we have curated a list of best practices specific your new Equitable Advisors web template. While we do encourage you to edit your website, we also wanted to identify watchouts and areas to avoid changing in order to ensure brand consistency.

Platform How To's and Best Practices

HOW TO ADD TEAM MEMBERS

By default, your new website comes with a team page and team member section. However, you do need to add team members for the section to appear.

- How to add a team member
 - Login to the Marketing Suite Dashboard
 - Select the Website tab
 - Select team members
 - Click Add Members
 - Complete the team member profile
 - Click Save Draft
- Team members will appear on Meet the Team page

The screenshot shows the 'Team Member Information' form within the Equitable Marketing Suite dashboard. The form has a sidebar on the left with navigation options like 'Dashboard', 'Website', 'Design', 'Header', 'Navigation', 'Home', 'Pages', 'About', 'SEO', 'Settings', and 'Blog'. The 'Team Members' section is highlighted. The main form area contains fields for 'First Name', 'Last Name', 'Email', and 'Phone', each with a placeholder example. There is a checkbox labeled 'Use a custom display name (handy for designating)' with a 'Custom Name' input field. At the bottom, there are 'Cancel' and 'Save Draft' buttons.

CONFIRM YOUR CONTACT INFORMATION

Contact information was pre-loaded into your new website. But we know things change. Under profile -> contact information, please confirm all your contact information is accurate.

SAVE AS DRAFT vs. PUBLISH

When updating or adding to your website, please select **Save Draft**, not Publish if you are not yet ready to submit your changes to compliance. The only instance where you will select Publish by default, is when updating your navigation. By saving your edits as a draft, it allows you to easily go back and modify, or make changes, without triggering a compliance alert.

SYNCED FROM EQUITABLE WEB PAGES

Your Equitable template comes loaded with new pre-approved content created and updated by Equitable Home Office. Pages are synced so the Home Office can easily update content for the website. We recommend leaving pages synced on your website, unless customizations are required. Otherwise, you are responsible for updates to the page moving forward as the page will no longer be synced.

If you want to add customized content a synced page, you must follow these steps:

- Go to the Marketing Suite Dashboard
- Select the Website Tab
- Select Pages
- Find the Page you want to customize
- On the right, select Action -> Copy (This will copy and open up the page editor. Add a new page title and customize the page. Save Draft when complete).
- Once your done customizing the page, go to the Navigation tab.
- Remove the synced page from the navigation and add the new page you created (if you don't do this step, the synced page will stay on your website).

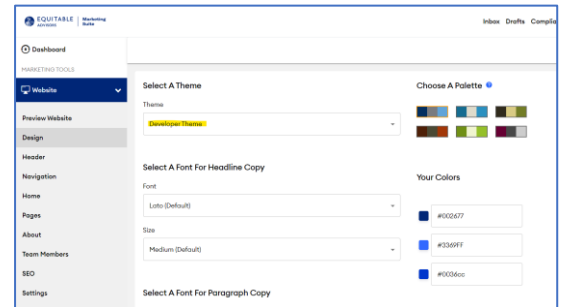


Website Best Practices (Cont.)

Platform How To's and Best Practices

WEBSITE DESIGN

This tab allows you to customize your color palette if you are a DBA Branded advisor. Fonts are defined with global styles for the theme. Please **DO NOT** change the 'Developer Theme' as this is the default for all Equitable advisors and will cause errors on your template. →



ADDING A NEW PAGE

You are free to add as many pages to your website as you like. The easiest way to do this is to copy existing pages and update the copy on the new page.

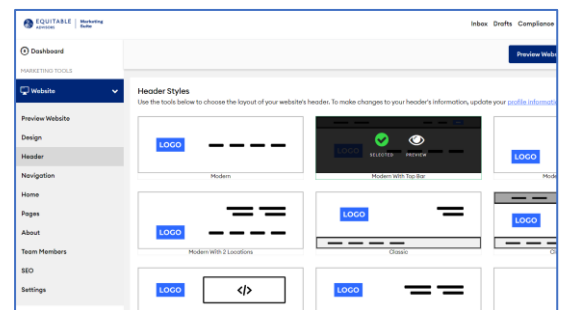
To copy pages, go to Pages -> Choose the Page to Copy -> Select Action button -> Select Copy. This will open a page editor of the copied page.

Tips:

- Make sure to change the header to align with the new page title.
- Add sections and components to the page to add /update your new content

WEBSITE HEADER UPDATES

The new platform provides a variety of Header (top part of your website) options for advisors to choose from. By default, 'Modern with Top Bar' will be selected as this header was used to build the new Equitable Advisors branded web templates. We recommend keeping this default option unless you are looking for another header layout. →



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Contact Support: Equitable@fmgsuite.com or (858) 500-5479

Contact MarTech Project Team: AdvisorMartech@Equitable.com