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John Higgins • Aug. 07, 2014



So where do you place your firm's website on your list of priorities for your firm? Do you see it as a necessary evil that has to be dealt with just to “be in the game?” Or, do

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to your firm's services. Virtually every firm has achieved the first stage, whereby their website succinctly describes the services they offer and the bios of the team that provides those services.

This is a good start, but in many cases could stand to be updated and expanded. All of the site building services reviewed here do a good job at facilitating the design and development of this type of website. Some may be overkill.

The second phase, whereby your website serves as your primary client communications center, means that you have a process for communicating important tax and accounting technical updates, new and expanded client services and providing a digital document exchange portal to deliver financial reports and tax returns in PDF format. Perhaps you want to have a blog that will provide a continuous stream of useful information to your clients. The blog may also be a part of this stage of your website development.

The third stage, using your website as a gateway to your client services, is where the greatest opportunity presents itself. At this stage you might offer your clients access to their cloud based accounting system, key performance financial dashboards and a variety of practical cloud based small business applications.

These applications might consist of a cloud based document management or file storage system, financial planning and investment management tools and many more. The mix of these information services should align with your firm's service offering niches. The fact is, only a small fraction of practices have evolved their website to this stage. However, this evolution should be in your long range plans for your website and considered when evaluating your site building options.

In the reviews provided we will look at features such as the scope of tools available to design and build your website, the availability to plug in automated content such as

newsletters, tax and accounting updates, the design options available, pricing and

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