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Your business web presence speaks volumes about your capabilities and focus. Your purpose and abilities should be clear on the public side of your website. And once a client logs into your site, the additional features of the private side should impress even more. What makes sense to include on your public website, and what should you provide to your clients? If you could describe the ideal client experience, what would your website look like on the public and private sides? Can you sketch and list

the features you desire on the public facing and privately available sides of your

your target industries, news sources about your niches or supported verticals, information on your offerings and other background information is helpful. Including interactive feeds like video, RSS feeds, blogs and other content generated by your organization can be most helpful. What is not helpful is marketing fluff, unclear messaging, slow response from your website and clunky navigation.

## The Private Side

For your best clients, we recommend a login mechanism that exposes key or private information. Portals, business intelligence, collaborative capability as well as information on service status, support information, downloads of support tools, and other items that are not shared with the general public should be on your portal. Portals provided by third parties like AccountantsWorld WebSite Relief, CCH Portal, Microsoft SharePoint, ShareFile or Thomson Reuters NetClient CS may provide some standard content, interfaces to your systems or particular capabilities. Additional functionality may have to be added by interfacing additional products. For example, Results CRM has components or applets that can be added to your portal to support your business development efforts. Business Intelligence tools like BizNet or Alchemex have reporting components that can be gathered in dashboards and reported in portals. Do you have your portal capability customized by the vertical you serve? Can you identify a client by their login and show them details specific to their industry or operation? Do you have an area where you simultaneously work together or, at a minimum, transfer content back and forth?

## The Collaboration Factor

SaaS versions of products are enabling more direct and secure collaboration directly with a client. Examples of vendors and products that have made this possible include Google Docs, Microsoft Office 365, Microsoft SharePoint, ShareFile, Bill.com, SmartVault, as well as a number of accounting products such as SAP Business

ByDesign, Intacct, NetSuite, QuickBooks Online and Xero. Many of these products

interfaced to most accounting or practice management products today to summarize key indicators in small graphical or numerical summaries. These key performance indicators (KPIs) can be established to measure important elements of your business plan and strategy. Responsible managers can observe the indicators that they control, and overall business owners or managers can see indicators of the health of the entire business. These indicators should be updated in real time, and no more than 20 indicators in four or five areas should be monitored by any one person. If you are a tax and accounting professional in public practice, you could collaborate with your client to understand and improve performance in each area monitored. When performance is satisfactory in an area, you could suggest shifting focus to the next area that has the greatest return. For example, you may start with helping clients understand, monitor and manage collection days, and then turn their focus to inventory turns. In our own practice, we have indicators that measure items like the amount of time before a service request is scheduled and resolved.

With portals that have collaboration tools and dashboards, you can proactively help clients manage their businesses. If you apply the technology to your own practice, you can see key indicators in your practice, monitor them for compliance and take corrective action more quickly when the business is not performing as expected. If dashboards and KPIs are used correctly, proactive action can be taken at the time that issues occur instead of addressing them long after the problem has occurred.

For many long-term managers, they know that a few key numbers will indicate the health of an operation. Relatively few numbers can convey the information needed if presented in an understandable dashboard where the supporting detail can also be viewed. For example, if the sales, inventory and receivable numbers are in line, the chances are good that the expected profitability will be maintained. As another example, assume the tax partner monitors the number of returns delivered to the firm. If the quantity of returns in house is about the same this year as the number

delivered in the past at about the same time in the season, a reasonable conclusion

vision and a plan. And you need to get started. You can build a few components at a time, adding the most valuable capability first. You will be better served by adding small components one at a time (understanding each one as they are added), rather than doing a very large project waiting for "everything" to be done. Your chances of having success, getting the portal right and producing something more useful is far greater if you build the components needed a few at a time. Continue to reflect on the most important information, prioritize what should be built next, and teach those around you how to understand the information. You'll discover that the capabilities that you have built will improve your own practice, contribute to profitability and help you manage your work more easily. You have the same opportunity with clients.

Technology