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## **E-TOOLS**

# **2014: The Year of Your Firm's Website**

Each year, the Association for Accounting Marketing holds an awards ceremony at its annual conference, honoring outstanding achievements in the areas of accounting marketing and communications.

**Gail Perry, CPA** • Feb. 07, 2014



Each year, the Association for Accounting Marketing holds an awards ceremony at its annual conference, honoring outstanding achievements in the areas of accounting marketing and communications. I've attended some of these ceremonies and have always been intrigued with the awards for best accounting firm websites. I contacted the judges of the website competition and discussed the criteria used for determining the best sites. Whether you're creating a website for your firm for the first time, upgrading an existing website, adding new features, or trying to improve your search rankings, you'll find the judges' tips to be useful.

Answering some basic questions about your existing website or about your plan for a new website will help you start the process of creating or upgrading your site.

If you already have a website, ask yourself and your coworkers, what purpose does your website serve today? Some basic reasons for having a website include:

- Providing contact information about your firm
- Introducing your staff
- Branding
- Selling your services
- Selling products
- Attracting new business
- Providing a secure site for document exchange
- Demonstrating your expertise
- Establishing credentials
- Expanding your geographic reach
- Recruitment

Make a list and include all of the reasons that apply to your current site. In a separate column, list all of the things that you want to accomplish with your new website. This new list will give you a foundation for creating or upgrading your site. Check back with this list frequently to make sure you are meeting all of these goals as you plan and change your site. It can be useful to ask some of your clients about their experience with your site. Is the site easy to find? Is it easy to use? What do they find worthwhile about the site?

### **Remember the Basics**

There are some basic features that should be included with any accounting firm website. Use this preliminary checklist to make sure you don't leave off any of these essential elements:

- Company name
- Address (consider including a map or a link to an external map)
- Names and titles of contacts
- Phone number(s), fax number, after hours number (if applicable)
- Email contact information
- Hours (if appropriate)
- Basic information about the services you provide

### **Navigation**

Site navigation should be user-friendly, and the easiest way to judge this is to ask some of your clients or some friends who don't work for your company about their experience in navigating the site. Give them a checklist of items you'd like them to

find on the site and then ask if they had difficulty in finding any of those items. Some important features to consider about navigation include:

- Menu should appear on every page
- Link to contact information should appear on every page
- Link to Home page should be easy to find
- Design should be consistent throughout site so these items appear in same place on every page
- Hyperlinks should be obvious (different color from text, and underlined)
- Include a search box

Regarding the search feature, you can write your own program, have one written for you, or use a third-party program. You can use a [Perl search engine script](#) or a [PHP search engine script](#) if your site is set up to run this type of search. Your webmaster will know the site capabilities. Having your own program is ideal because you can customize the search results and make sure site visitors are landing on exactly the right page. Alternatively, you can use a [free third-party search program](#), however keep in mind that many free search services include some advertising and might limit the frequency with which your site can be re-indexed, thus the results might not always be the most current.

The most important thing to keep in mind regarding the search feature you use on your site is that you need to monitor the searches. Don't think of the search as just a tool for your site visitors. The information you can acquire from the search can be extremely useful. You'll find out what your site visitors want to know and can customize the site to fit those needs. Collect the search terms that visitors use on your site and try those searches yourself to make sure that your site visitors are getting the results that you want them to see.

## **Calls to Action**

One way to keep visitors involved and engaged in your website is to provide calls to action. Give them a reason to be there, a reason to stay, a reason to use the tools you are providing, and a reason to recommend that others come to your site.

Descriptions of why to execute the calls to action will help visitors understand your expectations. Here are some sample calls to action that you could include on your website:

- Call us today for a free review of last year's tax return
- Email us if you would like more information about the types of services we offer

- [Leave a message with questions, comments, or requests for more information](#)
- [Click here to download our year-end planning checklist](#)
- [Click here to download our whitepaper on tax rules for the home office](#)
- [Enter your email address to receive our free newsletter](#)

Consider using live interaction on your site if you're trying to drum up business directly from Internet visitors. This could mean adding a pop-up live chat window or instructions for accessing a call center. If these options aren't available at all times, either remove them from the site when they are not being manned, or post the hours when your visitors can expect to receive an immediate response.

## **Document Sharing**

If you are using your site as a secure portal for sharing information and documents with your clients, be sure to make the access to this portal easy to find. One of the AAM judges mentioned, “The most important thing on my accountant's site is the Client button.” Include instructions so your clients know how to use the portal, and include reassuring language describing the security of the portal.

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