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CountingWorks Pro

ClientWhys

800-442-2477

www.CountingWorksPro.com

From the [2019 reviews of website building systems](#) for accounting firms.

Previously available as ClientWhys, CountingWorks Pro offers a variety of marketing tools designed for tax and accounting firms of all sizes. Along with custom website creation, CountingWorks Pro offers application users a variety of options for their custom created websites including blogging, page content, e-newsletters, lead management, and a client portal. Delivered as a SaaS application, CountingWorks Pro is extremely scalable, with three packages, and numerous plans available within each package.

CountingWorks Pro works with each customer to create a website that suits their practice. Users can opt to create the website themselves, or work closely with CountingWorks Pro designers to create the website. To get started, those interested in having a website created will simply need to supply CountingWorks Pro with details about their firm, and send along any design preferences they may have. Once the website is approved by the customer, CountingWorks Pro will then finalize the

design, and provide their customers with access to the site editor, where users will be

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also include content, such as tax and accounting articles. Accounting and tax related plugins are available, as are numerous pre-designed banners and slides. There is also an option to add custom images to the created website if desired, with the option to highlight firm services or staff/partner bios on the site if desired.

Several of the packages also include custom branded email addresses, with 3 email addresses offered in the Profit Margin Plan, 5 email addresses offered in the Capital Gain plan, 10 email addresses in the Growth Marketing Plan, and 15 email addresses in the Whitney Plan.

CountingWorks Pro includes numerous marketing and SEO options, working to optimize each created website while working to get the site placed on thousands of accounting and tax websites. In addition to website design, CountingWorks Pro will also post under a firm's brand up to four times per week. Accounting and tax related content is also available to display on the site from the beginning. An email newsletter is also available that can be automatically sent to clients, and a greeting card option is available as well.

As an added bonus, CountingWorks Pro links to TaxBuzz.com, with a premium membership available for all but the Profit Margin plan. Incoming client leads can be properly tracked and managed, and social media management is available in the application as well, with CountingWorks Pro posting to popular social media accounts such as Facebook, LinkedIn, Twitter, and Google two to three times per week. Custom social media posting is also available in the Whitney plan for those that prefer to choose their social media content.

CountingWorks Pro offers a client portal, designed to make it easy to share confidential documents, and the appointment option allows clients to book an appointment online using Google Calendar or Office 365, with built-in reminders available.

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Starter, Core Marketing, and Growth Marketing packages with various options available in each package, though the Starter package only includes marketing tools. Mobile friendly websites are available in both the Core Marketing and Growth Marketing Packages, with prices starting at \$69.95 per month all the way to \$349 per month for Whitney, which serves as a virtual marketing department. CountingWorks Pro does not require a contract, and a 30-day free trial is available to those that wish to take the product for a test drive.

2019 Rating – 5 Stars

Firm Management

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