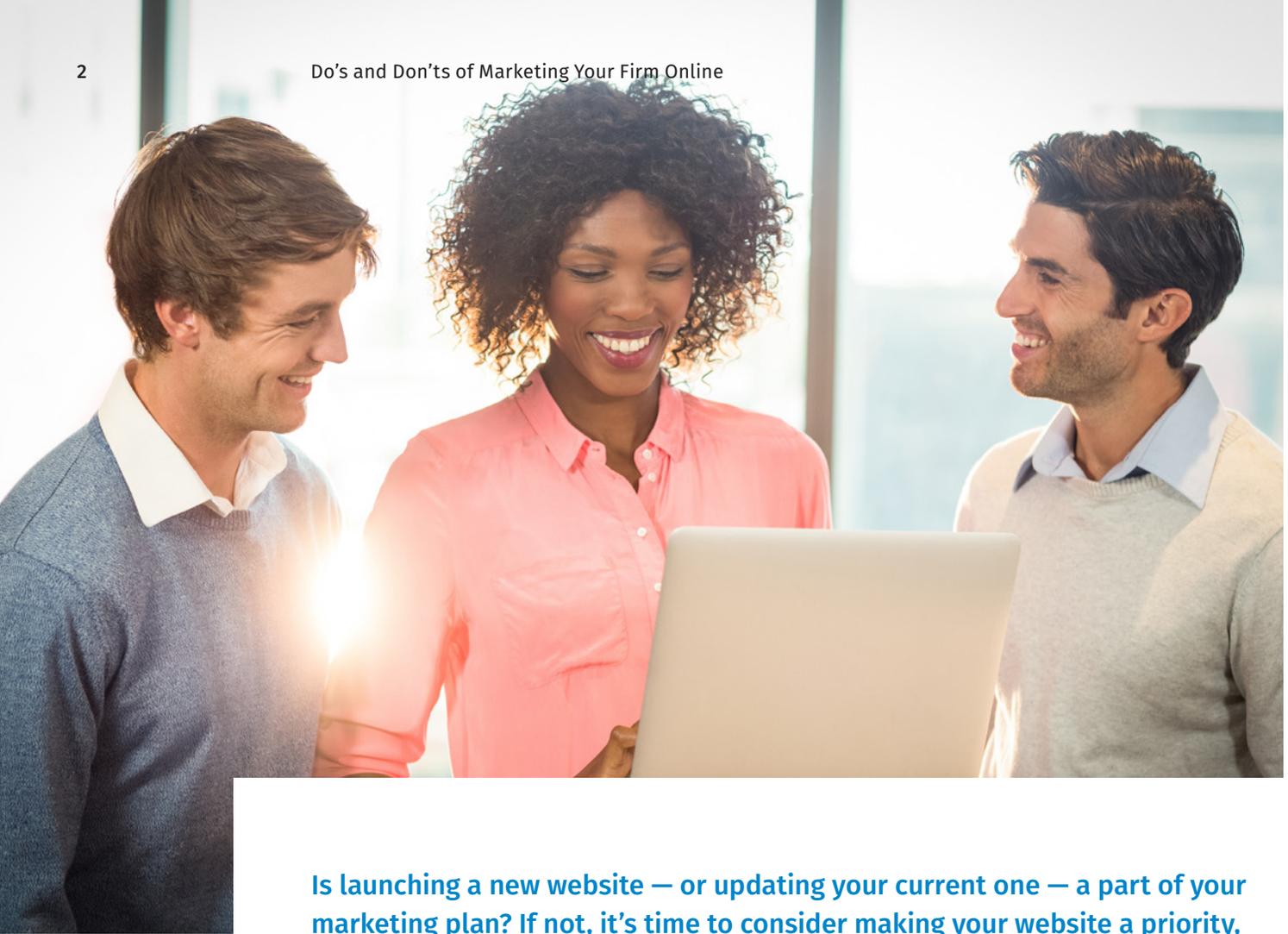




Tax & Accounting

Do's and Don'ts of Marketing Your Firm Online



Is launching a new website — or updating your current one — a part of your marketing plan? If not, it's time to consider making your website a priority, because no business today can compete effectively without this essential marketing tool. With an array of powerful features and capabilities that go far beyond the static websites of yore, today's website can actually bring you new business, increase your clients' satisfaction and loyalty, and, ultimately, promote your unique brand value. This white paper will discuss several website features today's CPAs should consider looking for — features that will keep them coming back for more.

A Marketing Plan and a Website — Basics You Can't Do Without

Let's face it — in today's economy, no firm, even a small one, can afford to do without a marketing plan. Just because you have an established business and loyal clients doesn't mean you can rest on your laurels. Even in the best run firms, client attrition is a natural occurrence. Firms that are not actively retaining existing clients and recruiting new ones — which is really what a marketing plan is all about — could be jeopardizing future growth. To become and remain competitive, firms must deploy technologies that make it easy for clients to interact and do business — and a website is one of the basic tools.

Even as recently as five years ago, a firm might have gotten by without a website. But, with the explosion in consumer use of the internet to find business providers, conduct their business and then discuss their choices using social media, being without a website is akin to giving away business to your competitors on a silver platter. Launching even a basic website is an important start, but there is so much more you can accomplish for your clients — and your business — if you follow some basic website do's and don'ts while also taking advantage of some website features that go beyond the basics.

Website Don'ts

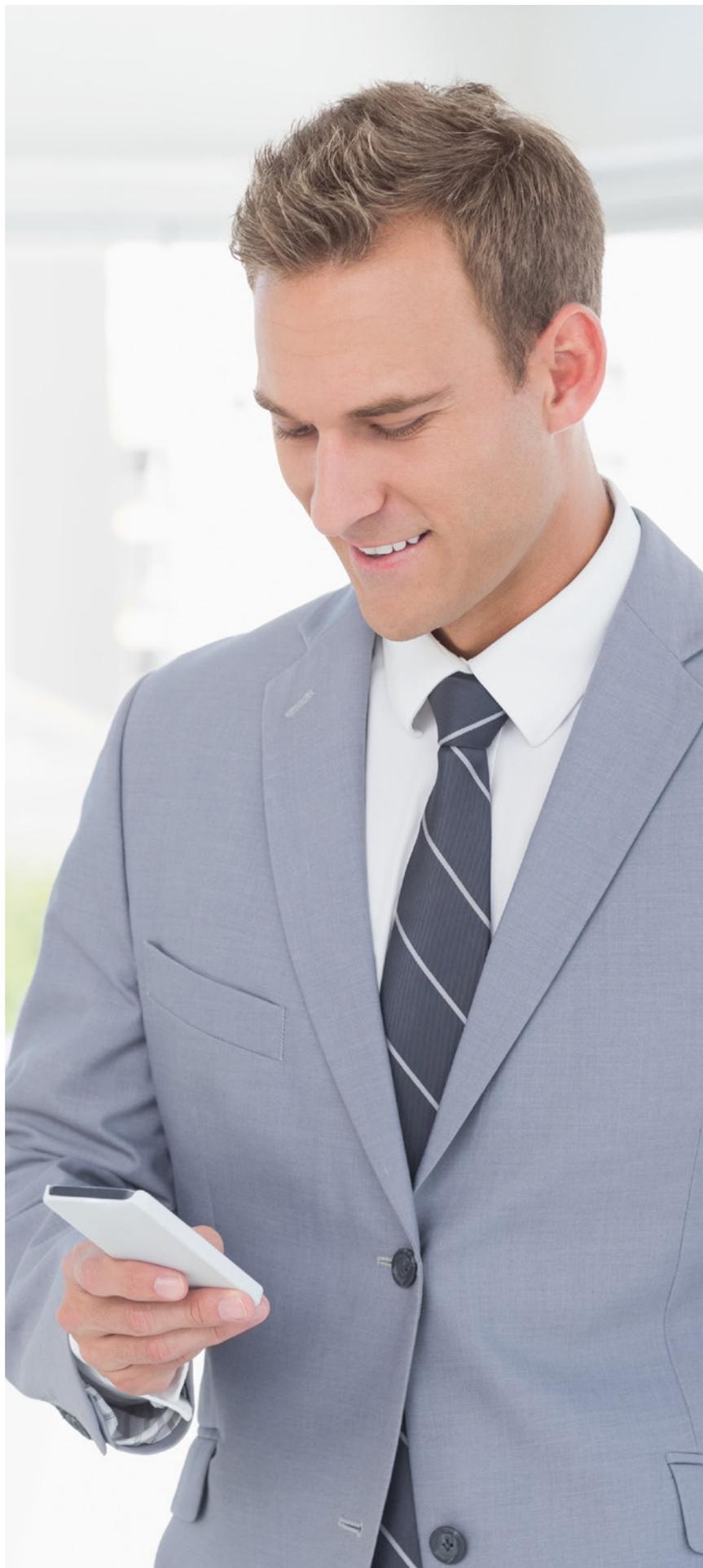
Though it may seem obvious how not to design a website, there are a lot of ineffective business websites out there that make well-meaning mistakes that tend to drive prospects away:

- Heavy, busy design that's crammed with links. Such websites make it hard to focus and find desired content, so visitor engagement suffers. Likewise, despite the old website adage that "content is king," websites stuffed with content that isn't terribly timely or relevant detract from rather than improve the user experience.
- Slow-loading graphics and ill-advised use of splash pages. Loading a page down with videos or images that jump out at you, or incorporating a "flash" page not only can slow down your site, but can also interfere with the ability for people to find your site.
- Stale content, inactive links and confusing navigation. Nothing is more likely to drive away prospects than these website problems. Think of the effect these would have on you if you were looking for a trusted professional! Yet a surprising number of websites, once launched, fail to maintain their sites with new content or make sure all links work and lead to correct, current information.

What can firms do to not only avoid or correct website don'ts, but also determine the appropriate do's that will take their website above the plain vanilla to improve their business?

Start with Your Brand

First and foremost, your website should be a reflection of your brand. Though "brand" might sound like a grandiose term when applied to a CPA or accounting firm, the concept is really quite simple: Your brand is what you represent in the marketplace; your unique offerings and professional services; everything that adds up to why a prospect should choose your firm over another. From the very first click, your website should have the look and the content that implicitly tells visitors the story of your brand — why you're the valuable partner for whom they've been looking.



Essential Website Features

Once you're committed to making your website an essential part of your branding and marketing efforts, how do you determine what features will give you the best return on investment? Over and over, the same answers recur in polls, studies and our own conversations with customers about the features that yield real value to a firm and its clients. Luckily, there are excellent resources available that can be both affordable and practical:

Have a simple and clean website that communicates your unique brand value.

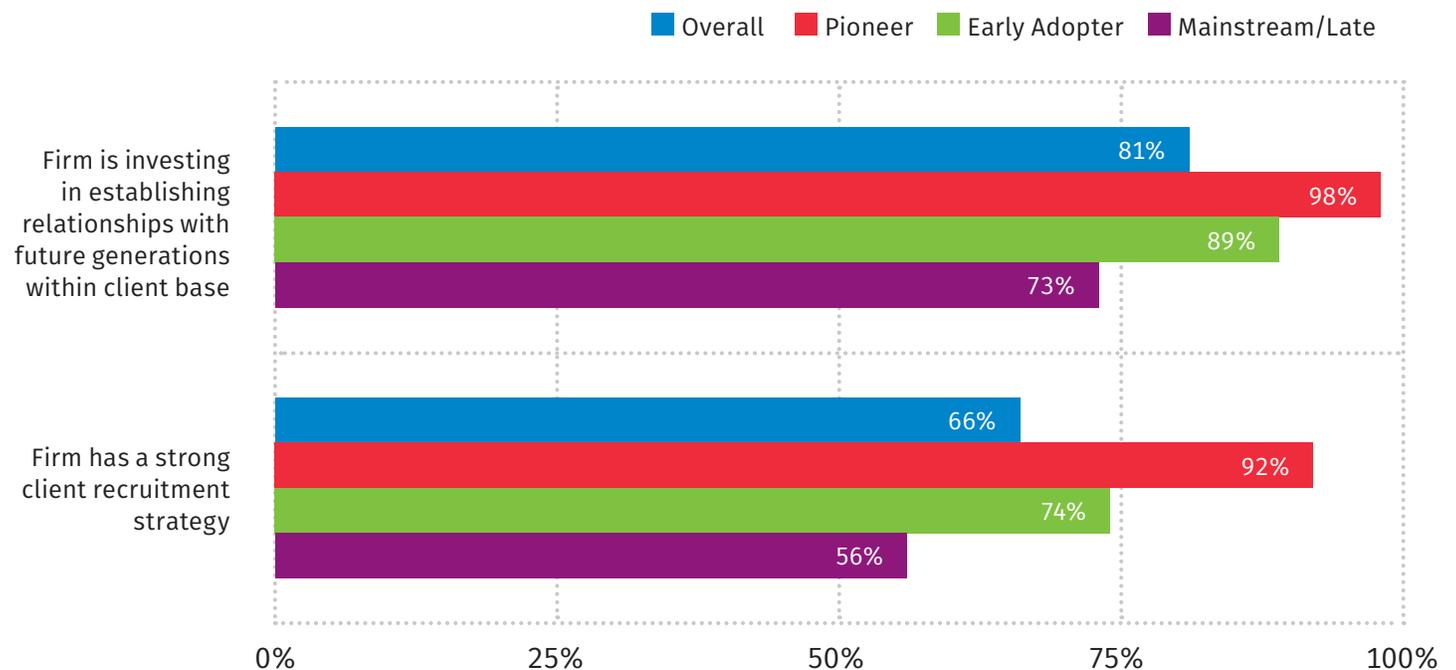
If you're starting a website for the first time and have the patience, time and know-how, an affordable option is to use one of the online, do-it-yourself website builders. But unless you really know what you're doing, the process may be frustrating and the results disappointing. Some firms have found a

better option is to hire an individual or team of professionals to create their design and navigation. The benefit of this approach is that you are likely to end up with a professional website built to your specifications (depending on the talents and experience of the people you've engaged to do the work). The downside is that this approach can be costly, time consuming since you're starting from scratch, and — something important to consider — you'll still need a plan for writing content and making updates to keep the site fresh.

Another and often more efficient option for building a professional website is to work with an all-purpose website provider that lets you choose from among a variety of attractive, ready-made design and navigation templates and, ideally, offers the flexibility of add-on customization options to fit your needs and budget.

Strength of Client Retention & Recruitment

The vast majority of firm leaders agree or strongly agree that their firm is taking steps to strengthen existing client retention; but fewer agree their firm has a strong client recruitment strategy.



Source: Wolters Kluwer Leaders Now and Next Survey

Mobile capability and responsive design are a must.

Study after study make it clear that consumers are increasingly using online mobile devices to conduct business, and that trend only continues to grow. For this reason it is critical that your website is mobile friendly; i.e., be built with what's known as "responsive design." Responsive design ensures that whatever mobile format someone uses, whether laptop, phone, tablet or other, a website automatically reformats so that it fits on the screen and is easy to read and navigate through. If your site isn't mobile friendly, clients and prospects are likely to give up on you find another site that's easier to use. When choosing a website designer or provider, make sure they are well experienced in responsive design.

Include timely, expert and relevant content.

Gone are the days when all you needed on your website was your mission statement, list of services and partner bios. Today, people expect to also find content of practical, immediate use and relevance that's updated on a regular basis. Remember, your site is a window into your brand, so content on your site should reflect that you are a valuable and reliable source of timely information.

For the average firm, continually coming up with new content can be a challenge, given the time constraints of running a business. One option is to have a staff resource devoted to writing and maintaining your website, but this is often not practical. An alternative many firms choose is to contract with a content-providing service that specializes in providing timely features designed to bring people to your site, engage their interest and offer information and help related to their needs. Examples of this are "ticker tape" updates of tax-related news and information; financial tools and calculators; and topical newsletters updated monthly.

Website Assessment

Does your current website:

- Help you attract new clients and expand your business?
- Engage your clients with timely and interactive tools?
- Advance your brand and help you stand out from competitors?
- Help you collaborate with clients in new and meaningful ways?
- Support mobile devices through responsive design?

If your answer is "no" to any of these questions, then it's time to consider website rebranding.

Enable two-way communication through social media.

Clients want to connect with you, and you want to connect with them. Adding dynamic content to your site, such as links right on your homepage to educational videos or blogs produced by your firm's thought leaders, is an excellent way to engage your clients and let them benefit from your expertise in between face-to-face meetings. Whatever your social media presence, make sure your links are easily accessible from your home page. Not only does this encourage and enable visitors to interact with you and share your site with others who might be interested, but it also gives you a window into the opinions and attitudes of your clients and prospects.

CCH® Site Builder — Your One-Stop Shop for Website Services and Support

To help tax and accounting professionals easily achieve their vision for a professional, value-added website that reflects their unique brand, Wolters Kluwer has developed a total-solution website service, CCH Site Builder. Comprehensive services range from basic design, hosting and content to total customization, allowing firms to choose a solution that both meets their immediate goals but also provides flexibility for further customization over time, according to the firm's evolving needs.

CCH Site Builder allows firms to:

- Host a website using a domain name chosen by the firm.
- Select a website design from an expansive collection of templates in many styles and colors, developed expressly for the professional services market — or engage the Wolters Kluwer web design team to create a customized site.
- Create a fully functional website in minutes, using a simple setup process.
- Easily change the look and content of the website at any time, as often as desired, at no charge.
- Populate their website pages with preset Wolters Kluwer content that can be edited or replaced by firm-created content.
- Strengthen their reputation as a trusted advisor by offering additional valuable content such as financial calculators, downloadable tax forms, an Events Calendar, newsletters updated monthly, the 500-page U.S. Master Tax Guide®, and financial planning and business owner's toolkits.
- Collaborate with clients, partners and associates by securely sharing any type of file via CCH® FileShare or CCH Axxess™ Portal.
- Improve their website's ranking with Search Engine Optimization tools included in the subscription (with premium SEO services also available to further drive quality clients to your site).

Given the fact that most tax and accounting professionals neither have the time nor background to create a basic website on their own, not to mention one optimized with the right design, content, SEO and special features to promote their brand and their business, it can make a lot of sense to utilize the services of a proven website provider. Wolters Kluwer offers a free 30-day, no obligation trial period to allow firms to evaluate CCH Site Builder.

For more information, visit [CCHGroup.com/SiteBuilder](https://www.CCHGroup.com/SiteBuilder) or call 800-739-9998.

Contact information:

Wolters Kluwer
2700 Lake Cook Road
Riverwoods, IL 60015
United States
800-739-9998

Please visit CCHGroup.com/SiteBuilder
for more information.

