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Effective Websites for CPAs: Grow Your Practice and Profits

By Kristi Stangeland, CPA

Published by RJ Thompson Publishing; 2006; ISBN: 0-9779907-5-3; 177 pages (hardcover); \$39.95

Reviewed by Susan B. Anders

The purpose of this book is to help CPAs understand the Internet and the lead-generating benefits of creating a website and explain how CPAs can develop websites that properly represent their firms. The book is written for CPAs by a CPA, at a quick pace, and at a level that will be useful to readers of varying backgrounds. The author assumes (and recommends) that CPAs will work with website designers, and she provides information for the manager perspective, rather than how-to instructions.

Readers whose firms already have websites can benefit from the author's perspective. Similarly, CPAs who are already well acquainted with the Internet will find plenty of new information. In addition to commonsense advice on many issues, the author's own website (www.klswebsolutions.com/worksheets) offers extra worksheets for exercises that appear throughout the book.

Chapter 1 explains the "Internet Effect." CPAs are missing a major opportunity to reach potential clients if they don't have professional websites. The same people who use the Internet to find telephone numbers, book airline reservations, and shop for consumer goods also use the Internet to find professional service providers such as CPAs. The Internet provides a 24-hour "cocktail party" opportunity, where clients can double-check professional advice and learn about the latest, greatest tax deduction. Effective use of a website can increase communication with existing clients to maintain their loyalty, and reduce the time and effort required to generate new clients.

Chapter 2 begins the way any good business plan should: by identifying the goals

that a CPA firm has for its website. The chapter explains ways to make full use of the Internet, including search engine positioning and keyword targeting, techniques which CPAs have been slow to use. Electronic magazines (e-zines) are another valuable tool for attracting clients that CPAs often overlook. Chapter 3 addresses the importance of search engines and optimizing website design to be search engine-friendly.

Chapters 4 through 6 take a step back from technology and focus on identifying a firm's ideal clients, designing a website to attract those individuals and companies, and the importance of planning. The author makes an excellent point that the website should be designed to meet the client's preferences, not the CPA's. The type of information that a website should provide includes pages for existing clients, contact information, and services offered. Because two of the four potential client behavioral styles described in the book require interpersonal relationships, the book errs in not suggesting that firm personnel's professional resumes be provided on a website. When viewing the website from the client's perspective, CPAs should remember that many potential clients want to hire *people*, not a firm.

Information on firm personnel also ties into the book's discussion of how to establish trust with prospective clients. An interesting exercise involves looking at several websites and determining how they give the user a sense of credibility and trust. Additionally, by identifying a firm's ideal clients before creating a website, the website can be designed to include information of particular interest to those clients. Other topics addressed include working backward from the desired result; determining who is in charge of the website and who will maintain it; and creating a budget for the website.

Chapter 7 covers positive and negative elements of website design. It recommends hiring a professional designer, creating an environment that fully reflects the firm, presenting a unified appearance on home and interior pages, and repeating navigation bars and page links. On the other hand, the book discourages the use of premade website tem-

plates because they are not search engine-friendly or customizable. "Flash" intros discourage repeat visitors and are also not search engine-friendly.

Chapter 8 discusses two important aspects of website "copy" (text). The copy should be about the clients, not about the firm; explain how the firm can solve clients' problems; and be written in a format that respects how people actually read website text. Additionally, website copy should be "search engine optimized," using appropriate key phrases while still flowing naturally.

Promoting a website is covered by chapters 9 through 11. The book explains organic search engines, spiders, and linking, as well as design aspects that reduce a website's chances of being searched. "Pay-per-click" advertising is one option to ensure that a website is found by search engines. Other alternatives include local listings, directory listings, and specialty directories.

Chapter 12 provides more information on e-zines, introduced in chapter 2, including how to write them, create distribution lists, and track who is reading them. Chapter 13 addresses making the website a part of the firm's overall marketing strategy, rather than treating it as a special project. The book explains specific aspects of website maintenance and a variety of web statistics that measure how well a website is performing.

While the book uses a substantial amount of "plain English" explanation of terms and concepts, the author emphasizes the CPA's role in planning and overseeing a firm's website. Many useful worksheets are provided to assist in this process. From the beginning of the book, however, the author has assumed and encouraged hiring website designers to carry out the work, something which is specifically addressed in the final chapter. □

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