

# 10 Web Design Tips For Accountants

How to create easy to use and profitable websites

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Character graphics designed by Freepik

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# Introduction



Hey there, I'm Mateusz (Matt) Petkiewicz, the founder of Dioma and the author of this short e-book.

Thank you for downloading this ebook and making that first step to building better website for your clients.

The goal of this workbook is to help you to **get as much out of website improvement as possible.**

Most of my clients have already come through those 10 steps, updated or created new websites and have really started seeing **drastic improvements in their income, signed agreements and more.**

A few have even set up their own blogs and publish regularly. (Pretty great — more on this later...)

So, good luck.

I'm looking forward to hearing from you ([matt@dioma.pl](mailto:matt@dioma.pl)) and seeing your website.

Hope you find a lot of value in this website transformation workbook.

**What are the Benefits?**

# What are the Benefits?

## 1. Organize

Your website is enhanced to welcome visitors and clients and start building trust with comprehensive content.

## 2. Navigate

Visitors are guided clearly and efficiently to find what they are searching for, turning them into Happy Clients who will share their positive experience.

## 3. Call to Action

Visitors are escorted at every stage of their decision-making, allowing them to sign-up, schedule appointments and inquire further information with ease. Increase your rate of conversion up to 60%.

## 4. Update

Stay fresh and competitive to maintain an edge in the healthcare market, strengthening your brand online.

## 5. Build trust

With a professional outlook and image, your company gains the trust of your prospective new clients who feel secure and confident with your services.

## 6. Communicate

Channels for assistance and feedback are bolstered, defining your company with excellent and prompt service.

## 7. Share Knowledge

Strategy and quality of service are improved to widen your audience and reach your target markets by being their source of information.

## 8. Be Fast

Your website is optimized to work efficiently with optimum user experience, turning your company into the leading first-rate choice.

## 9. Go Mobile

Maximise accessibility of your company by being available and responsive on all devices.

## 10. Connect

Making your company outstanding, known and reachable to service, inform, assist and network.

Organize

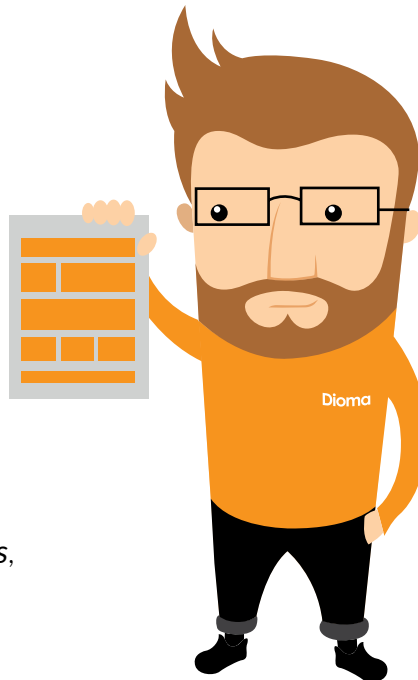
# 1. Organize

Whether it's your first website or the 10th version, imagine this is Day 1. Don't fill up your content into a template. That's the biggest mistake most companies do when they use something created for the masses. You need to make Your website fit Your business. Don't fit your business into a typical format.

1

## Plan & Draw.

Bullet point the main content and then draw the structure of your website- How it looks like on screen. Focus on your services and treatments then include informative pages like **Contact**, **Location** and **About**.



2

## Separate the pages.

Each **Service** must have its own page. By doing that, your clients will find those separate pages featured individually in Google instead of one big clump offer text. Write individual specific descriptions and target your potential clients with better precision.

3

## Design the Experience Path.

Control how your users go through the pages of your website. Think about what you want them to see, understand and know about your company and your staff. This path will turn visitors into clients.

5

## Create a Client's Guide.

Put everything your clients need to know in the **Client's Guide**. **Frequently Asked Questions**, and **Documentation Checklists** will assist and alleviate your visitor's experience.

4

## Extend About section.

Dedicate separate sections for **Staff**, **Certificates**, **Photos** of your office and **Testimonials**. This is where clients start their research on your company and build their confidence in you.

Navigate



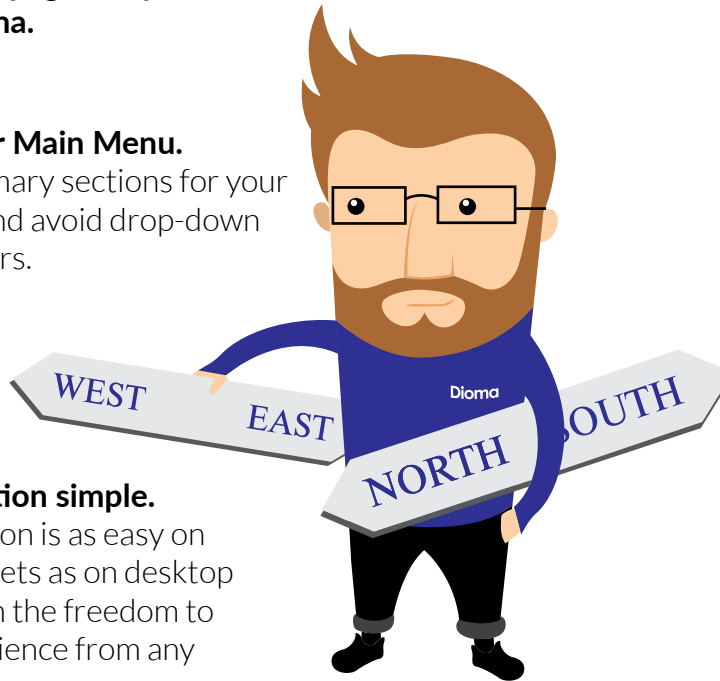
# 2. Navigate

Follow the website usability guru Steve Krug, author of “*Don’t Make Me Think*” and *Just Keep It Simple!* Moving through the pages of your website should be like a stroll in the park, not maneuvering the Schonbrunn Palace maze of Vienna.

1

## Simplify your Main Menu.

Pick only Primary sections for your main menu and avoid drop-down navigation bars.



2

## Stick to web-users' habits.

Put your **Contact Link** on the right and your **Logo** on the Left.

Users are used to seeing the Contact Link last in the main menu but also place your contact information in the website footer. Don't make your users search all over for how to contact your company.

5

## Make mobile navigation simple.

Check if your navigation is as easy on smartphones and tablets as on desktop computers. Give them the freedom to have a pleasant experience from any device.

4

## Tell them where they are.

With big, complex structured websites, show breadcrumbs: links to previous levels and the main page at the top of every article. (*home -> category -> subcategory -> article*).

Your visitors should never be lost or confused.

3

## Make it look effortless

Too many photos, animations and complicated hermetic language means Distractions from your **Experience Path**. Keep your website smooth and straightforward for non-financial visitors to read.

**Call to Action**

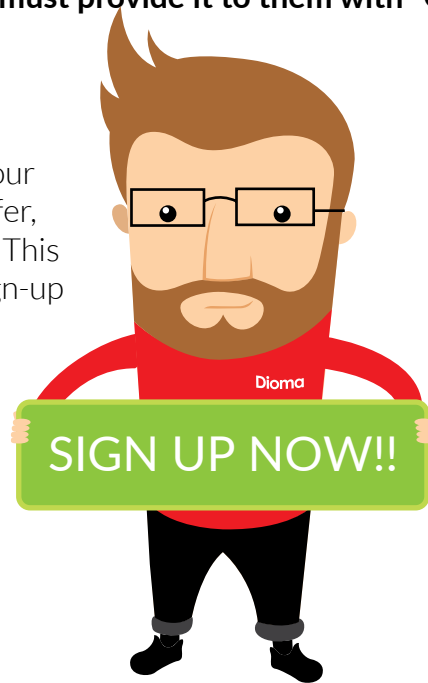
# 3. Call to Action

Sometimes your website users go directly to your article about a particular service, completely skipping the Homepage. After reading about your excellent treatment, they need an additional and immediate cue or prompt to know what to do next. Your website must provide it to them with “Calls to Action” (CTA).

**1**

## Use call-to-action buttons.

Under your content about your services or any form of an offer, place a call-to-action button. This acts as a kick to purchase, sign-up or inquiry.



**2**

## Customize your buttons.

Avoid using “Click here”. Tell them specifically what to do: “Contact us”, “Send inquiry”, or better: “Make An Appointment”, “Check My Books” or “Make Company Finances Better”. These informative buttons launch your visitors into client mode. Experiment!

**3**

## Make CTA buttons visible.

Location is key. Eliminate the need to scroll back up. If they can’t find it, they can’t click it.

Use a strong color that stands out from the background but it should also be compatible with your brand.

**5**

## Measure your CTA results.

You can know which specific pages of your website are sending you the most and least number of inquiries and registrations. Pinpoint which path is the most successful in bringing you the highest number of signed agreements. “A good conversion rate is anything better than you had last month.”

**4**

## Add a sense of urgency.

Inspire and encourage action, especially with discounts and promotions. Don’t overuse this technique.

“20% off for new companies only till the end of March” with the button: “Register now!” (or better “Get your tax money back!”) has the power to convince hesitant users.

Update

# 4. Update

**Clients and visitors come back.**

**No updates, no new articles, no recent data implies a stagnant, outdated business.**

**Add, grow and reinvent your information and your website. Upgrades and the latest innovative news energizes your potential clients as well as your current ones. Stay fresh and competitive by staying up-to-date.**

**1**

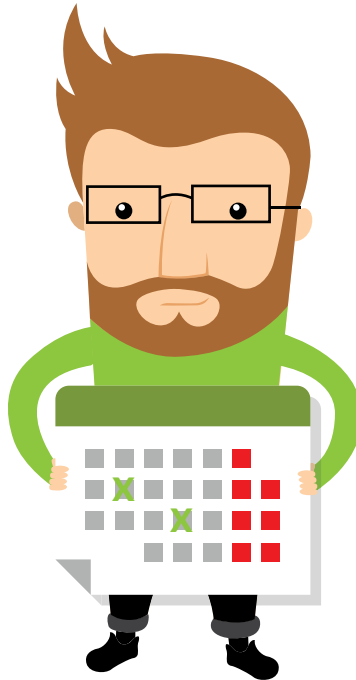
## **Refresh your staff list.**

Make sure your staff list, photos, and description are up to date. If you or your employees have new certificates or achievements, display and highlight them!

**5**

## **Do it yourself.**

Small changes like uploading photos and adding articles can be easily and quickly done yourself with *Content Management System (CMS)*. If you don't have one, then it's time to get one instead of hiring someone to do this basic action. Take control of your website.



**2**

## **Update your services.**

With a new Accountant on board, your list of services should also be immediately refreshed. Updated lists ensures you reach those new clients you can now target. Changes in your company should mirror changes in your website.

**3**

## **Write new articles.**

If your last article was published 6 months ago, it's definitely time to update. Take small steps- write something short anytime you have a free moment. Don't publish them all at once. Always keep additional articles for busy weeks in the future.

**4**

## **Verify all contact data.**

Old phone numbers, void contact forms, inaccurate location can actually kill your business. Check external online directories that your company is listed in. Most are careless about keeping addresses and phone numbers up-to-date. Confirm that all paths contain the correct details leading to your office.

**Build Trust**

# 5. Build Trust

A trusted company is a successful company. Your website is a crucial tool to earn that trust. As visitors skim through your pages, their trust in you, your company and your team either grows or shrinks. Control that with your online image.

1

## Make the best first impression.

Photos, both of individual workers as well as the whole team, create such a strong immediate personal connection. It's worth to consider hiring a professional photographer to convey first-rate proficiency and skill in every part of your company. **Don't forget to smile!**

4

## Get recommendations from your clients.

Publishing happy and satisfied client reviews directly on your website can look biased and manufactured. The best way is to use third-party rating websites and individual video recommendations to verify and fortify your reputation. Video endorsements are hard to get but the final result will surprise you.



2

## Show your educational background.

Your *About* page should be the spotlight on your credentials, qualifications and accounting achievements. With that, visitors acknowledge that you and your team are qualified professionals and up-to-date with modern accountancy.

3

## Present your company.

Seeing images of the actual rooms and interior of your office instantly welcomes your clients in, making them feel comfortable and at ease. Reducing the element of surprise strengthens their trust and confidence. Make sure there are people in every photo. If they are your clients, don't forget to ask for publishing permission.

Communicate



# 6. Communicate

Communication is the bloodflow of your business system. Handling client feedback and inquiries effectively and efficiently tells them you are there when they need you. Prioritize channels you can dedicate your full attention on and get rid of those you can't handle.

1

## Put Call Link.

With one click, clients will be able to call you directly from your website- connected via telephone line or applications like Skype. Making your business this accessible and reachable strengthens customer relations because you are able to satisfy their immediate need. Answer your phonecalls.

6

## Use messenger apps.

Applications like Messenger, WhatsApp, WeChat and Skype is rapidly replacing SMS and e-mails for their convenience. Providing all channels of communication puts your business at the top and ahead of the others.

5

## Install a built-in web chat.

Give your company an edge by providing a [Live web-chat service](#) where questions are addressed instantaneously, helping you to handle cases faster. Chat with visitors and convert them into clients. Ensure that your company is able to commit to be online.



2

## Support e-mail feedback.

Not every client will be comfortable calling. Some of them need to write about their problem and send additional files. Provide your email or just a contact form if you want to avoid spam.

3

## Set up inquiry forms.

This questionnaire allows both you and your clients to target and specify issues. Include key questions to gain a clear understanding of inquiries. Visitors prefer limited input fields without unnecessary personal data. Allow them to choose how to be contacted.

4

## Use social media platforms.

Social network sites like Facebook and Twitter have become one of the leading forms of communication. You can expect a significant amount of inquiries and feedback from these social media channels. Even if most of your clients and target customers are seniors, do remember their children and grandchildren favor these platforms.

**Share Knowledge**

# 7. Share Knowledge

As professionals in your field, the modern world expects you to stay up-to-date with the knowledge you possess and use. Content is king so your website should provide information and advice to reach and cater to all your target customers.

**1**

## **Create a knowledge section.**

Run a weekly or monthly blog that serves your team, peers and clients. Share your experience, insights, expertise and understanding of the industry to inspire, educate and increase your clientele. It would be also a good idea to run some webinars using [ClickMeeting](#)

**6**

## **Create an FAQ section.**

Build a Frequently Asked Question section where you can gather questions that you have answered in your emails, phone calls and the comment section. Additionally, you can easily address repeated questions and issues about your company and services.

**5**

## **Let them comment.**

Enabling feedback brings people closer to your business. This section increases blog activity, leading to your visitors to share your articles, attract even more readers who will take part in the discussions in your posts. Allow your company to act as a mediator for people who seek similar information.



**2**

## **Write for them.**

Remember not to write a report about yourself and what you and your team have done. You can mention previous achievements and procedures on Facebook or in the **About** section. Focus on your clients' needs.

**3**

## **Share it everywhere.**

It may take a while for your articles to gain interest and get the top position in Google search results. To speed up the process, share articles in social media to make full use of all channels available.

**4**

## **Include tips and steps.**

Publish and share easy-to-do steps or tips on company finances and basic economy. Just like with this short publication, a guide is an easy and powerful way to draw in potential clients.

**Be Fast**

# 8. Be Fast

If a page doesn't load by 4 seconds, the average user will leave or switch to a different site. Plus, not every user has LTE speed. With public Wifi hotspots, 3G packages and limited internet plans, your website may appear slow unless you take actions to optimize for all visitors regardless of their chosen connection.


1

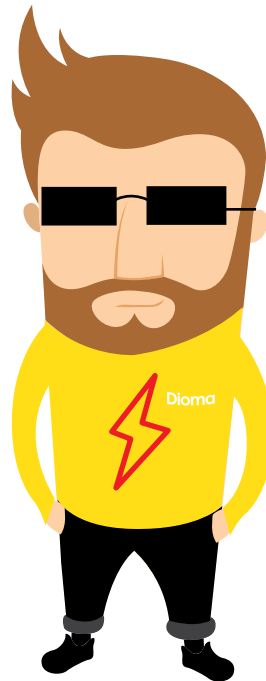
## Measure speed.

Use tools such as <https://tools.pingdom.com/> to measure your website's speed. If your initial result is low, don't panic. Getting 100% is near impossible but with Pingdom's report and the aid of your Webmaster, your website can definitely be faster.

4

## Get an SSL Certificate.

Changing your website to a *https://* means a secure connection and especially with new servers, a higher speed. When dealing with sensitive and confidential financial data and financial inquiries, it is crucial to protect and secure your data transfers. Clients who are aware of this will be looking out for this Green Lock  icon next to your website's address.



2

## Reduce the number of photos.

Images and big graphics are the “heaviest” content to download from your website. If yours is packed with big photos, try reducing their number and size. Text size and amount is insignificant so leave that as is. Fix the photos.

3

## Ask your IT guy.

Sometimes it's just simpler to ask your Webmaster or server/hosting company about page speed optimization. There are many options, including switching on gzip compression which will minimize your website data up to 60%.

**Go Mobile**

# 9. Go Mobile

Since April 2015, websites compatible with smartphones and tablets are getting additional position boost in search results. Google's algorithms check if your website is smartphone-friendly, if the content is readable and easy to navigate at the same time. Improve your mobile page version and invite mobile traffic to your company's website.

**1**

## Measure it.

Again, check your website statistics and find how many people are accessing your website from mobile devices. If you don't use any statistics tools, try [Google Analytics](#) and measure it after the first month.

**6**

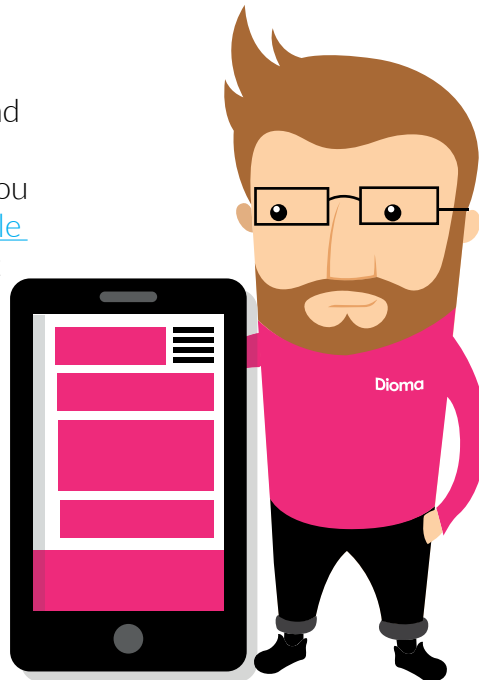
## Highlight contact data.

For mobile users, your phone number and location are really important. Make sure they are visibly highlighted and linked to direct call.

**5**

## Test on different devices.

Make sure that your website works on tablets and smartphones with different screen sizes. You can do that at [responsivedesignchecker.com](#)



**2**

## Check it.

The easiest way to check if your website is mobile friendly is to use Google's testing tool: <https://search.google.com/search-console/mobile-friendly>. Your aim is to achieve a perfect score of 100 points.

**3**

## Order a new website.

If your website is out-of-date, you should consider upgrading to a modern and mobile-friendly website.

**4**

## Improve usability and user experience.

Being mobile-friendly doesn't mean your website is user-friendly. Ask a study group or just friends and family to find specific data. Measure and observe how they navigate through your website.

Connect



# 10. Connect

**“Success in business is all about people, people, people” - Richard Branson, Business Magnate.**

**People cluster on forums and social media sites. Reach them directly to join and actively participate in their discussions. Pick your social media platforms from the most popular and rewarding. You can find your target audience gathered around both general health groups and your specialization topics.**

**1**

## **Grow on Facebook and Google+.**

Join and grow with these snowballing communities by sharing your article links and attract fans and brand evangelists, who will do the marketing for you.

**6**

## **Observe with Social Media Monitors.**

Keep your eye on online mentions with the aid of tools like [Brand24.com](http://Brand24.com) to gain a better understanding of your company online. Marketing analytics enables you to monitor and engage in real time. This will grow client satisfaction in addition to identify positive, neutral and negative service feedback.

**5**

## **Spread with Accounting catalogs.**

Acquire both local and international clients by being a part of company directories, which cooperate with the best specialists in the financial market. Some of these detailed listings are paid-for memberships while others are free.

**2**

## **Exclaim on Twitter.**

With its 300 million users, this micro-blog opens another wide two-way channel for feedback, recommendations as well as encourage followers to turn into future clients. Tweeting strengthens and livens up your brand image.

**3**

## **Network with LinkedIn.**

Gain additional public attention with a company page that gives you opportunity to network among professionals, hire competent candidates and create shareable content for your viewers and peers, giving your company another platform to stand out.

**4**

## **Educate and engage via YouTube.**

Interviews with your employee on services or tips and other video courses can be accessible to YouTube's 1 billion users, increasing both your traffic volume and search engine rankings. Videos produced with a personal touch relates to viewers on an emotional level and helps to increase conversions by building trust.

**WEBSITE**



**What to do Next?**

# What to do Next?

With a bad website, you are losing clients and money every day. With almost no effort use that checklist doing small steps every day to make your website perfect. Print this page and mark every step.

## 1. Organize

- I've made a plan of my website's structure.
- Every service have separate page.
- I've designed experience path for clients.
- My **About** page is not just a single page.
- My website has a **Client's Area**.

## 2. Navigate

- My website's menu is short and simple.
- I have a contact section on the right of the main menu.
- My clients can find all data fast and easily.
- My clients always know where they are on my website.
- Mobile navigation works really well on smartphones.

## 3. Call to Action

- I have at least one call-to-action button on my website.
- My call-to-action buttons aren't just simple "Click here".
- Call-to-action buttons stand out from rest of content.
- I've put at least one heading with a sense of urgency.
- I measure my CTA statistics.

## 4. Update

- List of my staff is updated and has great photos.
- Newest article is not older than a month.
- I listed every service my team can provide.
- I use CMS to update my website by myself.
- My contact data is up to date on the Internet.

## 5. Build Trust

- There's detailed presentation of me and my staff.
- There are photos of my office.
- I share our educational background and certificates.
- There are good testimonials on my website.
- I asked my clients for video recommendations.

## 6. Communicate

- I always call back or at least use answering machine.
- I write back for every email from clients.
- My website has an inquiry form.
- I use social media platforms.
- I use messenger applications.

## 7. Share Knowledge

- I have a blog or articles section with comments.
- I target my clients' problems in articles.
- I share links to my articles on social media platforms.
- My articles provide quick steps and tips for clients.
- My website FAQ section.

## 8. Be Fast

- My website loads under 2 seconds (1s would be great)
- I don't use too many big photos on my website.
- I asked hosting company if gzip is on and it is.
- My website has SSL certificate.
- I measured my website's speed on a smartphone.

## 9. Go Mobile

- I've checked mobile users statistics of my website.
- I've checked if my website is mobile friendly and it is.
- My website is not older than 5 years.
- Mobile version of my website is user-friendly.
- Contact data is easily reachable on a mobile version.

## 10. Connect

- I've picked at least one social media platform.
- I've set up my LinkedIn profile as a specialist.
- I've recorded couple of useful videos for YouTube.
- My website is listed in accounting catalogs.
- I monitor my brand with [Brand24](#) platform.

# How can we help?

Hire us to design your new mobile friendly website. After reading those tips you already know what are the most important benefits of websites that we provide. You can't afford your clients to "walk away" from your website. Am I right? So what do you need?

I want website report

I want new website

*Feel free to share this ebook with your professional colleagues!*

