

CCH iFirm Web Manager's New Look for Trend Setting Perta Thomson Partners

Summary

Company profile

Name: Perta Thomson Partners
Region: Australia
Operation: Financial and Wealth Management Services
Products: Accountants and Business Consultants
Employees: 31
Website: www.pertathomsonpartners.com.au

Challenges

- Ageing website with old look and no modern functionality
- Inability to provide clients with secure document upload
- Not optimised for mobility devices

Solution

- CCH iFirm Web Manager

Established in 2004 with two partners and five staff in regional Victoria, CPA firm Perta Thomson Partners now has a thriving practice with offices in Melbourne, Shepparton and Cobram. The current service offering of its five partners and 31 staff focuses on business improvement for SME clients across three key areas: compliance and tax, business advisory and wealth management.

In today's fast paced, mobility driven business environment, the partnership realised its ageing website was not the asset it needed to be. It had been five years since the site's last significant update and it was unable to provide the information or functionality expected by the firm's clients and staff. And nor could it attract new business to Perta Thomson Partners.

“ As accountants, we rely heavily on referrals. We recognised that when prospective clients jumped on the old website to check our credentials, it wasn't even close to creating the first impression that we were shooting for.

Joe Secull, Partner, Perta Thomson Partners

While researching which new-look websites most appealed to the partners, they recognised that many of them were developed by Eclipse – which has been acquired by Wolters Kluwer CCH and rebadged as CCH iFirm Web Manager. Once the refresh project was underway, Perta Thompson Partners (PTP) naturally committed its website redevelopment to CCH iFirm Web Manager.

A strategic approach to developing new content and the design brief

PTP took the strategic approach of rewriting the content, in conjunction with an external marketing consultant, prior to taking a brief to Wolters Kluwer CCH for the design and navigation work.

“ Because we had the content right, we were able to confidently give the iFirm Web Manager team a good story to tell. They worked well to our brief which gave details about other sites we liked and the functionality we needed. Then, from a design perspective, we were 100% guided by them. The Wolters Kluwer CCH people are very easy to deal with, they met all the timelines, and did what they said they were going to do.

Joe Secull, Partner, Perta Thomson Partners

Understanding that a vast number of people browse from their tablets and smartphones, the Wolters Kluwer CCH team ensured the design was mobile optimised and responsive.

It recommended that rolling customer testimonial statements and latest news items on the homepage be used to keep the site alive, active and relevant. And a modern social media presence, limited to the business-appropriate LinkedIn, has been introduced.

The site has also taken advantage of CCH iFirm Web Manager's automatically included content such as key dates, tax facts and calculators.

A modern website attracting new staff and new business

PTP is now using the website as an active part of its marketing program, by driving traffic to it. The focus of the firm's stationery and business cards is now on individual mobile numbers and direction to the site, rather than on the range of traditional contact details.

While PTP does not yet monitor traffic statistics to the new site, anecdotally, the responses are universally positive from staff and clients as they are impressed by its convenience and professionalism.

Clients applaud the site for the ease of uploading documentation and files - much of which is in sizeable folders or has privacy implications making the direct upload of scanned source documents faster and more secure than transferring via email or public sites such as DropBox.

The firm is also receiving employment enquiries and positive feedback via the site from the new generation of accountants.

“ Young professional staff are interested in a work environment that acknowledges the generational shift to practices that have cloud-based service delivery, where technology underpins vibrant businesses.

Joe Seccull, Partner, Perta Thomson Partners

Value adding online services

As all activity on the site can be measured, PTP is now starting to look at traffic to better understand what information and functionality is of value to users as it continues to streamline the firm's online services.

PTP is evaluating further development of the site as a service portal with facilities such as client access - anytime, from anywhere - to their folders, plus backups of data files and the ability to check details such as TFNs.

“ The site is making an impressive contribution to our marketing arsenal. We're working on spoiling our big, good clients and getting them to refer prospects to us via the site. We have even started to secure clients and create opportunities through web search functions, this is not an area that we have been able to capitalise on in the past.

Joe Seccull, Partner, Perta Thomson Partners

CCH iFirm is the pioneering cloud-based suite of software to allow accountants to run more efficient and profitable firms. The CCH iFirm suite includes Practice Manager, Tax, Client Accounting, Paper Buster, Web Manager, CGT Reporter and Document Manager. Web Manager is the No.1 website solution for accountants in Australia and New Zealand, used by more than 1000 accountants.

CALL US TO FIND OUT MORE

Website: cchifirm.com.au
Email: ifirmsupport@cch.com.au
Phone: 1800 07 57 55

Wolters Kluwer
Level 2, 101 Waterloo Road
North Ryde NSW 2113
Australia