William Thomas & Associates

A small, but growing, accounting firm that has prided itself in serving its local clientele across many generations.

Top goals for the website

- Increase number of tax returns processed during tax season.
- Increase clients who are interested in retirement, estate planning and investment planning.
- Increase engagement with our clients — via our "Tax Update" newsletter.

Content that is needed for the website, organized by section

- **About Us** — We are a small, but growing, accounting firm that has prided itself in serving its local clientele across many generations.
  - **Meet Our Team** — Allow clients to meet our team online, view their bios and contact them with questions.
  - **Read Testimonials** — Show testimonials from past clients.
  - **What We Believe** — Describe our core values and passion for serving our community.
  - **Contact Info** — Phone, Address, Email, and Job Opportunities.
- **What We Offer** — Describe our various service offerings. We offer personal accounting, small business accounting, estate planning, retirement planning and investment planning.
  - Retirement Planning.
  - Investment Planning.
  - Tax Filing Services.
  - Consulting.
  - Litigation.
  - ... etc. Each service should have it's own page. May be further organised by grouping related services.
- **Subscriber Newsletter** — Allow clients to subscribe to our "Tax Update" newsletter and read its content online.
  - **Featured and New** — Currently trending topics.
  - **Archive** — Search past articles by month.
  - **Sign-up Page** — Register your email to recieve notifications.
  - (**Event Calendar?**)
- **Make an Appointment** — Make it simple for new clients to schedule their first appointment.
- (**Resources?**) — Tax calculators, useful links, forms, and legal info.

Types of templates / layouts needed, based on content

- Home Page
- Services
- Contact Page
- 'Who Are We?' Page
- Scheduling Appointments Page

- Review of Products and Services Page

Common themes from competitor websites.

We analyzed Barnes Wendling, Walthall, Manning & Associates, and H&R Block.

- Common Navigation
  - The menu bars were located at the top for easy spotting and fast navigation. One didn't have to look or scroll all over to find other pages.
  - Menu items often triggered a drop down list when hovered over.
  - Lower level pages often employed a secondary sidebar menu.
  - Mobile sites placed the main menu in a hidden side panel.
- Content Voice and Tone
  - Reading through the websites, there is an obvious business tone, based off the language and vocabulary used throughout the pages.
  - Most websites had a detailed about section complete with contacts, staff info, and testimonials.
  - Most websites featured a Services section and an Industry section, as well as a Newsletter. H&R Block was different in that they had a heavier focus on tools and software.
- Design Aesthetic & Layout
  - All home pages had a large picture to give a visual on what their company is about.
  - There were bold colors and block text used throughout all 3 sites.
  - Most sites organized pages using a column based layout.

~Amber

Overview of competitor website design aesthetics

Common Navigation

- Barnes Wendling
  - Main menu uses a dropdown menu on all pages.
  - Subpages feature a secondary nav menu in the left sidebar.
  - Subpages feature breadcrumbs just above the header text.
  - 'Want to Know More?' Box appears on the right column in select pages.
  - Less important links in header and footer.
- Walthall
  - Main menu uses a dropdown menu on all pages.
  - Subpages feature a secondary nav menu to the right.
  - Apply, Subscribe and Contact buttons appear on most pages.
  - Back to Top button appears after scrolling down.
- Manning & Associates
  - Horizontal main menu, no sub-menus.
  - Hyperlinks.
  - Lacks a search bar.

- H&R Block
  - Complex dropdown-hover-menu uses both link lists and icons.
  - Subpages often feature a list of links to child pages, though there is little consistency.
  - Footer contains a comprehensive list of links, organized by section.

Content Voice and Tone

- Barnes Wendling
  - Professional
  - Warm and friendly
- walthall
  - Active voice
  - "Cultivating, helping responsive"
- Manning & Associates
  - "Highest ethical standards"
  - Professional
- H&R Block
  - Professional, informational

Design Aesthetic

- Barnes Wendling
  - Warm natural colors — uses a maroon, tan, and olive green color palette.
  - Circular photo images used to draw attention.
  - Photography uses full color photos, dominated by warm colors and featuring smiling businessmen / businesswomen.
  - Mostly sans serif type but sometimes accented with serif type.
  - Mostly flat design, few gradients, and rectilinear composition.
- Walthall
  - Clean, modern, minimal.
  - White, grey, and blue color palette.
  - Photography features technology and landscapes, rarely features people.
  - Flat design, heavy use of circular elements.
- Manning & Associates
  - Stark and often text heavy.
  - White background with tinges of navy blue and light green.
  - Textured background, on home page, not as modern.
  - Light grey sans serif body text.
  - Makes little use of photography.
- H&R Block
  - Clean and modern
  - White background and light colors.
  - Flat design and sans serif type.

Layout

- Barnes Wendling
  - 3 column grid with 1/3 for sidebar and main content, center column is widest.
  - Not responsive.
- Walthall
  - 4 column grid, with 2 columns for content and sidebar, image slider at top.
  - Responsive typography and collapsible grids, menu collapses into a hidden side panel.
  - Most pages feature a large image. Homepage features a carousel.
- Manning & Associates
  - 2 column grid with main content and sidebar.
  - 3 column grid on certain subpages.
  - All gridded layouts are responsive and collapsible.
  - Mobile site features a sliding panel menu that can only be accessed at the top of the page.
- H&R Block
  - Modular grid structure, use of squares.
  - Fixed position header nav bar.
  - Mobile site features a sliding panel menu that can be accessed from the header bar.

~Janet and Ken