

The Accountants Web Design Checklist

How to Get 10+ new Clients Per Month without Social Media - Even If You Never Touch Your Website!

INSTRUCTIONS

Go through each section and check off what you already have. If anything is missing, update your website to improve conversions. Once completed, your website will work as a client-generating system.



Step 1. Build Instant Trust with Branding & Credibility

Why this matters: If your website looks outdated or lacks trust signals, visitors won't feel confident hiring you.

- ☐ A professional, modern website design (No outdated 2005 templates!)
- ☐ Your face on the homepage (People trust people, not stock photos)
- ☐ Trust signals (CPA badge, testimonials, media features, certifications)
- ☐ Clear and professional logo & brand colors
- ☐ Easy-to-find contact info at the top (phone, email, "Book a Call" button)



Step 2. Homepage That Converts Visitors Into Leads

Why this matters: If visitors don't know what to do next, they'll leave. A strong CTA directs them to take action.

- ☐ A clear, benefit-driven headline (e.g., "Stress-Free Tax Planning for Small Business Owners")
- ☐ A strong call-to-action (CTA) (e.g., "Schedule a Free Consultation")
- ☐ Testimonials or case studies from happy clients
- ☐ A simple lead capture form (Name + Email + Phone)
- ☐ A booking button linked to an online scheduler (Calendly, Acuity, etc.)



Step 3. Services Page That Clearly Explains What You Do

Why this matters: Clients need clarity on what you offer, who you serve, and how to hire you—without confusion.

- ☐ A list of services in plain English (Not just "Accounting Solutions")
- ☐ Pricing transparency (or at least a "Get a Quote" button)
- ☐ A section explaining WHO you help (small businesses, real estate investors, etc.)
- ☐ FAQs that answer common objections (e.g., "What if I'm behind on taxes?")



Step 4. Automated Lead Capture & Follow-Up System

Why this matters: Most website visitors won't book a call immediately. A lead magnet keeps them in your pipeline.

- ☐ A free downloadable guide (Lead magnet)
- ☐ A lead capture form to collect emails (popup, sidebar, footer, etc.)
- ☐ An automated email sequence (Follow-up emails to nurture leads)



Step 5. Local SEO & Google Visibility (So Clients Find You)

Why this matters: If you don't show up on Google, your competitors will.

- ☐ Google My Business profile set up & optimized
- ☐ Website is optimized for "[City] CPA" or "[City] Accountant"
- ☐ 5+ Google Reviews (with responses)
- ☐ A blog or resource section for ongoing SEO value



Step 6. Mobile & Speed Optimization (So No One Clicks Away)

Why this matters: Over 60% of website traffic is mobile. If your site is slow, you're losing leads.

- ☐ Website loads in under 3 seconds (Test at Google PageSpeed Insights)
- ☐ Mobile-friendly design (Most traffic is mobile!)
- ☐ Click-to-call buttons for easy contact on mobile



Step 7. Automated Booking System (So You Don't Waste Time on Follow-Ups)

Why this matters: A manual booking process wastes time. Automate it and spend more time on billable work.

- ☐ A "Schedule a Consultation" button linked to Calendly (or another booking tool)
- ☐ Automatic email & SMS reminders for booked calls
- ☐ A short pre-call questionnaire to filter out bad leads

WHY THIS IS IMPORTANT

Most accountants rely on word-of-mouth or referrals, but that's unpredictable. Meanwhile, competitors are throwing money at ads or wasting time on social media trying to drum up business.

What if your website could quietly bring in 10+ new clients per month—without you lifting a finger?

That's exactly what this checklist will help you do. It breaks down how to turn your website into a lead-generating machine, so prospects come to you automatically instead of you chasing them.

Tired of a Website That Doesn't Generate Leads?

Your website should work for you, not against you. Let's fix the leaks, optimize your site, and start turning visitors into ready-to-work-with-you leads—without spending more on ads.

Let's audit your site and create a plan to 2x your leads. No more lost opportunities.

Reach out to us at square1grp.com/brainstorm