



Modern website offers clients a place to do business



The Back Story

Shannon Summersgill, CPA and Founder of Summersgill CPA was generally satisfied with her firm's former website. That is, until she realized that while it was aesthetically pleasing, it didn't deliver on functionality. Essentially, her website served as a marketing tool, and what she needed was a platform where clients could interact with her firm.

"Our previous website was about four years old, so it was definitely time for an update. When I started looking for a partner to help us with a redesign, it was evident that Rootworks could not only design a beautiful site, but also provide a centralized platform that offered clients access to our services," Shannon stated.

Shannon quickly signed up with Rootworks, and she is loving the end result!



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A modern firm website means never sacrificing form or function

"One of the best things about working with the Rootworks team is that we didn't have to reinvent the wheel. They already figured out how to offer clients a place to do business with their Client Center," Shannon explained. "All my clients have to do is click the Client Center button, and they can easily log in to their portals and access QuickBooks, QuickBooks Online and Bill.com. And as we grow and add additional services, we know the site can scale to accommodate them."

Very few of Shannon's clients have used online CPA services before, so this year the firm is easing into the transition by using portals to deliver tax returns. Clients are required to register for portal access—a move that Shannon is expecting will help clients understand the value of having 24/7 access to their information and the ability to "visit" her firm when needed.

Shannon is also an avid fan of Rootworks' integrated team approach, which helped to ensure that her brand was properly supported by her website. "I also had Rootworks create my logo, and I use their outsourced marketing service. Everyone on these teams talks to one another, and that ensured that my logo and marketing messaging aligned with my new website."



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A website built for maximum firm performance

With her firm's new website up and running, Shannon is excited to have found a solution that, as she shared, "Is a totally perfect fit." She continued: "Our website captures exactly the kind of firm we want to be."

Another plus according to Shannon is the ability to quickly update their website with new information by simply submitting a request to the Rootworks' web team. This, along with scheduled, automatic blog updates keeps the website fresh.

"You get so much with a Rootworks website. It really is the whole package," Shannon stated.

Shannon is confident that her clients will appreciate working within a collaborative online environment. "Having a reliable and beautiful website built on a proven platform makes it really easy to support clients with online accounting services. It's something that will differentiate our firm now and help us keep up with client service expectations in the years ahead."