

Web Review FOR

SAMPLE

1. What does the site say about you?

Confident, experienced, professional, long established

2. How well does it say it?

Content

- This site is quite content rich, clearly the result of some thought and a fair amount of copy, well written and generated, I would guess, in house. Unlike many adviser sites it does not use obvious clichés or “template” features
- The Maslow analogy and the “see if you can do all this yourself “ section cause the reader to think whilst reading – by contrast most sites just seek a general feeling of confidence.
- The main thing is that the tone of the content gives the user a very clear idea about the kind of business and people he would be dealing with – more so than other sites I’ve looked at
- The Core service is featured – for me there’s an implication that there are other services – add- ons/ optional etc but I’m not sure what they are?
- The client testimonies are particularly strong – mainly by virtue of their extent – you might consider building a case study or two
- The fees section might usefully be promoted with its own navigation tab – also I didn’t quite follow the fee structure where if I choose financial planning I pay less for my investment planning. Is the implication that financial life planning carries a separate cost?
- I’m not entirely sure about the international standard ref on the home page. We work with ISO 22222 but that’s more about the whole business piece rather than advice only. The user will typically not know much about UK standards or necessarily be impressed by international standards in this area – click the link and the site there tells the reader little about what international standards might mean – other than a clear US base which may or may not appeal. Anyway, just a personal view, you may know different!
- I very much like the consistent use of Take the First Step

Design

- The site looks to me like it was designed a little while ago and a refresh might be worth doing – all depends of course on the role you wish the site to play.
- I would think though looking at the content that current clients are not particularly your audience for it – so you might think about ways to attract the newer client – a news section or an offer of a newsletter for example?

3. What could be developed?

Design

- Consider a fresh design using more colour and less copy – consider use of video – quality does not have to be spectacular – easily hosted on u tube

- Consider the detail of the type layout – some of the point sizes vary without apparent reason – and italics are used sometimes then dropped
- Overall I think the content could be reduced a little without loss of impact – and bullet style introduced to replace some of the body text

Content

- Consider adding some news/ a blog feature – the content indicates that the partners? have clear and strong views – a blog a week would be one way of expressing these
- Consider a new section Second Opinion – if you are seeking new clients then this can be a professional route in – and most clients will have some form of current adviser so it's a less threatening way into the conversation?
- Although I liked the stand out factor in the Maslow feature I had a problem with the content – Maslow is reasonably well known with its progression from survival through to self realisation – the way you convert the model has material indulgence at the top whereas you could use the “life planning” language to place dream goals – including altruistic goals- at the top, achievable once you have the bedrock in place
- The write your own plan section again is excellent but the way it's executed may not chime well with some – in short it reads a bit patronising – would be great as the base for a presentation where the personality of the writer can come through but flat, on paper, it may be too strong a challenge to the reader “naive enough” to think he can do all this himself – again, just my view! All a matter of tone. As an aside I did some of the Nucleus site www.nucleusfinancial.com and on it there's a “quiz” “perfect partners” which is also challenging but I think strikes a good tone.

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Adviser Home

