

WEBSITE REQUEST FOR PROPOSALS: WWW.CNCCPA.COM
CONTACT: ADELAE WINTERS (509) 663-1661 / ADELAE@CNCCPA.COM

Company Overview

Cordell, Neher & Company, PLLC is NCW's trusted financial, tax, and professional service partner. We are dedicated to providing the highest quality of service to assist our clients on their path to financial success. This commitment has earned us the reputation for trusted excellence. Our experience has shown that personalized service is the key to an effective working relationship. Our clients' financial and tax needs are unique, and require individual attention and understanding. Located in Wenatchee, we provide individuals and businesses with all tax planning and preparation services, retirement planning, investment brokering, accounting & auditing, bookkeeping, consulting, and more.

Project Overview

Currently, the Firm maintains two websites: the current website, www.cnccpa.com serves as a deep resource of information about the Firm and services offered, important dates, and news. The secondary website, <https://financial.cnccpa.com/> is focused on the Firm's wealth management services. We are seeking a vendor to merge the two sites and provide a complete update of the site that highlight's established strengths and branding of Cordell, Neher & Company. The Firm intends to maintain both domains with the new website appearing at each. Critical elements include:

- Timeline:
 - Proposals due 4/1/2020
 - Proposal review, vendor interviews and selection to be completed by 5/1/2020
 - Project Start date: 5/15/2020
 - Completion and launch no later than 7/15/2020.
- We currently maintain two domains, we will consolidate these two sites into one site that will be housed on the two existing domains
- Using the analytics of the current sites, the vendor will review current traffic and recommend navigation and content adjustments to ensure maximum relevancy for target audiences.
- Must use existing logos.
- You will have one contact for this project, but the project will be reviewed by a board of individuals. We will communicate our expectations and changes as thoroughly and timely as possible and expect the same from the selected vendor.
- A mutually-agreed upon project timeline with key benchmarks will be established prior to project start date.
- Our expectation is that upon launch date every link is functional, every photo visible, and every document has been transferred.
- All documents posted to site must meet accessibility recommendations as outlined by the ADA.

Audience

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Our Firm currently supports clients in 25 states and abroad.

- Individuals & businesses in Washington State. Our clientele is generally in the North Central Washington area. Our target demographic for NEW clientele for all lines of marketing is defined as:
 - M/F age 40-60, earning \$40K/year+ in Wenatchee, East Wenatchee, Cashmere, Chelan, Leavenworth, Quincy, Moses Lake.
 - Business owners in trades, small service, and retail industries in Wenatchee, East Wenatchee, Cashmere, Chelan, Leavenworth, Quincy, Moses Lake.
 - Practicing attorneys in Wenatchee, East Wenatchee, Cashmere, Chelan, Leavenworth, Quincy, Moses Lake.
 - Tech-savvy individuals and businesses throughout the United States

Objectives

- Streamline two existing websites into one professional-looking and interactive website housed on the two existing domains
- Clearly identify Firm services, including taxes, financial planning, and bookkeeping for individuals and businesses at every level.
- Educate/reinforce position that the Firm is a resource for existing clients
- Attract new business and individual clients across the state of Washington
- Provide an elite, professional feel while also being approachable. We want our website to say we are credible, professional, and provide high-level service and expertise.
- Create a credible online presence for our financial planning department
- Ensure new site is optimized for mobile viewership
- Provide for an enhanced interactive user experience
- Ensure new website is easy to update by Firm staff
- Maintain and enhance site aesthetics while incorporating established brand elements.

Current Website

- We currently have two domains: www.cnccpa.com and <https://financial.cnccpa.com/> wherein our financial services department is completely separate from the other departments in our Firm. This was intentional in order to be compliant with very strict regulatory guidelines. We believe this can be done with ONE cohesive website.
- The current mobile version of the site is very clunky and not user friendly
- This site was built using a very restrictive template that is very difficult to update. We're equally interested in front end and back end user experience.

New Site Functionality Requirements

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- Must maintain existing links
- Must review past traffic to existing site page and make recommendations for modifications
- Must recommend opportunities to streamline navigation
- Must transfer all existing content
- Must have a clean, functional, responsive mobile site
- Must have a user-friendly, easily updated back end for frequent posts and updates

Budget Details

- We expect a high level of talent, communication, focus, and service from the selected vendor. Please provide a comprehensive cost estimate to deliver the described product. The cost provided should include all fees and charges.
- Please include any hosting or domain registration fees as a completely separate line item. We are not inclined to make a change at this time, but are open to new ideas.

Proposal Requirements

- Interested vendors must provide a Statement of Qualifications that details experience and relevant education. This information should be included for all members of the team that will be assigned to this project. Examples of past work are encouraged.
- Questions regarding this RFP or project are due in writing no later than March 20, 2020. Please submit questions to adelae@cnccpa.com
- Electronic proposal submissions are due by 5:00pm on April 1, 2020. Please submit to: adelae@cnccpa.com
- Vendors must provide three references for similar projects completed in the past 18 months.