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Client Surveys for Accounting Firms

(a ClearlyRated preview)



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Agenda for the webinar

- Key terms and ideas
- Correlation between client satisfaction and firm growth
- Common missed opportunities with survey initiatives
- ClearlyRated survey preview
- Client experience preview
- Reporting preview
- Q&A

Key Terms & Ideas

- **“Client survey”** – we’re specifically talking about digital client satisfaction surveys.

Here’s why...

Digital surveys are a highly productive use of resources.

Net Promoter Score (NPS) question

NPS Driver Questions

Satisfaction Survey

Based on your most recent experience, how likely would you be to recommend [brand] to a friend or colleague?

How likely are you? Strongly Dislike

1 2 3 4 5 6 7 8 9 10 Don't Know

Have any issues you've had been resolved within 24 hours?

Yes
 No
 N/A

Does [brand] submit multiple qualified candidates that match your requirements?

Yes
 No
 N/A

Does [brand] submit candidates who would be a good culture fit for your team?

Yes
 No
 N/A

Does [brand] submit candidates within the expected timeframe?

Yes
 No
 N/A

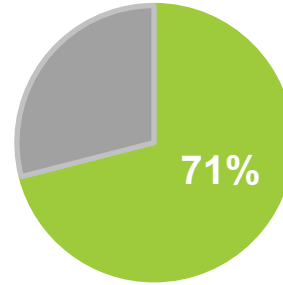
Does [brand] set realistic expectations regarding the open positions you have them work on?

Yes
 No
 N/A

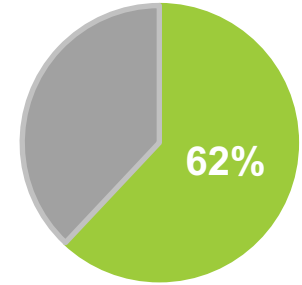
What is the primary reason behind the rating you provided?

What, if anything could [brand] do differently to increase the value you receive working with them?

Submit Survey



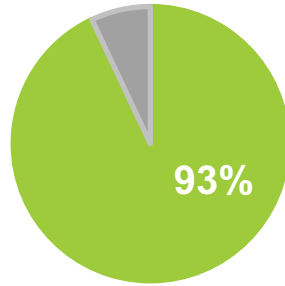
71% of accounting clients say they are more likely to take the time to provide feedback through a survey than in-person.



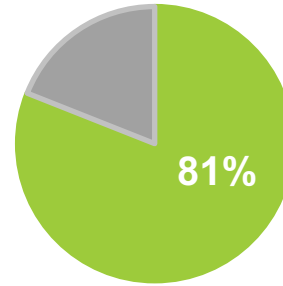
62% of accounting clients say they are more likely to be candid with their feedback in an online survey than in-person.

SOURCE: ClearlyRated 2018

Clients are *ready* to be asked for their feedback.



93% of accounting firm clients say it's important to have an open channel of communication to provide feedback to their firm.



81% say that when asked for feedback, their perception of their accounting firm is positively impacted.

SOURCE: ClearlyRated 2018

Key Terms & Ideas

- “**Client survey**” – we’re specifically talking about digital client satisfaction surveys.
- “**NPS®**” – or “Net Promoter® Score” – a leading client survey methodology that measures client satisfaction, loyalty, and refrerability.

Net Promoter® Methodology

How likely are you to recommend our firm to a friend or colleague?

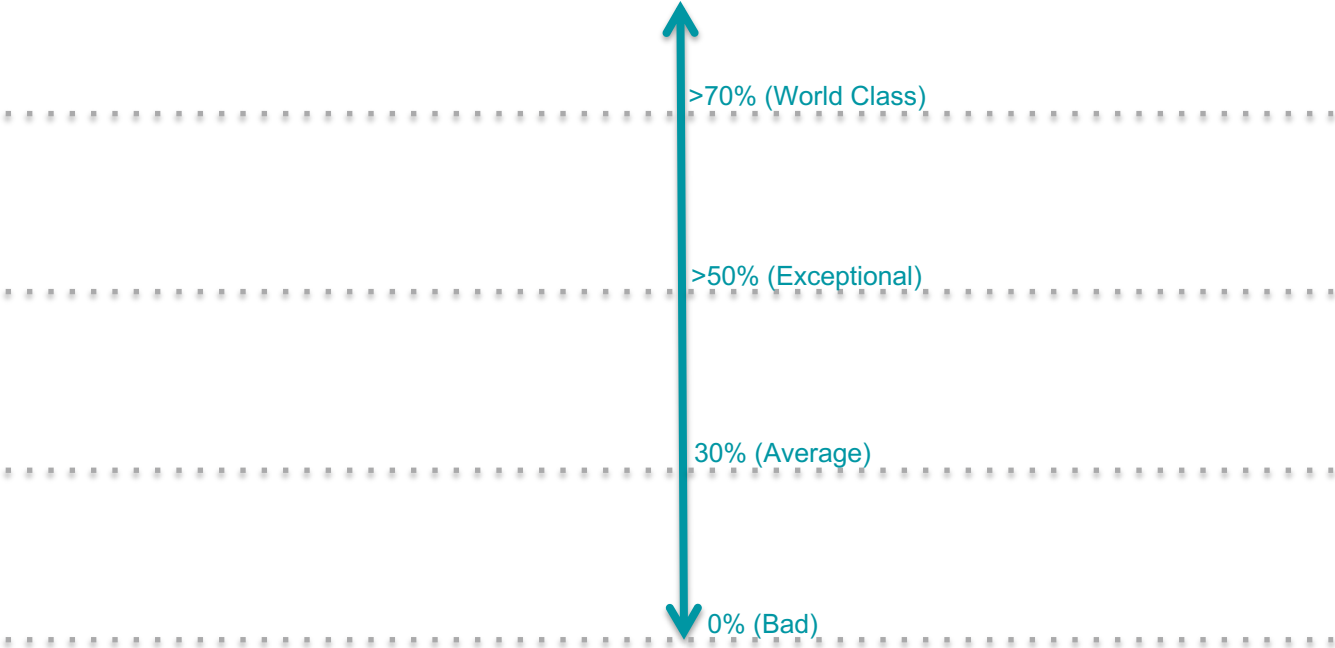


$$\text{Net Promoter® Score} = \% \text{ Promoters} - \% \text{ Detractors}$$

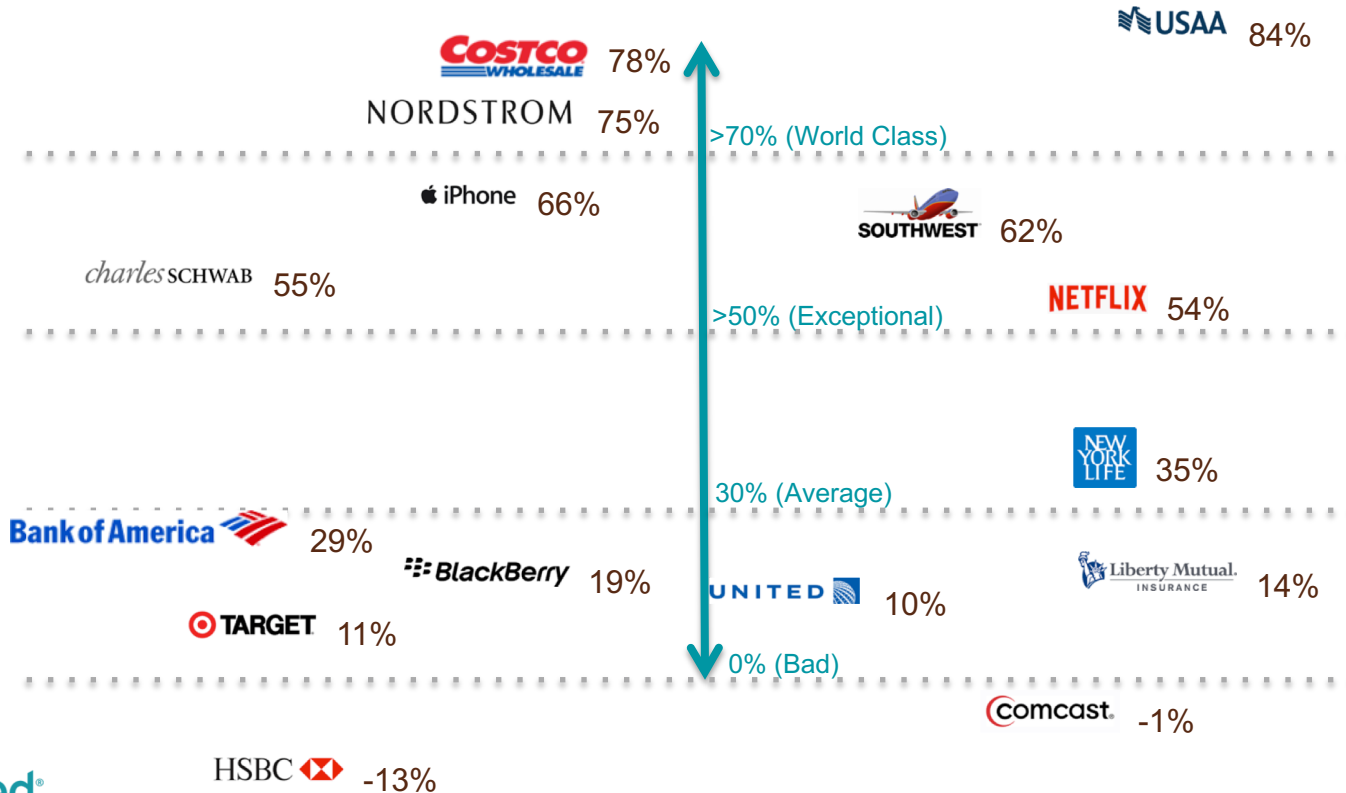
Why Net Promoter® Score?

- Directly tied to growth strategy for service firms – **referrals**.
- Single metric to **benchmark** against the industry and across other world-class service quality organizations.
- Creates service **awareness** and makes service quality an **accessible** goal across the organization.
- Measures **loyalty behavior as a proxy for client perception** – helps client remove their own bias about what constitutes “good” or “great” service.

Global NPS Standards

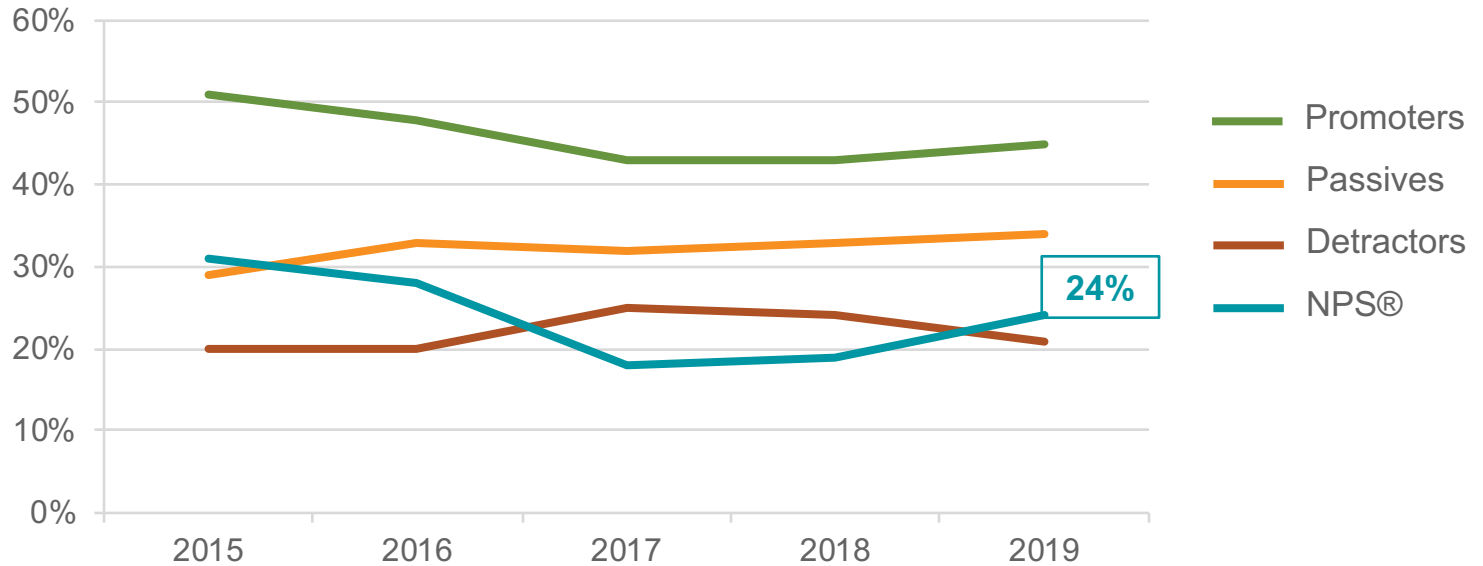


NPS Across Industries



Accounting Industry NPS® Benchmark


(How buyers and clients of accounting firms rank their primary provider)



SOURCE: ClearlyRated 2019

Key Terms & Ideas

- “**Client survey**” – we’re specifically talking about digital client satisfaction surveys.
- “**NPS®**” – or “Net Promoter® Score” – a leading client survey methodology that measures client satisfaction, loyalty, and referrability.
- “**Response rate**” – the % of clients asked for feedback who actually provide it.



24% of accounting clients report
having experienced a service
issue with their accounting firm.

Correlation between happy clients and revenue health

Compared to Detractors, Promoters of their primary accounting firm are...

More committed to only using their current primary accounting firm

2x

more likely to be fully committed

More likely to plan an increase in annual spend with their primary accounting firm

39%

more likely to increase spend

More likely to provide a testimonial for their primary accounting firm

6x

"very likely" to provide a testimonial

More likely to share an online, public review for their primary accounting firm, if asked

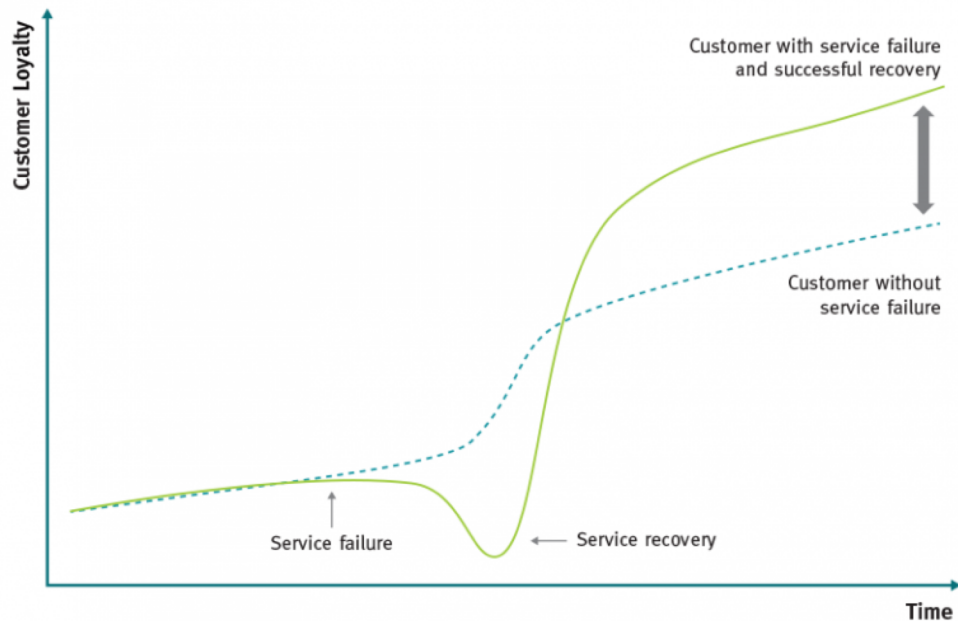
42%

more likely to provide an online review

SOURCE: 2019 Accounting Buyer Benchmark Report

Common missed opportunities to maximize the ROI of your survey initiative...

- Avoiding conversations with less-than-happy clients.



Common missed opportunities to maximize the ROI of your survey initiative...

- Avoiding conversations with less-than-happy clients.
- Not “scaling” access to client feedback internally.



Fragmented
Doesn't Scale



Efficient
Scalable

Common missed opportunities to maximize the ROI of your survey initiative...

- Avoiding conversations with less-than-happy clients.
- Not “scaling” access to client feedback internally.
- Not taking action on the feedback.

80 / 20



80% of your time should be spent responding to and taking action on feedback.



20% of your time should be spent on designing and implementing a survey.

Common missed opportunities to maximize the ROI of your survey initiative...

- Avoiding conversations with less-than-happy clients.
- Not “scaling” access to client feedback internally.
- Not taking action on the feedback.
- Not having a strategic plan in place to capitalize on positive feedback.

Promoters of their primary accounting firm say they would be **very likely** to provide a testimonial and have stated their willingness to refer, **6x more often** than other clients.





The process of surveying your clients

Initial Email Invitation Sent to Clients

Dear [fname],

Your opinion is important to us. Please help us improve by completing a quick, [question_count] question survey on your recent experiences with our firm.

Based on your most recent experience, how likely are you to recommend [Brand] to a friend or colleague?

0 1 2 3 4 5 6 7 8 9 10 Don't Know

(0 – Not at all likely and 10 – Extremely likely)

(Please note: clicking selection above will direct you to the rest of the survey)

By taking time to share a few thoughts with us on your experience, you are helping us discover ways to improve the service we provide you.

Thank you in advance for your time.

Sincerely,

[email_signature_name]

[email_signature_title]

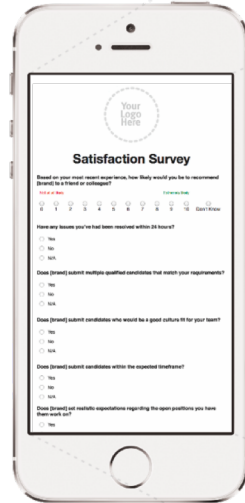
This survey was sent to you by ClearlyRated on behalf of [Brand]. If you have any questions or problems with the survey, please contact ClearlyRated at 800-921-2640, or by email at survey@clearlyrated.com

Please read our [Privacy Policy](#). To unsubscribe from all future surveys conducted by ClearlyRated, please click here: [\[unsubscribe\]](#)

A person in a dark suit and white shirt is holding a pen over a document. Another person's hand is visible in the foreground, also near the document. The background is blurred, suggesting an office setting. The entire image has a teal overlay.

Live Demo

8-Question Standard Client Driver Survey Questions



Your Logo Here

Satisfaction Survey

Based on your most recent experience, how likely would you be to recommend [brand] to a friend or colleague?

Not at all likely Extremely likely

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Yes
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Does [brand] submit multiple qualified candidates that match your requirements?

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Does [brand] set realistic expectations regarding the open positions you have them work on?

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 No
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What is the primary reason behind the rating you provided?

What, if anything could [brand] do differently to increase the value you receive working with them?

Client list suggested fields

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	brand	partner	practice area	location	audience	contact_com	contact_fnan	contact_lnan	contact_ema	contact_pho	email_signat	email_signat	email_notification		
2															
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Data Privacy & Technology Environment

The security and privacy of data shared with ClearlyRated is of utmost importance to us. We have taken the following steps to ensure that the privacy and security of all data shared with ClearlyRated is maintained:

- Implemented an industry standard Information Security Program and Policy that all employees are trained on and required to follow.
- Self certify into the EU-U.S. and Swiss-U.S. Privacy Shield programs (<https://www.privacyshield.gov/welcome>), which are stricter data privacy frameworks than is required by US law.
- Fully GDPR compliant privacy policy - <https://www.clearlyrated.com/solutions/privacy-legal/>
- Applied industry best practices on the storage and security of the data within our database servers and employee computers, including full hard drive encryption of all employee computers.
- Restrict access to production servers that store confidential information to the small number of employees needed to maintain those systems.
- All transfer of confidential information is fully encrypted at all times.

Any further questions relating to privacy and confidentiality of personal information can be directed to Nathan Goff the Chief Technology Officer at ClearlyRated. He can be contacted at ngoff@clearlyrated.com.

At ClearlyRated, we take information security very seriously. This sheet provides technical details for ClearlyRated's survey system and provides answers to common IT Department questions.

Servers

- All production survey fielding and reporting applications are hosted on leased dedicated hardware with Rackspace in their Chicago datacenter.
- All leased managed server hardware employs industry best practices for hardware redundancy around disks, power, and network.
- See <http://www.rackspace.com/about/datacenters> for full details on this datacenter and the certifications it has received. Sampling of some of the certifications this datacenter has received are: SOX, HITRUST, PCI-DSS, ISO 2700-1
- Application and database servers are dedicated to those functions and do not operate both on the same server.
- All of these servers are dedicated and managed hardware not within cloud or shared hosting environments.
- All production servers run a supported and managed version of Red Hat Enterprise Linux.

Networking

- All production server hardware is behind a managed Cisco firewall.
- Only ClearlyRated leased hardware is attached to the firewall.
- Industry standard protocols are followed to provide very limited direct access to firewall and the servers behind it.
- DNS services managed by Cloudflare.
- See <http://www.rackspace.com/about/datacenters> for full details on network uptime SLA.

Redundancy

- All production application servers have managed backups on a daily basis.
- All production database servers have a real-time replica with daily full backups.
- Rackspace managed services provides redundancy to all other aspects of the infrastructure.

Email

- Emailing infrastructure provided by Mailgun.
- All email sent on a dedicated IP.
- Email certification provided by ReturnPath.

Questions?

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