



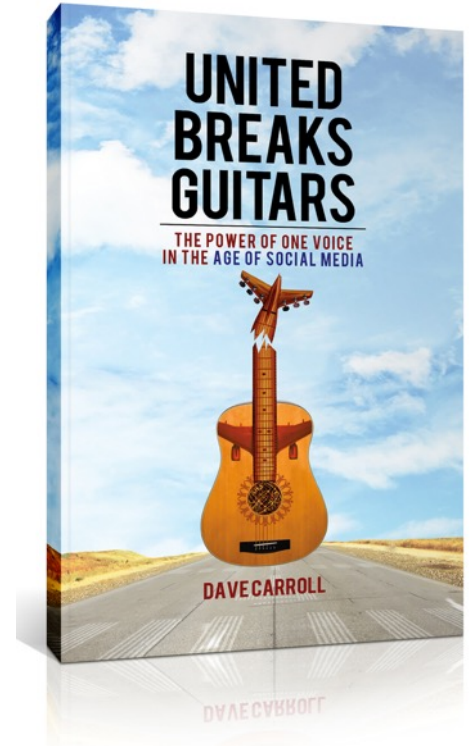
Client Experience Reimagined

How Best of Accounting™ Drives Growth for Accounting Firms

Eric Gregg, CEO & Founder of ClearlyRated



The client has never had more power

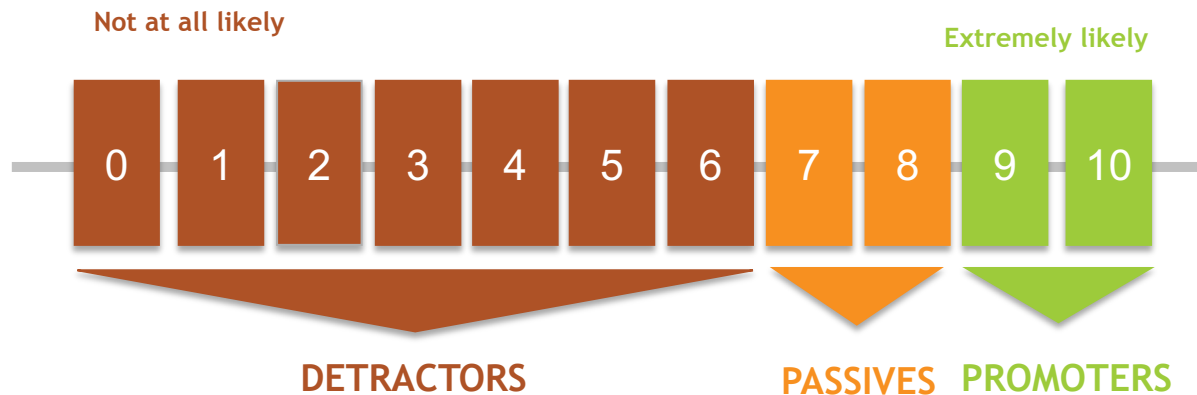


CX Reimagined Agenda

- **A primer on Net Promoter® Score (NPS®)** — what it is, and why we use it
- **The Best of Accounting award**—what it is, and how it's earned
- **Beyond the award**—financial and operational benefits of Best of Accounting
- **Focus on the feedback** —the 80/20 concept and why it works

Best of Accounting is powered by the Net Promoter® Score (NPS®)

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



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

The future of CX is responsive, always on, and transparent



	Ask	Analyze	Act	Appreciate internal employees	Amplify service wins	Enhance online reputation	Acquire new business
Most Cx	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reimagined Cx	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
				<ul style="list-style-type: none"> ✓ Scores by recruiter and account manager ✓ Shout-out recognition ✓ Testimonials 	<ul style="list-style-type: none"> ✓ Client + Employee testimonials ✓ Identify referral prospects ✓ Enhanced online ratings 	<ul style="list-style-type: none"> ✓ Ratings + testimonials at ClearlyRated.com ✓ 1st page Google brand search 77% of time ✓ Improvement to existing ratings 	<ul style="list-style-type: none"> ✓ Strong ratings online ✓ Sales enablement ✓ Social proof

CX Measurement Maturity Model



Elevating

- Weekly/event triggered feedback.
- CX & EX-centered organization. Company core value.
- Social proof centered marketing, sales, renewals.

Expecting

- End-of-Engagement feedback at key stages of journey.
- Service 'stars' are celebrated internally.
- Scores are leveraged internally and externally.

Sharing

- Semi-annual or more often.
- Client-facing employees see feedback.
- Feedback driving process and investment.

Measuring

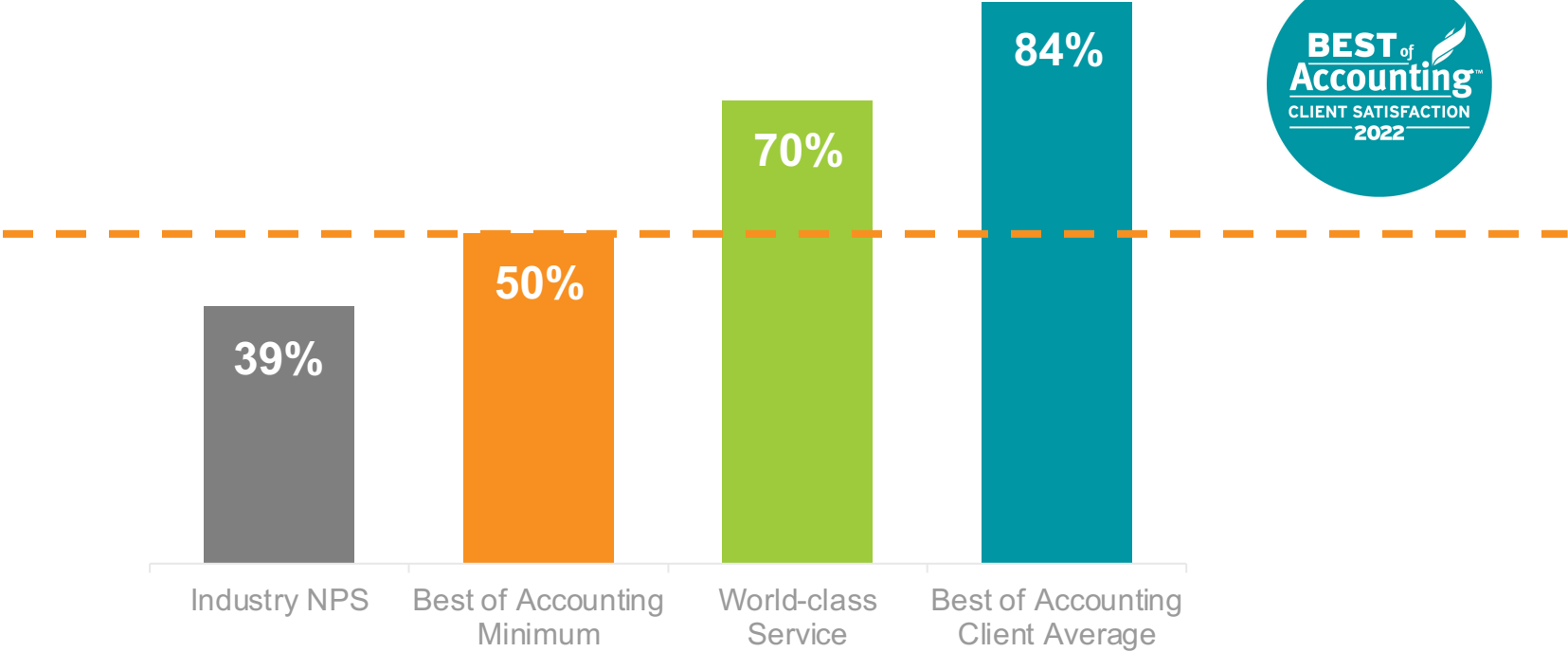
- Annual or semi-annual survey cadence.
- Reporting at leadership level only.
- Focus on macro areas of improvement.



How firms earn Best of Accounting



Best of Accounting winners versus the industry



How to earn Best of Accounting

- Survey a list of **50% (or a minimum of 500) of their clients** who were billed for services during a 3-month consecutive period over the last 12 months.
- Firms must receive **at least a 20% response rate AND at least 15 responses**, or a **minimum of 250 responses**.
- Firms must **earn a 50% Net Promoter® Score** (or higher) for client and / or internal employee satisfaction.
- Fewer than **1% of all accounting firms in the US and Canada** achieve Best of Accounting.

Best of Accounting award for Employee Satisfaction



- The industry's only diversity, equity, and inclusion-focused NPS® employee survey program
- Measure employee satisfaction and understand perceptions about DEI at your firm



Beyond the Award: What Best of Accounting Delivers



Best of Accounting delivers:

- Real-time feedback from your clients and internal employees.
- Benchmarking to help you measure service performance against the industry.
- Critical opportunities to identify (and get ahead of) at-risk revenue.
- New insight into account expansion and referral opportunities.
- Approved testimonials from your happiest stakeholders.
- A chance for clients to recognize star performers on your team.
- Indexed client ratings to improve the reputation of your brand online.
- Key marketing resources (and templates!) to help your firm share your proof of service.

80



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

/

20

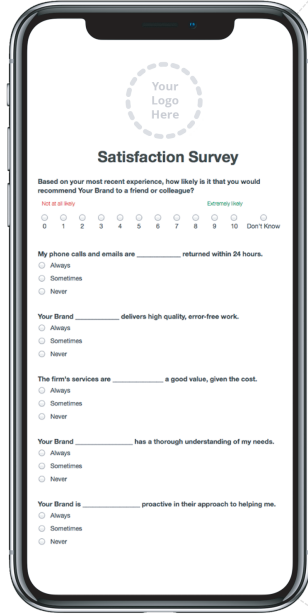


20% of your time
should be spent
on designing and
implementing a
survey.

8-Question Survey

Client

Ask the questions that will be most valuable and actionable to your team.



Satisfaction Survey

Based on your most recent experience, how likely is it that you would recommend Your Brand to a friend or colleague?

Not at all likely Extremely likely

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

My phone calls and emails are _____ returned within 24 hours.

- Always
- Sometimes
- Never

Your Brand _____ delivers high quality, error-free work.

- Always
- Sometimes
- Never

The firm's services are _____ a good value, given the cost.

- Always
- Sometimes
- Never

Your Brand _____ has a thorough understanding of my needs.

- Always
- Sometimes
- Never

Your Brand is _____ proactive in their approach to helping me.

- Always
- Sometimes
- Never

What is the primary reason behind the rating you provided?

What is one thing we could be doing differently to increase the value you receive from us?

Net Promoter Score (NPS) question

NPS Driver Questions

13-question survey

Internal Employee

Ask the questions that will be most valuable and actionable for your team.



Satisfaction Survey

If asked, how likely would you be to recommend Clarity Consultants as a good place to work to a friend or family member?

Not at all likely 0 1 2 3 4 5 6 7 8 9 10 Completely likely Don't Know

What is the primary reason behind the rating that you provided?

I am optimistic about what the next year has in store for me working at Clarity Consultants.

Yes
 No
 Don't Know

I enjoy working with my colleagues at Clarity Consultants.

Always
 Sometimes
 Never
 Don't Know

My compensation package (salary, bonuses and benefits) is fair compared to people who do similar work at other companies.

Yes
 No
 Don't Know

I receive recognition when I do my job well.

Always
 Sometimes
 Never
 Don't Know

There are opportunities for advancement for me within my firm.

Yes
 No
 Don't Know

I receive feedback in a timely manner from my immediate manager on my performance.

Always
 Sometimes
 Never
 Don't Know

I am proud to work for Clarity Consultants.

Always
 Sometimes
 Never
 Don't Know

I feel like I belong at this firm.

Always
 Sometimes
 Never
 Don't Know

The best people get promoted, regardless of gender, race, ethnicity, age, sexual orientation or identity, education or disability.

Always
 Sometimes
 Never
 Don't Know

Management shows that diversity is important through its actions.

Always
 Sometimes
 Never
 Don't Know

What can Clarity Consultants do to improve your experience as an employee?

Net Promoter Score (NPS) question

NPS Driver Questions

Dashboard provides aggregate and segmented views:

CLEARLYRATED DASHBOARD

Your online dashboard of survey responses.

PINPOINT PRACTICE AREA ISSUES

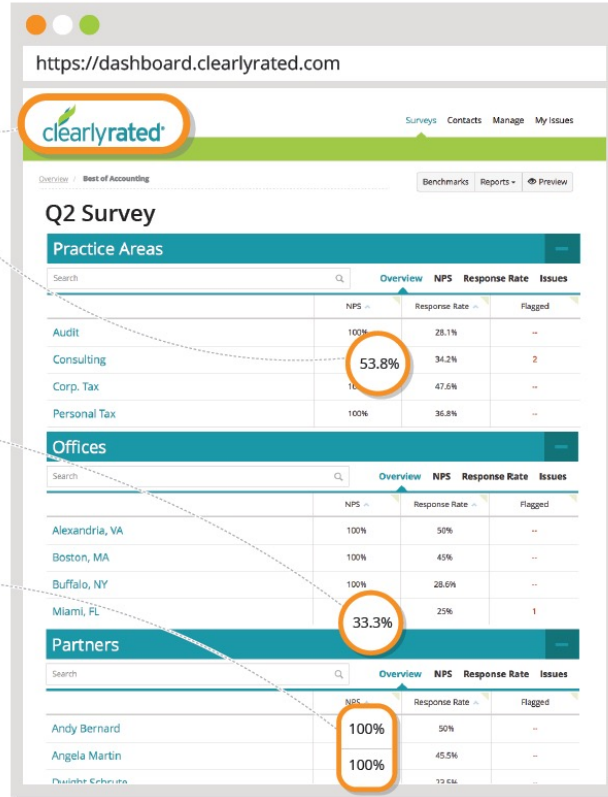
Why is our Consulting satisfaction score so much lower?
What's happening here?
Look into this.

PINPOINT OFFICE ISSUES

What's happening with Miami? Their satisfaction score is too low.

REWARD TOP PERFORMERS

Andy and Angela are doing a really great job! Recognize in next meeting.



Plus/Enterprise reporting package shown.

Dashboard provides aggregate and segmented views:

The screenshot displays the ClearRated dashboard for a 'Q2 Survey'. The interface includes a search bar for responses, a table of individual responses with NPS scores, and a testimonials section. Callouts highlight specific features and data points.

CLEARLYRATED DASHBOARD
Your online dashboard of survey responses.

RETAIN AT-RISK ACCOUNTS
Partner needs to look into Gerald's issue.

GET REFERRAL PROSPECTS
Ask for referrals from James and Anna!

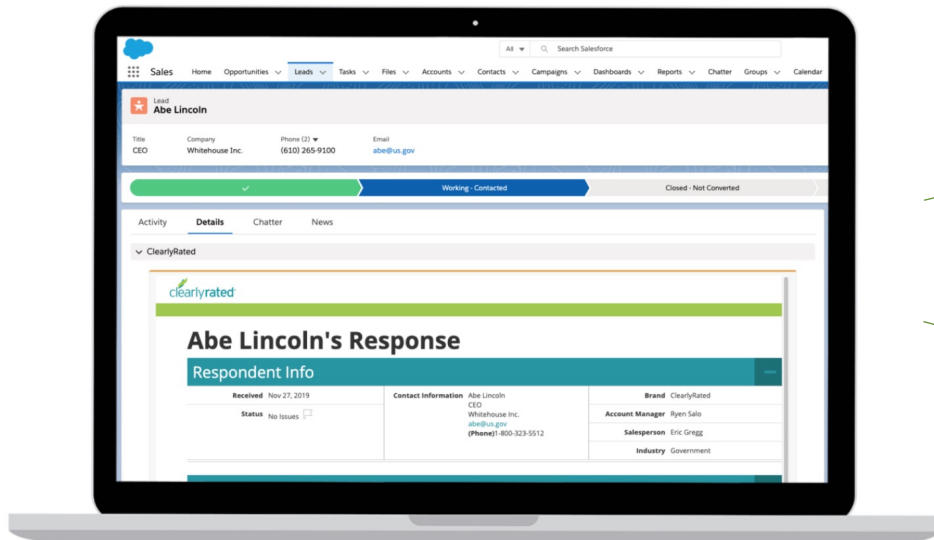
GET FRESH TESTIMONIALS
Great testimonial. Get on website and proposal template today.

NPS	Respondent	Response	Date	Share
7	Gerald Clinton Gerald City	"It's a great idea, complicated and already full schedule. I haven't been able to get a product."		
10	James Ford james.com	"Outstanding service and value." "Excellent service by our partner. She's very on top of things!"	Mar 4, 2015	
10	Anna Truman anna@records	"Professional, expert, great customer service." "Timely response and availability to meet our needs."	Mar 4, 2015	

Respondent	Response	Date
George Pierce George@records	Everyone is always helpful and truthful in their efforts and information. I always walk away or actually get off the phone feeling like the things have been taken care of.	Jun 1, 2015
Anna Johnson anna@records	"Your firm always provides on budget and accurate services. A trusted advisor and true extension of my team."	

Plus/Enterprise reporting package shown.

Integrations provide contact-level views in your native CRM

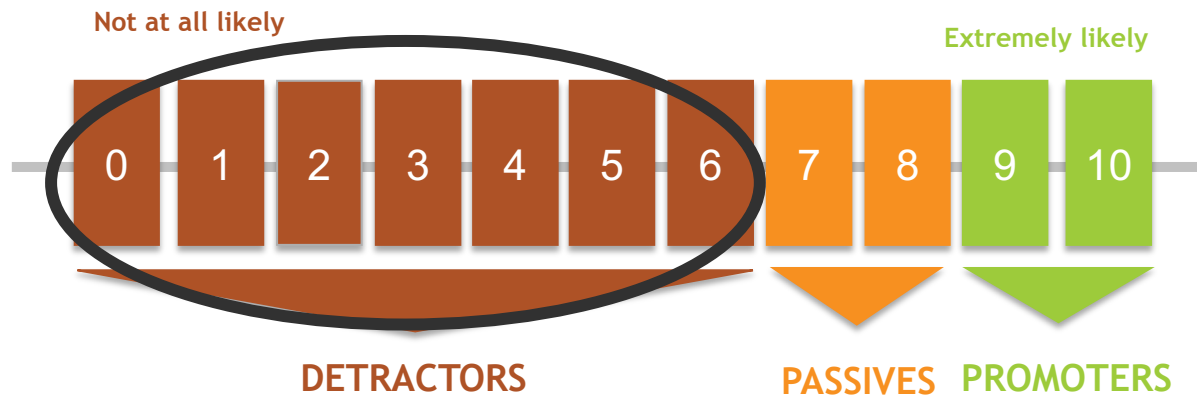


Microsoft
Dynamics 365



Detractors are offering you a lifeline, providing the opportunity to save at-risk revenue

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



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

Triage is Necessary

Wrecks happen – it is the recovery that matters most



Detractor Notifications: a native feature that alerts you to at-risk clients

Jane Doe **Detractor Response!**

Director: Eric Gregg · Nathan Goff

Email: janedoe@email.com

Phone: 555-123-4567

Company: ABC Company

Tags: Portland, Industrial, Top 100

Based on your most recent experience, how likely is it that you would recommend us to a friend or colleague?

6

What is the primary reason behind the rating you provided?

Nathan wasn't as responsive as he has in the past.

What is one thing we could be doing differently to increase the value of our services to you?

No Response Provided

Choose a resolution after following up:

[Resolution in Progress](#) | [Can't Resolve](#) | [Not an Issue](#) | [Resolved](#) | [Escalate](#)

NPS Financial Impact Report: Calculates revenue that has been identified as “at-risk” from unhappy clients

Using survey responses from your account over the past **year**, your ClearlyRated survey program has identified the following:

! Accounts At Risk

4

Detractor Accounts

\$56K

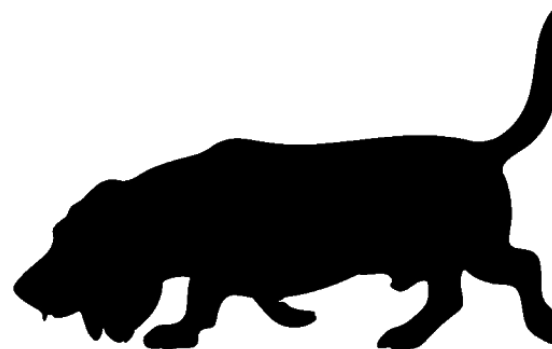
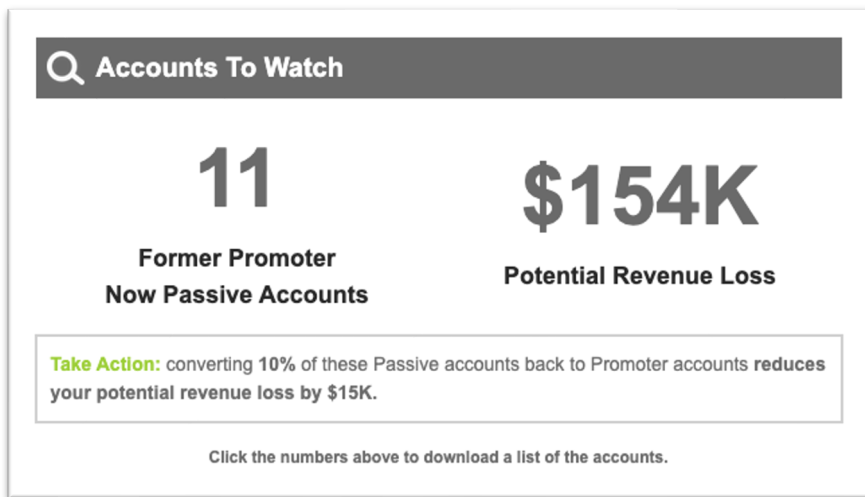
Likely Revenue Loss

Take Action: convert 2 of your Detractor accounts to Promoters or Passives to retain \$28K in potential revenue.

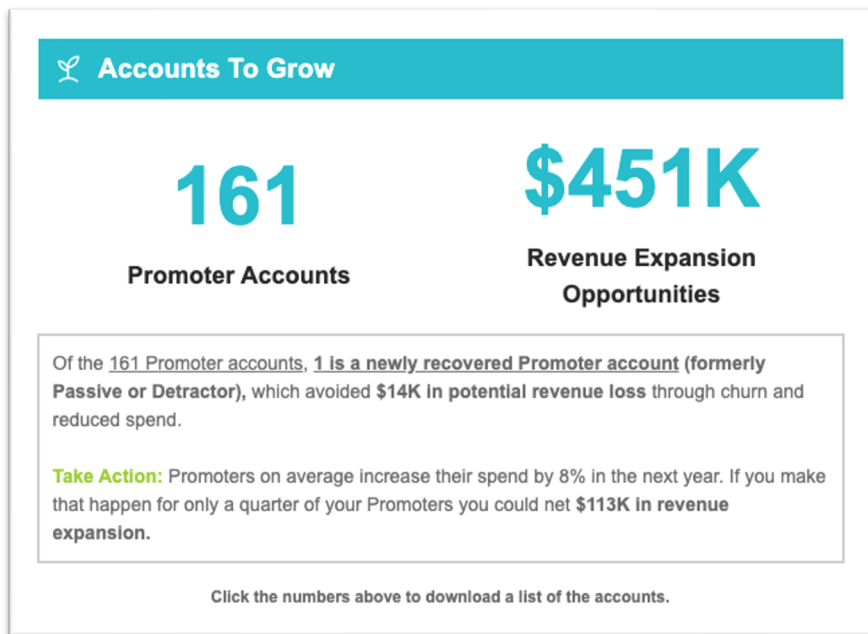
Click the numbers above to download a list of the accounts.

The **NPS Financial Impact Report** helps accounting firms translate their real-time client feedback data into actionable information that protects revenue.

NPS Financial Impact Report: Also helps you to “sniff out” potential revenue loss from former Promoters



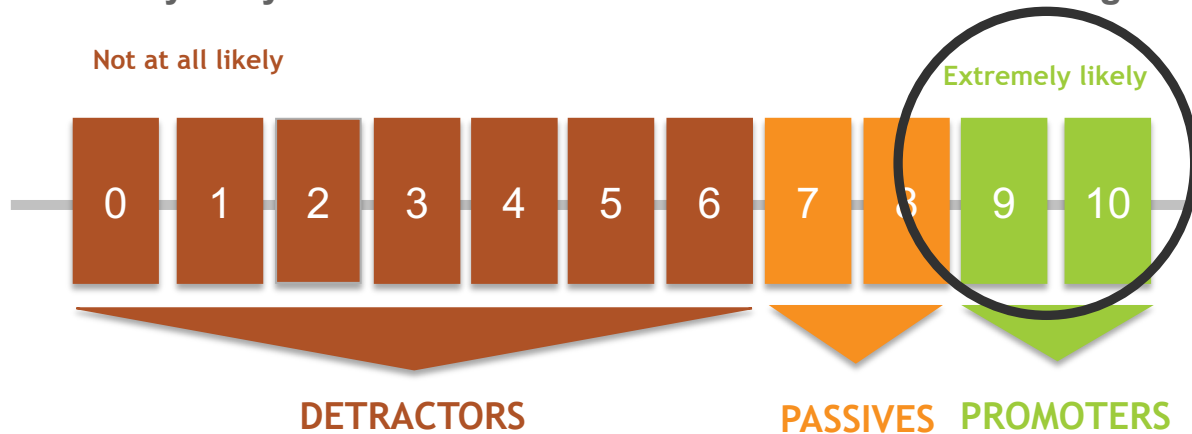
NPS Financial Impact Report: Identifies revenue expansion opportunities and scope of value



The **NPS Financial Impact Report** also helps accounting firms identify accounts where the greatest opportunity for expansion exists. Promoters on average increase their spend by 8% in the next year.

Look to Promoters for additional business, and work with Passives to expand loyalty

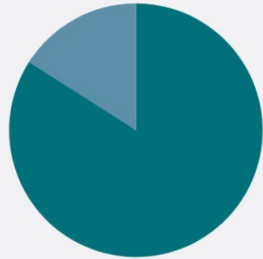
How likely are you to recommend our firm to a friend or colleague?



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

Testimonials carry high strategic value for prospects

Buyer Sentiment: B2B Purchasing



84%
trust testimonials.



9 in 10 say that seeing testimonials from businesses similar to theirs makes an impact on their decision to work with a provider.

Source: ClearlyRated's 2020 B2B Buyer & Client Benchmark Study

Best of Accounting generates automated, approved testimonials at scale

Satisfaction Survey

Based on your most recent experience, how likely is it that you would recommend Wexler to a friend or colleague?

Not at all likely Extremely likely

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

What is the primary reason behind the rating you provided?

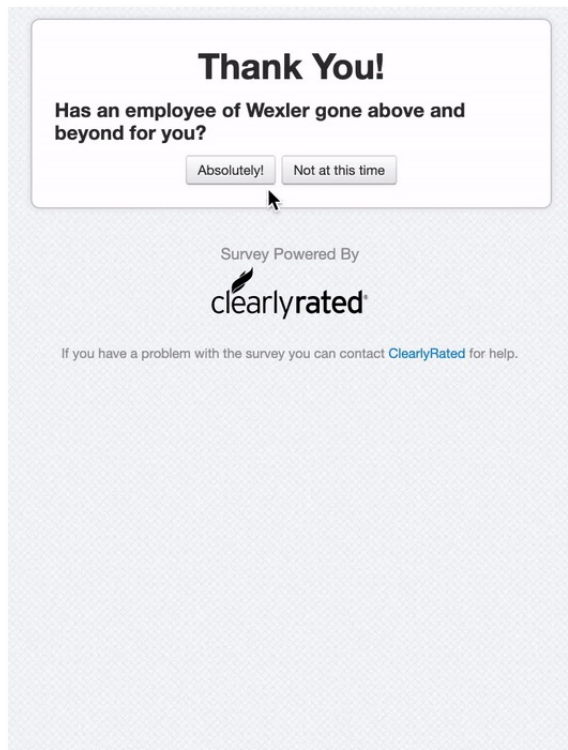
What is one thing we could be doing differently to increase the value of our services to you?

Submit Survey

Promoters are automatically invited to share their open-ended feedback as a testimonial.

- **2 in 5 survey completes result in a testimonial.**
- **48% of Promoters elect to share a testimonial with their provider.**
- **The average accounting firm that surveys with ClearlyRated generates nearly 200 client-approved testimonials.**


Shout Outs help firms harness positive feedback to keep employees engaged and motivated



Thank You!

Has an employee of Wexler gone above and beyond for you?

Survey Powered By

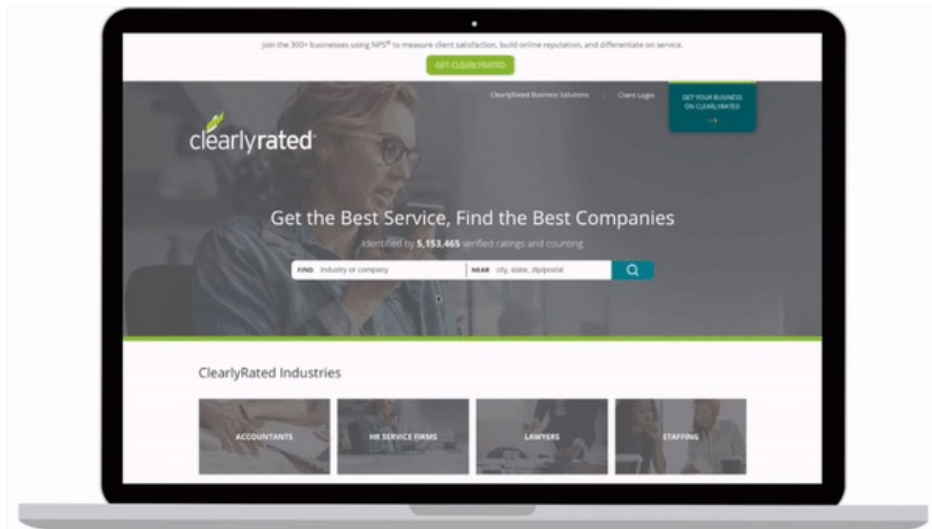
 clearlyrated

If you have a problem with the survey you can contact [ClearlyRated](#) for help.

Promoters are automatically invited to leave a Shout Out for any firm employees who have gone “above and beyond” for them..

- **40% of Promoters elect to leave a Shout Out for a team member at their accounting firm.**

Best of Accounting participants are featured alongside client ratings & testimonials on ClearlyRated.com



- Searchable
- Online ratings
- Social proof

Online ratings are persuasive resources for prospects when considering an accounting firm

Persuasiveness of Online Ratings & Reviews

Impact of Online Ratings & Reviews



87% of buyers say that online ratings and reviews have an impact on their decision to work with a B2B service provider.

Buyer Perception of Persuasiveness



Buyers are **1.7x** more likely to be persuaded by online ratings and reviews than your company's website.

Source: ClearlyRated's 2020 B2B Buyer & Client Benchmark Study

People will pay for a solution that appears less risky.

Imagine you are deciding between two accounting firms. Both seem like a good fit to you. Which would you choose?

FIRM A:

Costs what you budgeted.

38%

FIRM B:

10% over budget, but share high satisfaction scores, 4.6 rating from clients and dozens of testimonials.

62%

Best of Accounting firms earn more ratings on average, providing a more accurate reflection of their service



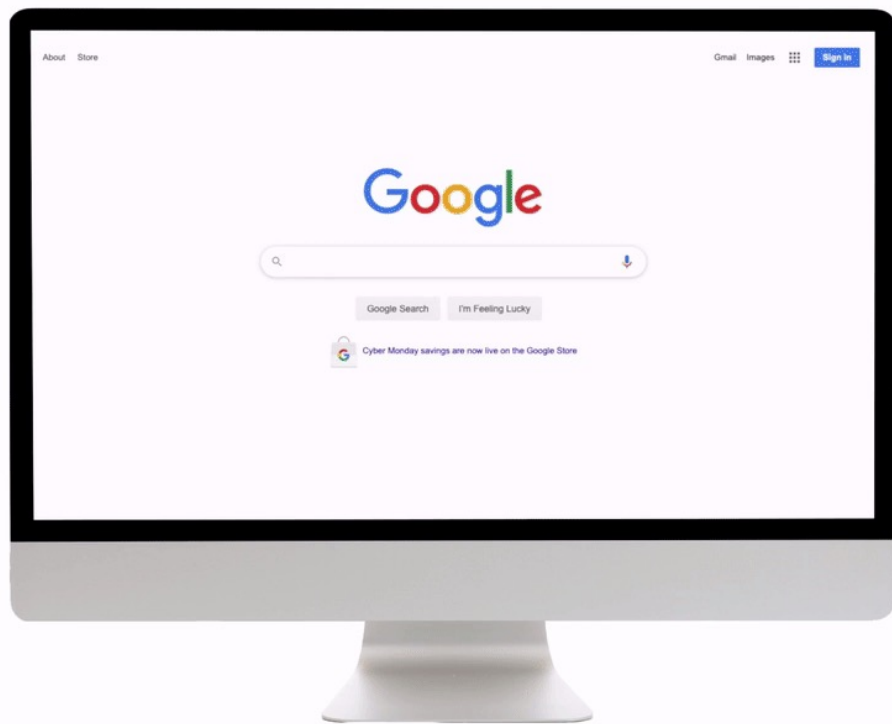
Firms average **less than 5 reviews** on sites such as Google & Yelp



Firms who work with ClearlyRated average **more than 200 ratings** from their clients on ClearlyRated.com

source: Analysis of 100 largest accounting firms in the U.S.

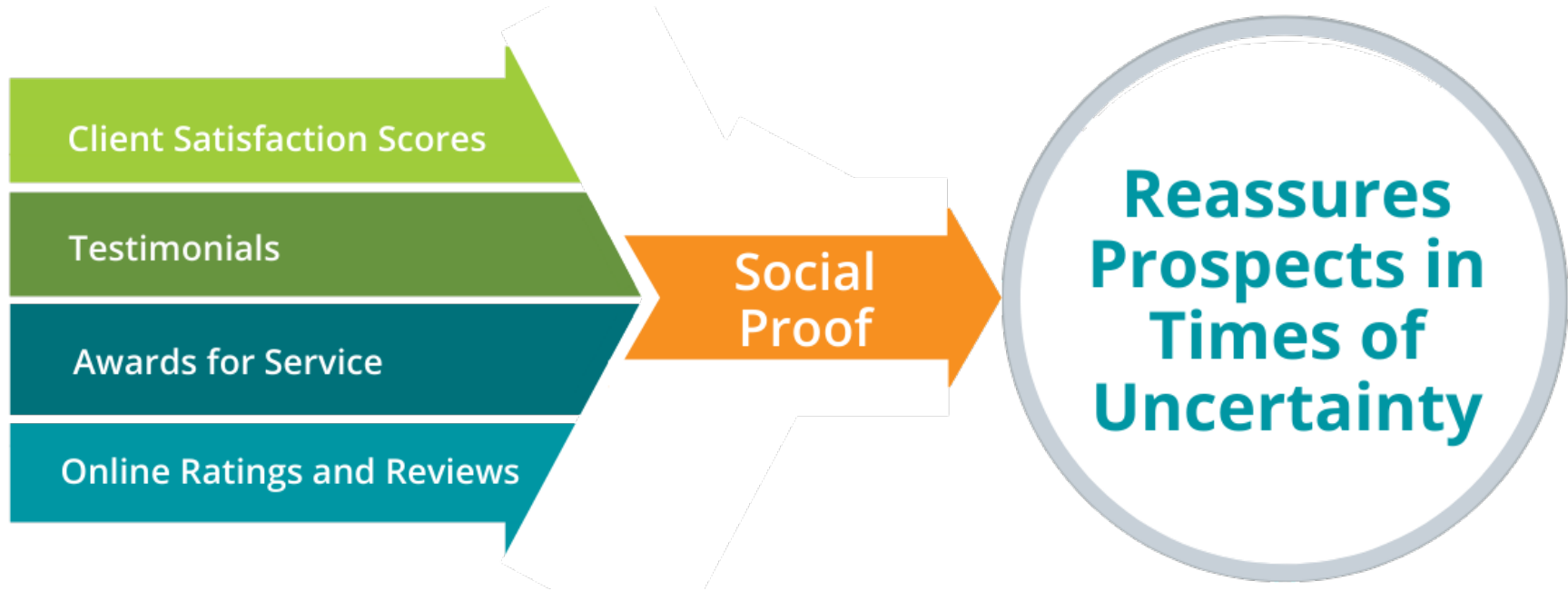
Client ratings earn valuable real estate in Google's search rankings



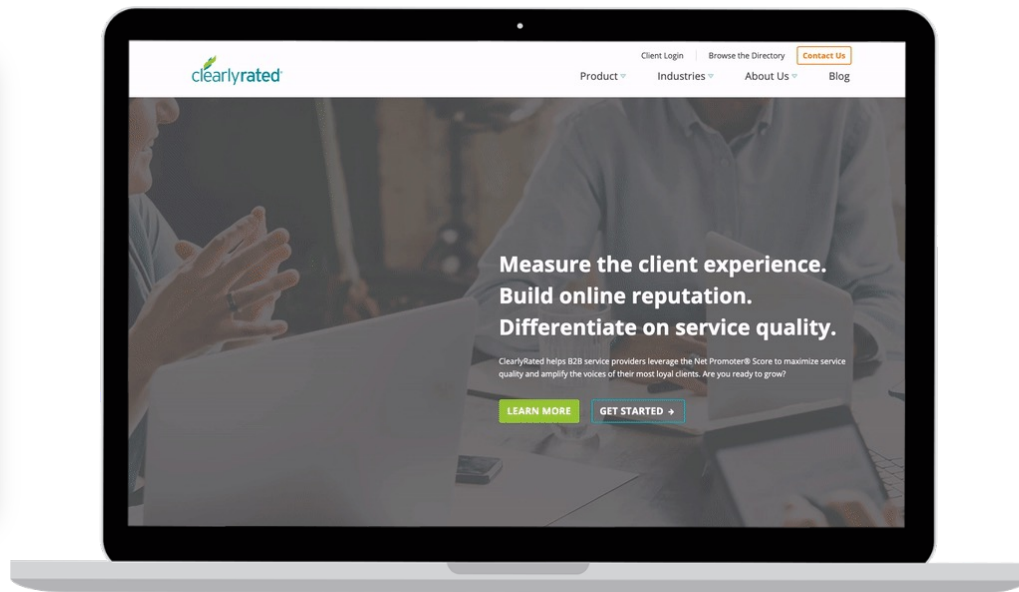
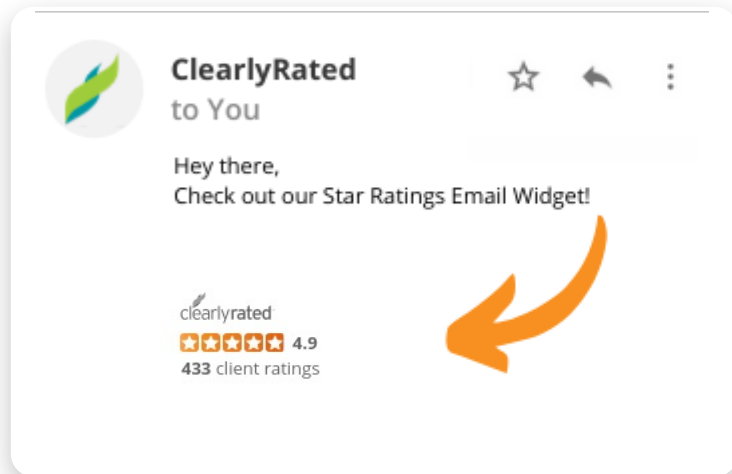
More than **80%** of Best of Accounting participants' ClearlyRated profile pages appear on the **1st page** of local Google search results for a given accounting firm.

We offer many resources to help you increase the value of your ClearlyRated.com profile—including **a complimentary SEO Audit!**

Proof of service has never been more important

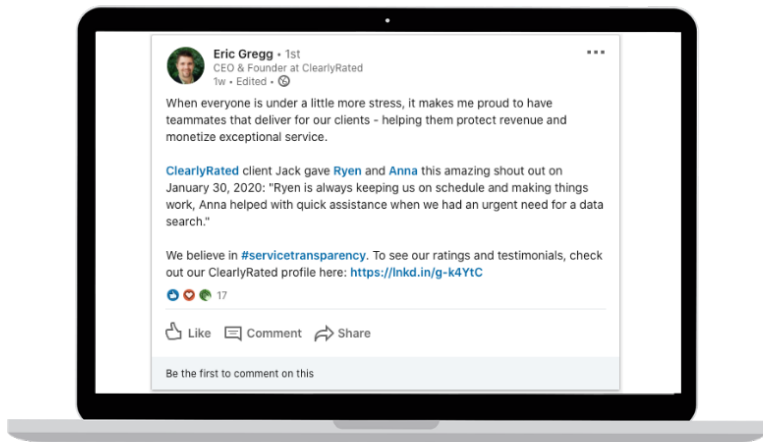


Show off star ratings on your website and in your email signatures



Share Testimonials and Shout Outs directly to your social networks

LinkedIn



facebook



Parting Thought

Customer experience is about what you do, not just what you know



Halloween 2013

25 lbs overweight



Halloween 2021

28 lbs overweight

Questions?



Eric Gregg

egregg@clearlyrated.com

[linkedin.com/in/ericgregg/](https://www.linkedin.com/in/ericgregg/)