

ClearlyRated®

Getting Started Package



CLEARLYRATED

Preparing Your Contact List for the Survey

INCLUDED WITH THIS GETTING STARTED PACKET:

- Who to survey, helpful resources, and tips to ensure a successful survey program.
- Blank contact list (CSV file) template you will use to populate your contact list.
- Contact List Template Tutorial (pdf file) contains instructions on how to properly fill out each column in order for it to upload smoothly into our system. This tells you which information belongs in each column and includes three examples.

YOU WILL UPLOAD TWO (2) CONTACT LISTS IF YOU ARE PARTICIPATING IN BOTH CLIENT AND TALENT COMPETITIONS.

ACCESSING YOUR FEEDBACK

You will receive information regarding your Dashboard login. If you already have a login to Dashboard but forgot your password you can reset it by clicking the [“I forgot my password!”](#) button on the [Dashboard login page](#).

ASSEMBLING YOUR SURVEY CONTACT LIST

Create a survey contact list with your survey recipients' contact information and data segmentation (if applicable to your package), and upload to the Dashboard.

Don't Forget!

Important Action Items

- ON DEMAND WELCOME WEBINAR**
Our welcome webinar will take you through the steps of how to compile your survey contact list, upload it to your Dashboard account as well as survey best practices.
- Log into your dashboard to view your key survey dates. Use [this guide](#) to navigate you to your survey schedule.
- COMPILE YOUR SURVEY CONTACT LIST(S) AND UPLOAD TO THE CLEARLYRATED DASHBOARD USING THIS [CHECKLIST](#)**

Who to Survey

Surveying your clients and talent with ClearlyRated grants your firm eligibility to win the annual Best of Staffing® award for service excellence. Each participating staffing firm must pass the eligibility standards before they can move forward to earn the award.

PREPARING YOUR CONTACT LIST

To be eligible for the award, each participating agency must provide ClearlyRated a list of **100% of their clients** who were billed for services and/or **100% of talent** who were placed on assignment, at least once, during a three month (minimum) to twelve month (maximum) consecutive period. The consecutive period must fall within the trailing twelve months from the survey launch date.

EXAMPLE 1: You request a list from your accounts receivable department of clients who were billed in June, July and August. These are three consecutive months, so your list meets the requirement.



YOU MUST CHOOSE BILLED CLIENTS FROM 3 CONSECUTIVE MONTHS.

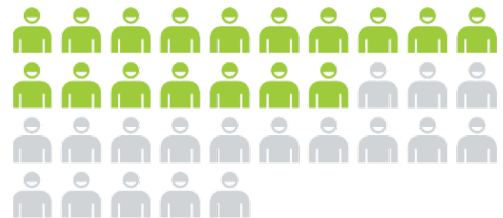
RESPONSE RATE REQUIREMENTS

Participating staffing firms must receive at least a 20% response rate AND at least 15 responses, or a minimum of 250 responses.

EXAMPLE 1: You provide a list of 35 clients. 17 of those clients complete the survey, that's a 49% response rate. You meet the award eligibility requirement of at least a 20% response rate and at least 15 total response.

Example 2: A firm provides a list of 172 clients. 31 of those clients complete the survey, that's an 18% response rate. This firm does NOT meet the response rate requirements of at least a 20% response rate, despite having received 15+ responses.

Example 3: You provide a list of 1500 clients. 280 clients complete the survey, that's a 19% response rate. This firm meets the award eligibility requirements because they have at least 250 responses despite not having a 20% response rate.



YOU MUST HAVE AT LEAST 15 RESPONSES AND A 20% RESPONSE RATE.

CLEARLYRATED

Initial Email Invitation Sent to Survey Participants

From: [Your Brand Name]
Subject: [Your Brand Name] - [x]* Question Survey

Dear [participant's first name],

Your opinion is important to us. Please help us improve by completing a quick, [x]* 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: If you have problems loading the survey, you may also copy the entire link into your web browser.)

For your time, you will be entered into a drawing for a [x]* debit card upon submitting the survey. If you are unable to accept a corporate gift, [brand] will make a charitable contribution in your honor. Arrangement for either a donation or delivery of your prize will be made once the winner has been selected and notified.

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 [Your Brand Name]. 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 and Official Drawing Rules. To unsubscribe from all future surveys conducted by ClearlyRated, please click here: [unsubscribe link](#)

* SURVEY QUESTIONS AND INCENTIVE (INCENTIVE DRAWING MANAGED BY CLEARLYRATED)

Best of Staffing Client = 8 Survey Questions and a \$150 Debit Card Giveaway

Best of Staffing Talent = 7 Survey Questions and a \$300 Debit Card Giveaway



8-Question Client Survey

This is the survey that will be sent to your clients.

SURVEY QUESTIONS

Based on your most recent experience, how likely are you to recommend [Brand] to a friend or colleague?
(Scaled 0 - 10 answer option)

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 time frame?


- 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 ratings you provided?
(Open-ended text answer option)

What, if anything, could [brand] do differently to increase the value you receive from them?
(Open-ended text answer option)



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

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

Yes
 No
 N/A

Does (Your Brand) submit multiple qualified candidates that match your requirements?

Yes
 No
 N/A

Does (Your Brand) submit candidates who would be a good culture fit for your team?

Yes
 No
 N/A

Does (Your Brand) submit candidates within the expected timeframe?

Yes
 No
 N/A

Does (Your Brand) set realistic expectations regarding the open positions you have them work on?

Yes
 No
 N/A

What is the primary reasons behind the rating you provided?

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

Email and Mobile Friendly!

7-Question Talent Survey

This is the survey that will be sent to your talent.

SURVEY QUESTIONS

Based on your most recent experience, how likely are you to recommend [Brand] to a friend or colleague?
(Scaled 0 - 10 answer option)

Have issues you've had been resolved in a timely manner?

- Yes
- No
- N/A

Have all your calls and emails received a response from [brand] within 24 hours?

- Yes
- No
- N/A

Was your current or most recent position accurately described to you prior to starting?

- Yes
- No
- N/A

Were you treated well by the organization with which you were placed on your current or most recent assignment?

- Yes
- No
- N/A

What is the primary reason behind the ratings you provided?
(Open-ended text answer option)

What, if anything, could [brand] do differently to increase the value you receive working with them?
(Open-ended text answer option)

Your Logo Here

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

Have issues you've had been resolved in a timely manner?

Yes
 No
 N/A

Have all your calls and emails received a response from (Your Brand) within 24 hours?

Yes
 No
 N/A

Was your current or most recent position accurately described to you prior to starting?

Yes
 No
 N/A

Were you treated well by the organization with which you were placed on your current or most recent assignment?

Yes
 No
 N/A

What is the primary reasons behind the rating you provided?

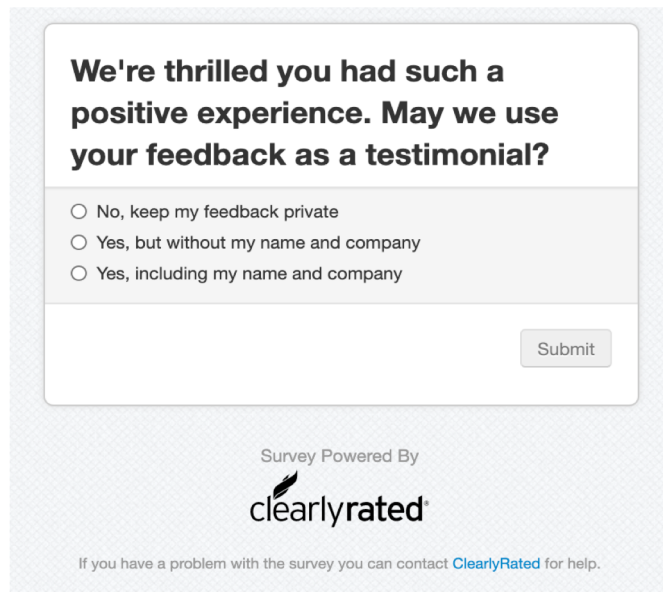
What is one thing we could be doing differently to increase the value of our services to you?

Email and Mobile Friendly!

Client Testimonials & Shout Outs

All ClearlyRated surveys include a feature to quickly capture Testimonials and Shout Outs for your company. Testimonials and Shout Outs are excellent tools for driving your sales and marketing initiatives and to celebrate your internal employees.

Testimonial Capture Question:



We're thrilled you had such a positive experience. May we use your feedback as a testimonial?

No, keep my feedback private

Yes, but without my name and company

Yes, including my name and company

Submit

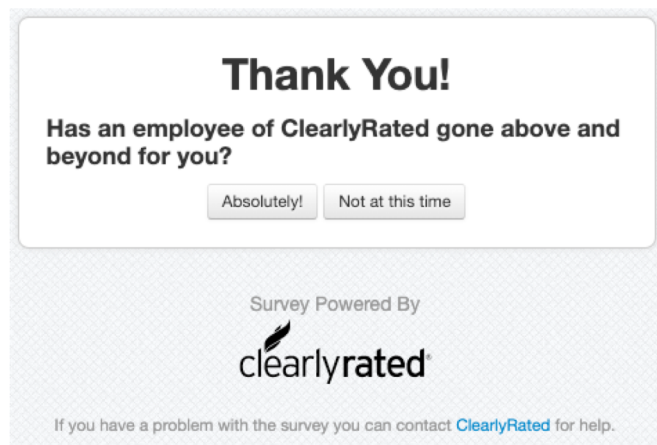
Survey Powered By
clearlyrated

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

How to get the most out of your client and/or talent testimonials?

If a client and/or talent gives your company an NPS rating of a 9 or a 10, they will be asked if they would like to leave a testimonial about their experience with your company. The client and/or talent will have the option to decide if they want their testimonial to remain anonymous or to include their name and company. These testimonials will appear on your ClearlyRated profile page(s) if you have testimonials enabled.

Shout Out Capture Question:



Thank You!

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

Absolutely! Not at this time

Survey Powered By
clearlyrated

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

How will positive feedback be celebrated in your company?

It's exciting when you receive high scores and positive comments from your clients and/or talent. Your clients and/or talent will be asked if they'd like to recognize an employee who has gone above and beyond. These are called Shout Outs and it's a great idea to celebrate these recognitions with your internal teams.

Competition Rules & Guidelines

We ask that participants follow a few very important rules and guidelines to ensure a fair competition for everyone involved.

To avoid disqualification, please review the truncated rules below and communicate them to all of your internal employees that will be involved in the competition.

1. REGARDLESS OF INTENT, TAKING SURVEYS ON BEHALF OF YOUR CLIENTS OR TALENT MAY DISQUALIFY YOUR FIRM.

This includes filling out survey answers for your clients/talent over the phone, through email or in person, even if they give you permission to do so.

2. REGARDLESS OF INTENT, INCLUDING INTERNAL EMPLOYEES IN YOUR LIST OF CONTACTS TO BE SURVEYED MAY DISQUALIFY YOUR FIRM.

If you are surveying clients or talent who are also internal employees within your firm, please contact us.

3. REGARDLESS OF INTENT, COMMUNICATING TO YOUR CLIENTS OR TALENT THAT YOU ARE IN A COMPETITION AND NEED TO WIN MAY DISQUALIFY YOUR FIRM.

It is important that you only communicate that you are surveying your clients or talent in order to gauge their satisfaction with your firm and never to mention that you are taking part in a competition, which could unfairly skew responses.

4. REGARDLESS OF INTENT, REMOVING SPECIFIC CLIENTS OR TALENT FROM THE SURVEY THAT YOU FEAR MAY GIVE YOU A BAD SCORE MAY DISQUALIFY YOUR FIRM.

All participants must survey one hundred percent (100%) of clients who were billed for services and/or one hundred percent (100%) of talent who were placed on assignment, at least once, during a three month (minimum) to twelve month (maximum) consecutive period.

5. REGARDLESS OF INTENT, UTILIZING THE AWARD LOGO WITHOUT PERMISSION MAY DISQUALIFY YOUR FIRM.

Firms who have purchased the Premium, Plus, or Enterprise package AND are winners listed on clearlyrated.com have rights to use the logo.

6. REGARDLESS OF INTENT, SURVEYS COMPLETED ON A COMPUTER THAT IS OWNED OR UNDER THE CONTROL OF YOUR COMPANY MAY DISQUALIFY YOUR FIRM.

Important Considerations to Ensure a Successful Survey Program

WHO WILL BE THE SENIOR LEADERSHIP INTERNAL CHAMPION?

We recommend having a senior leader on board with this program who has the authority to make changes based on your survey feedback.

WHO ON YOUR TEAM WILL OWN THE PROGRAM TACTICALLY?

One person internally should be assigned the tactical elements of this survey. Compiling the contact list can be cumbersome. This key person will either a.) generate this list, or b.) work with your IT team to generate the list of contacts that will be surveyed.

WHO WILL YOU SURVEY?

Typically the decision of which business to partner with is made by a group of people rather than a single individual. To retain and grow client relationships it's crucial to understand the needs of each individual person within an account. It's a good idea to survey decision-makers and also influencers for feedback.

HOW SHOULD THE REPORTS AND RESPONSES BE SEGMENTED?

If you are participating at the Plus or Enterprise level and are segmenting your data (i.e. segmenting by Location), how your data will be segmented should be decided prior to generating your contact list, and your segments should be reflected in your contact list as outlined in the spreadsheet template included in this package.

WHO WITHIN YOUR COMPANY WILL SIGN THE SURVEY EMAIL INVITATION?

To achieve a strong response rate, it's important that the email invitation sent to your survey recipients be signed by an employee at your company - particularly one who the recipient is familiar with. This aspect gives the invitation a personalized look and feel.

WHO WILL HAVE DASHBOARD ACCESS AND WHAT LEVEL OF INFORMATION SHOULD THEY BE ABLE TO SEE?

Prior to your survey launching, you will be asked to decide who on your team will have access to Dashboard and the amount of information they should be able to view. With the Premium package, you receive two (2) logins to the survey dashboard. The Plus package includes five (5) logins and Enterprise package includes ten (10) logins.

CLEARLYRATED

Important Considerations to Ensure a Successful Survey Program

WHO WILL FOLLOW THROUGH WITH NON-RESPONDERS TO IMPROVE RESPONSE RATE?

Once your survey has been sent, if you are a Premium, Plus or Enterprise level participant, you will be able to access data about who hasn't taken your survey. This information will be available in real-time in the Dashboard under Reports on the upper right side of your screen. [Click here](#) for a sample script to help guide your team members while reaching out to non-responders.

WHO ON YOUR TEAM WILL RESPOND TO DETRACTORS AND MANAGE ISSUE RESOLUTIONS?

When a client gives you an NPS rating of 6 or lower, they are considered a detractor. If you are a Premium, Plus, or Enterprise level participant, prior to the survey launching, you will want to decide who is responsible for responding to detractors. [Click this link](#) for a white paper titled 'Handling Detractors', this will guide you through best practices when responding to your survey recipients. Additionally within the Dashboard, that same team will also manage those detractors issues within the My Issues section of the Dashboard.

HOW WILL POSITIVE FEEDBACK BE CELEBRATED IN YOUR COMPANY?

It's exciting when you receive high scores and positive comments from your employees. It's a great idea to consider celebrating with your employees who are recognized for providing exceptional support or leadership! If you are a Premium, or Enterprise level participant, you will receive Shout Out emails where promoters have identified an individual within your organization that has gone above and beyond on their team or in the company.

HOW WILL FEEDBACK BE EVALUATED AND CHANGES IMPLEMENTED WITHIN YOUR COMPANY?

Identify the project team who will be evaluating the feedback and prioritizing next steps to implement any changes within your company. The project team should include a senior leader who has authority to drive change.

HOW AND WHEN WILL YOUR SURVEY RESULTS BE COMMUNICATED EXTERNALLY AND INTERNALLY?

We recommend having a plan in place, prior to the survey launching, for communicating your results. In order for your program to succeed long-term, your clients and internal employees need to understand what you are doing with the feedback they have provided.



© Copyright 2021 ClearlyRated®. All Rights Reserved.

Net Promoter, NPS, and Net Promoter Score are trademarks of Satmetrix Systems, Inc., Bain & Company, and Fred Reichheld.