

Gain leads with the quick and easy client survey

Want to kill three marketing birds with one stone? Try this (virtually) cost-free way to improve client retention, cross-sell services and gain referrals...

Think about these three questions:

1. **Where do most of your new clients come from?**
2. **How do you know that your clients are happy?**
3. **How can you effectively cross-sell services to your clients?**

For the majority of accountants, the answer to the first question is: "Most of my new clients come from my old clients." Recommendations make up a huge percentage of new business for professionals. But some accountants might find it awkward, overly forward or even vaguely 'unethical' to ask their clients outright for referrals. Wouldn't it be nice to have a simple, non-pushy but effective method for gaining leads from clients?

Mind you, clients will only refer your services if they're happy with them. Unfortunately, many unhappy clients won't tell you until it's too late to fix the problem. And what about the ones who are satisfied – you need to know what you're doing right so that you can keep on doing it! But how can you accurately gauge the 'happiness' of your clients?

Finally, a vital source of business is cross-selling new services to existing clients. But again, how can you go about effective cross-selling without appearing too pushy?

Fortunately, we have developed a very simple, cost-effective solution for all of these problems. The Quick and Easy Client Survey allows you to gauge the satisfaction of your clients, nip potential problems in the bud, cross-sell services and gain hot leads.

Avoiding the survey traps

Few firms regularly survey their clients, and even fewer get surveys right. Typical reasons given for avoiding surveys altogether include: "We won't learn anything we don't already know"; and "We're too busy serving clients to survey them". The danger is that behind these excuses lies an attitude that says: "We're worried that we'll hear something we don't want to hear."

Even when firms do survey, the questionnaires are often over-long, over-complicated and produce results that don't really lead to any obvious conclusions or actions.

The Quick and Easy Client Survey avoids these traps: it is just a single page long, so clients are more likely to take the time to complete it, and the questions are carefully worded to get straight to the heart of the matter, providing you with precisely the information you need to implement effective follow-up actions.

So there you have it: a simple survey that enables you to measure client satisfaction, cross-sell services and gain leads. For a free template of the survey, see the details overleaf.

For further details on this subject please see overleaf

The Quick and Easy Survey

Our survey consists of just six carefully-crafted and targeted questions, which can easily fit on a single side of A4. Here they are:

1. **There may be areas where you are dissatisfied with our service. So that we can improve, can you tell us what we need to do differently?**
This question gives clients an opportunity to express dissatisfaction, but forces them to do so in a way that gives you constructive feedback and an opportunity to fix the problem.
2. **We aim to bring real value to you as a client and to help you achieve success on your terms. To what extent have we helped you in the past year?**

This is a chance for the client to give you positive feedback, but it requires them to be specific, enabling you to identify areas where things are really working well. If this client appreciates a particular service, so will others.

The next three questions are all about positioning yourself as a trusted adviser:

3. **Our goal is to help you achieve your personal and business objectives. Where do you want to be in the next year?**
4. **What would it mean to you to achieve these goals?**
5. **What more can we do to help you in the next year?**

These questions allow you to identify the right services to cross-sell. *If you would like to discuss your responses to any of the above, please call me.* The answers will give you an ice-breaker when calling the client: "I noticed that in our survey you said you wanted to cut down on the time you spend on routine admin work. Did you know that we can help?"

6. **Is there anyone you know that you feel would benefit from our expertise? If so, you may wish to use the space to provide contact information. We always appreciate your referrals!**

This is a great, non-pushy way to gain strong leads, since it forces the client to think about specific contacts.

The image shows a printed version of the 'Quick and Easy Client Survey' form. The form is titled 'Quick and Easy Client Survey' and includes the following questions:

1. There may be areas where you are dissatisfied with our service. So that we can improve, can you tell us what we need to do differently?
2. We aim to bring real value to you as a client and to help you achieve success on your terms. To what extent have we helped you in the past year?
3. Our goal is to help you achieve your personal and business objectives. Where do you want to be in the next year?
4. What would it mean to you to achieve these goals?
5. What more can we do to help you in the next year?
6. Is there anyone you know that you feel would benefit from our expertise? If so, you may wish to use the space to provide contact information. We always appreciate your referrals!

The form also includes a section for providing contact information for referrals, with a note: "If you would like to discuss your responses to any of the above, please call me on [phone number]."

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Using the survey

Here are my top 10 tips for making the survey even more effective:

1. Present the survey in a clear, attractive format (Practice Track can help you with this! See right)
2. Include the survey with the final copy of the financial statements
3. Provide the receptionist with a stock of surveys for clients to complete while they wait
4. Thank every client who completes the survey
5. Have a follow-up meeting with key people in the firm to discuss the results and decide an action plan
6. Broadcast the results throughout the firm, along with the follow-up plan
7. Make sure you follow up every instance of dissatisfaction expressed in question 1
8. Ask if clients who give great answers to question 2 will allow you to use their comments in a firm testimonial
9. Thank clients personally for any referrals
10. Conduct the survey once a year

More help?

For a free Word template of the Quick and Easy Client Survey, just email andrew@practicetrack.co.uk and put "Free template survey" in the subject line.

Practice Track can also create an **attractive personalised PDF of the survey**, branded for your firm, which you can print or email to clients. This is £100+VAT. To order email andrew@practicetrack.co.uk or call **0117 932 7812**.

Finally, the survey is just one of the many useful templates and tools in the Marketing Director system – the complete A to Z of marketing your practice. Visit www.mktgdirector.com for more information.

Alternatively, complete the form below and fax to 0117 932 1132 or post to Practice Track Ltd, The Old Estate Yard Offices, Upton Cheyney, Bristol BS30 6ND

Please email a **free Word Client Survey template** to me.

My email address is: _____

I would like a personalised PDF of the survey @£100 + VAT

Please send me more information about the Marketing Director system

Your contact details

Name _____

Firm _____

Address _____

Tel _____

Email _____

practice track

Making Marketing Work for Accountants

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